INSURANCE MARKET IN POLAND, 2021–2023
CEE INSURANCE SERIES

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by Inteliace Research

November 2021

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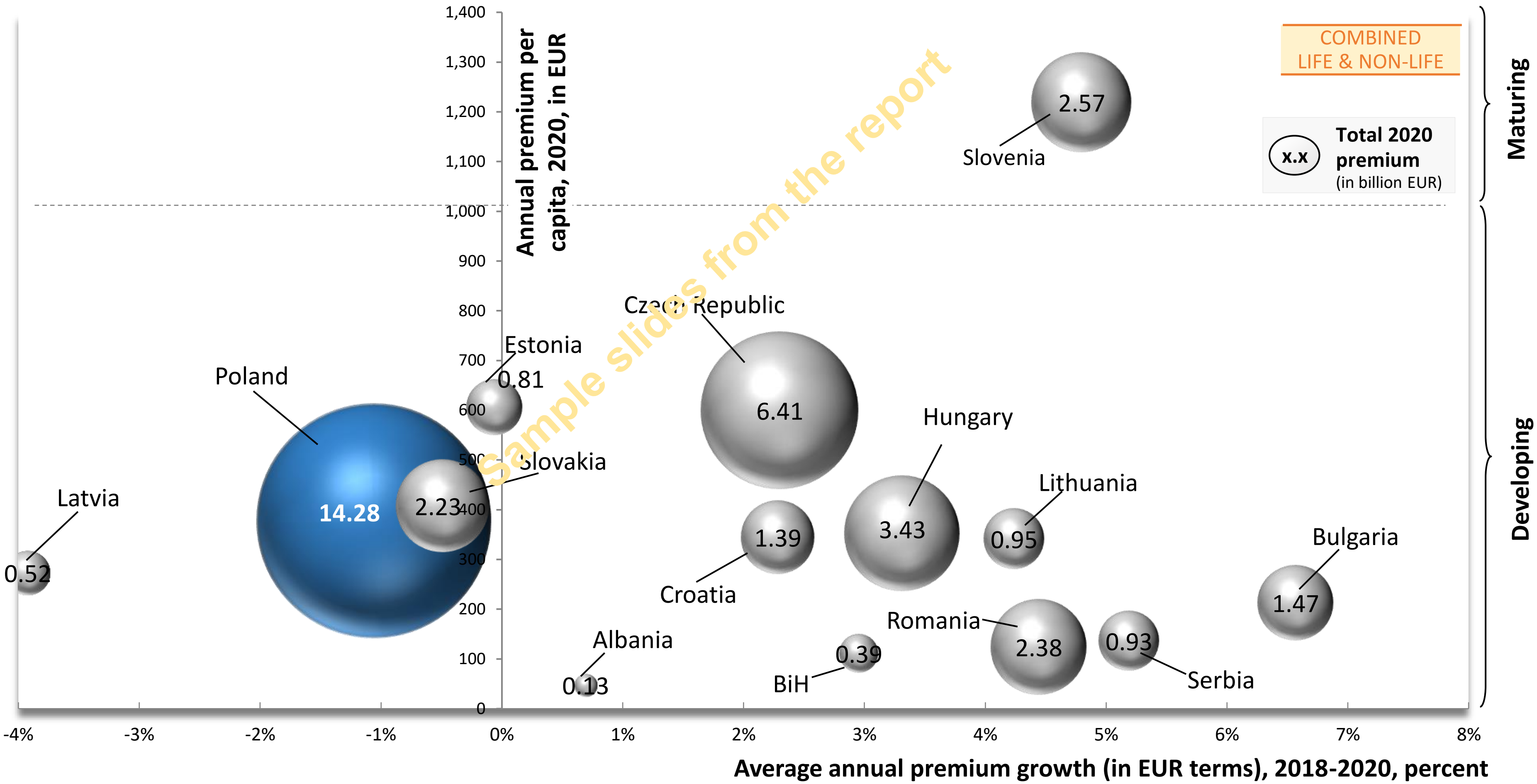
Poland has the largest insurance market within CEE14* and it accounts for ca. 38% of total insurance premium written in the region

