

Global Offshore Decommissioning Market Size Study & Forecast, By Water Depth (Shallow Water, Deep Water), by Structure (Topside, Subsea Infrastructure, Substructure), By Service (Project Management, Engineering, and Planning, Platform Preparation, Well Plugging and Abandonment, Platform Removal, Material Disposal, Site Clearance, Others), and Regional Analysis, 2023-2030

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Abstracts

Global Offshore Decommissioning Market is valued at approximately 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. Offshore decommissioning refers to the process of safely and efficiently removing offshore oil and gas installations, pipelines, and related infrastructure that are no longer in use or have reached the end of their productive life. This includes activities such as well plugging and abandonment, dismantling and removal of platforms, pipelines, and associated equipment, and environmental cleanup to restore the offshore area to its natural state. Offshore decommissioning is a complex and highly regulated process that aims to minimize environmental impact while ensuring worker safety and compliance with regulatory requirements. The offshore decommissioning market offers numerous advantages. It enhances safety and lowers environmental risks linked with aging offshore installations by eliminating potential leaks, spills, and accidents. The offshore decommissioning market is being driven by the rising number of aging oil and gas platforms globally. Decreasing productivity from these wells is a major factor prompting decommissioning activities in oil fields. The implementation of legal guidelines by regulatory bodies in various countries is also contributing positively to market growth across the globe.

The volatile prices of oil are resulting in the high demand for offshore decommissioning activities, which is poised to bolster the market demand during the estimated period of 2023-2030. Fluctuating oil prices impact the profitability of offshore oil and gas operations, making it economically challenging for companies to sustain production from aging or marginal fields during periods of low prices. This volatility creates uncertainty in revenue streams and operational costs, prompting companies to reassess the viability of continuing production from such fields. As per the article published by The World Bank in January 2024, the average oil price stood at USD 78 per barrel in December, marking a decline from USD 94 per barrel in September and reversing all the gains made in the third quarter of 2023. Also, it is projected that the oil prices are likely to decrease to USD 81 per barrel in 2024 and continue to moderate further in 2025, down from USD 83 per barrel in 2023.

Operators discover that decommissioning offshore assets is more cost-effective than continuing operations when oil prices are low or fluctuate significantly. Through decommissioning, businesses can reduce continuing operating costs, lower financial risk, and reallocate resources to more lucrative projects or assets. Furthermore, organizations maximize asset use, consolidate their portfolios, and adapt to changing market conditions by retiring aging infrastructure. Thus, these aforementioned factors are propelling the growth of the Offshore Decommissioning Market during the estimated period. Moreover, the aging offshore infrastructures, as well as increasing deepwater discovery and development in offshore areas present various lucrative opportunities over the forecast years. However, the high cost associated with offshore decommissioning projects and the environmental concerns associated with offshore decommissioning are challenging the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Offshore Decommissioning Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. Europe dominated the market in 2022 owing to the stricter environmental regulations regarding decommissioning practices, fluctuations in oil prices and market conditions, as well as increasing focus on ensuring the safety of personnel and mitigating operational risks. Whereas North America is expected to grow at the highest CAGR over the forecast years. The high presence of mature oil and gas fields, growing focus on environmental protection, and advancements in technology are significantly propelling the market demand across the region.

Major market players included in this report are:

Aker Solutions ASA

John Wood Group PLC

Allseas Group SA

Schlumberger Limited

Petrofac Limited

DeepOcean Group Holding AS

AF Gruppen ASA

TechnipFMC plc

Chevron Corporation

MacGregor Machining & Cutting Services

Recent Developments in the Market:

In February 2021, Saipem secured a contract from Qatargas for the offshore development of the North Field Production sustainability project. The scope encompasses engineering, procurement, construction, and installation of various offshore facilities.

In January 2021, Boskalis acquired Rever Offshores' subsea services business, bolstering its position in the Northwest Europe, Africa, and Middle East subsea services market. This acquisition equips Boskalis to serve both the traditional oil and gas sector and the burgeoning offshore wind industry.

Global Offshore Decommissioning 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 - Water Depth, Structure, Service, Region

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

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

The objective of the study is to define the market sizes of different segments & countries in recent years and to forecast the values for 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 to detailed information about the crucial aspects such as driving factors & challenges that will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Water Depth:

Shallow Water

Deep Water

By Structure:

Topside

Subsea Infrastructure

Substructure

By Service:

Project Management, Engineering, and Planning

Platform Preparation

Well Plugging and Abandonment

Platform Removal

Material Disposal

Site Clearance

Others

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. Offshore Decommissioning Market, by Region, 2020-2030 (USD Billion)
 - 1.2.2. Offshore Decommissioning Market, by Water Depth, 2020-2030 (USD Billion)
 - 1.2.3. Offshore Decommissioning Market, by Structure, 2020-2030 (USD Billion)
 - 1.2.4. Offshore Decommissioning Market, by Service, 2020-2030 (USD Billion)
- 1.3. Key Trends
- 1.4. Estimation Methodology
- 1.5. Research Assumption

