



INTERNATIONAL INSURANCE BROKERS  
**CINCOTTI**  
& PARTNERS

## THE MARINE P&I COVER PANORAMA: WORLD AND IN ITALY

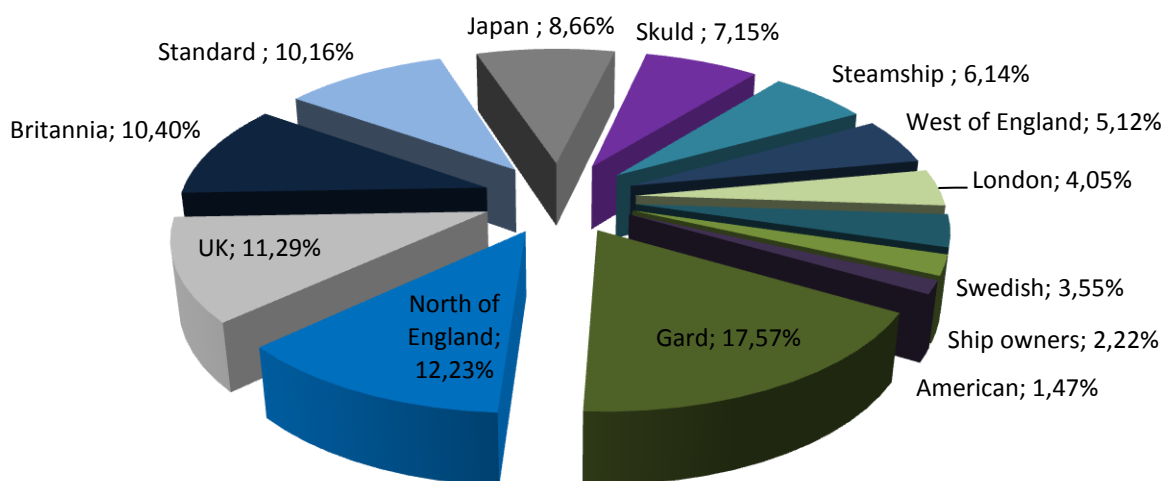
The gross tonnage in the World (Gt 1:06 billion) and in Europe (490 Mln Gt) is homogeneously spread on 13 Mutual Clubs (data collected from October 2014 Annual Report P&I Clubs). We also expressed graphically the situation in Italy by analyzing 150 shipping companies, 1.200 ships and 18.6 Mln Gt (source Equasis August 2015) in which it is emphasized a concentration of all Gt on three clubs representing the 70% about of the domestic market (See our website) .