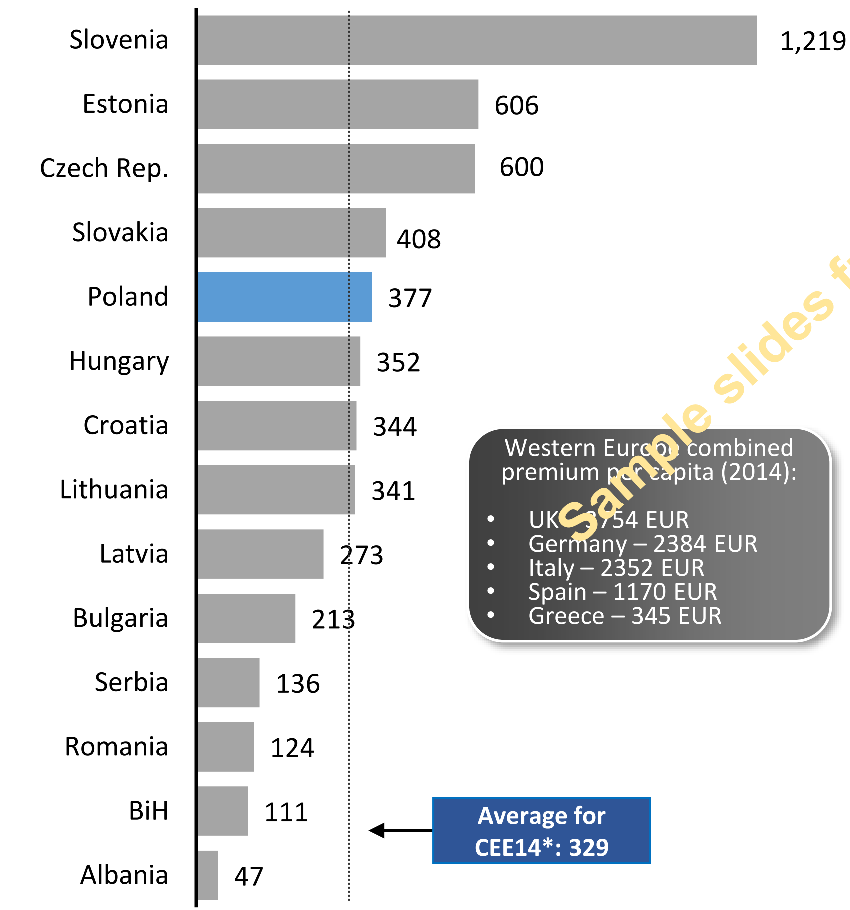
CEE14* insurance markets - Size vs. growth matrix



