

# Italy Insurance Market Outlook to 2015

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## Abstracts

### Executive Summary

The Report titled “Italy Insurance Market Outlook to 2015” provides an in-depth analysis of the Italian insurance industry. The report covers specific insights on the market size, insurance density, insurance penetration, segmentation and future outlook of the insurance industry in Italy. The report also entails the market size on the basis of gross insurance premium written in case of life and non-life insurance and market share of various companies at the country level. Overall, the report offers a comprehensive analysis of the entire Italy insurance industry.

Italy insurance market generates highest per-company non-life premium incomes in Europe with over ~ insurers in 2008. The involvement of foreign insurers in the market is strong and foreign ownership accounted for approximately ~ % of all the non-life companies in Italy.

Brokers have a relatively major role to play as the distribution channel in the Italian non-life insurance market.

In the period from 2009-2015, the gross life insurance premium is expected to increase from USD ~ million to USD ~ million, at a CAGR of ~ %. A modest growth is also expected in non-life insurance sector. The sector is expected to register a growth of ~ %, rising from USD ~ million in 2009 to USD ~ million by 2015. Total gross insurance premium is also expected to increase continuously in the forecasted period. The premium would reach approximately USD ~ million in 2015.

Life insurance density registered a growth rate of ~ % during the period from 2001-2009. The density increased from USD ~ to USD ~. A considerable dip in the density was registered from 2006-2008. In case of non-life insurance density the density

stood at USD ~ in 2001. The region witnessed a negative growth only in the year 2009 and the density stood at USD ~. Total insurance density also registered a double digit growth rate during the initial period. The market then declined and further increased to register a density of USD ~ in 2009.

Life insurance is the major segment with close to ~ % of the market share. Motor insurance is another major segment with a share of ~ %. Property and health insurance held a very small share of ~ % and ~ % respectively. Other non-life insurance also contributed with a share of ~ %.

Life insurance premium is expected to reach USD ~ million in 2015. Motor insurance would be the second largest contributor with a premium of USD ~ million. Other non-life insurance would also contribute with a significant share of USD ~ million. Property and health would be the other segments contributing with USD ~ million and USD ~ million respectively.

Motor insurance sector in Italy registered a positive growth rate from 2001-2008, later declined in 2009. During the period from 2001-2009, the gross premium increased from USD ~ million to USD ~ million at a CAGR of ~ %.

In the future the market is expected to register a moderate growth rate of ~ %. The premium is likely to increase from USD ~ million to USD ~ million by 2015.

Italy insurance market is highly fragmented with none of the player holding a double digit market share. The biggest player i.e. Poste Vita has a market share of ~ %. The second largest player is Assicurazioni Generali with a market share of ~ %. There was a stiff competition among Alleanza Assicurazioni, INA Assitalia and CreditRas Vita, with a market share of ~ %, ~ % and ~ % respectively. Some of the major players in the insurance industry are Allianz, Popolare Vita, Genertel Life, Intesa Vita and MediolanumVita. Other players operating in the region holds a combined share of ~ % of the total market.

## **Scope of Research**

The report entails thorough analysis and offers valuable insights on the insurance industry in Italy. The scope of the report includes:

The market size of life and non-life insurance industry in terms of gross

insurance premium written in Italy, 2001 to 2015

Life and Non-life insurance density in USD for Italy, 2001 to 2015

Life and Non-life insurance penetration, premium as a percentage of GDP for the country, 2001 to 2015

Market segmentation on the basis of Product in Italy, 2009 and 2015

Non-life insurance market segmentation by motor, health, property on the basis of gross insurance premium written, 2001-2015

Competitive Landscape of the major life insurers (Poste Vita, Assicurazioni Generali, Alleanza Assicurazioni, INA Assitalia, CreditRas Vita) in Italy on the basis of gross premium written

Competitive Landscape of the major non-life insurers (Allianz, Fondiaria-SAI, Assicurazioni Generali, Compagnia Di Ass Di Milan, Aurora) in Italy on the basis of gross premium written

Valuable Insights and Future Outlook of the insurance industry in Italy.

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