Brazil Insurance Market Outlook to 2015

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Executive Summary

The Report titled “Brazil Insurance Market Outlook to 2015” provides an in-depth analysis of the Brazil insurance industry. The report covers specific insights on the market size, insurance density, insurance penetration, segmentation and future outlook of the insurance industry in Brazil. The report also entails the market size on the basis of gross insurance premium written in case of life and non-life insurance and market share of various companies at the country level. Overall, the report offers a comprehensive analysis of the entire Brazil insurance industry.

Brazil is the largest insurance market in Latin America, accounting for nearly ~ % of the gross insurance premium written in the region in 2009. Brazil has the largest population in Latin America which is ninth largest in the world by GDP but has a rate of insurance penetration of just ~ %. This underscores the fact that although the Brazil insurance market is really large in terms of size, it still has tremendous growth potential. Brazil is considered as the third best emerging market next to China and India.

Gross insurance premium in Brazil was valued at USD ~ million in 2001. From that level, the market has increased more than 3 times to USD ~ million in 2009 which indicates an exceptional 8 year CAGR of ~ % from 2001 to 2009. The market felt the jitters of economic recession but managed to grow at ~ % in 2009. It is expected that market will recover by 2010 and will reach USD ~ million in 2011 and USD ~ million in 2015.

Brazil insurance market outlook is very optimistic as indicated by the low penetration level of just ~ % in 2009. It is expected that future growth in the insurance sector will be positive and the gross insurance premium will contribute ~ % in the expected GDP of USD ~ billion by 2015.

Both life and non-life insurance contributes more or less equally to the insurance market in Brazil. Life insurance market share was ~ % in 2009 with the gross insurance premium written of USD ~ million. On the other hand, non-life insurance market commands the market share of ~ % with the gross insurance premium of USD ~ million in 2009. The share of residential and other non-life has also witnessed decline from ~ % and ~ % in 2003 to ~ % and ~ % in 2009. The non-life has lost the market share because of the growing demand for life insurance.

According to Brazil Insurance regulator SUSEP, approximately ~ % of the premium was generated from the Southeast region of Brazil. The region accounts for the largest GDP concentration in the country. The share of Sao Paulo has decreased marginally over the years from ~ % in 2007 to ~ % in 2009.

Porto Seguro is the biggest player in the motor insurance sub segment with a market share of ~ %. SulAmerica is the second largest player with a market share of ~ %, closely followed by Bradesco with ~%. Mapfre and Liberty are other major players with a market share of ~ % and ~ % respectively. Other players in the country constitute collectively ~ % of the remaining market share.

The premium for health insurance in 2003 was USD ~ million. A minor decline in the growth rate in 2004

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and a slight increase in growth rate in 2005 was registered. A double digit growth rate was observed for the next three years where the premium increased and reached USD ~ million. A decrease in premium was registered in 2009, which made the premium reach USD ~ million in 2009. The growth is expected in this sub sector in the near future where, the premium is expected to reach USD ~ million, registering a CAGR of ~ % from 2009-2015.

Scope of Research

The report will entail thorough analysis and offers valuable insights on the insurance industry in the Brazil. The scope of the report includes:

- The market size of life and non-life insurance industry in terms of gross insurance premium written for Brazil, 2001 to 2015
- Life and Non-life insurance density in USD for Brazil, 2001 to 2015
- Life and Non-life insurance penetration, premium as a percentage of GDP for the country, 2001 to 2015
- Market segmentation on the basis of Product in Brazil, 2009 and 2015
- Non-life insurance market segmentation by motor, health, property on the basis of gross insurance premium written, historical and projections.
- Competitive Landscape of the major life insurers in Brazil on the basis of gross premium written
- Competitive Landscape of the major non-life insurers in Brazil on the basis of gross premium written
- Valuable Insights and Future Outlook of the insurance industry in Brazil.

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