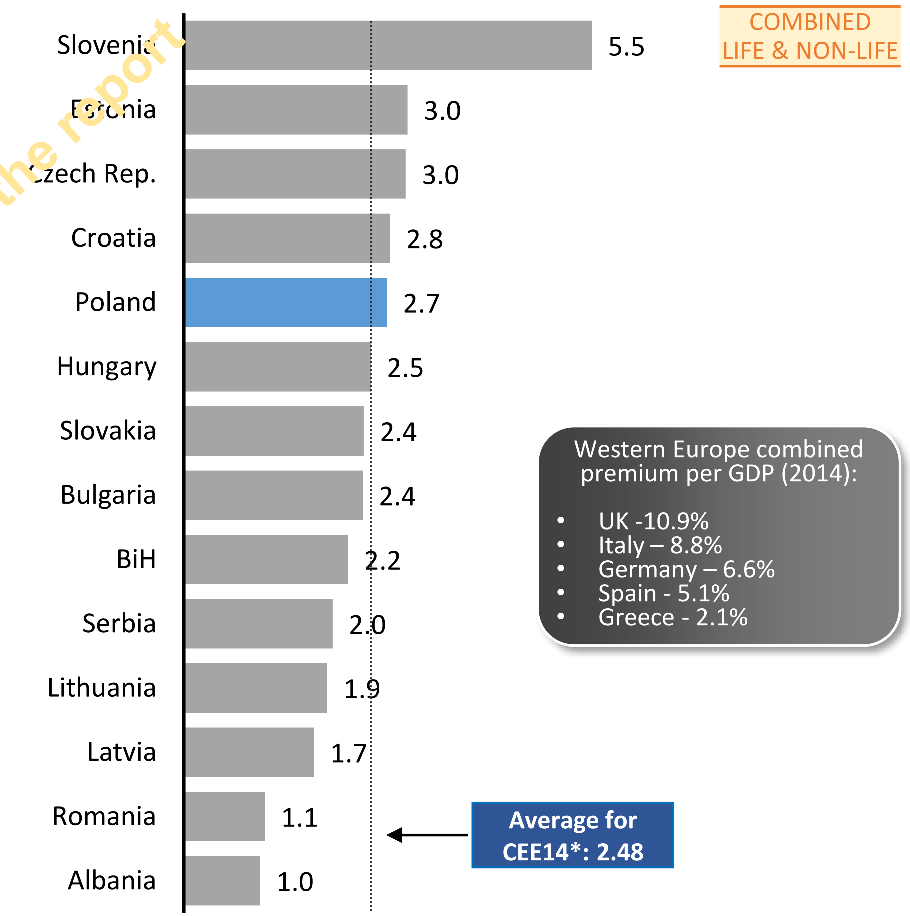
*Major 14 CEE countries. Russia, Ukraine, Belarus and North Macedonia not included
Source: National supervision authorities, IMF, Inteliace Research

Insurance premium penetration benchmarks in Poland are slightly above CEE14* regional averages