## PANORAMA COPERTURE P&I : MONDO ed ITALIA

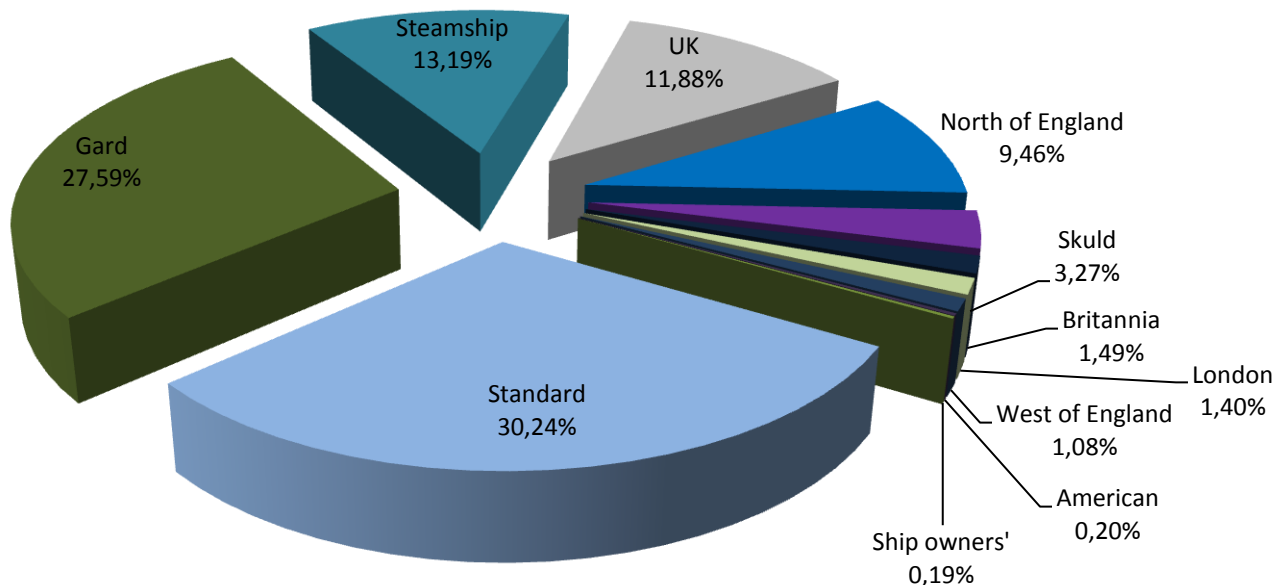
Il tonnellaggio mondiale (1.06 Mld Gt) è omogeneamente spalmato su 13 Mutual Clubs. (dati rilevati da Annual Report Ottobre 2014 P&I Clubs).

Abbiamo espresso graficamente anche la situazione in Italia analizzando 150 Società Armatrici, 1.200 navi e 18.6 MI GT (fonte Equasis - Agosto 2015) nella quale si pone in risalto una concentrazione sui tre Clubs con circa il 70% del mercato domestico (Vedi allegato sul nostro sito).

### I.G. P&I CLUBS MARKET SHARE IN THE WORLD (%gt)



### I.G. P&I CLUBS MARKET SHARE IN ITALY (%gt)



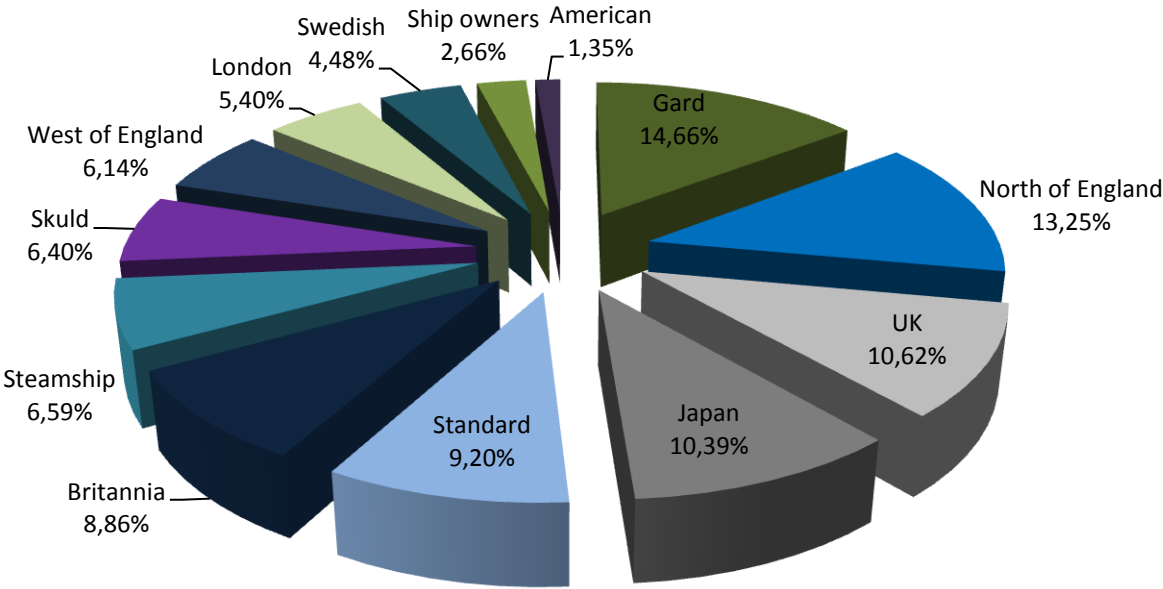
### COMPETITIVENESS

The risks considering the ships type are also globally and homogeneously spread between the thirteen major Clubs. Does Your Club grant sufficient competition in premiums when compared with its international portfolio?

