

# Czech Republic Insurance Report Q3 2016

<https://marketpublishers.com/r/CE1A015E529EN.html>

Date: April 2016

Pages: 62

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

ID: CE1A015E529EN

## Abstracts

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**BMI View:** The insurance market in the Czech Republic is relatively well developed, with a number of domestic and multinational insurers in the country providing a broad range of life and non-life products. The marketplace is fragmented and we do expect to see some consolidation among the smaller firms over the course of the forecast period, potentially via mergers and acquisitions by foreign firms attracted by the solid regulatory environment and growth potential. Although a small market, premiums in the Czech life market are forecast to grow steadily, supported by wider economic growth in the country - though we note that low interest rates will continue to dampen demand. In the non-life sector, following a short-term contraction, premiums are forecast to grow, particularly in the health insurance segment. Despite this growth penetration and density rates will remain relatively low, indicating that further longer term potential remains.

### Key Updates And Forecasts

The Czech National Bank (CNB) announced in February 2016 it will keep its currency cap of CZK27.00/ EUR and leave its policy rate at 0.05% in 2016, which will continue to dampen investment returns in the life sector. However, with the CNB's inflation target in sight by end-2017, the koruna will return to a free-floating mechanism, leading to broad based appreciation.

We are maintaining our current forecasts for a short-term decline in the non-life sector in 2016, when premiums are measured in local currency terms. The outlook is more positive over the remainder of the forecast period, with premiums forecast to reach CZK87.4bn in 2020, up from CZK83.2bn in 2016.

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