

Global Embedded Non-Volatile Memory (eNVM) Market: Analysis By Type (eFLASH, eE2PROM, FRAM, and Others), By Application (Consumer Electronics, Automotive, Healthcare Monitoring, Enterprise Storage, and Other Applications), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

Embedded non-volatile memory (eNVM) is a memory technology that is integrated directly onto a semiconductor chip or embedded systems, capable of retaining data even when the power is turned off. The embedded part refers to it being directly soldered onto a microcontroller, and non-volatile means the memory can be used without power. eNVM market is associated with production, sale, and application of embedded non-volatile memory solutions across various industries, where the market includes both standalone eNVM products and integrated eNVM solutions offered by various semiconductor companies. The global eNVM market value stood at US\$401.86 million in 2023, and is expected to reach by US\$724.68 million by 2029.

Embedded non-volatile memory (eNVM) stores critical data and instructions for electronic devices. Global eNVM market demonstrated a consistent growth, primarily driven by the growing need for better security in hardware, rising demand for industrial-grade flash memory, increasing popularity of cloud-based services, rapidly expanding automotive industry, increasing demand for efficient data storage & processing, proliferation of internet of things (IoT) devices & wearable technology, rising adoption of advanced consumer electronics, ongoing improvements in semiconductor fabrication technologies, growing smart city projects, increased need for high-speed, low-power, & dependable memory solutions, etc. Furthermore, increasing integration of cutting-edge

technologies like artificial intelligence, machine learning, and blockchain, growing need for lightweight and miniature devices at comparatively lower cost, rising adoption of smart cars among consumers, growing adoption of eNVM in code storage applications, and ongoing eNVM integration on SiP and SoC architecture is expected to boost the market growth in the forecasted period. The market is expected to grow at a CAGR of 11.01% over the projected period of 2024-2029.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the global eNVM market into four segments on the basis of type: eFLASH, eE2PROM, FRAM, and others. eFLASH is the largest segment of global embedded non-volatile memory market owing to increasing deployment of IoT, reduced cost of producing eFLASH memory, rapidly expanding automotive sector, standardization of eFLASH technology and its compatibility with existing semiconductor processes, ongoing advancements in the semiconductor technology, and extensive use of eFLASH in smartphones, tablets, and other consumer electronics. eE2PROM is the fastest growing segment of global embedded non-volatile memory market as a result of growing demand for secure and reliable storage in smart cards and RFID tags, increasing shift towards industrial automation, wide operating temperature range of eE2PROM devices, compliance of E2PROM devices with various industry standards & certifications, ongoing advancements in miniaturization of eE2PROM cells, and increasing use of eE2PROM in consumer electronics for storing user settings, configuration parameters, and calibration data.

By Application: The report has segmented the global eNVM market into five applications, namely, consumer electronics, automotive, healthcare monitoring, enterprise storage, and other applications. Consumer electronics is the largest and fastest growing segment of the global embedded non-volatile memory, driven by growing demand for larger storage capacities in consumer electronics devices, increasing adoption of solid-state drives, proliferation of smart devices including smartphones, tablets, wearables, smart TVs, & smart home appliances, rapidly expanding electronics sector, growing trend of edge computing, rising demand for eNVM solutions that offer robust security features, ongoing trend of miniaturization of devices, and growing popularity of feature-rich devices containing artificial intelligence and high-resolution displays.

By Region: The report provides insight into the global eNVM market based on regions namely, Europe, North America, Asia Pacific, and rest of the world. Asia Pacific embedded non-volatile memory market is the largest and fastest growing region of

global eNVM market, driven by rising demand for consumer electrical and electronic items, region's strong hold in semiconductor manufacturing and consumer electronics assembly, positive shift of enterprises and end users towards the use of solid-state drive (SSDs), region's high population density resulting in large consumer base, Asia Pacific acting as a significant centre for research and development in electronics and semiconductor technology, region's rapid growth in IoT and consumer electronics markets, and increasing construction of large data centres in countries like India and China.

