

Israel Insurance Report 2014

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Abstracts

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BMI View: The main themes and trends within Israel's insurance sector have remained unchanged for several years. As is the case in South Africa and Taiwan, a peculiar geopolitical and financial history has resulted in the domination of the sector by a small number of diversified financial services organisations, whose interests generally go beyond insurance. These organisations are, in world terms, sophisticated and large. However, they do not constitute a cosy oligopoly: the normal situation includes downwards pressure on prices and margins, competition by way of product innovation and development of new distribution channels and attention of antitrust regulators. The market is emphatically open to foreign competition. However, the strengths of the entrenched local players are such that few foreign insurers see the market as offering an attractive opportunity.

The demographics of Israel are such that the life segment is continuing to grow steadily, if not rapidly. However, and in spite of being in a steadily rising trend, life density (premiums per capita) are not particularly high for a country of Israel's per capita incomes. This is because conventional life insurance faces substantial competition as a conduit for organised savings from pension funds, the main providers of which are the leading local life insurers. Through 2013, the main change to the competitive landscape is that Harel has acquired the life insurance business of Eliahu, and the asset management and mutual fund operations of Clal Finance. Thanks to the better performance of financial markets through 2013, most of the companies in the life segment have reported a significant improvement to investment earnings in the latest year.

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