



IUMI
International Union of
Marine Insurance

Asian Marine Insurance Market in IUMI's view

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Agenda

- 1. Growing demand for Marine Insurance in Asia, especially China*
2. Asian Marine Insurance Market according to IUMI statistics
3. Building Expertise in Asian Marine Insurance Market

Top 20 World Container Ports (2014)



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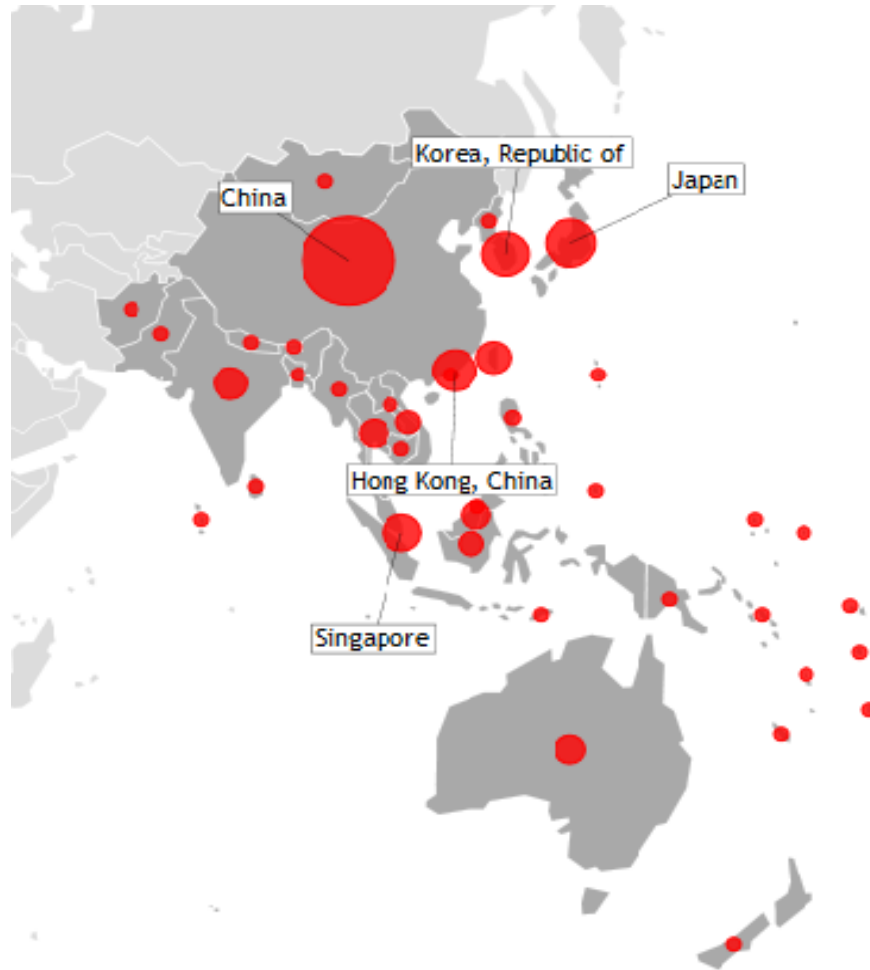
Rank	Rank of 2013	Port	Country	TEU (000)	YoY
1	1	Shanghai	China	35,290	5.0
2	2	Singapore	Singapore	33,870	5.1
3	3	Shenzhen *1	China	24,040	3.3
4	4	Hongkong	China	22,280	▲ 0.4
5	6	Ningbo	China	19,430	12.0
6	5	Busan	Korea	18,680	5.5
7	7	Qingdao	China	16,620	7.1
8	8	Guangzhou	China	16,410	7.2
9	9	Dubai	UAE	15,250	11.8
10	10	Tianjin	China	14,050	8.0
11	11	Rotterdam	The Netherlands	12,300	5.8
12	13	Port Kelan	Malaysia	10,950	5.8
13	14	Kaohsiung	Chinese Taipei	10,590	6.6
14	12	Dalian	China	10,130	2.2
15	15	Hamburg	Germany	9,730	4.6
16	16	Antwerp	Belgium	8,980	4.7
17	17	Xiamen	China	8,570	7.0
18	19	PTP(Tanjung Pelepas)	Malaysia	8,550	12.1
19	18	Los Angeles	U.S.A.	8,340	6.0
20	20	Long Beach	U.S.A.	6,820	1.3

*1Shenzhen : Total of ports of Chiwan, Shekou and Yantian

The share of the Asian countries within the World container movement

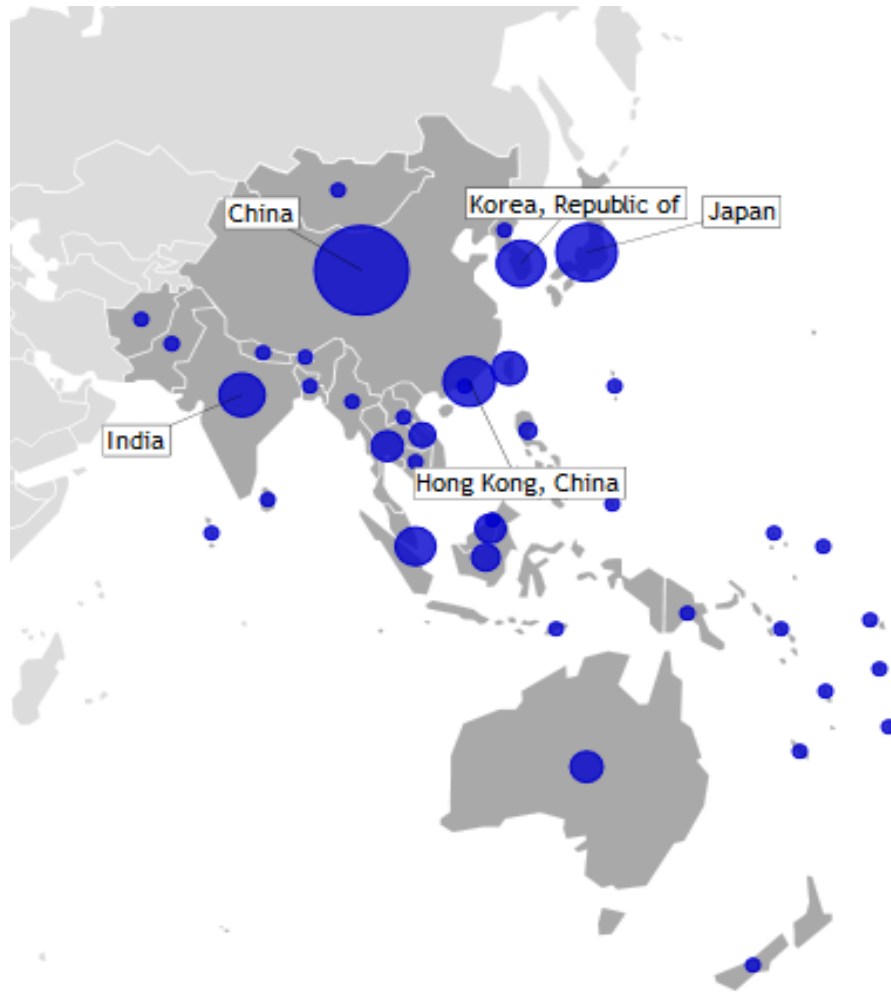


Exports of Asian countries in 2014



Economy	Million US Dollars
China	2,342,306.0
Japan	683,845.6
Korea, Republic of	572,664.0
Hong Kong, China	524,064.9
Singapore	409,769.0
India	321,596.4
Chinese Taipei	313,695.9
Australia	241,222.0
Malaysia	234,139.1
Thailand	227,573.6