North America embedded non-volatile memory market has been positively growing over the years as a result of large and technologically savvy consumer base, increasing adoption of advanced technology such as connected devices and 5G smartphones in Canada and Mexico, growing emphasis on domestic manufacturing of electronic components in North America, presence of favorable infrastructure that support high-speed internet services, rising adoption of smart or IoT-based devices, increasing number of data centers being built in response to rising demand for digital entertainment, videoconferencing, and video and phone call services, and strong presence of major eNVM companies including Microchip Technology Inc., Synopsys, Inc., etc.

Market Dynamics:

Growth Drivers: The global eNVM market has been rapidly growing over the past few years, due to factors such as growth in automotive sector, increasing integration of eNVM technologies in medical sector, rising demand for power efficient solutions, growing need to enhance security of chips, rapid growth in mobile and portable electronics, increasing investment in research and development, etc. A substantial presence of electric vehicles will continue to augment the growing importance of advanced electronic systems within the automotive industry. As vehicles, including electric vehicles (EVs), hybrid vehicles, and autonomous vehicles, increasingly integrate electronic components for functions such as infotainment, driver assistance, and autonomous driving, the demand for robust and reliable memory solutions like eNVM becomes crucial. In addition, as consumers seek longer battery life and reduced energy consumption in their devices, there is a rising need for eNVM solutions that offer ultra-low power consumption.

Challenges: However, the global eNVM market growth would be negatively impacted by various challenges such as, widening gap between supply and demand, low write endurance rate, etc. In eNVM technologies like Flash memory, which are commonly

used in consumer electronics, IoT devices, and automotive systems, the write endurance can be limited compared to other memory types. High-frequency data logging, firmware updates, and frequent system writes can accelerate wear-out and reduce the lifespan of eNVM devices, leading to reliability issues and increased maintenance costs for end-users.

Trends: The global eNVM market is projected to grow at a fast pace during the forecasted period, due to rise in 5G adoption, increasing integration of eNVM with AI and ML, expansion of the wearable technology, integration with advanced semiconductor, growing adoption of eNVM in code storage applications, ongoing development of 3D eNVM technologies, eNVM integration on SiP and SoC architecture, rise of cloud-based eNVM services etc. The acceleration of AI and machine learning (ML) applications is a significant trend for the eNVM market. eNVM technologies, such as MRAM and ReRAM, offer lower power consumption compared to traditional memory technologies, making them crucial for AI and ML applications that require efficient data processing and storage solutions. In addition, the expansion of the wearable technology market serves as a significant trend for the eNVM market. eNVM is essential for wearables because it provides the necessary storage capacity for firmware, user data, and sensor information while offering low-power operation and data retention even in the absence of power.

Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. The growth of the global embedded non-volatile memory market was negatively impacted due to COVID-19 pandemic. Lockdown policies imposed by the government to prevent the spread of virus forced various semiconductor facilities to either shut down or run low on production capacity, resulting in increased delays and lower production of eNVM chips, which further resulted in delays in fulfilling orders and meeting customer demand. Also, pandemic disrupted global supply chains, creating enormous challenges in production, distribution, and sourcing of key raw materials components, and equipment necessary for eNVM chip production.

Competitive Landscape:

The global embedded non-volatile memory market is consolidated, with few players accounting for the majority of market revenue, including eMemory, Microchip (SST), Synopsys and Yield Microelectronics Corp. (YMC), and Chengdu Analog Circuit

Technology Inc. (Actt). Each of these companies has made significant contributions to the market, driving the growth and adoption of eNVM technology. The key players of the market are:

Microchip Technology Inc.

eMemory Technology Inc.

Synopsys, Inc.