Total insurance premium per capita 2020,
in EUR



Total insurance premium/GDP penetration 2020,
Percent of GDP

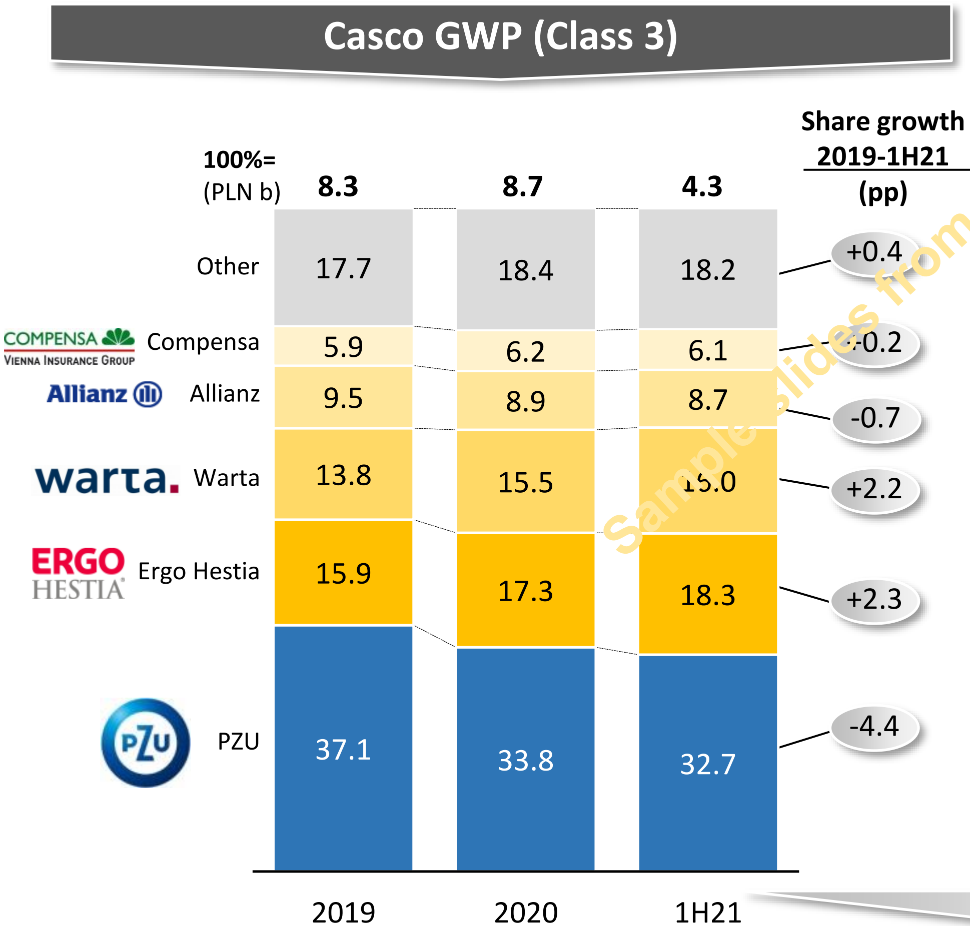


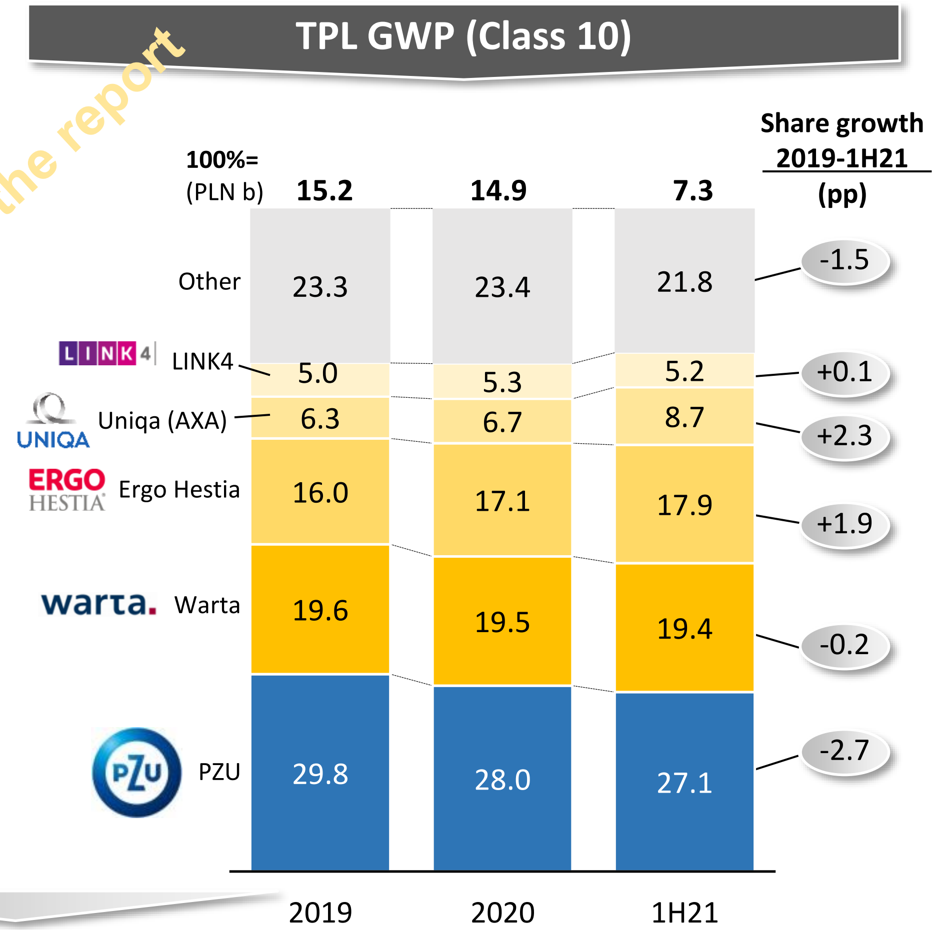
*Major 14 CEE countries. Nt.Macedonia, Russia, Ukraine and Belarus not included
Source: National supervision authorities, IMF, CEA, Inteliace Research

PZU keeps losing market share in car insurance, both in casco and in TPL

Market shares of top players* in car insurance, 2019-1H21
in percent, totals in PLN billion