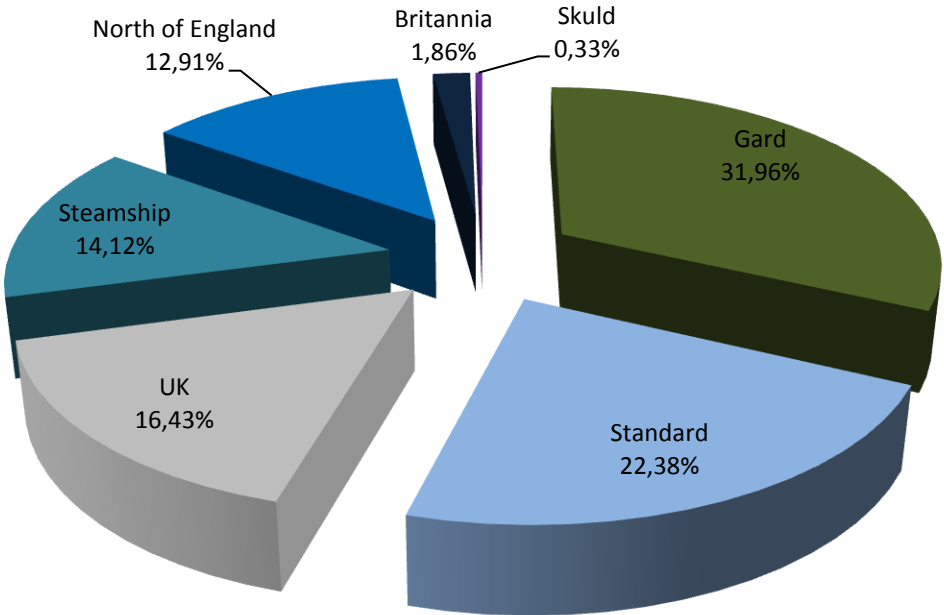
### COMPETITIVITÀ

Anche i rischi per tipo di nave sono globalmente ed omogeneamente divisi fra i tredici principali Clubs. Il Tuo Club garantisce un'adeguata competitività dei premi applicati se confrontati con il suo portafoglio internazionale?