Imports of Asian countries in 2014



Economy	Million US Dollars
China	1,959,356.0
Japan	822,251.1
Hong Kong, China	600,613.1
Korea, Republic of	525,514.0
India	463,033.3
Singapore	366,247.0
Chinese Taipei	274,026.2
Australia	236,919.0
Thailand	227,952.3
Malaysia	208,864.3
Indonesia	178,178.8

The top 10 countries of Exports/Imports (2014)



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Exports in billion US \$

1	China	2,342
2	US	1,621
3	Germany	1,508
4	Japan	684
5	Netherlands	672
6	France	583
7	Korea	573
8	Italy	529
9	HongKong	524
10	UK	506

Imports in billion US \$

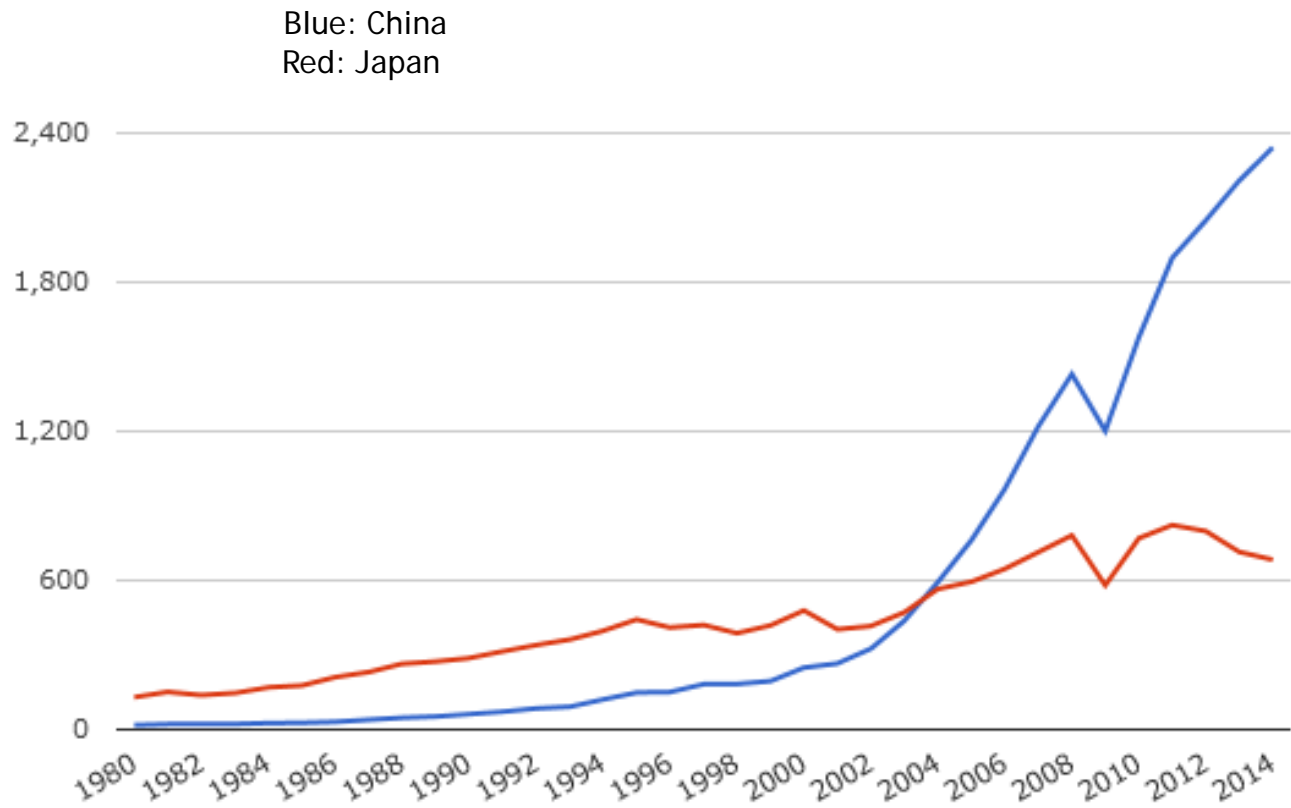
1	US	2,413
2	China	1,959
3	Germany	1,216
4	Japan	822
5	UK	684
6	France	378
7	HongKong	601
8	Netherlands	588
9	Korea	526
10	Canada	475

