

Global Automotive Lighting Market: Analysis By Technology (LED, Halogen and Xenon), By Vehicle Type (Passenger Vehicles and Commercial Vehicles), By Position (Front Lighting/Headlamps, Rear Lighting, Interior Lighting and Others), By Sales Channel (OEMs and Aftermarket), By Region Size And Trends With Impact Of COVID-19 And Forecast Up To 2028

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Abstracts

Automotive lighting refers to the lighting systems integrated into vehicles for the purpose of illumination, visibility, and safety. These lighting components include headlights, taillights, brake lights, turn signals, and various auxiliary lighting elements. One of the reasons leading to the rising demand for automotive lighting in recent years is the increased emphasis on safety and visibility. As automotive technology advances, there is a growing awareness among consumers and regulatory bodies about the crucial role that lighting systems play in ensuring road safety. Thus, representing a need and large market opportunity for the automotive lighting market. The global automotive lighting market in 2022 stood at US\$33.67 billion, and is likely to reach US\$48.80 billion by 2028.

According to WHO, approximately 1.3 million people die each year as a result of road traffic crashes globally and this huge rise in road accidents prompt regulatory authorities to enforce stricter safety standards, potentially leading to mandatory upgrades or enhancements in automotive lighting technology. Some other factors driving the rise in automotive lighting demand include the rising disposable income and improved lifestyle which has led to increased sales of automobiles globally. Additional trends include the styling and individualization of cars, interior lighting, electrification, new functions, rising electronics content, the increased sophistication of products, and ongoing technological

advancements like introduction of LEDs, OLEDs, laser lights, adaptive lighting system. In the coming years, these improvements or trends are expected to significantly stimulate demand for automotive lighting. The global automotive lighting market value is projected to grow at a CAGR of 6.38%, during the forecast period of 2023-2028.

Market Segmentation Analysis:

By Technology: According to the report, the global automotive lighting market is segmented into three segments based on the technology: Halogen, LED and Xenon. Halogen segment acquired majority of share in the market in 2022 as this is the cheapest lighting systems for vehicles and it has been a standard automotive lighting technology for decades because of its easy replacement and widespread availability. Although LED is the fastest growing segment, as it is efficient means of generating light and lighting systems based on LEDs do not take up much space. Also, the shift towards electrification and autonomous driving is expected to drive the growth of this segment.

By Position: According to the report, the global automotive lighting market is bifurcated into four positions: Front Lighting/Headlamps, rear lighting, interior lighting and others. Front lighting/headlamps segment acquired majority of share in the market in 2022, as it plays a crucial role in ensuring driver visibility and road safety and it is mandate for every vehicle to be equipped with headlamps to prevent road accidents. Although, interior lighting is the fastest growing segment as passengers are increasingly focusing on enhancing the overall driving experience and creating more aesthetically pleasing and comfortable interior environment. Also, the integration of LED technology allows for customizable and dynamic interior lighting, enabling automakers to offer a range of color options and lighting scenarios. As consumers seek more sophisticated and technologically advanced features in vehicles, interior lighting has become a key differentiator for automakers, leading to its rapid growth within the automotive lighting market.

By Vehicle Type: According to the report, the global automotive lighting market is bifurcated into two vehicle types: Passenger vehicles and commercial vehicles. Passenger vehicles acquired majority of share in the market in 2022 and is the fastest growing segment as well, primarily due to several factors. The increasing consumer demand for advanced safety features and the incorporation of innovative lighting technologies in passenger vehicles have been key drivers. As consumers place a growing emphasis on aesthetics, comfort, and cutting-edge technology in their vehicles, automakers are integrating sophisticated lighting solutions to enhance both the visual appeal and safety aspects of passenger cars. Additionally, the revival of economic

conditions post-pandemic has led to a surge in consumer confidence and increased purchasing power, driving the demand for new passenger vehicles equipped with state-of-the-art lighting systems.

By Sales Channel: According to the report, the global automotive lighting market is bifurcated into two sales channels: OEMs and Aftermarket. OEMs acquired majority of share in the market in 2022 and is the fastest growing segment as well since OEM increasingly prioritize safety and efficiency. OEM parts are guaranteed to fit and almost always come with a manufacturer-backed warranty. Also, these systems are installed in vehicles during the manufacturing process and are integral to the vehicle's design. Additionally, collaborations between OEMs and lighting technology providers allow for seamless integration of innovative lighting features, meeting the evolving preferences of consumers and regulatory standards.