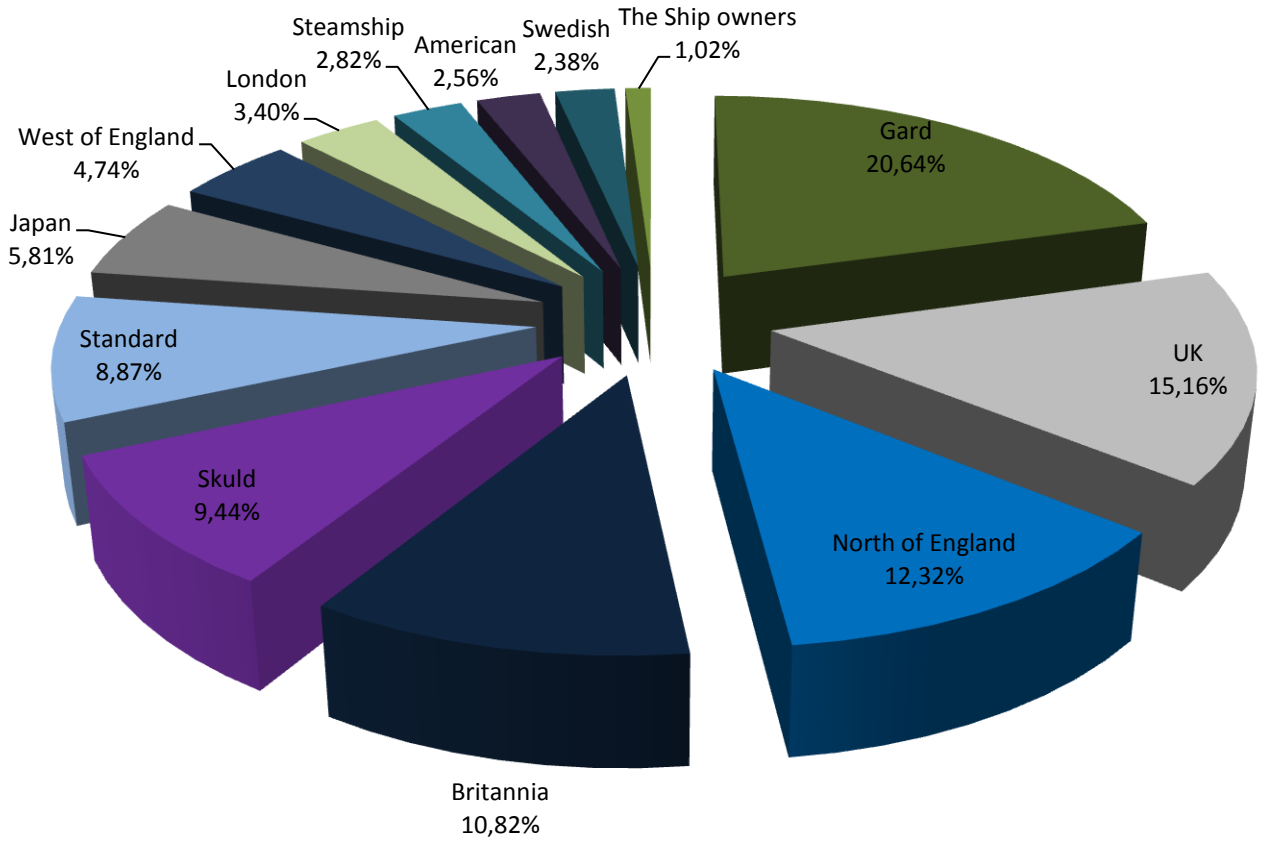
### I.G. P&I CLUBS WORLD MARKET SHARE (%gt) BULK/GENERAL/CARGO/CONTAINER



