

Ukraine Insurance Report 2012

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Abstracts

Ukraine's insurance sector enjoys few of the strengths of its counterpart in Russia and all of the weaknesses. As a result of a variety of problems – poverty, lack of understanding of the advantages of insurance, lack of trust in local insurance companies in particular and in the general economic/financial environment – the insurance sector is growing in terms of gross written premiums, but not in terms of most other metrics. Unlike in any other market in Central and Eastern Europe, no player has a dominant market share – whether in the non-life or the life segment. For the foreign multi-nationals who have taken the trouble to buy or establish an operation in Ukraine, their business in the country is invariably a very minor part of a larger organisation. It is not a market that they necessarily have to remain in.

The life segment barely exists. Some – but not all – of the multi-nationals who are committed to building a regional business across Central and Eastern Europe are present. However, in a country where the average person spends less than US\$5 on life insurance, it is clear that the constraints and obstacles are huge.

Most of the over 400 insurance companies that operate in Ukraine are active in the non-life segment. Since the end of 2010, the number of players has been falling. So too has been the capital that is allocated to the segment and the total assets of the insurers. Unlike in most underdeveloped non-life markets, the key lines are not motor-related, but pertain to various aspects of voluntary property insurance. To a greater extent than in other countries, it is possible that many of Ukraine's (generally tiny) non-life companies are effectively captives or investment companies. Certainly, the few hard numbers that are available indicate that demand for inwards reinsurance is relatively high. In the meantime, though, only 15% of Ukrainians actually use insurance.

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