By Region: The report provides insight into the automotive lighting market based on the geographical operations, namely North America, Europe, Asia Pacific, Latin America and Middle East and Africa. Asia Pacific automotive lighting market held the highest market share in 2022 and is expected to grow at the fastest rate as well, primarily owing to reasons such as increasing production of passenger vehicles, increasing road fatalities, consumer preferences for advanced features, stringent safety regulations, high disposable income of the people and rising sales of luxury cars.

China is the Asia Pacific's strongest market for automotive lighting because of its focus on increasing vehicle production, technological advances in automotive lighting, and increasing disposable income of the people. On the other hand, the Indian automotive lighting market is anticipated to grow the quickest in Asia Pacific. This growth is significantly driven by an upswing in demand for premium vehicles and the introduction of new models. Furthermore, increased customer demand for aesthetically pleasing automobile lights and the implementation of strict safety regulations by regulatory agencies are poised to be the major growth drivers.

Global Automotive lighting Market Dynamics:

Growth Drivers: Increasing sales and production of automotive vehicles has the potential to boost the growth of the automotive lighting market. When the automotive industry experiences growth, there is a parallel surge in the demand for automotive lighting components. This is because every vehicle requires lighting systems for safety and compliance with regulations. As more vehicles are manufactured and sold, the need for headlights, taillights, turn signals, and interior lighting also rises. Further, the

market is expected to increase due to rising disposable income, increasing number of road accidents, stringent government regulation, replacement exposure etc.

Challenges: High cost of LED lighting can present challenge for the automotive lighting market. LED technology comes with a higher initial cost compared to traditional lighting sources such as halogen or incandescent bulbs. This is due to the significant investment required in research, development, and production, as well as the increased heat emission and additional installation costs. Despite its superior performance, this cost remains a barrier. Other challenge that automotive lighting market faces are shortage of raw materials like semiconductor.

Trends: A major trend gaining pace in automotive lighting market is personalization and pay-per-use. The global automotive lighting market is set to see a shift towards customization and innovative payment models. Carmakers are offering customers the ability to personalize their vehicle's lighting, using LED and OLED technologies for flexible designs. Pay-per-use features, such as adaptive lighting or high-definition projectors, can be offered as optional extras. This aligns with sustainability efforts and user-centric vehicle design. Also, ambient lighting in automotive design is becoming a key element, enhancing the aesthetic and functional interior environment. As cars evolved from transportation to mobile living spaces, ambient lighting became an integral part of the design language, enhancing the emotional experience for drivers and passengers. More trends in the market are believed to augment the growth of automotive lighting market during the forecasted period include connectivity and digitalization, electrification, autonomous driving and technological advancements in lighting systems like introduction of uAFS LED headlights, flexible OLEDs, laser lights and adaptive lighting systems etc.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has had negative impact on the global automotive lighting market. Pandemic disrupted manufacturing operations, supply chains, shortage of raw material, and decreased consumer demand. Lockdowns, production halts, and reduced consumer spending during the pandemic led to a temporary downturn in the automotive industry.

However, as economic activities gradually resumed and the automotive sector recovered, there has been a resurgence in demand for vehicles, including those equipped with advanced lighting systems. The emphasis on safety and technological innovation, coupled with a rebound in the automotive industry, is expected to drive the

recovery and growth of the global automotive lighting market post-COVID-19.

Competitive Landscape and Recent Developments:

Global automotive lighting market is competitive with the top six players controlling more than 75% of the global market. It is estimated that Valeo leads the global automotive lighting market along with Koito.

Key players of global automotive lighting market are:

SL Corporation

Stanley Electric Co., Ltd.

Valeo S.A.

LG Electronics (ZKW)

Lumax Industries Ltd.

Koito Manufacturing Co., Ltd.

Forvia

Plastic Omnium

Koninklijke Philips NV.

