

Global Automotive Fintech Market Size Study & Forecast, by Vehicle Type (Passenger Cars and Commercial Vehicles), By Propulsion (ICE and Electric), By Industry (Auto Finance, Connected Vehicle, Auto Insurance, and Auto Rental and Leasing), and Regional Analysis, 2023-2030

<https://marketpublishers.com/r/GC15C80CE141EN.html>

Date: April 2024

Pages: 200

Price: US\$ 4,950.00 (Single User License)

ID: GC15C80CE141EN

Abstracts

Global Automotive Fintech Market is valued approximately at USD XX billion in 2022 and is anticipated to grow with a healthy growth rate of more than XX% over the forecast period 2023-2030. Automotive fintech refers to the innovative use of technology to provide diverse financial services to both customers and major entities within the automotive sector. This comprehensive term encompasses a wide range of financial activities within the automotive industry. The emergence of financial technology primarily stemmed from collaborative efforts between banks and original equipment manufacturers (OEMs) to offer customers unique and tailored vehicle financing solutions. This sector is expanding owing to its digital footprint into areas such as insurance, rental, leasing, and beyond. The rapid growth and extensive acceptance of fintech within the automotive sector is attributed to the significant demand for its services. This market growth has been further propelled by the integration of IoT (Internet of Things) and wireless technologies across various industries. For example, the introduction of in-vehicle payments, on-demand transportation services, and pay-per-mile insurance exemplify the extensive coverage of fintech in the automotive domain. Key factors driving this widespread adoption include the increasing adoption of connected vehicle technologies, the rise of subscription-based vehicle ownership models, the surge in online vehicle purchasing platforms, and the growing presence of captive lenders in the automotive sector. These developments collectively contribute to the widespread adoption and pervasive use of fintech in the modern automotive

landscape.

In addition, the demand for connected vehicle technologies like in-vehicle payments and telematics is constantly rising, which is driving market expansion across the globe. As per Statista, in 2020, the global market for in-vehicle payments accounted for USD 100 million, which is projected to reach to USD 1,000 million by 2023. The increasing adoption of in-vehicle payment systems is fueling demand for Automotive Fintech by offering convenience to consumers, integrating seamlessly with digital wallets, enhancing overall customer experience, fostering partnerships between OEMs and financial institutions, and providing valuable data for personalized financial services. This trend highlights a shift towards digital and integrated financial solutions within the automotive sector, driving the need for innovative fintech offerings tailored to in-vehicle payments. Leading automotive companies are actively enhancing the communication channels between vehicles and infrastructure to facilitate seamless data exchanges. Accordingly, prominent players in the financial industry are collaborating with automotive giants to introduce innovative technologies, with in-vehicle payment systems being a prime example. Furthermore, the integration of telematics modules in various vehicles is significantly improving vehicle health monitoring and enabling efficient vehicle and fleet maintenance. For instance, in July 2022, Edelweiss General Insurance's announced the introduction of the Switch mobile telematics-based vehicle insurance in India. This fully digitalized policy, accessible via a mobile app, leverages telematics to assess driver behaviors and other factors, ultimately reducing vehicle ownership costs for customers. Thus, these aforementioned factors are propelling the growth of Automotive Fintech Market during the estimated period. Moreover, the rising inclination toward integration of digital technologies in the automotive industry, as well as growing popularity of on-demand transportation present various lucrative opportunities over the forecast years. However, the high risk associated with security hacks and data breaches and the competition from traditional financial institutions are challenging the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Automotive Fintech Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 with largest market share owing to the high adoption of technology and financial services. Furthermore, the region's growing reliance on auto financing, availability of vehicle rental and leasing options and widespread use of connected vehicle technology are also key factors driving the demand for financial technology services during the forecast period of 2023-2030. Whereas, Asia Pacific is expected to grow at the highest CAGR over the forecast years. The robust demand for vehicles, rising inclination towards vehicle rental and leasing

services, growing presence of major automotive industry players, as well as growing consumer preference for connected services are significantly propelling the market demand across the region.

Major market players included in this report are:

General Motors Company (U.S.)

Toyota Motor Corporation (Japan)

Uber Technologies, Inc. (U.S.)

Ola Cabs (India)

Ally Financial Inc. (U.S.)

Banco Santander, S.A. (Spain)

Tesla, Inc. (U.S.)

Honda Motor Co., Ltd. (Japan)

Hertz Global Holdings, Inc. (U.S.)

Europcar Mobility Group S.A. (France)

Recent Developments in the Market:

In May 2023, Car Karlo Mobility Technologies LLP, an Indian start-up, announced the debut of its self-driven car rental services in Pune, India, with the goal of securing a portion of the expanding Indian car rental market.

