

Croatia Insurance Report Q3 2016

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Abstracts

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BMI View: The outlook is currently mixed for Croatia's developing insurance market. On the one hand, the life insurance market, although small, is expected to record steady growth in premiums as wider economic growth stimulates increases in household income rates, improving affordability and demand for a range of traditional life covers and retirement/saving products. On the other hand the prospects for non-life insurance are dampened by competitive pressures in the key motor insurance segment which is offsetting more positive growth in smaller lines. Overall, while we do expect to see some growth, the small size of the market and limited wider economic outlook in Croatia means that we do not expect to see any major investment in the country's insurance market over the medium term.

Key Updates And Forecasts

Croatia's health insurance sector is set to be overhauled as the state attempts to address healthcare sector debts of around HRK2.5bn (USD380mn). Expected changes include the introduction of supplementary health insurance premiums and changes to access to emergency healthcare. As well as increasing private health expenditure, the changes could also stimulate greater demand in the underdeveloped private health insurance market.

The weak outlook for the motor insurance sector continues to dampen our forecasts for Croatia's non-life insurance market where we expect to see an overall fall in premiums written over the course of the forecast period, despite steady growth in some of the smaller lines such as personal accident insurance.

More positive growth is expected in the smaller life insurance market, where

improvements to household income rates will supported increased expenditure on life products meaning premiums are forecast to grow by over 4% annually (in local currency terms) between 2016 and 2020.

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