

Poland Insurance Report Q3 2016

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Abstracts

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BMI View: Poland is home to a relatively well developed insurance market, though low penetration and density rates suggest there is still scope for further growth. After a fall in premiums in 2015, the insurance market is expected to return to more positive territory in 2016 and we expect to see both life and non-life premiums record steady, single-digit growth throughout the forecast period between 2016 and 2020, bolstered by rising employment rates and improvements to average household income levels.

Key Updates And Forecasts

The economic outlook in Poland is positive, with GDP expected to grow by 3.9% in 2016 followed by 4.1% growth in 2017 and 2018. We also expect to see Poland exit a period of negative inflation in late 2016. There is, however, some market uncertainty, particularly relating to the independence of the National Bank of Poland, creating some risk to our current growth forecasts.

At present we expect to see subdued growth of 1.7% in life insurance premiums written in 2016 (in local currency terms), recovering from a fall in premiums seen in 2015. Stronger growth is expected over the remainder of the forecast period, with premiums forecast to reach PLN1.5bn (USD9.5bn) by 2020.

Stronger growth is expected in the non-life sector, with premiums growing by 1.8% in 2016 followed by more robust growth between 2017 and 2020. Non-life premiums are expected to reach PLN41.0bn (USD12.3bn) by the end of the forecast period, accounting for over 56% of insurance premiums written in the Polish market.

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