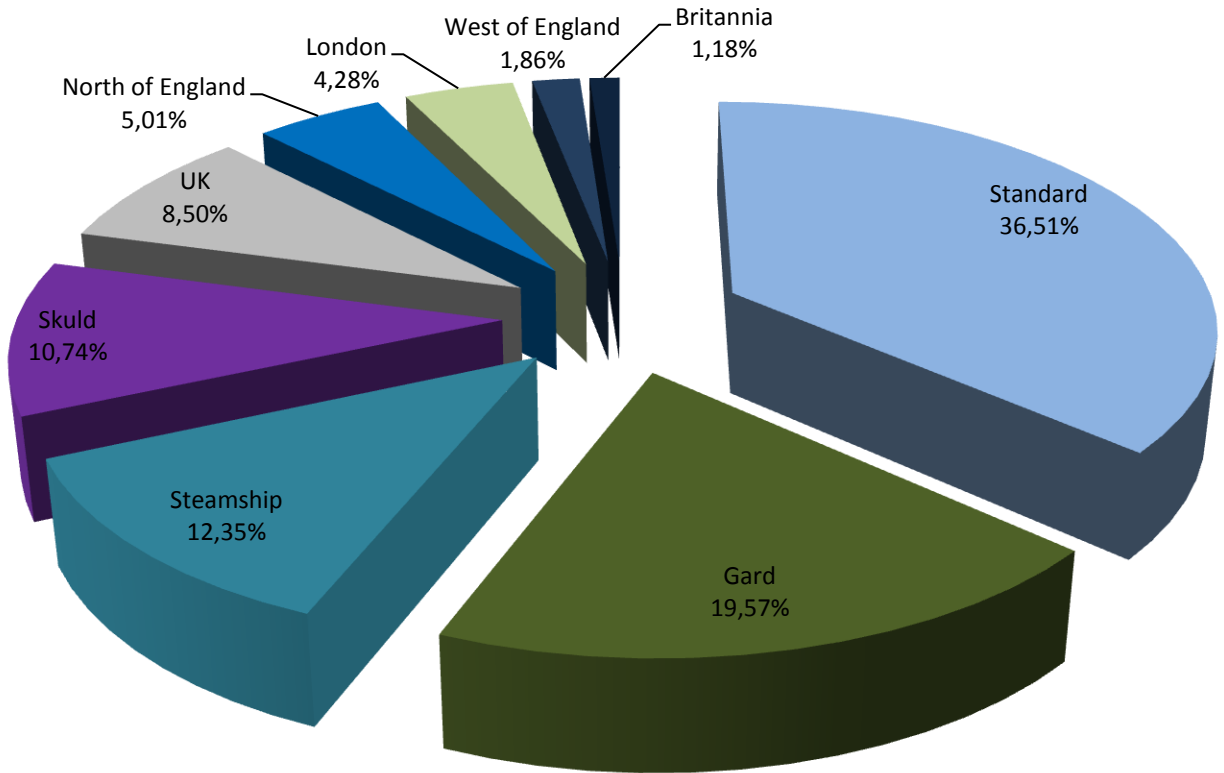
### I.G. P&I CLUBS ITALIAN MARKET SHARE (%gt) BULK/GENERAL/CARGO/CONTAINER



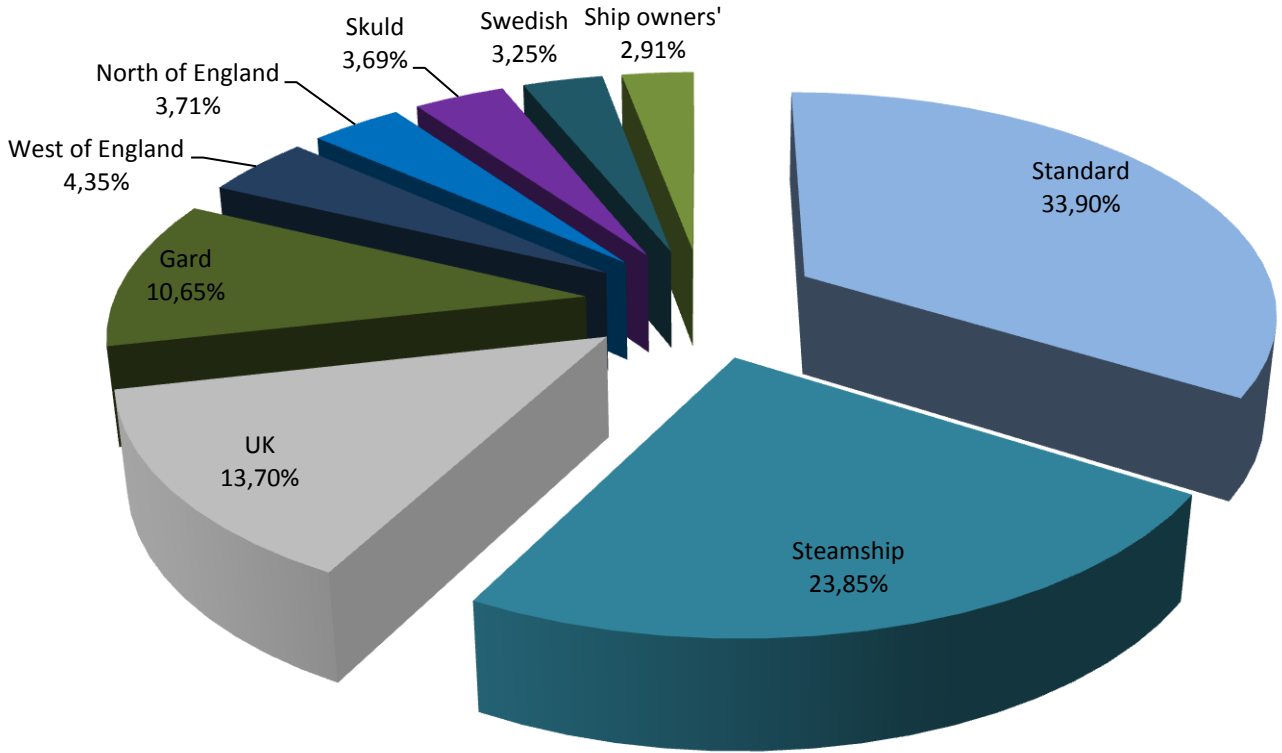
### I.G. P&I CLUBS WORLD MARKET SHARE (%gt) TANKER