Growth of Chinese Exports



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in billion US \$

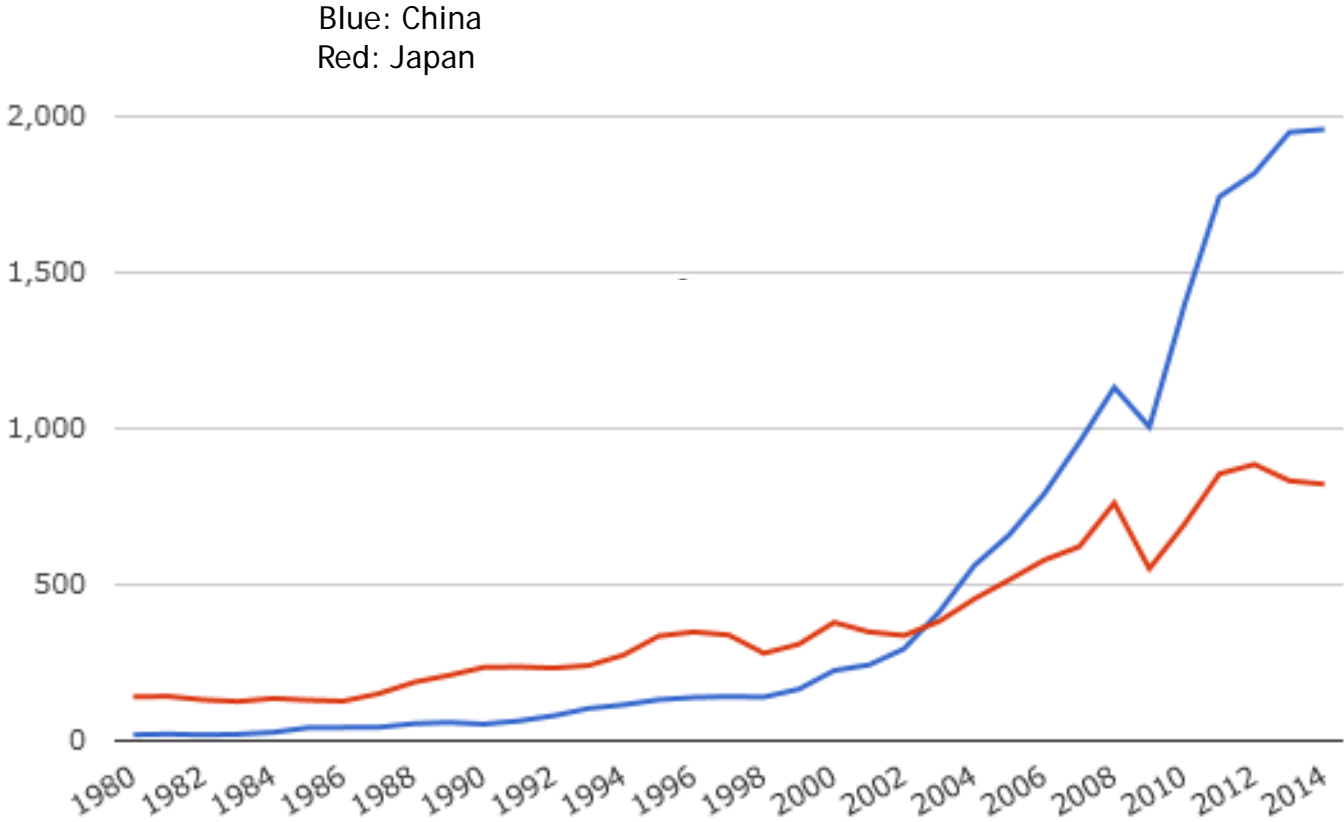


Growth of Chinese Imports

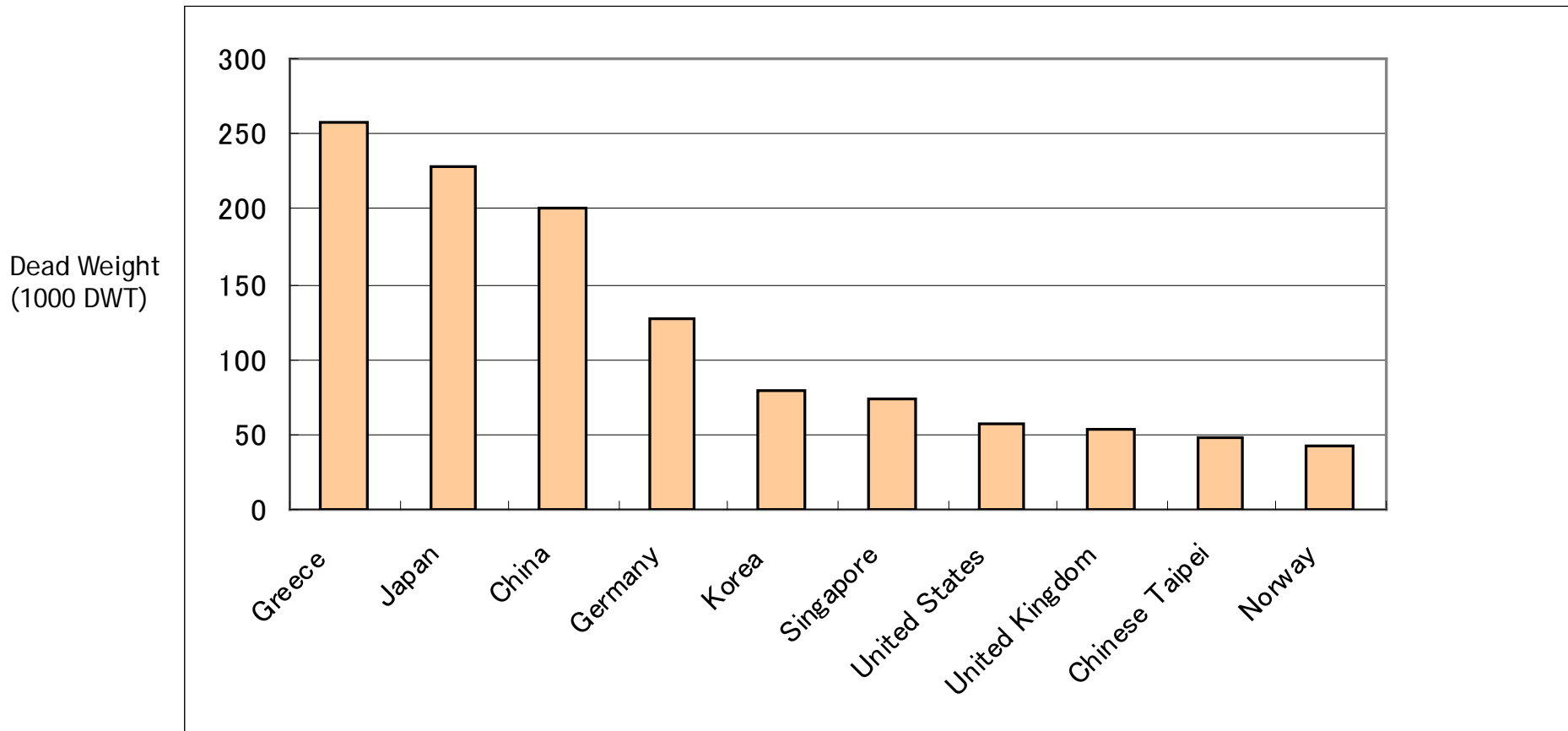


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in billion US \$



Top 10 Ship-owning nations, beneficial ownership of Merchant fleet, 1 January 2014



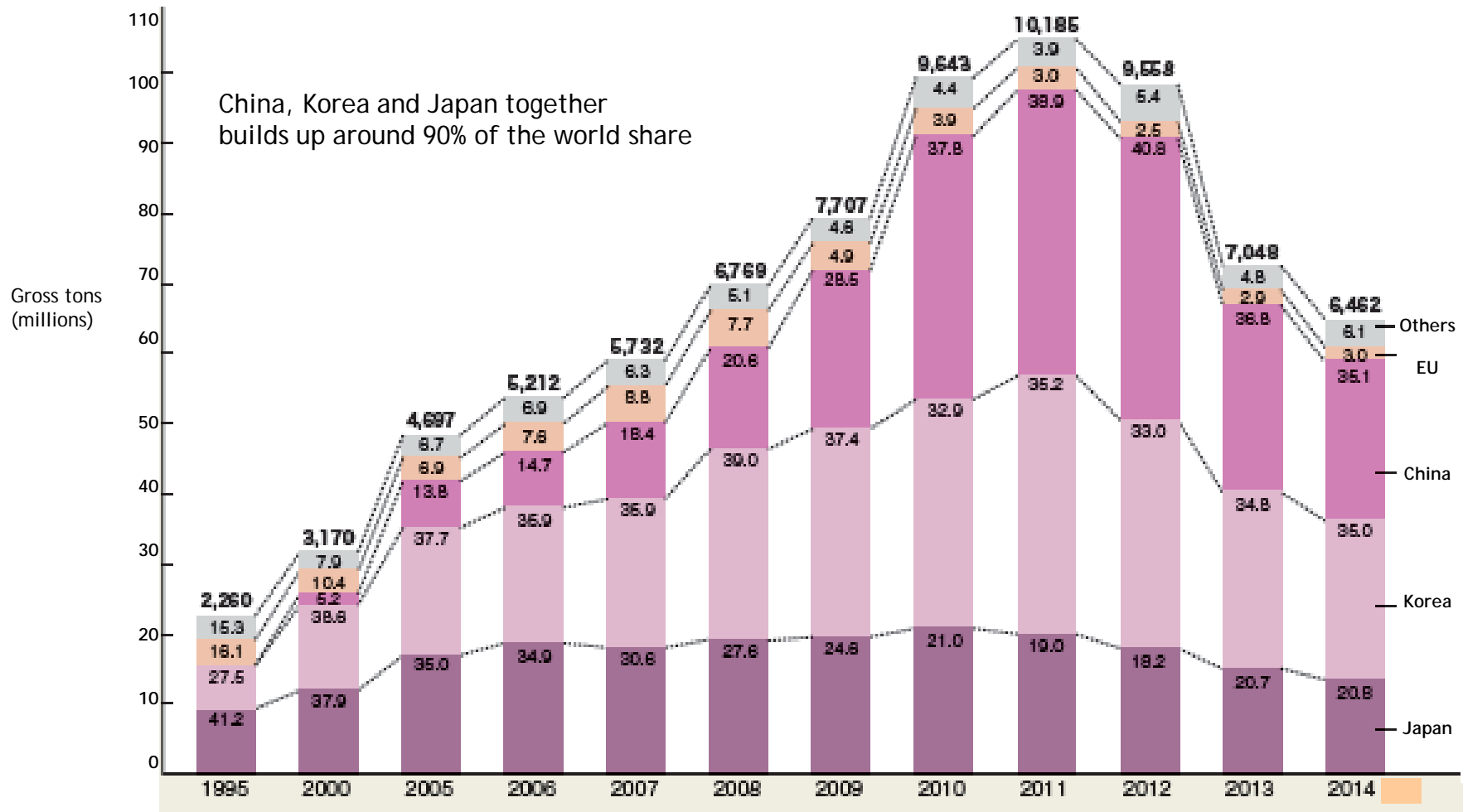
Ship-owning nations in "Asia" and "other than Asia",
beneficial ownership of Merchant fleet, 1 January 2014



