

# China Fertilizer Market Review & Outlook 2010/2011

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## Abstracts

### Background

In 2010, the economy continued its rapid growth guided by the stimulating growth policy of the government. Import and export trade restored to the highest level in history and the grain and agricultural production had another bumper harvest; on the other hand, the negative impact of loose monetary policy was on full display, resource materials prices went up and the imported inflation from external economies made domestic inflation pressure mounting gradually. Meanwhile, the economic fluctuation cycle was shortened, irrational industrial structure is still very prominent and the turmoil with the external economic environment continued. All these became an important factor impacting the healthy development of the economy .

In this context, Chinese fertilizer market showed a complex trend in 2010. On the one hand, fertilizer production continued to rise, domestic consumption and exports increased significantly and the overall level of prices also appeared fully recovered; on the other hand, the excess production capacity situation has not been fundamentally reversed. The negative impact of the tight fuel and raw materials supply on the fertilizer industry was more prominent and enterprises had weak profitability. In addition, significant differentiation appeared within the industry. The operating conditions of nitrogen fertilizer (especially urea) sub-sectors was far worse than other fertilizers sub-sectors.

As the first year of the Twelfth Five-Year Plan, the 2011 macroeconomic policy will be curbing inflation and accelerating the strategic readjustment of economic structure-oriented. Government regulation and control will be further strengthened. Policy environment will continue to be the dominant factor affecting the fertilizer market in 2011. It reflects in: Government support to increase agricultural production accumulated, favorable for fertilizer consumption to continue to grow; the fertilizer

export tariff policy was comprehensively tightened; the price mechanism reform process of main fertilizer raw materials (coal, natural gas, parathion ore, etc.) is likely to slow under the pressure of high inflation; environmental policy gave unprecedented pressure on the fertilizer business and so on.

Resources became another major factor that influenced the trend of fertilizer industry. In the context of the long-term tight supply of raw materials and fuel, mergers and acquisitions within the fertilizer industry continued to develop and large-scale enterprises with resources and scale advantages gradually gained dominance in the industry; the cost advantages of gas-first chemical fertilizers to coal-first chemical fertilizer was seriously weakened, forcing fertilizer structure of production also having a change. In addition, prices of agricultural products entered into the upstream channel; self-sufficiency rate of potash steadily increased; the impact of macroeconomic situation and the international fertilizer market on the domestic market has presented a growing trend. Under the impact of a variety of good and bad combination of factors, the fertilizer market in 2011 will continue to show a fluctuating trend.

On the basis of a comprehensive review and analysis of the fertilizer market in China in 2010 and combined with national economic conditions and policy changes, BOABC will conduct a more in-depth analysis of Chinese fertilizer market trend in 2011 and make a clear analysis and judgement to provide references for people who care about China's fertilizer market at home and abroad for decision-making.

## Contents

### CHAPTER ONE: MACRO-ECONOMY & FERTILIZER INDUSTRY'S DEVELOPMENT

#### 1.1 Macroeconomic Situation and Fertilizer Industry Planning

1.1.1 Macroeconomic Situation in 2010 and Prospection of Development Trend in 2011

1.1.2 2011-2015 Planning Targets of National Economy

Table 1.1, Fulfillment of Objectives Set for 2006-2010

1.1.3 2011-2015 Planning Targets of Agricultural and Rural Economy

Table 1.2, Fulfillment of Major Farm Product Supply Objectives Set in 2006-2010

1.1.4 2011-2015 Planning Targets of Chemical Industry

Table 1.3 Fulfillment of Major Chemical Product Supply Objectives Set in 2006-2010