CAR INSURANCE





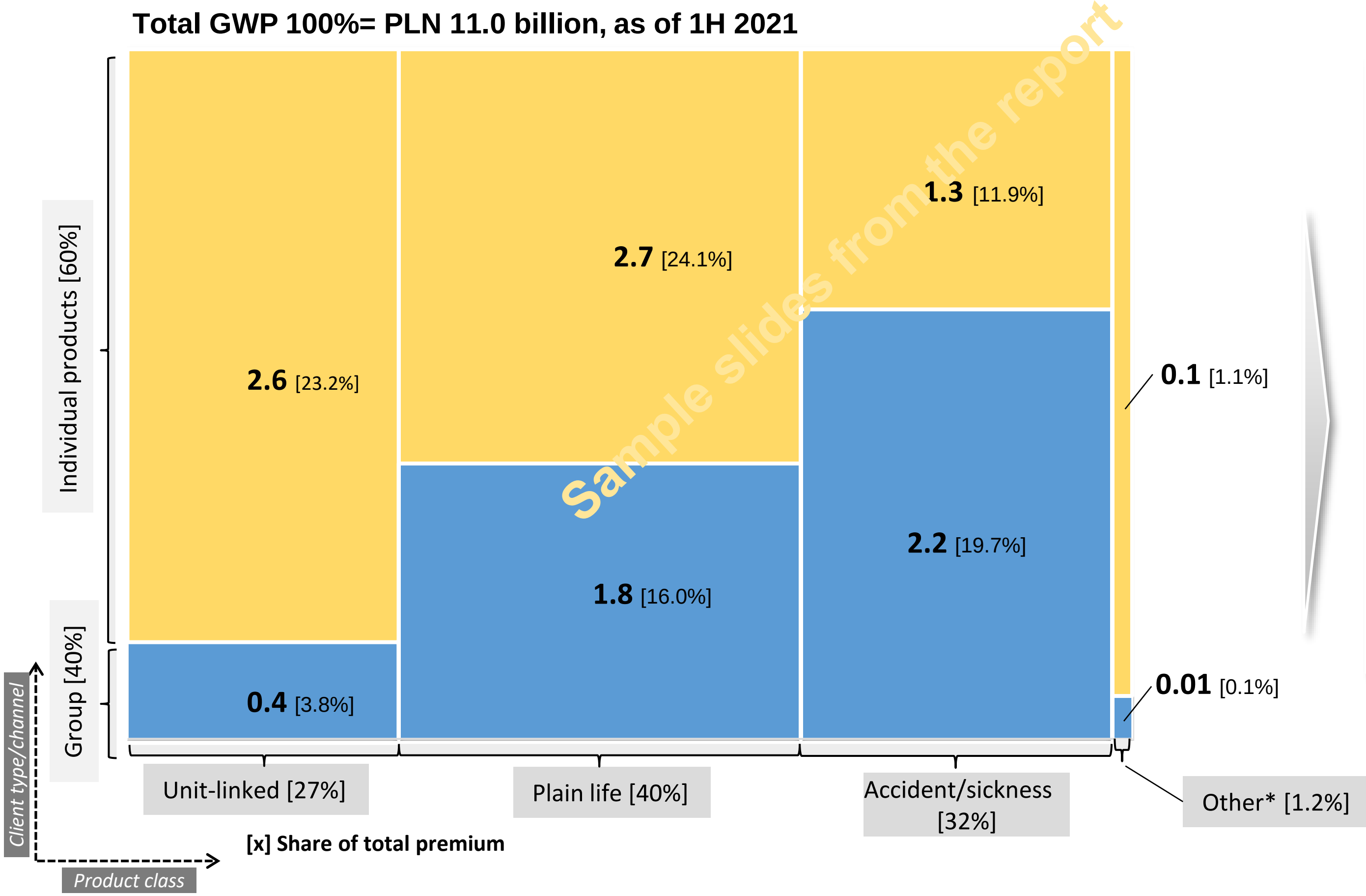
* Insurers with market share >~5%
Source: KNF, Inteliace Research