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		in number of ships	in dead weight tonnage			share (%)	
			national flag	foreign flag	total	world	Asia
Asia	Japan	4,022	17,871,000	210,682,000	228,553,000	13.7	59.0
	China	5,405	73,252,000	126,928,000	200,179,000	12.0	
	Korea	1,568	16,266,000	61,974,000	78,240,000	4.7	
	Hong Kong	610	18,637,000	7,966,000	26,603,000	1.6	41.0
	Singapore	2,120	41,080,000	32,984,000	74,064,000	4.4	
	Chinese Taipei	862	3,859,000	43,622,000	47,481,000	2.8	
	Malaysia	602	8,668,000	8,129,000	16,797,000	1.0	
	Indonesia	1,598	12,519,000	2,992,000	15,511,000	0.9	
	Vietnam	859	6,511,000	1,489,000	8,000,000	0.5	
	Thailand	407	4,598,000	2,162,000	6,760,000	0.4	
	India	753	14,636,000	7,021,000	21,657,000	1.3	
	Others	171	2,270,000	849,000	3,118,000	0.2	
	Total of Asia	18,977	220,167,000	506,798,000	726,963,000	43.5	
Other than Asia		27,975	233,565,000	712,627,000	945,938,000	56.5	
World total		46,952	453,732,000	1,219,425,000	1,672,901,000	100.0	

World Shipbuilding Tonnage



(Source: Japan Maritime Public Relations Center)

