



Rob Nijhout – Executive Director



Number of members and premiums

52 Members

Credit Insurance

- 29 members = 56%
- EUR 6 billion

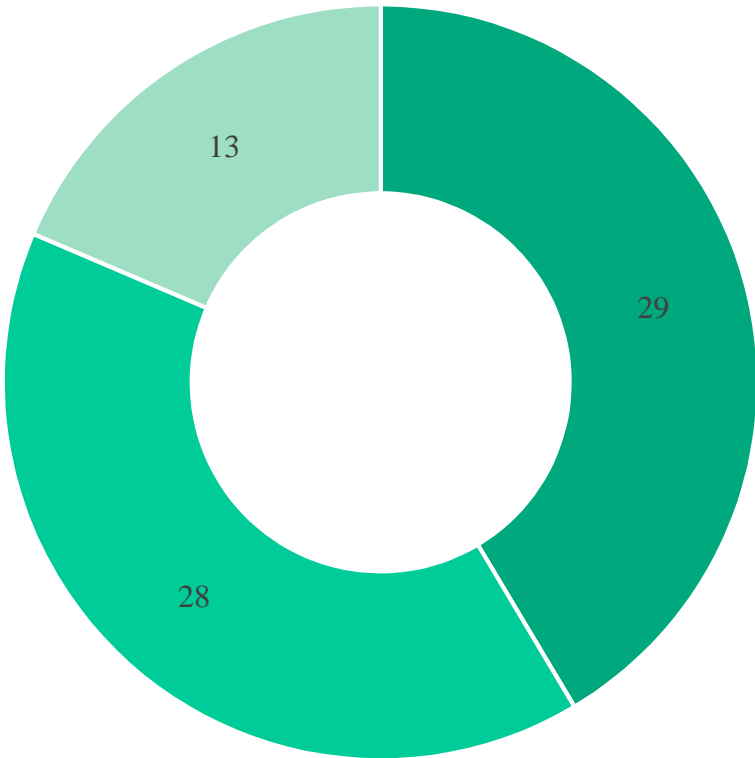
Surety

- 28 members = 54%
- EUR 5 billion

Reinsurance

- 13 members = 25%
- EUR 3.5 billion

Number of members and premiums



■ Credit Insurance ■ Surety ■ Reinsurance

Regional representation

Europe

31 members = 60%

European Union

22 members = 42%

Asia

18 members = 35%

Americas

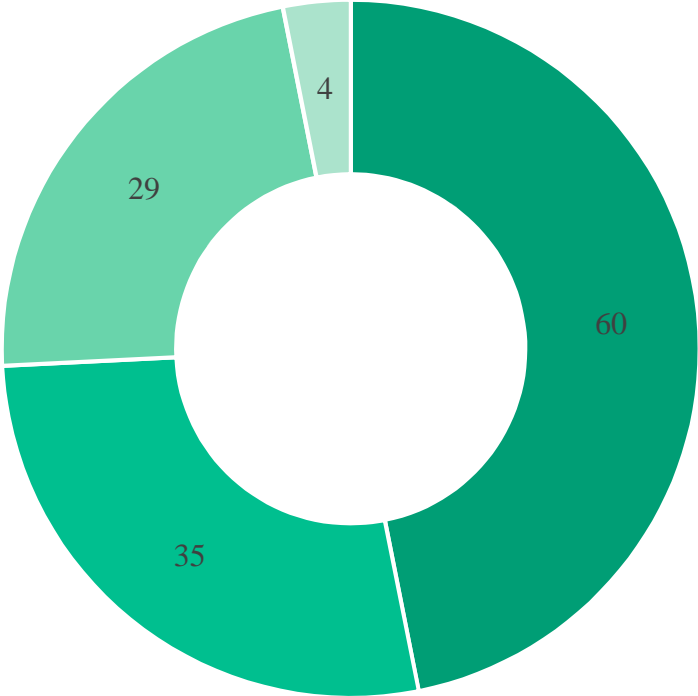
15 members = 29%

Africa

2 members = 4%

Regional Representation

Regions



■ Europe ■ Asia ■ Americas ■ Africa

Advocacy and lobby

European Union:

- CRR II
- Solvency II



Global:

- Basel III and IV
- IFRS 17



UK:

- PRA Consultation

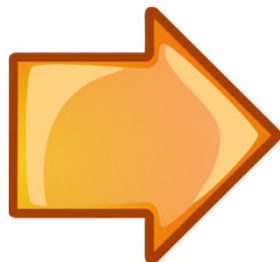


The current TCI market

- Mismatch between risk and premium
- Fraud
- Soft market conditions
- Decreasing premium income
- Stable claims



TCI market trends – insured turnover



48% = stable

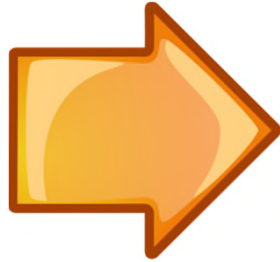


47% = increasing



5% = decreasing

TCI market trends - claims



72% = stable



21% = increasing



7% = decreasing

TCI market trends, next 12 months

12% = hard

39% = neither

49% = soft

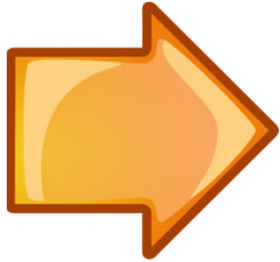
Hard | Soft

The current surety market

- Increasing premium income
- Decreasing claims
- Soft market conditions



Surety market trends – insured turnover



52% = stable

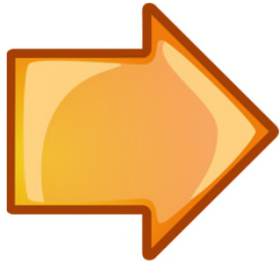


43% = increasing



5% = decreasing

Surety market trends - claims



53% = stable



42% = increasing



5% = decreasing

Surety market trends, next 12 months

12% = hard

34% = neither

54% = soft

Hard | Soft



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ICISA
INTERNATIONAL CREDIT
INSURANCE & SURETY
ASSOCIATION