

Brazil Insurance Report Q4 2016

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Abstracts

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BMI View: Brazil's insurance industry has continued to grow despite the combined effects of low economic growth and high inflation on the country's wider financial services sector. The core drivers of growth over recent years have been the expansion of the middle class, combined with an ageing population which, together, have supported demand for personal insurance products, such as life, health and motor insurance. We also noted a growing tendency towards savings and investment activity in the life insurance sector. For a country of its size, insurance penetration and density have remained relatively low, allowing for consistently high levels of premium growth over recent years, though this has also been due, in part, to high inflationary pressures. As the country's economic downturn begins to bottom out, we see opportunities for investors and new entrants over the next few years. Brazil's composite insurers (many of which are subsidiaries of banking groups), have become increasingly amenable to mergers and partnerships with overseas firms as they look to shore up their balance sheets, and we expect to see merger and acquisition activity increasing over the coming months.

Key Updates And Forecasts

In May 2016, French insurance group AXA said it was considering making further acquisitions as it looks to extend its footprint in Brazil's insurance market. The company, which entered the country in 2013, is targeting premiums of BRL500mn in 2016.

In April, state-owned financial services group Caixa Econômica Federal revoked plans for an initial public offering (IPO) if its insurance unit due to adverse capital market conditions. The bank had been expected to sell 25% of the company



with a view to raising BRL11.3bn.



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