World Oil/Gas Production/Consumption by region

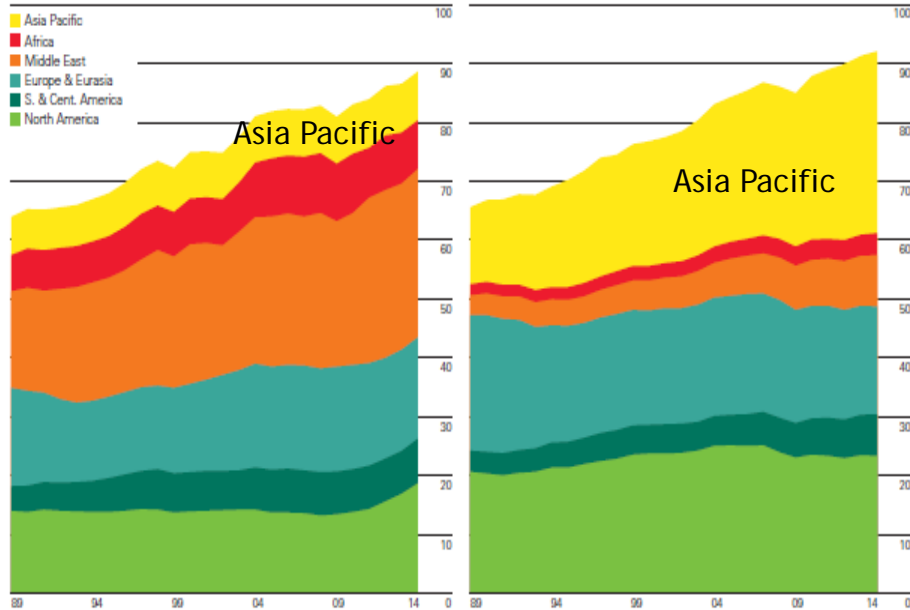


< Oil >

Production/Consumption by region

Production
Million Barrels Daily

Consumption
Million Barrels Daily

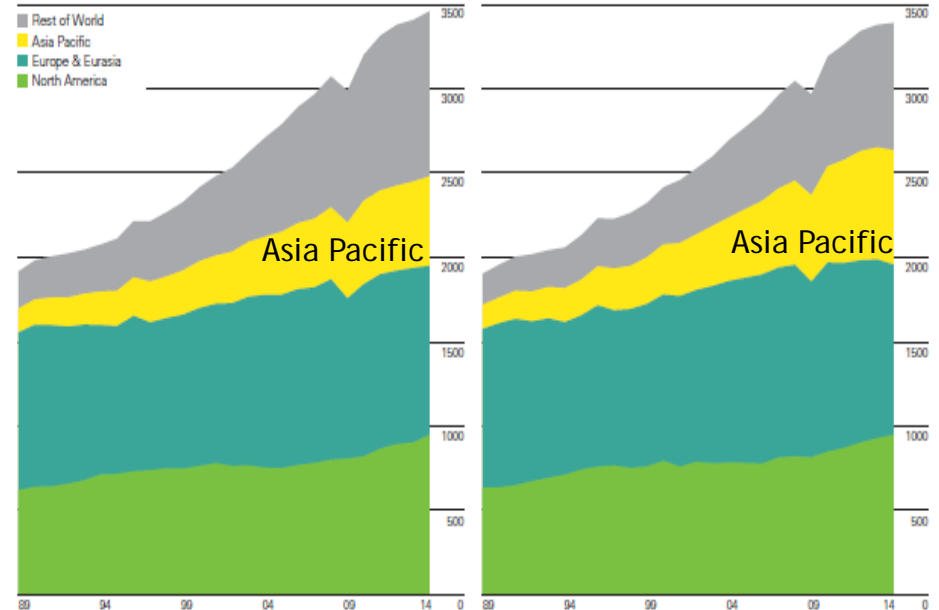


< Natural Gas >

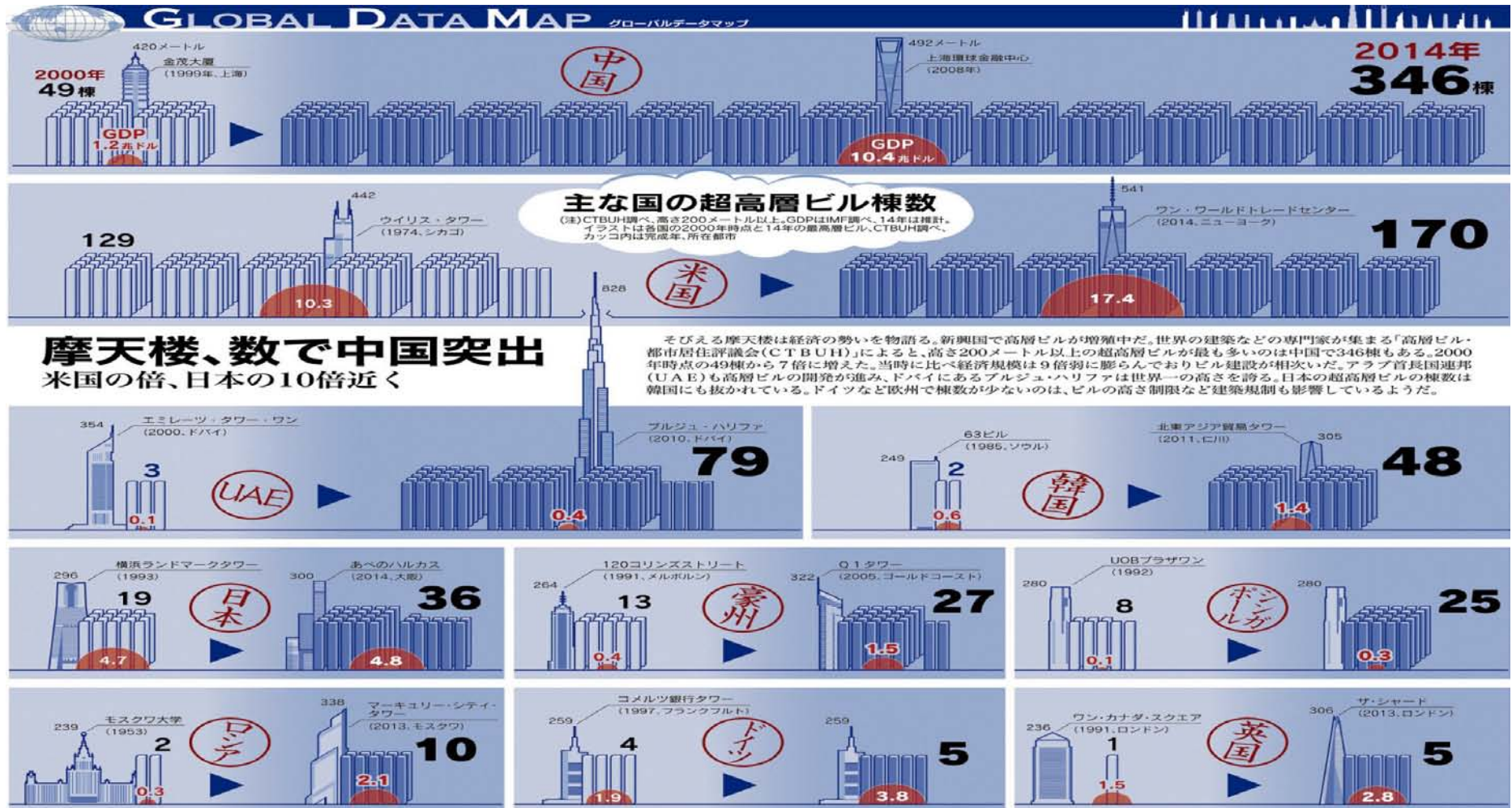
Production/Consumption by region

Production
Billion cubic metres

Consumption