Taiwan Semiconductor Manufacturing Company Limited

United Microelectronics Corporation

Huahong Group (Hua Hong Semiconductor Limited)

Semiconductor Manufacturing International Corporation

Yield Microelectronics Corporation

Chengdu Analog Circuit Technology Inc. (Actt)

In 2023, top five companies in the global eNVM IP market, accounted for more than 90% share in the market, Major companies operating in the market have a wide product portfolio, strong distribution networks, and significant investments in research and development, fostering innovation and giving them a competitive edge in the market. For instance, on September 27, 2023, GlobalFoundries and Microchip Technology announced the immediate release to production of the SST ESF3 third-generation embedded SuperFlash technology NVM solution in the GF 28SLPe foundry process. Similarly, in 2022, Toshiba Electronic Devices & Storage Corporation and Japan Semiconductor Corporation together developed a highly reliable & versatile analog platform with eNVM for automotive applications.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Embedded Non-Volatile Memory: An Overview

2.1.1 Definition of Embedded Non-Volatile Memory

2.2 Embedded Non-Volatile Memory Segmentation: An Overview

2.2.1 Embedded Non-Volatile Memory Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Embedded Non-Volatile Memory Market: An Analysis

3.1.1 Global Embedded Non-Volatile Memory Market: An Overview

3.1.2 Global Embedded Non-Volatile Memory Market by Value

3.1.3 Global Embedded Non-Volatile Memory Market by Type (eFLASH, eE2PROM, FRAM, and Others)

3.1.4 Global Embedded Non-Volatile Memory Market by Application (Consumer Electronics, Automotive, Healthcare Monitoring, Enterprise Storage, and Other Applications)

3.1.5 Global Embedded Non-Volatile Memory Market by Region (North America, Europe, Asia Pacific, and Rest of the World)

3.2 Global Embedded Non-Volatile Memory Market: Type Analysis

3.2.1 Global Embedded Non-Volatile Memory Market: Type Overview

3.2.2 Global eFLASH Embedded Non-Volatile Memory Market by Value

3.2.3 Global eE2PROM Embedded Non-Volatile Memory Market by Value

3.2.4 Global FRAM Embedded Non-Volatile Memory Market by Value

3.2.5 Global Others Embedded Non-Volatile Memory Market by Value

3.3 Global Embedded Non-Volatile Memory Market: Application Analysis

3.3.1 Global Embedded Non-Volatile Memory Market: Application Overview

3.3.2 Global Consumer Electronics Embedded Non-Volatile Memory Market by Value

3.3.3 Global Automotive Embedded Non-Volatile Memory Market by Value

3.3.4 Global Healthcare Monitoring Embedded Non-Volatile Memory Market by Value

3.3.5 Global Enterprise Embedded Non-Volatile Memory Market by Value

3.3.6 Global Other Applications Embedded Non-Volatile Memory Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 Asia Pacific Embedded Non-Volatile Memory Market: An Analysis
 - 4.1.1 Asia Pacific Embedded Non-Volatile Memory Market: An Overview
 - 4.1.2 Asia Pacific Embedded Non-Volatile Memory Market by Value
 - 4.1.3 Asia Pacific Embedded Non-Volatile Memory Market by Region (China, Japan, South Korea, India, and Rest of Asia Pacific)
 - 4.1.4 China Embedded Non-Volatile Memory Market by Value
 - 4.1.5 Japan Embedded Non-Volatile Memory Market by Value
 - 4.1.6 South Korea Embedded Non-Volatile Memory Market by Value
 - 4.1.7 India Embedded Non-Volatile Memory Market by Value
 - 4.1.8 Rest of Asia Pacific Embedded Non-Volatile Memory Market by Value
- 4.2 North America Embedded Non-Volatile Memory Market: An Analysis
 - 4.2.1 North America Embedded Non-Volatile Memory Market: An Overview
 - 4.2.2 North America Embedded Non-Volatile Memory Market by Value
 - 4.2.3 North America Embedded Non-Volatile Memory Market by Region (the US, Canada, and Mexico)
 - 4.2.4 The US Embedded Non-Volatile Memory Market by Value
 - 4.2.5 Canada Embedded Non-Volatile Memory Market by Value
 - 4.2.6 Mexico Embedded Non-Volatile Memory Market by Value
- 4.3 Europe Embedded Non-Volatile Memory Market: An Analysis
 - 4.3.1 Europe Embedded Non-Volatile Memory Market: An Overview
 - 4.3.2 Europe Embedded Non-Volatile Memory Market by Value
 - 4.3.3 Europe Embedded Non-Volatile Memory Market by Region (Germany, UK France, and Rest of Europe)
 - 4.3.4 Germany Embedded Non-Volatile Memory Market by Value
 - 4.3.5 UK Embedded Non-Volatile Memory Market by Value
 - 4.3.6 France Embedded Non-Volatile Memory Market by Value
 - 4.3.7 Rest of Europe Embedded Non-Volatile Memory Market by Value
- 4.4 Rest of the World Embedded Non-Volatile Memory Market: An Analysis
 - 4.4.1 Rest of the World Embedded Non-Volatile Memory Market: An Overview
 - 4.4.2 Rest of the World Embedded Non-Volatile Memory Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19 on Global Embedded Non-Volatile Memory Market
- 5.2 Post COVID-19 Impact on Global Embedded Non-Volatile Memory Market