1.1.5 2011-2015 Planning Targets of Fertilizer Industry

Table 1.4, Fulfillment of Fertilizer Objectives Set for 2006-2010

#### 1.2 Effect of Agricultural Policies on Fertilizer Industry

1.2.1 Effect of Agriculture and Rural Development Planning on Fertilizer Industry

1.2.2 Effect of Direct Grain Subsidy and Comprehensive Subsidy Policy on Agricultural Materials on Fertilizer Demand

1.2.3 Effect of Other Agricultural Policies on Fertilizer Industry

#### 1.3 Effect of Resource Policy Adjustment on Fertilizer Production

1.3.1 Effect of Coal Enterprise Merger and Restructuring on Fertilizer Production

1.3.2 Effect of Natural Gas Pricing Mechanism Reform on Fertilizer Production

1.3.3 Effect of Sulphur and Phosphor Mineral Resources Policies on Fertilizer Production

1.3.4 Effect of Electricity Price on Fertilizer Production

#### 1.4 Effect of Economic Structure Strategic Adjustment on Fertilizer Industry Investment and Development

#### 1.5 Effect of Fuel Oil Policy Adjustment on Fertilizer Logistics

#### 1.6 Effect of Environmental Protection Policies (Energy-saving and Emission-reducing) on Fertilizer Industry

#### 1.7 Investment on Fertilizer Industry

1.7.1 Investment on Nitrogenous Fertilizer Industry

Table 1.5, Investment in the Nitrogen Fertilizer Industry, 2006-2010

1.7.2 Investment on Phosphate fertilizer Industry

Table 1.6, Investment in the Phosphate Fertilizer Industry, 2006-2010

1.7.3 Investment on Potash fertilizer Industry

Table 1.7, Investment in the Potash Fertilizer Industry, 2006-2010

1.7.4 Investment on Compound Fertilizer Industry

Table 1.8, Investment in the Compound Fertilizer Industry, 2006-2010

1.7.5 Investment on Organic Fertilizer Industry

Table 1.9, Investment in the Organic Fertilizer Industry, 2006-2010

1.8 Competitive Power Analysis of Fertilizer Industry

1.8.1 Competitive Power Analysis of Nitrogen Fertilizer Industry

Table 1.10, Competitiveness index of Nitrogen Fertilizer Industry

1.8.2 Competitive Power Analysis of Phosphate Fertilizer Industry

Table 1.11, Competitiveness index of Phosphate Fertilizer Industry

1.8.3 Competitive Power Analysis of Potash Fertilizer Industry

Table 1.12, Competitiveness index of Potash Fertilizer Industry

1.8.4 Competitive Power Analysis of Compound Fertilizer Industry

Table 1.13, Competitiveness index of Compound Fertilizer Industry

1.9 Variation of Fertilizer Industrial Structure

Figure 1.1 Proportion of China Fertilizer Production

1.10 Development of Fertilizer Circulation System

1.10.1 Participants and Competition Pattern of Fertilizer Circulation Field

1.10.2 Development of Agricultural Material Chain Operation

1.10.3 Domestic Marketing Network Construction of Sinochem

1.10.4 Marketing Network Construction of Sino-agri

1.10.5 Development of Postal Agricultural Logistics

1.10.6 Market Distribution and Circulation of Foreign-funded Enterprises

## **CHAPTER TWO: REVIEW & OUTLOOK OF FERTILIZER MARKET IN 2010-2011**

2.1 Review of Fertilizer Market in 2010

2.1.1 Analysis of Prosperity Degree of Fertilizer Industry in 2010

Table 2.1, Economic Indicators of Fertilizer Industry in 2010

Figure 2.1, Profit margin of chemical fertilizer manufacture

2.1.2 Momentum Analysis of Fertilizer Market in 2010

2.1.3 Effect of International Fertilizer Market on China's Fertilizer Market in 2010

Figure 2.2, International Fertilizer Prices

2.1.4 Effect of Export Tariff Policy on Fertilizer Market in 2010