Marelli Holdings Co., Ltd

The key players are constantly investing in strategic initiatives, such as adoption of new technologies, introducing their services to emerging markets, mergers and acquisitions, and more, to maintain a competitive edge in this market. For instance, recently, Faurecia acquired Hella and Plastic Omnium acquired Varroc/Osram. Faurecia and Plastic Omnium are becoming important players in the automotive lighting (AL) market following the respective acquisitions of Hella and Varroc/Osram. They join Valeo, a historic major market player. Now, the three largest listed French OE suppliers are directly involved in global AL, with two in the top three and Plastic Omnium immediately joining the top ten.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Automotive Lighting: An Overview

2.1.1 Definition of Automotive Lighting

2.1.2 Types of Automotive Lighting

2.2 Automotive Lighting Segmentation: An Overview

2.2.1 Automotive Lighting Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Automotive Lighting Market: An Analysis

3.1.1 Global Automotive Lighting Market: An Overview

3.1.2 Global Automotive Lighting Market by Value

3.1.3 Global Automotive Lighting Market by Technology (LED, Halogen, Xenon)

3.1.4 Global Automotive Lighting Market by Position (Front Lighting, Rear Lighting, Interior Lighting and Others)

3.1.5 Global Automotive Lighting Market by Vehicle Type (Passenger vehicle and Commercial vehicle)

3.1.6 Global Automotive Lighting Market by Sales Channel (OEMs and Aftermarket)

3.1.7 Global Automotive Lighting Market by Region (North America, Asia Pacific, Europe, Latin America and Middle East and Africa)

3.2 Global Automotive Lighting Market: Technology Analysis

3.2.1 Global Automotive Lighting Market by Technology: An Overview

3.2.2 Global Halogen Automotive Lighting Market by Value

3.2.3 Global LED Automotive Lighting Market by Value

3.2.4 Global Xenon Automotive Lighting Market by Value

3.3 Global Automotive Lighting Market: Position Analysis

3.3.1 Global Automotive Lighting Market by Position: An Overview

3.3.2 Global Front Automotive Lighting/Headlamps Market by Value

3.3.3 Global Rear Automotive Lighting Market by Value

3.3.4 Global Interior Automotive Lighting Market by Value

3.3.5 Global Others Automotive Lighting Market by Value

3.4 Global Automotive Lighting Market: Vehicle Type Analysis

3.4.1 Global Automotive Lighting Market by Vehicle Type: An Overview

- 3.4.2 Global Passenger Vehicle Automotive Lighting Market by Value
- 3.4.3 Global Commercial Vehicle Automotive Lighting Market by Value
- 3.5 Global Automotive Lighting Market: Sales Channel Analysis
 - 3.5.1 Global Automotive Lighting Market by Sales Channel: An Overview
 - 3.5.2 Global OEMs Automotive Lighting Market by Value
 - 3.5.3 Global Aftermarket Automotive Lighting Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 Asia Pacific Automotive Lighting Market: An Analysis
 - 4.1.1 Asia Pacific Automotive Lighting Market: An Overview
 - 4.1.2 Asia Pacific Automotive Lighting Market by Value
 - 4.1.3 Asia Pacific Automotive Lighting Market by Region (China, Japan, India and Rest of the Asia Pacific)
 - 4.1.4 China Automotive Lighting Market by Value
 - 4.1.5 Japan Automotive Lighting Market by Value
 - 4.1.6 India Automotive Lighting Market by Value
 - 4.1.7 Rest of Asia Pacific Automotive Lighting Market by Value
- 4.2 North America Automotive Lighting Market: An Analysis
 - 4.2.1 North America Automotive Lighting Market: An Overview
 - 4.2.2 North America Automotive Lighting Market by Value
 - 4.2.3 North America Automotive Lighting Market by Region (The US, Canada, Mexico)
 - 4.2.4 The US Automotive Lighting Market by Value
 - 4.2.5 Canada Automotive Lighting Market by Value
 - 4.2.6 Mexico Automotive Lighting Market by Value
- 4.3 Europe Automotive Lighting Market: An Analysis
 - 4.3.1 Europe Automotive Lighting Market: An Overview
 - 4.3.2 Europe Automotive Lighting Market by Value
 - 4.3.3 Europe Automotive Lighting Market by Region (Germany, UK, France, Rest of Europe)
 - 4.3.4 Germany Automotive Lighting Market by Value
 - 4.3.5 UK Automotive Lighting Market by Value
 - 4.3.6 France Automotive Lighting Market by Value
 - 4.3.7 Rest of Europe Automotive Lighting Market by Value
- 4.4 Latin America Automotive Lighting Market: An Analysis
 - 4.4.1 Latin America Automotive Lighting Market: An Overview
 - 4.4.2 Latin America Automotive Lighting Market by Value
- 4.5 Middle East and Africa Automotive Lighting Market: An Analysis
 - 4.5.1 Middle East and Africa Automotive Lighting Market: An Overview