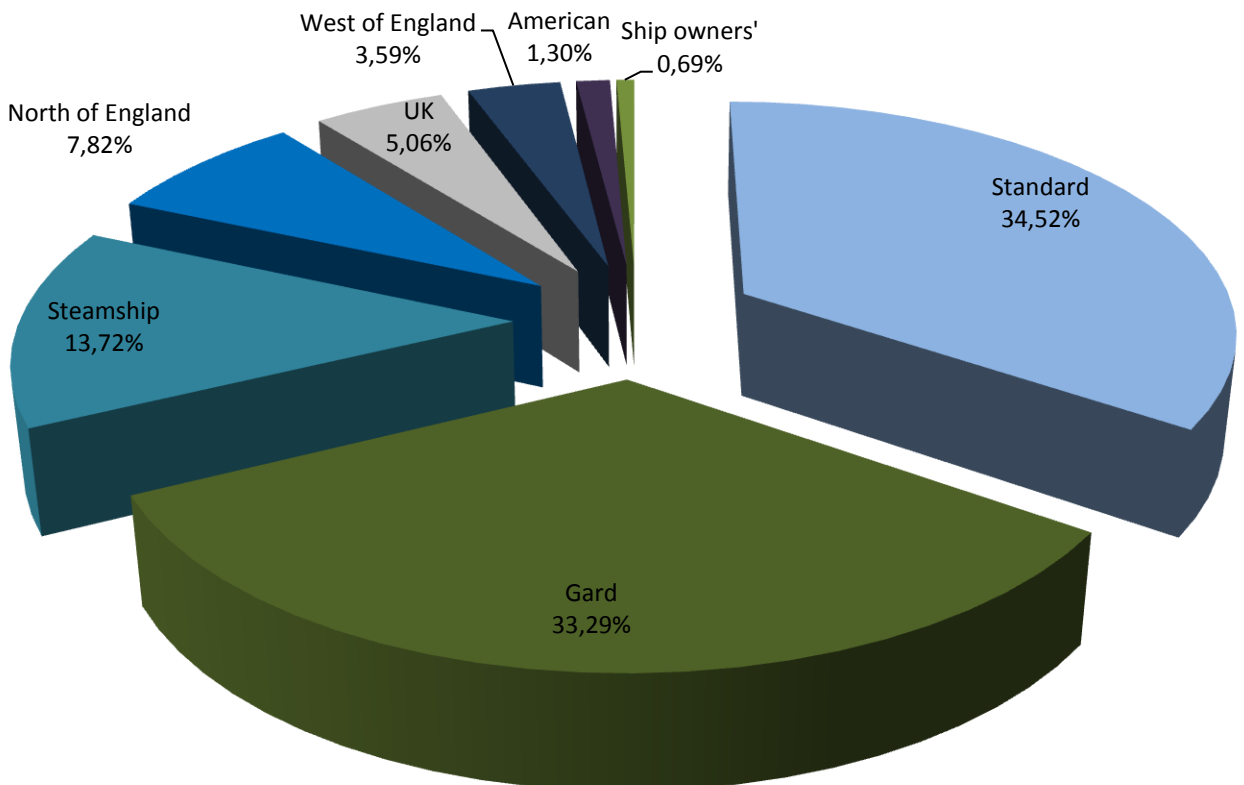
### I.G. P&I CLUBS ITALIAN MARKET SHARE (%gt) TANKER



