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Abstracts

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BMI View: The newsflow from late 2012 highlights two major themes. One is the resilience of the German insurance sector in the face of challenging economic conditions. Non-life premiums appear to have risen by around 3% in the first half of the year. This is partly thanks to a firming in rates for car insurance and partly because of the passing on to customers of the higher claims costs associated with catastrophes in 2011. As was the case in 2011, combined ratios have been improving: underwriting discipline and cost control continue to come to the fore. In the life segment, a decline in single premium product sales in 2011 was partially offset by a rise in more profitable recurring premium lines. The leading life insurance companies have indicated that these trends continued in H112.

In short, it remains clear that Germany has a clear competitive advantage as a provider of insurance solutions. This is the second major theme. Germany's leadership in insurance has been developed over the long-term as a result of the key protagonists working together to leverage the country's key strengths. An obvious advantage is the long-established concept that insurance is a useful vehicle for reducing the risks associated with unemployment or illness. Within Germany's Social-Market economy, the basic concept is that individuals must pay out of their own pocket in order to ensure that risks are defrayed - even if there is substantial public sector participation as well.

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