4.5.2 Middle East and Africa Automotive Lighting Market by Value

5. IMPACT OF COVID-19

5.1 Impact of COVID-19 on Automotive Lighting Market

5.2 Post COVID-19 Impact on Automotive Lighting Market

6. MARKET DYNAMICS

6.1 Growth Drivers

- 6.1.1 Rising Disposable Income
- 6.1.2 Increasing Sales and Production of Vehicles
- 6.1.3 Increasing Number of Road Accidents
- 6.1.4 Favorable Government Regulations
- 6.1.5 Replacement Exposure

6.2 Challenges

- 6.2.1 Shortage of semiconductor
- 6.2.2 High Cost of LED Lighting

6.3 Market Trends

- 6.3.1 Flexible OLEDs in Vehicle Lighting
- 6.3.2 Laser Lights for Headlights
- 6.3.3 uAFS LED Headlights
- 6.3.4 Interior Lighting
- 6.3.5 Electrification
- 6.3.6 Autonomous Driving
- 6.3.7 Adaptive Lighting System
- 6.3.8 Connectivity and Digitalization
- 6.3.9 Personalization

7. COMPETITIVE LANDSCAPE

7.1 Global Automotive Lighting Market: Competitive Landscape

7.2 Global Automotive Lighting Players by Market Share

8. COMPANY PROFILES

8.1 Koito Manufacturing Co., Ltd.

- 8.1.1 Business Overview
- 8.1.2 Operating Segments

- 8.1.3 Business Strategy
- 8.2 Valeo S.A.
 - 8.2.1 Business Overview
 - 8.2.2 Operating Segments
 - 8.2.3 Business Strategy
- 8.3 Forvia
 - 8.3.1 Business Overview
 - 8.3.2 Operating Segments
 - 8.3.3 Business Strategy
- 8.4 Stanley Electric Co., Ltd.
 - 8.4.1 Business Overview
 - 8.4.2 Operating Segments
 - 8.4.3 Business Strategy
- 8.5 SL Corporation
 - 8.5.1 Business Overview
 - 8.5.2 Operating Segments
 - 8.5.3 Business Strategy
- 8.6 LG Electronics (ZKW)
 - 8.6.1 Business Overview
 - 8.6.2 Operating Segments
 - 8.6.3 Business Strategy
- 8.7 Plastic Omnium
 - 8.7.1 Business Overview
 - 8.7.2 Operating Segments
 - 8.7.3 Business Strategy
- 8.8 Lumax Industries Ltd.
 - 8.8.1 Business Overview
 - 8.8.2 Operating Segments
 - 8.8.3 Business Strategy
- 8.9 Koninklijke Philips NV
 - 8.9.1 Business Overview
 - 8.9.2 Operating Segments
 - 8.9.3 Business Strategy
- 8.10 Marelli Holdings Co., Ltd.
 - 8.10.1 Business Overview
 - 8.10.2 Business Strategy

List Of Figures

LIST OF FIGURES

Figure 1: Types of Automotive Lighting

Figure 2: Automotive Lighting Segmentation

Figure 3: Global Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 4: Global Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 5: Global Automotive Lighting Market by Technology; 2022 (Percentage, %)

Figure 6: Global Automotive Lighting Market by Position; 2022 (Percentage, %)

Figure 7: Global Automotive Lighting Market by Vehicle Type; 2022 (Percentage, %)

Figure 8: Global Automotive Lighting Market by Sales Channel; 2022 (Percentage, %)

Figure 9: Global Automotive Lighting Market by Region; 2022 (Percentage, %)

Figure 10: Global Halogen Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 11: Global Halogen Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 12: Global LED Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 13: Global LED Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 14: Global Xenon Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 15: Global Xenon Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 16: Global Front Automotive Lighting/Headlamps Market by Value; 2018-2022 (US\$ Billion)