Figure 2.3 Duty Rate for China's Exported Fertilizer 2010

2.1.5 Effect of Soil Testing and Formulated Fertilization Project on Fertilizer Market in 2010

2.1.6 Fertilizer Input-Output Analysis of Planting Industry in 2010

Figure 2.4, Returns from Major Crops in China

Figure 2.5, Wheat/Fertilizer Price Ratio

Figure 2.6, Corn/Fertilizer Price Ratio

Figure 2.7, Rice/Fertilizer Price Ratio

2.1.7 Fertilizer Production in 2010

Figure 2.8, Monthly Total Fertilizer Production

2.1.8 Fertilizer Import and Export in 2010

Figure 2.9 China Fertilizer Net Imports

Figure 2.10, Proportion of China Fertilizer Imports, 2010

Figure 2.11, Proportion of China Fertilizer Imports, 2009

Figure 2.12, Proportion of China Fertilizer Exports, 2010

Figure 2.13, Proportion of China Fertilizer Exports, 2009

2.1.9 Fertilizer Consumption in 2010

2.1.10 Fertilizer Market Price Trend in 2010

Figure 2.14, Producer's Prices of Fertilizers, 2009-2010

Figure 2.15, Retail Prices of Fertilizers, 2001-2010

2.2 Prospect on Fertilizer Market in 2011

2.2.1 Forecast on Fertilizer Market Trend in 2011

2.2.2 Forecast on Fertilizer Input-Output of Planting Industry in 2011

2.2.3 Import Quota and Import Agents in 2011

Table 2.2, Preferential Tariff Rate Fertilizer Import Quotas for 2011

2.2.4 Prospect on Import and Export Tariff Rate Variation and Market Impact in 2011

Figure 2.16 Duty Rate for China's Exported Fertilizer 2011

2.2.5 Policy Direction on Fertilizer Market in 2011

2.2.5.1 Policy on Industry and Investment

2.2.5.2 Taxation and Subsidy Policies

2.2.5.3 Policy on Reserve during Off-season

2.2.5.4 Import and Export Policies

2.2.6 Forecast on Fertilizer Output in 2011

2.2.7 Forecast on Fertilizer Import and Export in 2011

2.2.8 Forecast on Fertilizer Consumption in 2011

## **CHAPTER THREE: REVIEW & OUTLOOK OF NITROGEN FERTILIZER MARKET IN 2010-2011**

3.1 Review of Nitrogen fertilizer Market in 2010

3.1.1 Analysis of Prosperity of Nitrogen Fertilizer Industry in 2010

Table 3.1, Economic Indicators of Nitrogenous Fertilizer Industry in 2009

Figure 3.1, Profit margin of Nitrogenous Fertilizer Industry

3.1.2 Costs and Profits of Nitrogen Fertilizer Industry in 2010

Table 3.2, Production Cost of Urea

3.1.3 Analysis of Nitrogen Fertilizer Market in 2010

### 3.1.4 Output of Nitrogen Fertilizers in 2010

Figure 3.2, Monthly Nitrogen Fertilizer Production

Figure 3.3, Proportion of Nitrogen Fertilizer Production, 2010

Figure 3.4, Proportion of Nitrogen Fertilizer Production, 2009

### 3.1.5 Import and Export of Nitrogen Fertilizers in 2010

Figure 3.5, Monthly Urea Exports

### 3.1.6 Consumption of Nitrogen Fertilizers in 2010

#### 3.1.7 Review of Urea Market in 2010

##### 3.1.7.1 Analysis of Urea Market in 2010

##### 3.1.7.2 Urea Production in 2010

Figure 3.6, Monthly Urea Production

##### 3.1.7.3 Urea Consumption in 2010

##### 3.1.7.4 Urea Price Trend in 2010

Figure 3.7, China Urea Monthly Retail Prices

##### 3.1.7.5 Concentration Degree of Urea Industry in 2010

### 3.1.8 ABC Market in 2010

#### 3.1.8.1 ABC Production in 2010

#### 3.1.8.2 ABC Consumption in 2010

#### 3.1.8.3 ABC Price Trend in 2010

Figure 3.8, China ABC Monthly Retail Prices

### 3.1.9 Other Nitrogen Fertilizers Market

## 3.2 Outlook of Nitrogen fertilizer Market in 2011

### 3.2.1 Growth Potential of Production Capacity of Nitrogen Fertilizer in 2011

### 3.2.2 Forecast on the Trend in Nitrogen Fertilizer Market in 2011

### 3.2.3 Outlook of Urea Market in 2011

### 3.2.4 Influence of Export Tariffs Adjustment on Urea Market in 2011

Figure 3.9 Duty Rate for China's Exported Urea, 2010-2011

