

Czech Republic Insurance Report Q2 2016

<https://marketpublishers.com/r/CB7920D5B00EN.html>

Date: January 2016

Pages: 59

Price: US\$ 1,295.00 (Single User License)

ID: CB7920D5B00EN

Abstracts

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BMI View: Strong domestic economic growth underpins our expectations for steady growth in both life and non-life premiums over the course of our five year forecast period through to 2020. Rising rates of household spending and declining unemployment rates will drive demand for a range of insurable consumer products, while wider economic growth will support increases in corporate lines, particularly credit and financial guarantee insurance which is currently a minor line. While low interest rates continue to dampen demand for life insurance products, positive demographic trends and a growing middle class ensure some growth will be maintained.

Key Updates And Forecasts

Following strong growth in autos sales in 2015, we expect to see a short-term contraction in the motor insurance segment which dominates the non-life market, primarily due to intense premium pricing competition as the BMI Autos team does expect to see further growth in new vehicle sales over 2016. Overall, non-life premiums are forecast to fall by 1.7% in 2016 before returning to growth over the remainder of the forecast period.

Growth in the life sector will slow in 2016 compared to 2015, largely a result of tax revisions which have subdued demand but also due to lingering effects from low investment returns. We expect life premiums to grow by 2.0% over the year, with similar growth expected through to 2020.

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