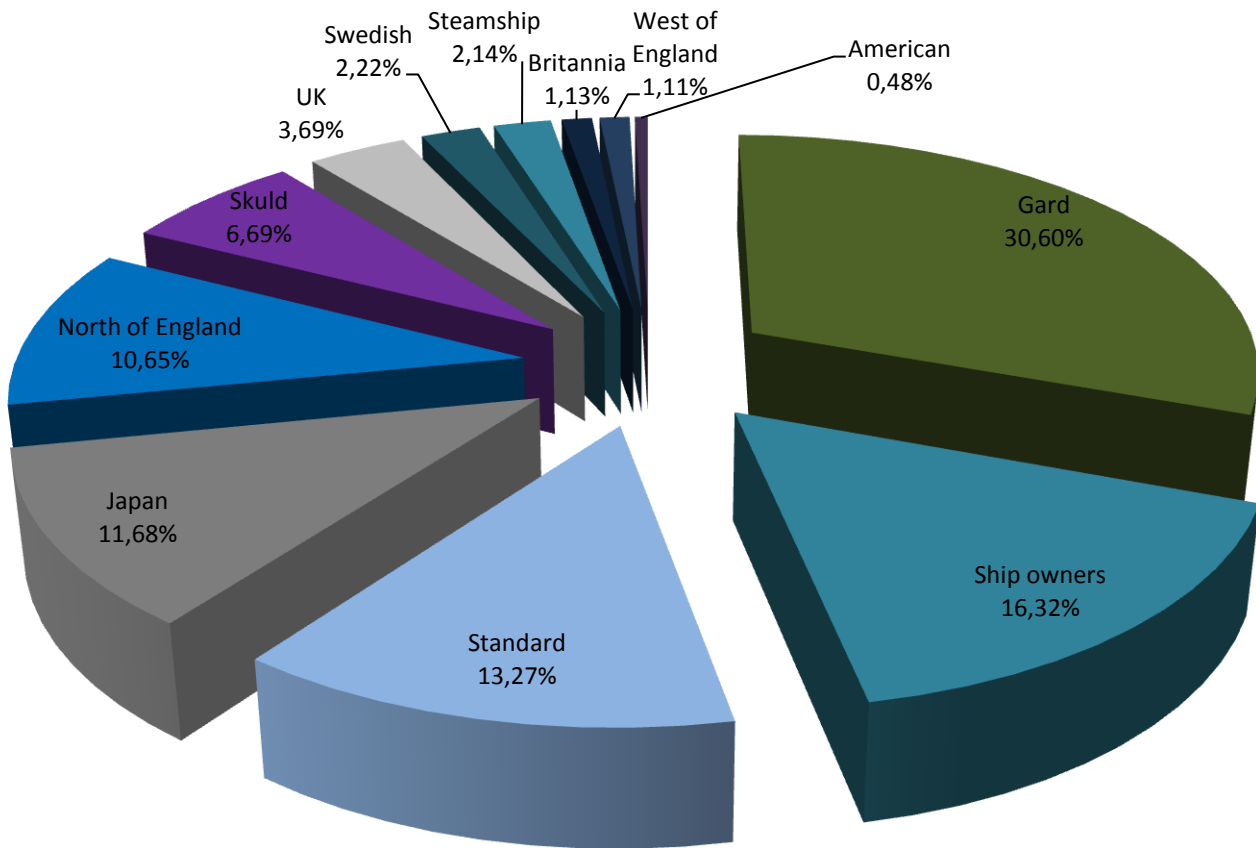
**I.G. P&I CLUBS WORLD MARKET SHARE (%gt) PASSENGERS/FERRY**