3.2.5 Trends of Production Capacity Structure of Coal-based Urea and Gas-based Urea

### 3.2.6 Forecast on Nitrogen Fertilizer Output in 2011

### 3.2.7 Forecast on Import and Export of Nitrogen Fertilizer in 2011

### 3.2.8 Forecast on Nitrogen Fertilizer Consumption in 2011

## **CHAPTER FOUR: REVIEW AND OUTLOOK OF PHOSPHATE FERTILIZER MARKET 2010-2011**

### 4.1 Review of Phosphate Fertilizer Market in 2010

#### 4.1.1 Analysis of Prosperity Degree of Phosphate Industry in 2010

Table 4.1, Operation Performance of the Phosphate Fertilizer Industry in 2010

Figure 4.1, Profit Margin of Phosphate Fertilizer Industry

4.1.2 Phosphate Fertilizer Industrial Costs and Profits in 2010

Table 4.2, Production Cost of SSP

4.1.3 Analysis of the Phosphate Fertilizer Market in 2010

4.1.4 Phosphate Fertilizer Output in 2010

Figure 4.2, Monthly Phosphate Fertilizer Production

Figure 4.3, Proportion of Phosphate Fertilizer Production, 2010

Figure 4.4, Proportion of Phosphate Fertilizer Production, 2009

4.1.5 Phosphate Fertilizer Import & Export in 2010

Figure 4.5 Monthly TSP Exports

Figure 4.6 Monthly SSP Exports

4.1.6 Consumption on Phosphate Fertilizer in 2010

4.1.7 Phosphate Fertilizer Price Trend in 2010

Figure 4.7, China SSP Monthly Retail Prices

4.2 Outlook of Phosphate Fertilizer Market in 2011

4.2.1 Outlook of Phosphate Market Trend in 2011

4.2.2 The Control of Phosphate Fertilizer Enterprises on Phosphate ore Resources

4.2.3 Forecast on Phosphate Fertilizer Output in 2011

4.2.4 Forecast on Phosphate Fertilizer Import & Export in 2011

4.2.5 Forecast on Phosphate Fertilizer Consumption in 2011

## **CHAPTER FIVE: REVIEW AND OUTLOOK OF POTASH FERTILIZER MARKET 2010-2011**

5.1.1 Analysis of Prosperity Degree of Potash Fertilizer Industry in 2010

Table 5.1, Operation Performance of the Potash Fertilizer Industry in 2010

Figure 5.1, Profit Margin of Potash Industry

5.1.2 Potash Fertilizer Industrial Costs and Profits in 2010

Table 5.2, Production Cost of K-fertilizer

5.1.3 Progress in China's Major Potash Fertilizer Projects

5.1.4 Progress of Offshore Potash Fertilizer Project Construction

5.1.5 Impact of International Potash Fertilizer M & A Activity on Chinese Potash Fertilizer Market

5.1.6 Analysis on the Potash Fertilizer Market in 2010

5.1.7 Potash Fertilizer Output in 2010

Figure 5.2, Monthly Potash fertilizer Production

5.1.8 Potash Fertilizer Import & Export in 2010

Figure 5.3, Monthly MOP Imports

Figure 5.4, Monthly SOP Imports

5.1.9 Consumption on Potash Fertilizer in 2010

5.1.10 Trend of Potash Fertilizer Price in 2010

Figure 5.5, China MOP Monthly Retail Prices

Figure 5.6, SOP Monthly Retail Prices

Figure 5.7, China Imported MOP(red) Prices At Ports

Figure 5.8, China Imported MOP(white) Prices At Ports

5.2 Outlook of Potash Fertilizer Market in 2011

5.2.1 Analysis on the Potash Fertilizer Productivity Growth Potential and Self-sufficiency in 2011

5.2.2 Forecast on Trend of Potash Fertilizer Market in 2011

5.2.3 Forecast on Potash Fertilizer Output in 2011

5.2.4 Forecast on Potash Fertilizer Import Negotiation in 2011

5.2.5 Forecast on Potash Fertilizer Import & Export in 2011

5.2.6 Forecast on Potash Fertilizer Consumption in 2011

## **CHAPTER SIX: REVIEW AND OUTLOOK OF COMPOUND FERTILIZER MARKET 2010-2011**

6.1 Review of Compound Fertilizer Market in 2010