Billion cubic metres



Skyscraper over 200 meters high (just for your information!)



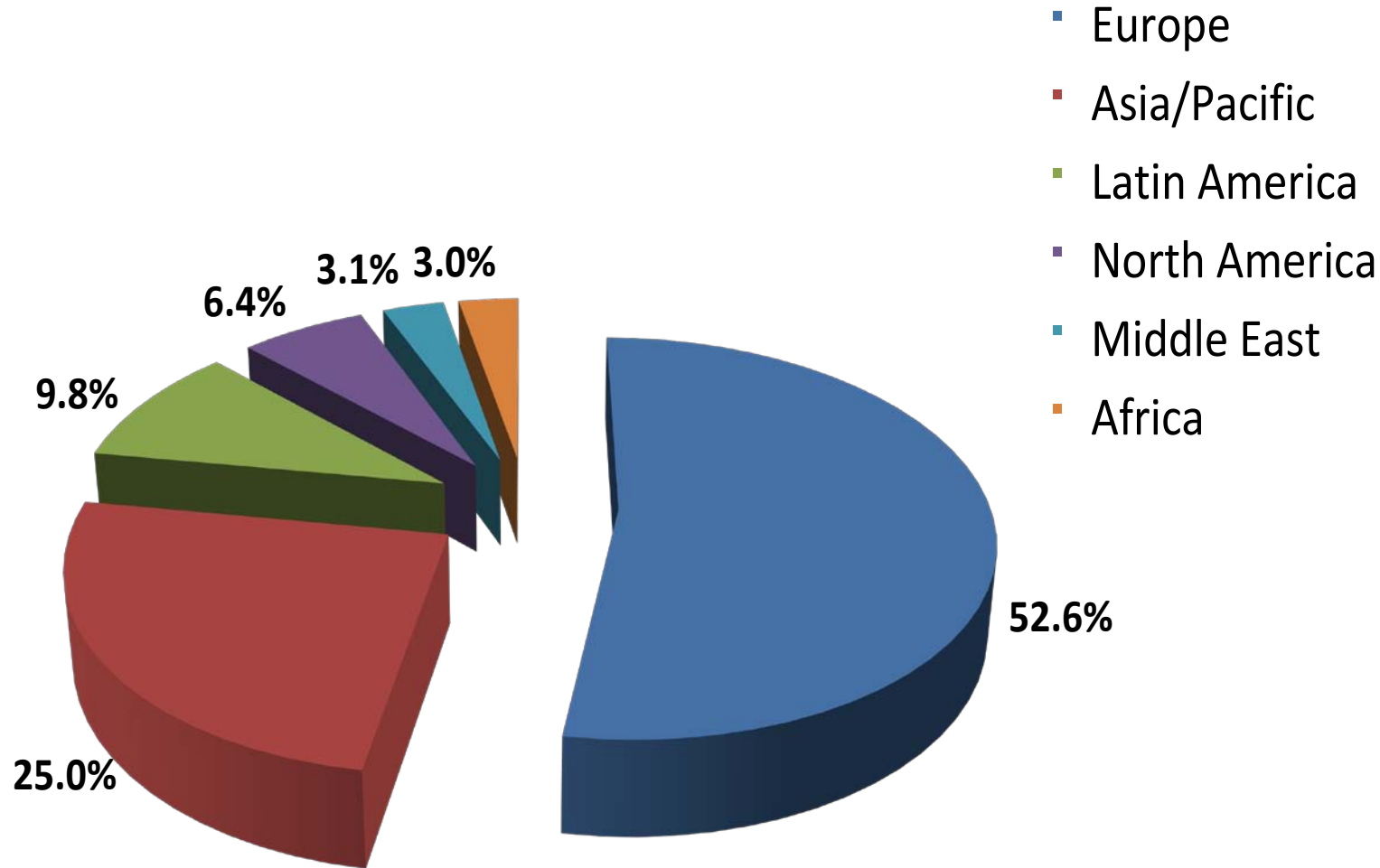
グローバルデータマップは月間1日に掲載、世界や日本のデータや情報を取り上げ、インフォグラフィックスの手法でわかりやすく紹介します。

インフォグラフィックス 編集局デザイン編集部 佐々木 司 協力 TUBE GRAPHICS

Agenda

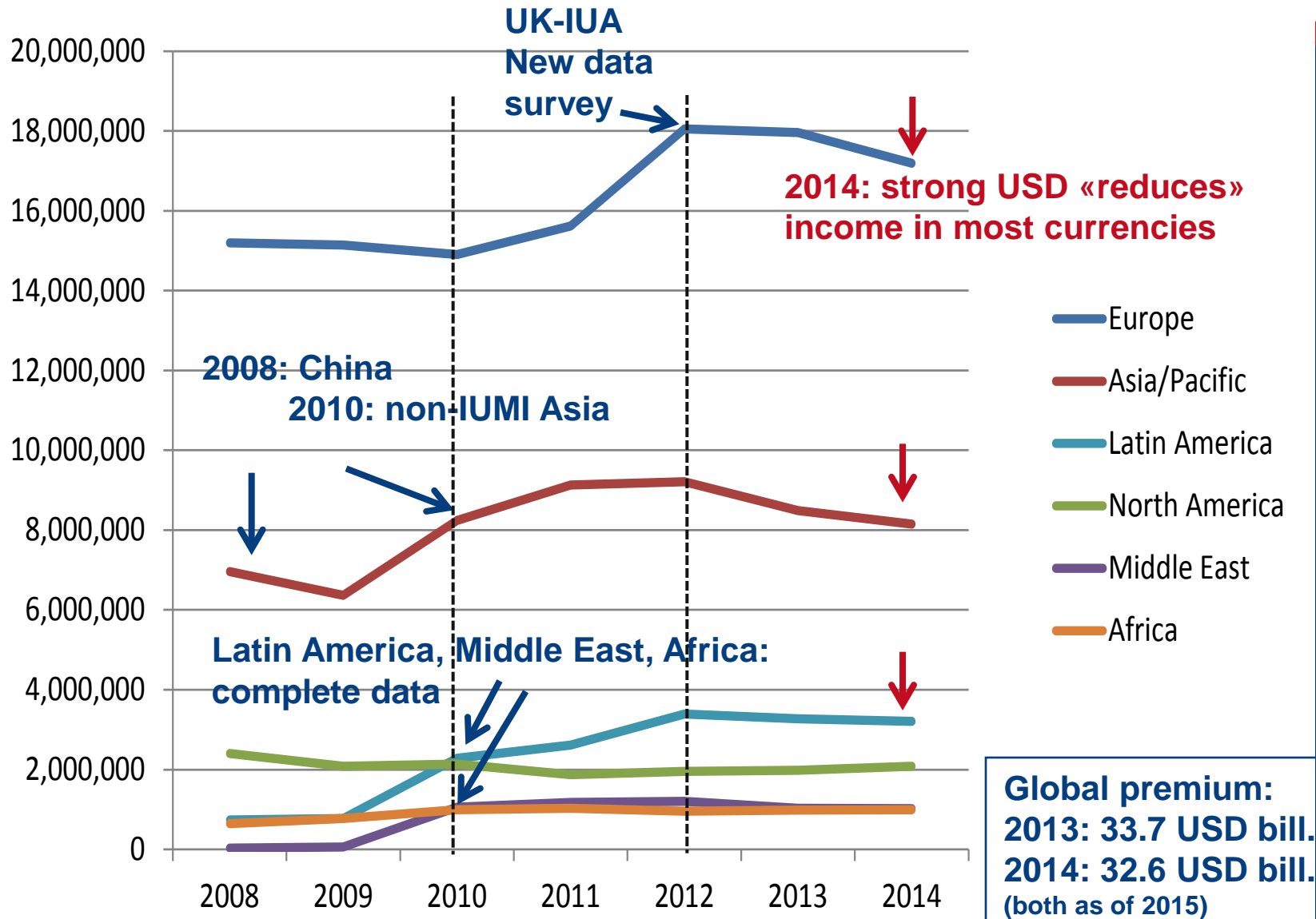
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MARINE PREMIUM 2014 – BY REGION