In April 2023, CarDekho unveiled its specialized fintech platform named Ruppy, focused on providing auto financing solutions for both consumers and retailers in the automotive sector. The company emphasized that the entire financing process would be digital, offering users seamless and convenient loan approvals.

In March 2023, Mercedes Benz and Visa disclosed their partnership to introduce

in-car payments in Germany, starting with selected models. Users can make purchases using a fingerprint sensor integrated into the car, enhancing payment convenience while on the road.

In January 2021, AutoFi launched a new business division dedicated to providing financing services with enhanced flexibility for automobile consumers. This new division, called 'lending as a service,' focused on optimizing and simplifying the entire financing process for consumers, aiming to offer more streamlined and convenient solutions.

Global Automotive Fintech Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Vehicle Type, Propulsion, Industry, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it

also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Vehicle Type:

Passenger Cars

Commercial Vehicle

By Propulsion:

ICE

Electric

By Industry:

Auto Finance

Connected Vehicle

Auto Insurance

Auto Rental and Leasing

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

Contents

CHAPTER 1. EXECUTIVE SUMMARY

- 1.1. Market Snapshot
- 1.2. Global & Segmental Market Estimates & Forecasts, 2020-2030 (USD Billion)
 - 1.2.1. Automotive Fintech Market, by region, 2020-2030 (USD Billion)
 - 1.2.2. Automotive Fintech Market, by Vehicle Type, 2020-2030 (USD Billion)
 - 1.2.3. Automotive Fintech Market, by Propulsion, 2020-2030 (USD Billion)
 - 1.2.4. Automotive Fintech Market, by Industry, 2020-2030 (USD Billion)
- 1.3. Key Trends
- 1.4. Estimation Methodology
- 1.5. Research Assumption

CHAPTER 2. GLOBAL AUTOMOTIVE FINTECH MARKET DEFINITION AND SCOPE

- 2.1. Objective of the Study
- 2.2. Market Definition & Scope
 - 2.2.1. Industry Evolution
 - 2.2.2. Scope of the Study
- 2.3. Years Considered for the Study
- 2.4. Currency Conversion Rates

CHAPTER 3. GLOBAL AUTOMOTIVE FINTECH MARKET DYNAMICS

- 3.1. Automotive Fintech Market Impact Analysis (2020-2030)
 - 3.1.1. Market Drivers
 - 3.1.1.1. Increasing demand for connected vehicle technologies
 - 3.1.1.2. Rising presence of captive lenders in the automotive sector
 - 3.1.2. Market Challenges
 - 3.1.2.1. High risk associated with security hacks and data breaches
 - 3.1.2.2. Competition from traditional financial institutions
 - 3.1.3. Market Opportunities
 - 3.1.3.1. Rising inclination towards integration of digital technologies in the automotive industry
 - 3.1.3.2. Growing popularity of on-demand transportation

CHAPTER 4. GLOBAL AUTOMOTIVE FINTECH MARKET: INDUSTRY ANALYSIS

- 4.1. Porter's 5 Force Model
 - 4.1.1. Bargaining Power of Suppliers
 - 4.1.2. Bargaining Power of Buyers
 - 4.1.3. Threat of New Entrants
 - 4.1.4. Threat of Substitutes
 - 4.1.5. Competitive Rivalry
- 4.2. Porter's 5 Force Impact Analysis
- 4.3. PEST Analysis
 - 4.3.1. Political
 - 4.3.2. Economic
 - 4.3.3. Social
 - 4.3.4. Technological
 - 4.3.5. Environmental
 - 4.3.6. Legal
- 4.4. Top investment opportunity
- 4.5. Top winning strategies
- 4.6. COVID-19 Impact Analysis
- 4.7. Disruptive Trends
- 4.8. Industry Expert Perspective
- 4.9. Analyst Recommendation & Conclusion

CHAPTER 5. GLOBAL AUTOMOTIVE FINTECH MARKET, BY VEHICLE TYPE

- 5.1. Market Snapshot
- 5.2. Global Automotive Fintech Market by Vehicle Type, Performance - Potential Analysis
- 5.3. Global Automotive Fintech Market Estimates & Forecasts by Vehicle Type 2020-2030 (USD Billion)
- 5.4. Automotive Fintech Market, Sub Segment Analysis
 - 5.4.1. Passenger Cars
 - 5.4.2. Commercial Vehicle

CHAPTER 6. GLOBAL AUTOMOTIVE FINTECH MARKET, BY PROPULSION

- 6.1. Market Snapshot
- 6.2. Global Automotive Fintech Market by Propulsion, Performance - Potential Analysis
- 6.3. Global Automotive Fintech Market Estimates & Forecasts by Propulsion 2020-2030 (USD Billion)
- 6.4. Automotive Fintech Market, Sub Segment Analysis

