

Taiwan Insurance Report Q1 2016

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Abstracts

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BMI View: The Taiwanese life insurance market is well developed, with penetration and density rates that among the world's highest, reflecting the established role the sector plays in citizens' late-life planning and retirement needs. Life insurance premiums are expected to continue to grow throughout the forecast period, supported by domestic economic growth and rising rates of private financial consumption, though we note that over the longer term a shrinking working age population and higher proportion of retirees will place pressure on the profitability of life insurance providers. Although some recent financial market troubles are notable, Taiwan remains an attractive investment destination overall and is less risky relative to many of its regional neighbours. Non-life insurance sector growth is primarily being driven by health insurance through 2019 and most other subsectors will exhibit little to no growth through 2016.

Key Updates & Forecasts:

The third quarter of 2015 returned lackluster results in financial markets and the global economy. Continued economic troubles in China will be a drag on Taiwan's economy, resulting in downgrades to our 2015 projections in many insurance lines. We anticipate that these troubles will continue to negatively impact investment returns in the life insurance sector, as well as premium growth in the nonlife sector in 2016, aside from health insurance.

Overall, the proportion of health insurance to total non-life premiums will continue to rise overall and we are expecting consolidation in the industry as a whole amongst smaller providers.

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