

Poland Insurance Report Q1 2016

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Abstracts

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BMI View: Poland's insurance market is relatively well developed, with healthy levels of penetration and density, though it continues to lag behind more established European markets. Following a short-term contraction in premiums (in US dollar terms) due to currency movements, we expect to see sustained growth in both the life and non-life insurance sectors, based primarily on wider economic growth prospects. The market is dominated by PZU; however, opportunities for foreign entrants and expansion remain and we would expect to see further consolidation amongst the smaller firms moving forward, particularly as the regulatory environment is enhanced and solvency requirements tightened.

Key Updates And Forecasts

The non-life sector (which is slightly larger than the life sector, accounting for around 57.4% of premiums written) is expected to record healthy growth over the forecast period, with non-life premiums expected to increase from USD8.6bn in 2015 to USD13.1bn in 2019.

Growth will be slightly slower in the life sector where premiums are forecast to increase from USD6.4bn in 2015 to USD8.6bn in 2019, leading to life losing some market share to the non-life sector.

Poland's Financial Supervision Authority (KNF) has requested that insurance companies increase motor insurance policy fees in an attempt to regulate pricing competition in the market.

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