- Market is deconsolidating as the share of small players is growing
- PZU's market share keeps falling fast, in particular within Casco insurance

Individual life contracts and other than unit-linked life products dominate in new life premium written

LIFE INSURANCE

Premium written in life insurance business by insurance class and segment, 1H 2021
in PLN billion, [share of total in%]



- Individual insurance contracts increased their share and reached over 60% in new sales while group products dropped below 40%
- The share of individual contracts is particularly big in case of unit linked and other contracts
- Group contracts prevail in case of accident & sickness insurance

Insurance Market in Poland, 2021–2023

* e.g. Endowment, disability etc.
Source: KNF, Inteliace Research

About the report and its authors

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Our company specializes in value-added research services and tailored business intelligence solutions.

Through our customized research services we help our clients to better understand their customers, competitors and overall market dynamics.

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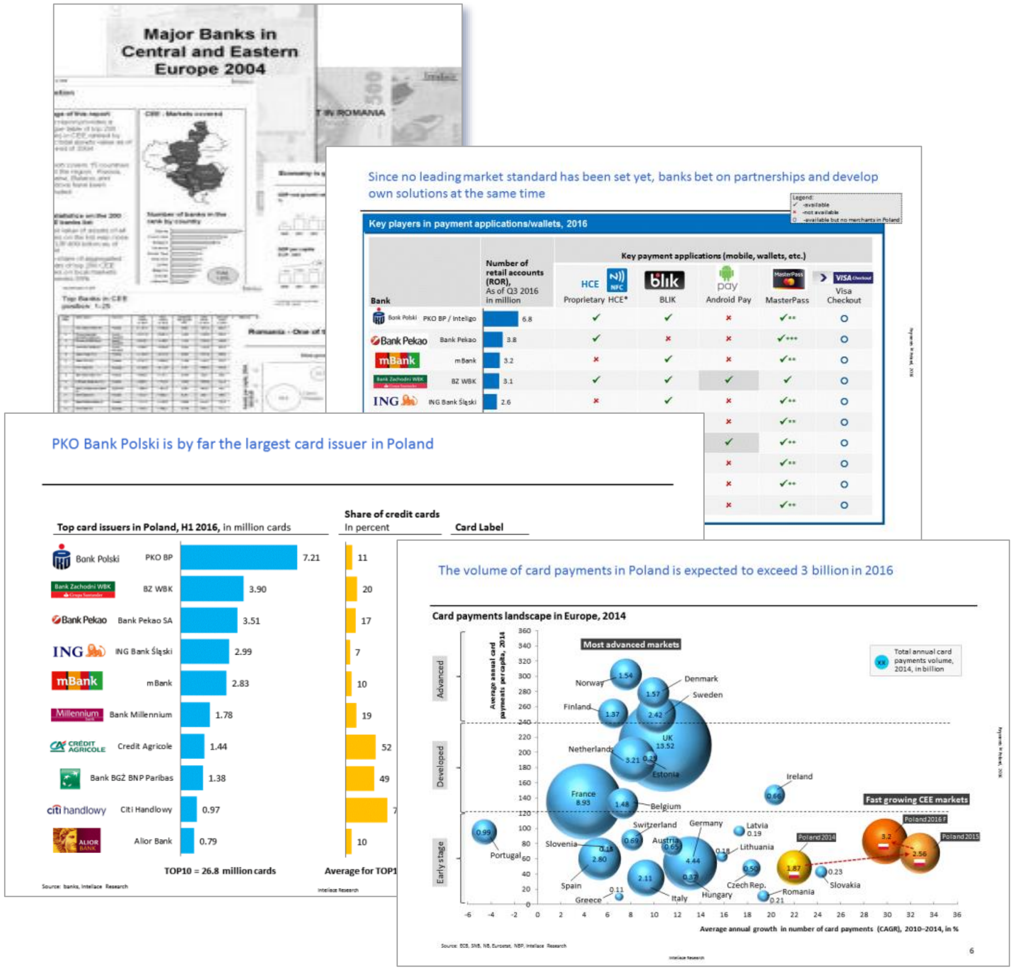

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