6.1.1 Analysis of Prosperity Degree of Compound Fertilizer Industry in 2010

Table 6.1, Operation Performance of Compound Fertilizer Industry in 2010

Figure 6.1, Profit Margin of Compound Fertilizer Industry

6.1.2 Cost and Profit of Compound Fertilizer Industry in 2009

Table 6.2, Production Cost of Compound Fertilizer

6.1.3 Analysis of the Compound Fertilizer Market Trend in 2010

6.1.4 Compound Fertilizer Output in 2010

Figure 6.2, Monthly DAP Production

6.1.5 Compound Fertilizer Import & Export in 2010

Figure 6.3, Monthly DAP Imports

Figure 6.4, Monthly DAP Exports

Figure 6.5, Monthly MAP Exports

Figure 6.6, Monthly NPK Imports

6.1.6 Consumption on Compound Fertilizer in 2010

6.1.7 Price Trend of NPK, DAP and MAP in 2009

Figure 6.7, China DAP Monthly Retail Prices

Figure 6.8, China NPK Monthly Retail Prices

Figure 6.9, China Imported NPK Prices at Ports

6.2 Prospect on Compound Fertilizer Market in 2011

6.2.1 Analysis of the Compound Fertilizer Productivity Growth Potential and Self-



sufficiency in 2011

6.2.2 Forecast on Compound Fertilizer Market Rend in 2011

6.2.3 The Impact of Export Tariff Adjustments on the Compound Fertilizer Market in 2011

Figure 6.10 Duty Rate for China's Exported DAP/MAP 2010-2011

Figure 6.11, Duty Rate for China's Exported NPK, 2010-2011

6.2.4 Forecast on Compound Fertilizer Output in 2011

6.2.5 Forecast on Import and Export of Compound Fertilizer in 2011

6.2.5.1 Forecast of DAP and MAP Import & Export in 2011

6.2.5.2 Forecast on NPK Import & Export in 2011

6.2.6 Forecast on Consumption of Compound Fertilizer in 2011

## **CHAPTER SEVEN: REVIEW AND OUTLOOK OF RELATED INDUSTRIES 2010-2011**

7.1. Review & Outlook of Synthetic Ammonia Market in 2010 ~ 2011

7.1.1 Coal and Natural Gas Supply to Synthetic Ammonia Producers in 2010

7.1.2 Synthetic Ammonia Output in 2010

Figure 7.1, Monthly Ammonium Production

7.1.3 Import and Export of Synthetic Ammonia in 2010

7.1.4 Price Trend of Synthetic Ammonia in 2010

7.1.5 Forecast on Production of Synthetic Ammonia in 2011

7.1.6 Forecast on Import & Export of Synthetic Ammonia in 2011

7.2 Review and Outlook of Phosphate Ore in 2010-2011

7.2.1 Analysis of Domestic Supply of Phosphate Ore

7.2.2 Phosphate ore Output in 2010

Figure 7.2, Monthly Phosphorite Production

7.2.3 Import & Export of Phosphate Ore in 2010

Figure 7.3, Monthly Phosphorite Exports

7.2.4 Price Trend of Phosphate Ore in 2010

7.2.5 Forecast on Production of Phosphate Ore in 2011

7.2.6 Forecast on Import & Export of Phosphate Ore in 2011

7.3 Review and Outlook of Sulfur and Sulfuric Acid Market in 2010-2011

7.3.1 Analysis of Supply of Sulfur and Sulfuric Acid

7.3.2 Output of Sulfur and Sulfuric Acid in 2010

Figure 7.4, Monthly Sulphric Acid Production

7.3.3 Pyrite Production in 2010

Figure 7.5 Monthly Lump Pyrite Production

7.3.4 Import and Export of Sulfur & Sulfuric Acid in 2010

Figure 7.6, Monthly Sulfur Imports

- 7.3.5 Price Trend of Sulfur, Sulfuric Acid and Pyrite in 2010
- 7.3.6 Forecast on Production of Sulfur and Sulfuric Acid in 2011
- 7.3.7 Forecast on Pyrite Production in 2011
- 7.3.8 Forecast on Import of Sulfur and Sulfuric Acid in 2011
- 7.4 Review and Outlook of Phosphoric Acid in 2010-2011
  - 7.4.1 Production of Phosphoric Acid in 2010
  - 7.4.2 Import and Export of Phosphoric Acid in 2010
  - 7.4.3 Forecast on Production of Phosphoric Acid in 2011
  - 7.4.4 Forecast on Import and Export of Phosphoric Acid in 2011