6. MARKET DYNAMICS

- 6.1 Growth Drivers

- 6.1.1 Growth in Automotive Sector
- 6.1.2 Increasing Integration of eNVM Technologies in Medical Sector
- 6.1.3 Rising Demand for Power Efficient Solutions
- 6.1.4 Growing Need to Enhance Security of Chips
- 6.1.5 Rapid Growth in Mobile and Portable Electronics
- 6.1.6 Increasing Investment in Research and Development
- 6.2 Challenges
 - 6.2.1 Widening Gap Between Supply and Demand
 - 6.2.2 Low Write Endurance Rate
- 6.3 Market Trends
 - 6.3.1 Rise in 5G Adoption
 - 6.3.2 Increasing Integration of eNVM with AI And ML
 - 6.3.3 Expansion of the Wearable Technology
 - 6.3.4 Integration with Advanced Semiconductor
 - 6.3.5 Growing Adoption of eNVM in Code Storage Applications
 - 6.3.6 Ongoing Development Of 3D eNVM Technologies
 - 6.3.7 eNVM Integration on SiP And SoC Architecture
 - 6.3.8 Rise Of Cloud-based eNVM Services

7. COMPETITIVE LANDSCAPE

- 7.1 Global Embedded Non-Volatile Memory Market: Competitive Landscape
- 7.2 Global Embedded Non-Volatile Memory (eNVM) IP Players By Market Share

8. COMPANY PROFILES

- 8.1 Microchip Technology Inc.
 - 8.1.1 Business Overview
 - 8.1.2 Operating Segments
 - 8.1.3 Business Strategy
- 8.2 eMemory Technology Inc.
 - 8.2.1 Business Overview
 - 8.2.2 Revenue by Products and Services
 - 8.2.3 Business Strategy
- 8.3 Synopsys, Inc.
 - 8.3.1 Business Overview
 - 8.3.2 Operating Segments
 - 8.3.3 Business Strategy
- 8.4 Taiwan Semiconductor Manufacturing Company Limited

- 8.4.1 Business Overview
- 8.4.2 Revenue by Geographical Regions
- 8.4.3 Business Strategy
- 8.5 United Microelectronics Corporation
 - 8.5.1 Business Overview
 - 8.5.2 Revenue by Geographical Regions
 - 8.5.3 Business Strategy
- 8.6 Huahong Group (Hua Hong Semiconductor Limited)
 - 8.6.1 Business Overview
 - 8.6.2 Revenue by Geographical Regions
- 8.7 Semiconductor Manufacturing International Corporation
 - 8.7.1 Business Overview
 - 8.7.2 Revenue by Geographical Regions
- 8.8 Yield Microelectronics Corporation
 - 8.8.1 Business Overview
- 8.9 Chengdu Analog Circuit Technology Inc. (Actt)
 - 8.9.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Embedded Non-Volatile Memory Segmentation