CHAPTER 2. GLOBAL OFFSHORE DECOMMISSIONING 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 OFFSHORE DECOMMISSIONING MARKET DYNAMICS

- 3.1. Offshore Decommissioning Market Impact Analysis (2020-2030)
 - 3.1.1. Market Drivers
 - 3.1.1.1. Volatile Prices of Oil
 - 3.1.1.2. Rising Implementation of Legal Guidelines by Regulatory Bodies
 - 3.1.2. Market Challenges
 - 3.1.2.1. High Cost Associated with Offshore Decommissioning Projects
 - 3.1.2.2. Environmental Concerns Associated with Offshore Decommissioning
 - 3.1.3. Market Opportunities
 - 3.1.3.1. Aging Offshore Infrastructures
 - 3.1.3.2. Increasing Deepwater Discovery and Development in Offshore Areas

CHAPTER 4. GLOBAL OFFSHORE DECOMMISSIONING 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. Economical
 - 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 OFFSHORE DECOMMISSIONING MARKET, BY WATER DEPTH

- 5.1. Market Snapshot
- 5.2. Global Offshore Decommissioning Market by Water Depth, Performance - Potential Analysis
- 5.3. Global Offshore Decommissioning Market Estimates & Forecasts by Water Depth 2020-2030 (USD Billion)
- 5.4. Offshore Decommissioning Market, Sub Segment Analysis
 - 5.4.1. Shallow Water
 - 5.4.2. Deep Water

CHAPTER 6. GLOBAL OFFSHORE DECOMMISSIONING MARKET, BY STRUCTURE

- 6.1. Market Snapshot
- 6.2. Global Offshore Decommissioning Market by Structure, Performance - Potential

Analysis

6.3. Global Offshore Decommissioning Market Estimates & Forecasts by Structure 2020-2030 (USD Billion)

6.4. Offshore Decommissioning Market, Sub Segment Analysis

6.4.1. Topside

6.4.2. Subsea Infrastructure

6.4.3. Substructure

CHAPTER 7. GLOBAL OFFSHORE DECOMMISSIONING MARKET, BY SERVICE

7.1. Market Snapshot

7.2. Global Offshore Decommissioning Market by Service, Performance - Potential Analysis

7.3. Global Offshore Decommissioning Market Estimates & Forecasts by Service 2020-2030 (USD Billion)

7.4. Offshore Decommissioning Market, Sub Segment Analysis

7.4.1. Project Management, Engineering, and Planning

7.4.2. Platform Preparation

7.4.3. Well Plugging and Abandonment

7.4.4. Platform Removal

7.4.5. Material Disposal

7.4.6. Site Clearance

7.4.7. Others

CHAPTER 8. GLOBAL OFFSHORE DECOMMISSIONING MARKET, REGIONAL ANALYSIS

8.1. Top Leading Countries

8.2. Top Emerging Countries

8.3. Offshore Decommissioning Market, Regional Market Snapshot

8.4. North America Offshore Decommissioning Market

8.4.1. U.S. Offshore Decommissioning Market

8.4.1.1. Water Depth breakdown estimates & forecasts, 2020-2030

8.4.1.2. Structure breakdown estimates & forecasts, 2020-2030

8.4.1.3. Service breakdown estimates & forecasts, 2020-2030

8.4.2. Canada Offshore Decommissioning Market

8.5. Europe Offshore Decommissioning Market Snapshot

8.5.1. U.K. Offshore Decommissioning Market

8.5.2. Germany Offshore Decommissioning Market

- 8.5.3. France Offshore Decommissioning Market
- 8.5.4. Spain Offshore Decommissioning Market
- 8.5.5. Italy Offshore Decommissioning Market
- 8.5.6. Rest of Europe Offshore Decommissioning Market
- 8.6. Asia-Pacific Offshore Decommissioning Market Snapshot
 - 8.6.1. China Offshore Decommissioning Market
 - 8.6.2. India Offshore Decommissioning Market
 - 8.6.3. Japan Offshore Decommissioning Market
 - 8.6.4. Australia Offshore Decommissioning Market
 - 8.6.5. South Korea Offshore Decommissioning Market
 - 8.6.6. Rest of Asia Pacific Offshore Decommissioning Market
- 8.7. Latin America Offshore Decommissioning Market Snapshot
 - 8.7.1. Brazil Offshore Decommissioning Market
 - 8.7.2. Mexico Offshore Decommissioning Market
- 8.8. Middle East & Africa Offshore Decommissioning Market
 - 8.8.1. Saudi Arabia Offshore Decommissioning Market
 - 8.8.2. South Africa Offshore Decommissioning Market
 - 8.8.3. Rest of Middle East & Africa Offshore Decommissioning 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. Aker Solutions ASA
 - 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. John Wood Group PLC
 - 9.3.3. Allseas Group SA
 - 9.3.4. Schlumberger Limited
 - 9.3.5. Petrofac Limited
 - 9.3.6. DeepOcean Group Holding AS
 - 9.3.7. AF Gruppen ASA