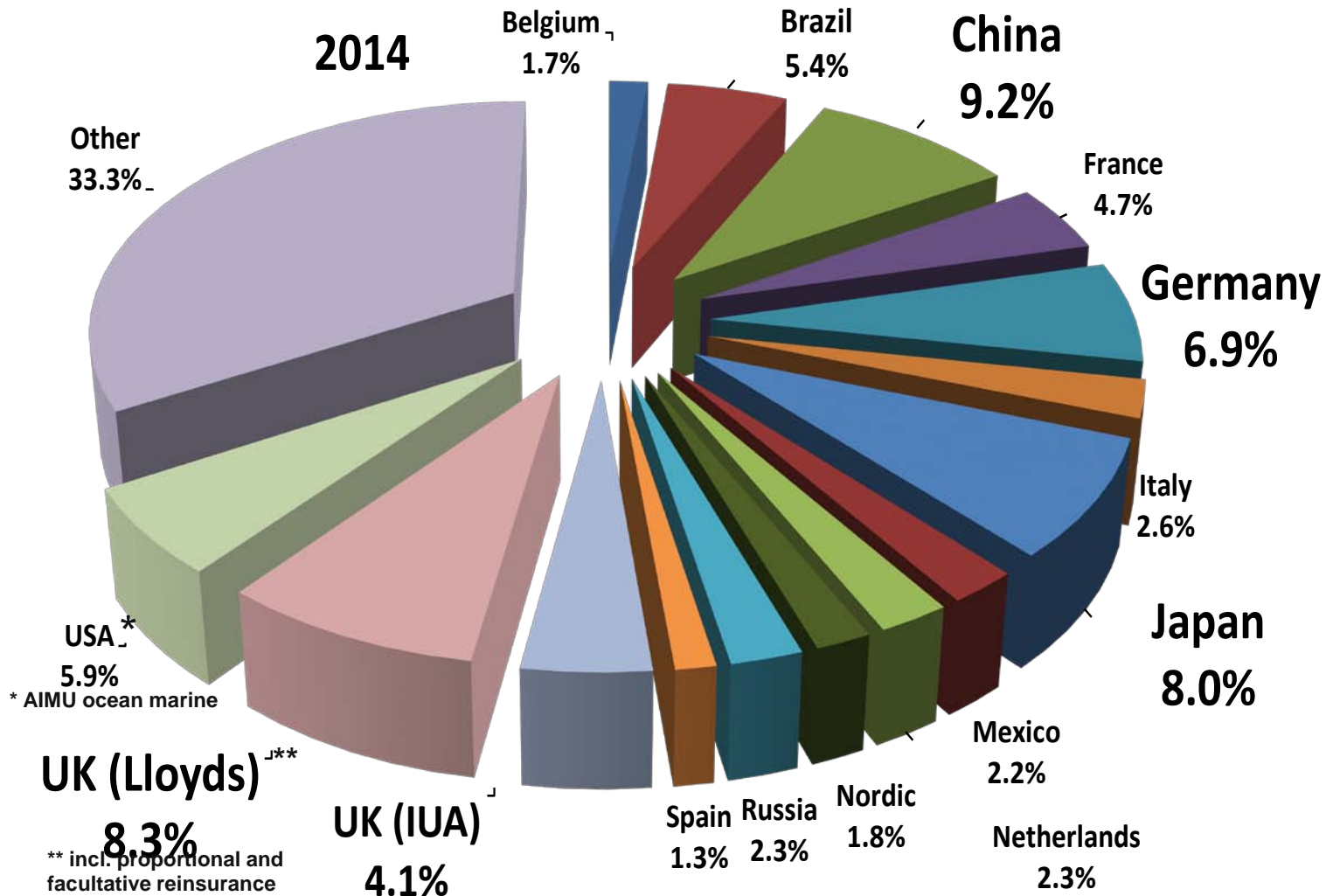
**Total: 32.6 USD
billion**

MARINE PREMIUM 2008-2014 – AS OF 2015



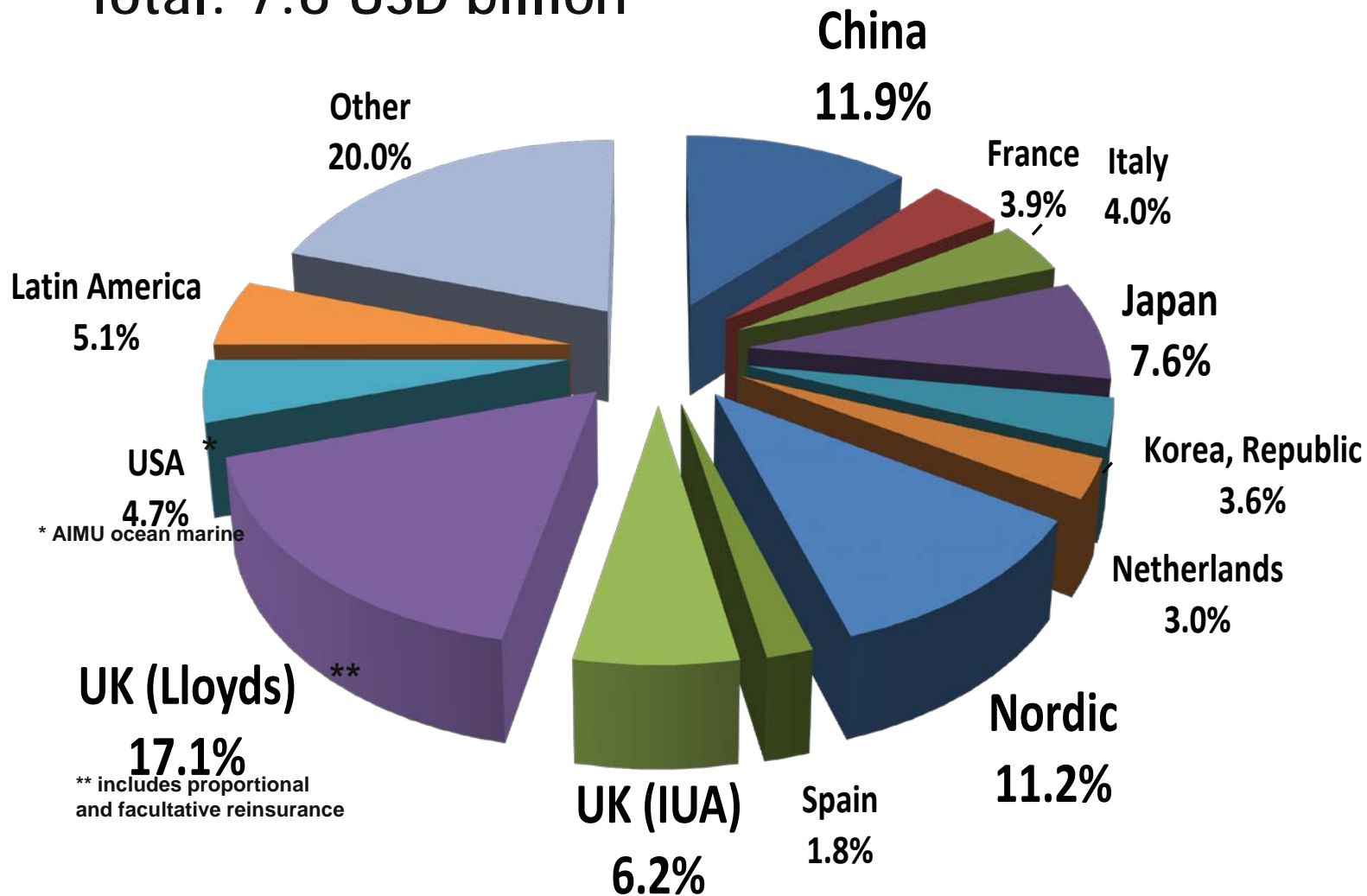
CARGO PREMIUM 2014 - BY MARKETS

Total: 16.95 USD billion

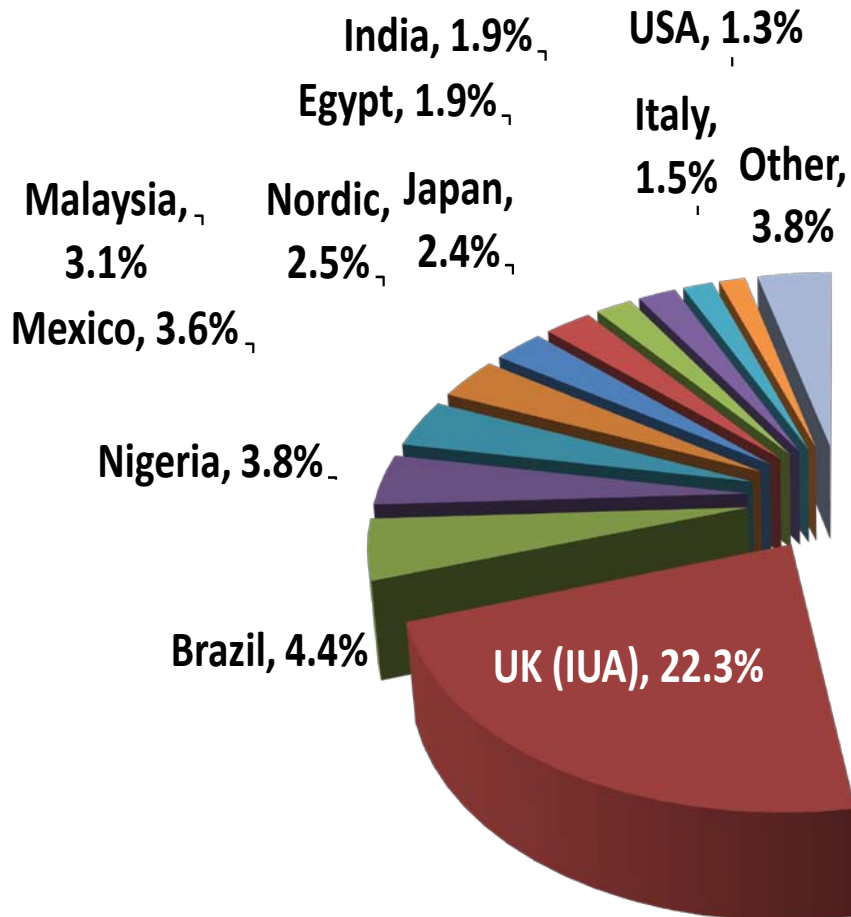


HULL PREMIUM 2014 – BY MARKETS

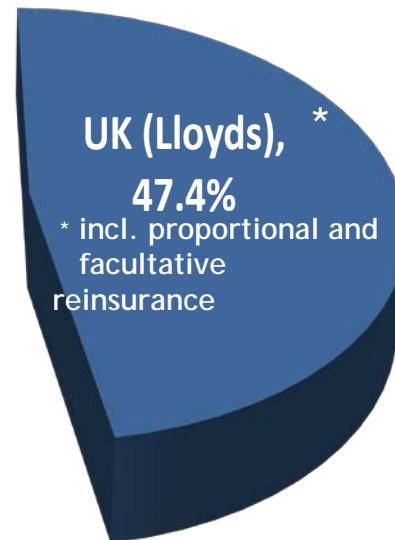
Total: 7.6 USD billion



OFFSHORE ENERGY PREMIUM 2014



Total: 5.7 USD billion





Marine Premium 2014 in Asia by markets

in USD 000

	IUMI	Hull	Cargo	Marine Lia	Energy	Total	
Australia	x	68,000	239,000	46,000	0	353,000	
China	x	897,998	1,554,802			2,452,800	from Chinese yearbook
Chinese Taipei	x	38,397	128,070	0	0	166,467	
Hong Kong	x	47,292	104,803	17,431	0	169,526	
India	x	77,792	338,899	2,940	115,412	535,044	
Indonesia		129,804	245,280	0	0	375,084	estimated from 2013
Japan	x	574,134	1,360,304	45,413	142,361	2,122,212	
Kazakhstan	x	8,255	23,861	2,720	NA	34,836	
Korea, D.P.R. Of	x	8,300	24,100	690	0	33,090	
Korea, Republic of	x	272,684	227,836	5,163	67,560	573,243	
Malaysia	x	77,830	134,444	0	186,934	399,209	
New Zealand	x	22,696	62,269	4,963	0	89,928	
Philippines		59,886	67,051	0	0	126,937	estimated from 2013
Singapore	x	228,400	83,700	0	0	312,100	
Thailand		13,410	149,560	0	0	162,970	
Vietnam		78,333	115,025	NA	0	193,358	estimated from 2013

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What is a characteristic of Marine Insurance?
Marine Insurance market is varied by country, but...