## **APPENDIX TABLE**

### Chemical Fertilizer

- Table 1, Chemical Fertilizer Balance Sheet, 2007-2011
- Table 2, Import by Major Chemical Fertilizer Products, 2006-2010
- Table 3, Exports by Major Chemical Fertilizer Products, 2006-2010
- Table 4, Chemical Fertilizer Production, 2006-2010
- Table 5, Chemical Fertilizer Consumption, 2006-2010

### N-Fertilizer

- Table 6, N-Fertilizer Balance Sheet, 2007-2011
- Table 7, Balance Sheet of Urea in China, 2007-2011
- Table 8, N-Fertilizer Production by Variety, 2006-2010
- Table 9, N-Fertilizer Production, 2006-2010
- Table 10, N-Fertilizer Consumption, 2006-2010
- Table 11, China's Urea Imports by Country Original, 2006-2010
- Table 12, China's Urea Exports by Destination Country, 2006-2010
- Table 13, Urea Imports by Customs, 2006-2010
- Table 14, China's Urea Exports by Customs, 2006-2010
- Table 15, China's Urea Imports by Provinces, 2006-2010
- Table 16, China's Urea Exports by Provinces, 2006-2010

### P-Fertilizer

- Table 17, P-Fertilizers Balance Sheet, 2007-2011
- Table 18, P-Fertilizer Production by Variety, 2006-2010
- Table 19, P-Fertilizer Production, 2006-2010
- Table 20, P-Fertilizer Consumption, 2006-2010

### K-Fertilizer

- Table 21, K-Fertilizers Balance Sheet, 2007-2011
- Table 22, K-Fertilizer Production by Variety, 2006-2010
- Table 23, K-Fertilizer Production, 2006-2010

Table 24, K-Fertilizer Consumption, 2006-2010

Table 25, China's MOP Imports by Country Original, 2006-2010

Table 26, China's MOP Exports by Destination Country, 2006-2010

Table 27, MOP Imports by Customs, 2006-2010

Table 28, MOP Imports by Provinces, 2006-2010

Table 29, China's SOP Imports by Country Original, 2006-2010

Table 30, China's SOP Exports by Destination Country, 2006-2010

Table 31, SOP Imports by Customs, 2006-2010

Table 32, SOP Imports by Provinces, 2006-2010

#### Compound Fertilizer

Table 33, Balance Sheet of Compound Fertilizer in China, 2007-2011

Table 34, Balance Sheet of DAP in China, 2007-2011

Table 35, Balance Sheet of NPK in China, 2004-2009

Table 36, Compound Fertilizer Production, 2006-2010

Table 37, Compound Fertilizer Consumption, 2006-2010

Table 38, China's NPK Imports by Country Original, 2006-2010

Table 39, China's NPK Exports by Destination Country, 2006-2010

Table 40, NPK Imports by Customs, 2006-2010

Table 41, China's NPK Exports by Customs, 2006-2010

Table 42, NPK Imports by Provinces, 2006-2010

Table 43, China's DAP Imports by Country Original, 2006-2010

Table 44, China's DAP Exports by Country Destination, 2006-2010

Table 45, DAP Imports by Customs, 2006-2010

Table 46, China's DAP Exports by Customs, 2006-2010

#### Chemical Fertilizer Related Products

Table 47, China's Import by Major Chemical Fertilizer Related Products, 2006-2010

Table 48, China's Production by Major Chemical Fertilizer Related Products, 2006-2010

Table 49, China's Sulfur Import by Country Original, 2006-2010

Table 50, China's Sulfur Import by Customs, 2006-2010

Table 51, China's Exports by Major Chemical Fertilizer Related Products, 2006-2010

Table 52, China Phosphorite Exports by Destination Country, 2006-2010

Table 53, China Phosphorite Exports by Customs, 2006-2010

## **APPENDIX ?CHRONICLE OF EVENTS OF FERTILIZER MARKET IN 2009**

Policy

Investment & Construction

Investment & Construction in Nitrogen Fertilizer Industry

Investment in potash Fertilizer  
Investment in Phosphate and Compound Fertilizers

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