

Japan Insurance Report Q2 2016

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Abstracts

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BMI View: Home to large numbers of wealthy - and ageing - households that have long valued the advantages of life insurers' offerings, Japan is a rare example of a life insurance market that is enormous in absolute terms, well developed by most metrics and still expanding faster than the economy as a whole. It is also profitable for most of the long-established (and enormous) players, notwithstanding that earnings have been crimped by very low interest rates. Conversely, the non-life segment faces headwinds - in particular, contracting volumes for motor insurers, who account for over half of the premiums written in the segment.

Key Updates And Forecasts

We continue to forecast growth in life insurance premiums of around 4% annually through the forecast period, notwithstanding that some companies have reported double-digit rises in new business in recent months. Growth will be driven by increasing demand for retirement income solutions; the established position of the life insurance industry as a provider of social security in Japan; the low rates of return available from competing investment opportunities; and innovation by life insurers in terms of product design, distribution and brand.

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