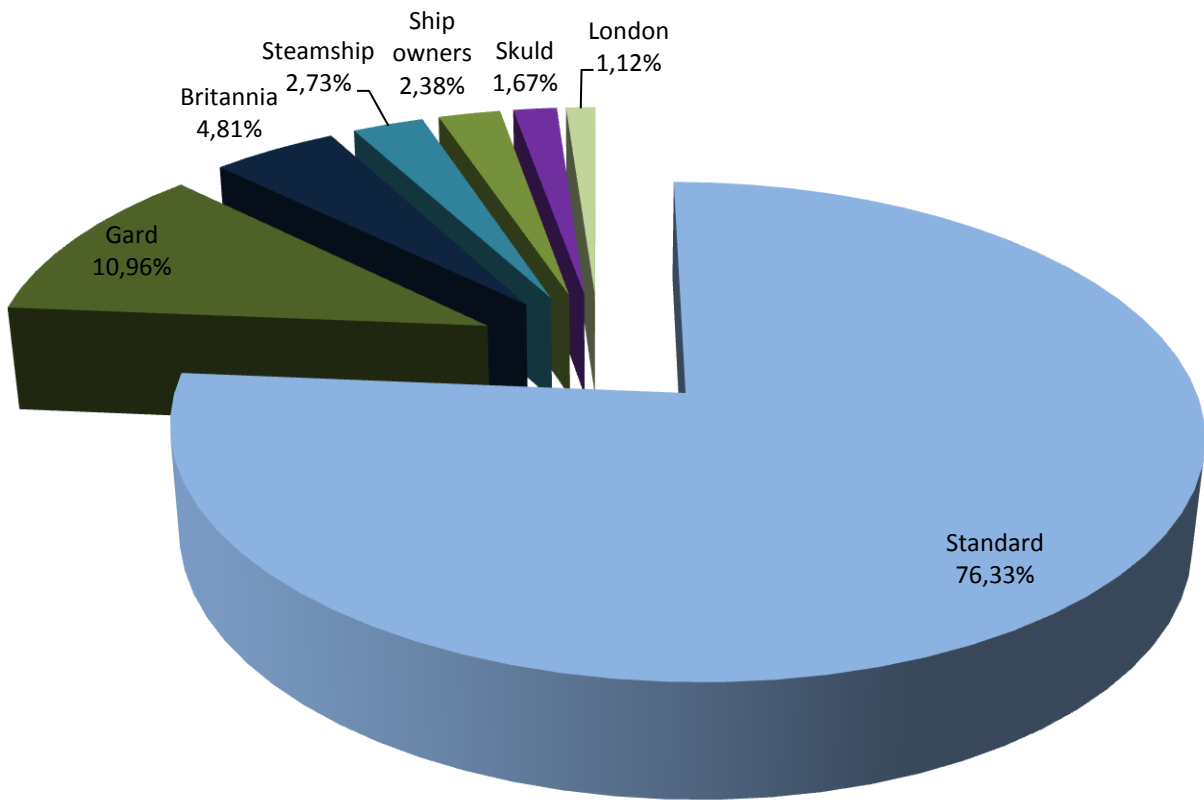
**I.G. P&I CLUBS ITALIAN MARKET SHARE (%gt) PASSENGERS/FERRY**



### I.G. P&I CLUBS WORLD MARKET SHARE (%gt) TUG/OFFSHORE/OTHERS



### I.G. P&I CLUBS ITALIAN MARKET SHARE (%gt) TUG/OFFSHORE/OTHERS





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