Marine Insurance

Specialty/Expertise

1. Global/International

2. Volatility

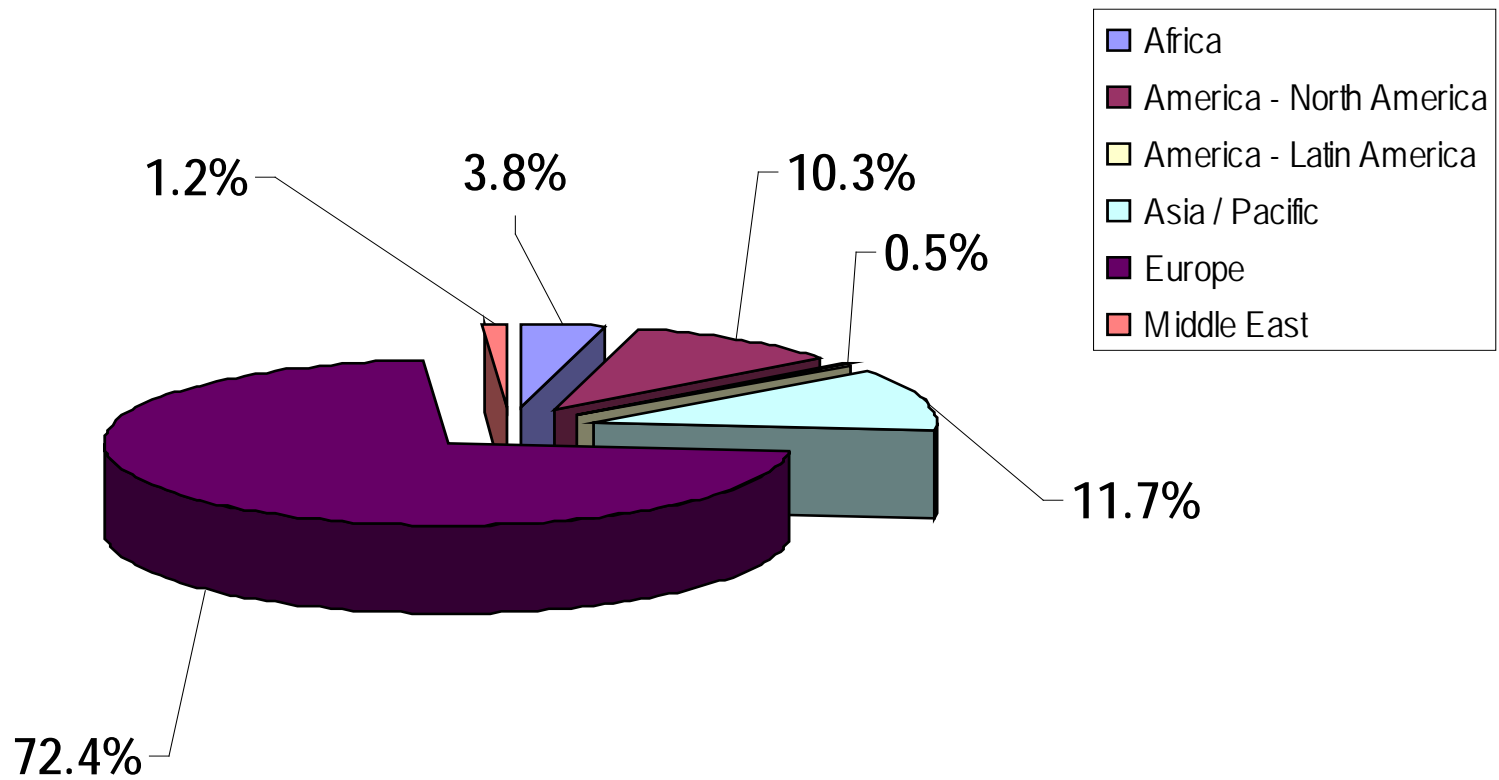
3. Tradition/History

IUMI annual conference / The number of participants by region



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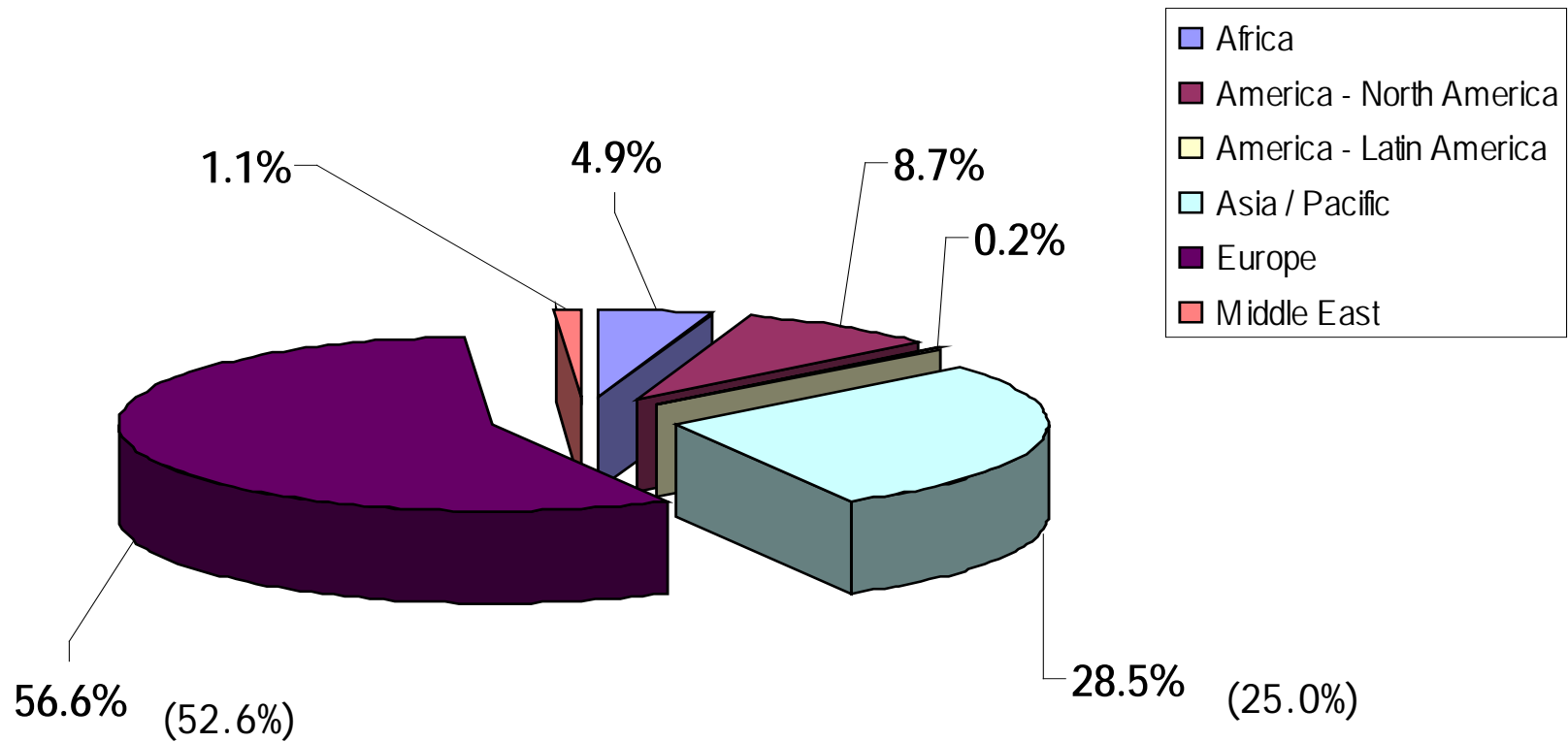
Berlin Conference 2015





IUMI annual conference / The number of participants by region

Hong Kong Conference 2014



IUMI member countries in Asia / Pacific



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Australia

China

Chinese Taipei

Hong Kong

India

Japan

Kazakhstan

Korea, D.P.R. of

Korea, Republic of

Malaysia

New Zealand

Singapore



will continue to encourage non IUMI
member associations to join



Finally where we are living

Cargo saw its net earned premiums go down by ##% to post ### million over 2013. It registered the most decline in net earned premiums among the major lines of business. Its underwriting profit fell far lower, tumbling by ##% year-on-year to deliver ## million. Both performances followed a drift slightly similar to that in 2013, when year-on-year premiums and underwriting profits slid by ##% and ##%, respectively.

Hull hit a slump in its performances in 2014. From a ##% year-on-year growth it registered in 2013, net earned premiums grew only by #% to ##million in 2014. It fared worse on the underwriting front as it made a loss of ## million, representing a plunge of ##% in its underwriting result and making it the worst performer underwriting-wise among the major segments.



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Thank you !

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