6.4.1. ICE

6.4.2. Electric

CHAPTER 7. GLOBAL AUTOMOTIVE FINTECH MARKET, BY INDUSTRY

7.1. Market Snapshot

7.2. Global Automotive Fintech Market by Industry, Performance - Potential Analysis

7.3. Global Automotive Fintech Market Estimates & Forecasts by Industry 2020-2030
(USD Billion)

7.4. Automotive Fintech Market, Sub Segment Analysis

7.4.1. Auto Finance

7.4.2. Connected Vehicle

7.4.3. Auto Insurance

7.4.4. Auto Rental and Leasing

CHAPTER 8. GLOBAL AUTOMOTIVE FINTECH MARKET, REGIONAL ANALYSIS

8.1. Top Leading Countries

8.2. Top Emerging Countries

8.3. Automotive Fintech Market, Regional Market Snapshot

8.4. North America Automotive Fintech Market

8.4.1. U.S. Automotive Fintech Market

8.4.1.1. Vehicle Type breakdown estimates & forecasts, 2020-2030

8.4.1.2. Propulsion breakdown estimates & forecasts, 2020-2030

8.4.1.3. Industry breakdown estimates & forecasts, 2020-2030

8.4.2. Canada Automotive Fintech Market

8.5. Europe Automotive Fintech Market Snapshot

8.5.1. U.K. Automotive Fintech Market

8.5.2. Germany Automotive Fintech Market

8.5.3. France Automotive Fintech Market

8.5.4. Spain Automotive Fintech Market

8.5.5. Italy Automotive Fintech Market

8.5.6. Rest of Europe Automotive Fintech Market

8.6. Asia-Pacific Automotive Fintech Market Snapshot

8.6.1. China Automotive Fintech Market

8.6.2. India Automotive Fintech Market

8.6.3. Japan Automotive Fintech Market

8.6.4. Australia Automotive Fintech Market

8.6.5. South Korea Automotive Fintech Market

- 8.6.6. Rest of Asia Pacific Automotive Fintech Market
- 8.7. Latin America Automotive Fintech Market Snapshot
 - 8.7.1. Brazil Automotive Fintech Market
 - 8.7.2. Mexico Automotive Fintech Market
- 8.8. Middle East & Africa Automotive Fintech Market
 - 8.8.1. Saudi Arabia Automotive Fintech Market
 - 8.8.2. South Africa Automotive Fintech Market
 - 8.8.3. Rest of Middle East & Africa Automotive Fintech Market

CHAPTER 9. COMPETITIVE INTELLIGENCE

- 9.1. Key Company SWOT Analysis
 - 9.1.1. Company
 - 9.1.2. Company
 - 9.1.3. Company
- 9.2. Top Market Strategies
- 9.3. Company Profiles
 - 9.3.1. General Motors Company (U.S.)
 - 9.3.1.1. Key Information
 - 9.3.1.2. Overview
 - 9.3.1.3. Financial (Subject to Data Availability)
 - 9.3.1.4. Product Summary
 - 9.3.1.5. Recent Developments
 - 9.3.2. Toyota Motor Corporation (Japan)
 - 9.3.3. Uber Technologies, Inc. (U.S.)
 - 9.3.4. Ola Cabs (India)
 - 9.3.5. Ally Financial Inc. (U.S.)
 - 9.3.6. Banco Santander, S.A. (Spain)
 - 9.3.7. Tesla, Inc. (U.S.)
 - 9.3.8. Honda Motor Co., Ltd. (Japan)
 - 9.3.9. Hertz Global Holdings, Inc. (U.S.)
 - 9.3.10. Europcar Mobility Group S.A. (France)

CHAPTER 10. RESEARCH PROCESS

- 10.1. Research Process
 - 10.1.1. Data Mining
 - 10.1.2. Analysis
 - 10.1.3. Market Estimation

10.1.4. Validation

10.1.5. Publishing

10.2. Research Attributes

10.3. Research Assumption

List Of Tables

LIST OF TABLES

TABLE 1. Global Automotive Fintech Market, report scope

TABLE 2. Global Automotive Fintech Market estimates & forecasts by Region
2020-2030 (USD Billion)

TABLE 3. Global Automotive Fintech Market estimates & forecasts by Vehicle Type
2020-2030 (USD Billion)

TABLE 4. Global Automotive Fintech Market estimates & forecasts by Propulsion
2020-2030 (USD Billion)

TABLE 5. Global Automotive Fintech Market estimates & forecasts by Industry
2020-2030 (USD Billion)