Figure 17: Global Front Automotive Lighting/Headlamps Market by Value; 2023-2028 (US\$ Billion)

Figure 18: Global Rear Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 19: Global Rear Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 20: Global Interior Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 21: Global Interior Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 22: Global Others Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 23: Global Others Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 24: Global Passenger Vehicle Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 25: Global Passenger Vehicle Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 26: Global Commercial Vehicle Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 27: Global Commercial Vehicle Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

- Figure 28: Global OEMs Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)
- Figure 29: Global OEMs Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)
- Figure 30: Global Aftermarket Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)
- Figure 31: Global Aftermarket Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)
- Figure 32: Asia Pacific Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)
- Figure 33: Asia Pacific Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)
- Figure 34: Asia Pacific Automotive Lighting Market by Region; 2022 (Percentage, %)
- Figure 35: China Automotive Lighting Market by Value, 2018-2022 (US\$ Billion)
- Figure 36: China Automotive Lighting Market by Value, 2023-2028 (US\$ Billion)
- Figure 37: Japan Automotive Lighting Market by Value, 2018-2022 (US\$ Billion)
- Figure 38: Japan Automotive Lighting Market by Value, 2023-2028 (US\$ Billion)
- Figure 39: India Automotive Lighting Market by Value, 2018-2022 (US\$ Billion)
- Figure 40: India Automotive Lighting Market by Value, 2023-2028 (US\$ Billion)
- Figure 41: Rest of Asia Pacific Automotive Lighting Market by Value, 2018-2022 (US\$ Billion)
- Figure 42: Rest of Asia Pacific Automotive Lighting Market by Value, 2023-2028 (US\$ Billion)
- Figure 43: North America Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)
- Figure 44: North America Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)
- Figure 45: North America Automotive Lighting Market by Region; 2022 (Percentage, %)
- Figure 46: The US Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)
- Figure 47: The US Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)
- Figure 48: Canada Automotive Lighting Market by Value; 2018-2022 (US\$ Million)
- Figure 49: Canada Automotive Lighting Market by Value; 2023-2028 (US\$ Million)
- Figure 50: Mexico Automotive Lighting Market by Value; 2018-2022 (US\$ Million)
- Figure 51: Mexico Automotive Lighting Market by Value; 2023-2028 (US\$ Million)
- Figure 52: Europe Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)
- Figure 53: Europe Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)
- Figure 54: Europe Automotive Lighting Market by Region; 2022 (Percentage, %)
- Figure 55: Germany Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)
- Figure 56: Germany Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)
- Figure 57: UK Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)
- Figure 58: UK Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)
- Figure 59: France Automotive Lighting Market by Value; 2018-2022 (US\$ Million)
- Figure 60: France Automotive Lighting Market by Value; 2023-2028 (US\$ Million)
- Figure 61: Rest of Europe Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 62: Rest of Europe Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 63: Latin America Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 64: Latin America Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 65: Middle East and Africa Automotive Lighting Market by Value; 2018-2022 (US\$ Billion)

Figure 66: Middle East and Africa Automotive Lighting Market by Value; 2023-2028 (US\$ Billion)

Figure 67: Household disposable income by Region; 2018-2022 (US\$ per capita)

Figure 68: Global Motor Vehicle Production by Region; 2021-2022 (Thousand)

Figure 69: Global Sales of Electric Cars; 2022-2030 (Million)

Figure 70: Global Automotive Lighting Players by Market Share; 2023 (Percentage, %)

Figure 71: Koito Sales by Segments; 2022 (Percentage, %)

Figure 72: Valeo S.A. Sales by Segments; 2022 (Percentage, %)

Figure 73: Forvia Sales by Business Group; 2022 (Percentage, %)

Figure 74: Stanley Electric Co., Ltd. Sales by Segments; 2023 (Percentage, %)

Figure 75: SL Corporation Sales by Segments; 2022 (Percentage, %)

Figure 76: LG Electronics Sales by Segments; 2022 (Percentage, %)

Figure 77: Plastic Omnium Revenue by Segments; 2022 (Percentage, %)

Figure 78: Lumax Industries Ltd. Revenue by Segments; 2022 (Percentage, %)

Figure 79: Koninklijke Philips NV Sales by Segment; 2022 (Percentage, %)

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