

Slovenia Insurance Report Q2 2016

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Abstracts

BMI View: Our outlook for Slovenia's insurance market is broadly positive. Although comparatively small, the life insurance sector is expected to record steady premium growth during the forecast period, bolstered by supportive demographic trends as well as rising average household income rates. The larger non-life insurance market is expected to see slower growth, led by the dominant lines (motor, health and property insurance). The market is highly consolidated, and moving forward we could see more multinationals entering the Slovenian insurance sector, challenging the incumbent domestic providers. However, present growth rates are not likely to increase sufficiently rapidly to entice major investment.

Key Updates And Forecasts

We are currently forecasting steady economic growth in Slovenia, with GDP growth expected to remain over 2% annually over the medium term. We do note, however, that the ongoing migrant crisis could impact this outlook, both due to associated costs and due to a deterioration in regional relations. Should economic growth slow, we would revisit a range of forecasts, including those for the insurance sector.

Our forecasts for the Slovenian non-life sector see premiums growing by an annual average of 3.7%, in local currency terms between 2016 and 2020. In US dollar terms, growth is more varied due to ongoing currency fluctuations. Overall, we expect non-life premiums to increase from USD1.6bn in 2016 to USD2.1bn in 2020.

The life insurance market is considerably smaller, writing premiums of just under USD600mn in 2016. We do expect to see stronger annual growth over the course of the forecast period, however, at 6.8%, as the life sector continues to

challenge conventional savings products. As a result, premiums are forecast to reach USD888mn in 2020.

Contents

BMI Industry View

Table: Headline Insurance Forecasts (Slovenia 2013-2020)

SWOT

Insurance

Industry Forecast

Life Premiums Forecast

Table: Life Premiums (Slovenia 2013-2020)

Table: Life Insurance Claims (Slovenia 2008-2014)

Non-Life Premiums Forecast

Table: Non-Life Premiums (Slovenia 2013-2020)

Table: Non-Life Insurance Claims (Slovenia 2009-2014)

Non-Life Sub-Sector Forecast

Table: Non-Life Insurance Premiums By Product Line (Slovenia 2013-2020)

Industry Risk Reward Ratings

Emerging Europe Risk/Reward Index

Table: Emerging Europe Insurance Risk/Reward Index - Q216

Market Overview

Life Market Overview

The Product Offering

The Competitive Landscape

Table: Slovenia Life Insurance Market (USDmn) 2008-2014

Non-Life Market Overview

The Product Offering

The Competitive Landscape

Table: Slovenia Non-Life Insurance Market (USDmn) 2008-2014

Company Profile

Generali

Vienna Insurance Group (VIG)

Zavarovalnica Triglav

Methodology

Industry Forecast Methodology

Risk/Reward Index Methodology

Table: Indicators

Table: Weighting of Indicators

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