- 9.3.8. TechnipFMC plc
- 9.3.9. Chevron Corporation
- 9.3.10. MacGregor Machining & Cutting Services

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 Offshore Decommissioning Market, report scope

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

TABLE 3. Global Offshore Decommissioning Market estimates & forecasts by Water Depth 2020-2030 (USD Billion)

TABLE 4. Global Offshore Decommissioning Market estimates & forecasts by Structure 2020-2030 (USD Billion)

TABLE 5. Global Offshore Decommissioning Market estimates & forecasts by Service 2020-2030 (USD Billion)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

TABLE 38. RoE Offshore Decommissioning Market estimates & forecasts by segment

2020-2030 (USD Billion)

TABLE 39. RoE Offshore Decommissioning Market estimates & forecasts by segment

2020-2030 (USD Billion)

TABLE 40. China Offshore Decommissioning Market estimates & forecasts, 2020-2030

(USD Billion)

TABLE 41. China Offshore Decommissioning Market estimates & forecasts by segment

2020-2030 (USD Billion)

TABLE 42. China Offshore Decommissioning Market estimates & forecasts by segment

2020-2030 (USD Billion)

TABLE 43. India Offshore Decommissioning Market estimates & forecasts, 2020-2030

(USD Billion)

TABLE 44. India Offshore Decommissioning Market estimates & forecasts by segment

2020-2030 (USD Billion)

TABLE 45. India Offshore Decommissioning Market estimates & forecasts by segment

2020-2030 (USD Billion)

TABLE 46. Japan Offshore Decommissioning Market estimates & forecasts, 2020-2030

(USD Billion)

TABLE 47. Japan Offshore Decommissioning Market estimates & forecasts by segment

2020-2030 (USD Billion)

TABLE 48. Japan Offshore Decommissioning Market estimates & forecasts by segment

2020-2030 (USD Billion)

TABLE 49. South Korea Offshore Decommissioning Market estimates & forecasts,

2020-2030 (USD Billion)

TABLE 50. South Korea Offshore Decommissioning Market estimates & forecasts by

segment 2020-2030 (USD Billion)

TABLE 51. South Korea Offshore Decommissioning Market estimates & forecasts by

segment 2020-2030 (USD Billion)

TABLE 52. Australia Offshore Decommissioning Market estimates & forecasts,

2020-2030 (USD Billion)

TABLE 53. Australia Offshore Decommissioning Market estimates & forecasts by

segment 2020-2030 (USD Billion)

TABLE 54. Australia Offshore Decommissioning Market estimates & forecasts by

segment 2020-2030 (USD Billion)

TABLE 55. RoAPAC Offshore Decommissioning Market estimates & forecasts,

2020-2030 (USD Billion)

TABLE 56. RoAPAC Offshore Decommissioning Market estimates & forecasts by

segment 2020-2030 (USD Billion)

TABLE 57. RoAPAC Offshore Decommissioning Market estimates & forecasts by

segment 2020-2030 (USD Billion)

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

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

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

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

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

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

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

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

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

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

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

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

TABLE 70. List of secondary sources, used in the study of Global Offshore Decommissioning Market

TABLE 71. List of primary sources, used in the study of Global Offshore Decommissioning 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 Offshore Decommissioning Market, research methodology
 - FIG 2. Global Offshore Decommissioning Market, Market estimation techniques
 - FIG 3. Global Market size estimates & forecast methods
 - FIG 4. Global Offshore Decommissioning Market, key trends 2022
 - FIG 5. Global Offshore Decommissioning Market, growth prospects 2023-2030
 - FIG 6. Global Offshore Decommissioning Market, porters 5 force model
 - FIG 7. Global Offshore Decommissioning Market, pest analysis
 - FIG 8. Global Offshore Decommissioning Market, value chain analysis
 - FIG 9. Global Offshore Decommissioning Market by segment, 2020 & 2030 (USD Billion)
 - FIG 10. Global Offshore Decommissioning Market by segment, 2020 & 2030 (USD Billion)
 - FIG 11. Global Offshore Decommissioning Market by segment, 2020 & 2030 (USD Billion)
 - FIG 12. Global Offshore Decommissioning Market by segment, 2020 & 2030 (USD Billion)
 - FIG 13. Global Offshore Decommissioning Market by segment, 2020 & 2030 (USD Billion)
 - FIG 14. Global Offshore Decommissioning Market, regional snapshot 2020 & 2030
 - FIG 15. North America Offshore Decommissioning Market 2020 & 2030 (USD Billion)
 - FIG 16. Europe Offshore Decommissioning Market 2020 & 2030 (USD Billion)
 - FIG 17. Asia Pacific Offshore Decommissioning Market 2020 & 2030 (USD Billion)
 - FIG 18. Latin America Offshore Decommissioning Market 2020 & 2030 (USD Billion)
 - FIG 19. Middle East & Africa Offshore Decommissioning 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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