Figure 2: Global Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 3: Global Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 4: Global Embedded Non-Volatile Memory Market by Type; 2023 (Percentage, %)

Figure 5: Global Embedded Non-Volatile Memory Market by Application; 2023 (Percentage, %)

Figure 6: Global Embedded Non-Volatile Memory Market by Region; 2023 (Percentage, %)

Figure 7: Global eFLASH Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 8: Global eFLASH Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 9: Global eE2PROM Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 10: Global eE2PROM Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 11: Global FRAM Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 12: Global FRAM Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 13: Global Others Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 14: Global Others Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 15: Global Consumer Electronics Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 16: Global Consumer Electronics Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 17: Global Automotive Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 18: Global Automotive Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 19: Global Healthcare Monitoring Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 20: Global Healthcare Monitoring Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 21: Global Enterprise Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 22: Global Enterprise Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 23: Global Other Applications Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 24: Global Other Applications Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 25: Asia Pacific Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 26: Asia Pacific Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 27: Asia Pacific Embedded Non-Volatile Memory Market by Region; 2023 (Percentage, %)

Figure 28: China Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 29: China Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 30: Japan Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 31: Japan Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 32: South Korea Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 33: South Korea Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 34: India Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 35: India Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 36: Rest of Asia Pacific Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 37: Rest of Asia Pacific Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 38: North America Embedded Non-Volatile Memory Market by Value; 2020-2023

(US\$ Million)

Figure 39: North America Embedded Non-Volatile Memory Market by Value; 2024-2029

(US\$ Million)

Figure 40: North America Embedded Non-Volatile Memory Market by Region; 2023

(Percentage, %)

Figure 41: The US Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 42: The US Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 43: Canada Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 44: Canada Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 45: Mexico Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 46: Mexico Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 47: Europe Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 48: Europe Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 49: Europe Embedded Non-Volatile Memory Market by Region; 2023

(Percentage, %)

Figure 50: Germany Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 51: Germany Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 52: UK Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 53: UK Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 54: France Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 55: France Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 56: Rest of Europe Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 57: Rest of Europe Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 58: Rest of the World Embedded Non-Volatile Memory Market by Value; 2020-2023 (US\$ Million)

Figure 59: Rest of the World Embedded Non-Volatile Memory Market by Value; 2024-2029 (US\$ Million)

Figure 60: Global Electric Car Stocks; 2017-2023 (Million)

Figure 61: Global Population Coverage by 5G Technology; 2023 & 2029 (Percentage, %)

Figure 62: Global Artificial Intelligence Revenue; 2023-2030 (US\$ Billion)

Figure 63: Global Embedded Non-Volatile Memory (eNVM) IP Players by Market Share; 2023 (Percentage, %)

Figure 64: Microchip Technology Inc., Net sales by Segment; 2023 (Percentage, %)

Figure 65: eMemory Technology Inc. Revenue by Products and Services; 2023 (Percentage, %)

Figure 66: Synopsys, Inc. Revenue by Segments; 2023 (Percentage, %)

Figure 67: Taiwan Semiconductor Manufacturing Company Limited Revenue by Geographical Regions; 2023 (Percentage, %)

Figure 68: United Microelectronics Corporation Revenue by Geographical Regions; 2023 (Percentage, %)

Figure 69: Huahong Group Revenue by Geographical Regions; 2023 (Percentage, %)

Figure 70: Semiconductor Manufacturing International Corporation Revenue by Geographical Regions; 2023 (Percentage, %)

Table 1: Global Embedded Non-Volatile Memory Market: Competitive Landscape

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Product name: Global Embedded Non-Volatile Memory (eNVM) Market: Analysis By Type (eFLASH, eE2PROM, FRAM, and Others), By Application (Consumer Electronics, Automotive, Healthcare Monitoring, Enterprise Storage, and Other Applications), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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