TABLE 6. Global Automotive Fintech Market by segment, estimates & forecasts,
2020-2030 (USD Billion)

TABLE 7. Global Automotive Fintech Market by region, estimates & forecasts,
2020-2030 (USD Billion)

TABLE 8. Global Automotive Fintech Market by segment, estimates & forecasts,
2020-2030 (USD Billion)

TABLE 9. Global Automotive Fintech Market by region, estimates & forecasts,
2020-2030 (USD Billion)

TABLE 10. Global Automotive Fintech Market by segment, estimates & forecasts,
2020-2030 (USD Billion)

TABLE 11. Global Automotive Fintech Market by region, estimates & forecasts,
2020-2030 (USD Billion)

TABLE 12. Global Automotive Fintech Market by segment, estimates & forecasts,
2020-2030 (USD Billion)

TABLE 13. Global Automotive Fintech Market by region, estimates & forecasts,
2020-2030 (USD Billion)

TABLE 14. Global Automotive Fintech Market by segment, estimates & forecasts,
2020-2030 (USD Billion)

TABLE 15. Global Automotive Fintech Market by region, estimates & forecasts,
2020-2030 (USD Billion)

TABLE 16. U.S. Automotive Fintech Market estimates & forecasts, 2020-2030 (USD
Billion)

TABLE 17. U.S. Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 18. U.S. Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 19. Canada Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 20. Canada Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 21. Canada Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 22. UK Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 23. UK Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 24. UK Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 25. Germany Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 26. Germany Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 27. Germany Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 28. France Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 29. France Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 30. France Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 31. Italy Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 32. Italy Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 33. Italy Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 34. Spain Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 35. Spain Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 36. Spain Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 37. RoE Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 38. RoE Automotive Fintech Market estimates & forecasts by segment

2020-2030 (USD Billion)

TABLE 39. RoE Automotive Fintech Market estimates & forecasts by segment

2020-2030 (USD Billion)

TABLE 40. China Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 41. China Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 42. China Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 43. India Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 44. India Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 45. India Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 46. Japan Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 47. Japan Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 48. Japan Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 49. South Korea Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 50. South Korea Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 51. South Korea Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 52. Australia Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 53. Australia Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 54. Australia Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 55. RoAPAC Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 56. RoAPAC Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 57. RoAPAC Automotive Fintech Market estimates & forecasts by segment
2020-2030 (USD Billion)

TABLE 58. Brazil Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 59. Brazil Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 60. Brazil Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 61. Mexico Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 62. Mexico Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 63. Mexico Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 64. RoLA Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 65. RoLA Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 66. RoLA Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 67. Saudi Arabia Automotive Fintech Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 68. South Africa Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 69. RoMEA Automotive Fintech Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 70. List of secondary sources, used in the study of global Automotive Fintech Market

TABLE 71. List of primary sources, used in the study of global Automotive Fintech Market

TABLE 72. Years considered for the study

TABLE 73. Exchange rates considered

List of tables and figures and dummy in nature, final lists may vary in the final deliverable

List Of Figures

LIST OF FIGURES

- FIG 1. Global Automotive Fintech Market, research methodology
 - FIG 2. Global Automotive Fintech Market, Market estimation techniques
 - FIG 3. Global Market size estimates & forecast methods
 - FIG 4. Global Automotive Fintech Market, key trends 2022
 - FIG 5. Global Automotive Fintech Market, growth prospects 2023-2030
 - FIG 6. Global Automotive Fintech Market, porters 5 force model
 - FIG 7. Global Automotive Fintech Market, pest analysis
 - FIG 8. Global Automotive Fintech Market, value chain analysis
 - FIG 9. Global Automotive Fintech Market by segment, 2020 & 2030 (USD Billion)
 - FIG 10. Global Automotive Fintech Market by segment, 2020 & 2030 (USD Billion)
 - FIG 11. Global Automotive Fintech Market by segment, 2020 & 2030 (USD Billion)
 - FIG 12. Global Automotive Fintech Market by segment, 2020 & 2030 (USD Billion)
 - FIG 13. Global Automotive Fintech Market by segment, 2020 & 2030 (USD Billion)
 - FIG 14. Global Automotive Fintech Market, regional snapshot 2020 & 2030
 - FIG 15. North America Automotive Fintech Market 2020 & 2030 (USD Billion)
 - FIG 16. Europe Automotive Fintech Market 2020 & 2030 (USD Billion)
 - FIG 17. Asia pacific Automotive Fintech Market 2020 & 2030 (USD Billion)
 - FIG 18. Latin America Automotive Fintech Market 2020 & 2030 (USD Billion)
 - FIG 19. Middle East & Africa Automotive Fintech Market 2020 & 2030 (USD Billion)
- List of tables and figures and dummy in nature, final lists may vary in the final deliverable

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