

# **Global Lignin Market: Analysis By Type (Lignosulfonates, Kraft Lignin, and Others), By Form (Solid, and Liquid), By Application (Dispersants, Construction Material, Carbon Fiber & Bio-base Carbons, Resins & Glues, Biopolymer, Animal Feed, and Other Applications), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029**

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## **Abstracts**

The global lignin market refers to the global industry involved in the production, distribution, and commercialization of lignin and lignin-based materials, ranging from concrete additives to biofuel production. Lignin based materials are sustainable, environmentally friendly, non-toxic, and affordable with wide variety of applications in energy storage environments, electronic devices, automotive, construction, etc. The global lignin market value stood at US\$995.24 million in 2023, and is expected to reach by US\$1.33 billion by 2029.

Greater emphasis on sustainability, rise in production & demand for concrete additives, increased need for environmentally acceptable materials, rising availability of raw material and easy production of lignin, favorable regulatory actions supporting the use of bio-based products, and growing demand for paints & coatings, are major factors driving the growth of global lignin market. Additionally, expanded commercial applications in animal feed additives, agriculture, industrial cleaners and water treatment, oil field chemicals, industrial binders, battery additives, and a variety of other industries is expected to further boost the sales of lignin in upcoming years. Moreover, rise in usage of biofuels, increasing demand for lignin in animal feed and natural products, growing popularity of substituting fossil-based raw materials, and increasing inclination of industries and consumers towards greener alternatives, will continue to

boost the use of lignin as a promising renewable raw material in the forecasted years. The market is expected to grow at a CAGR of 5.04% over the projected period of 2024-2029.

#### Market Segmentation Analysis:

**By Type:** The report provides the bifurcation of the global lignin market into three segments on the basis of type: lignosulfonates, kraft lignin, and others. Lignosulfonates is the largest segment of global lignin market as a result of lignosulfonates's high binding capability & low cost, established market presence and broad application range, increasing demand for sustainable and environment friendly products, rising application of lignin in concrete mixtures in China, India, & the US on account of developing construction sector, rapid urbanization in emerging economies, positive growth in oil & gas industry, & increasing adoption of lignosulfonates for dust control. Kraft Lignin is the fastest growing segment of global lignin market owing to consistent and abundant supply of kraft lignin, ongoing integration of circular economy framework, presence of favorable government policies and incentives promoting the use of renewable energy & sustainable materials, competitive pricing of kraft lignin compared to synthetic alternatives, and presence of high energy content in kraft lignin, making it suitable for bioenergy applications.

**By Application:** The report has segmented the global lignin market into seven applications, namely, dispersants, construction material, carbon fiber & bio-base carbons, resins & glues, biopolymer, animal feed, and other applications. Lignin dispersants is the largest segment of global lignin market as a result of environmental benefits of lignin-based dispersants, well-established & proven lignin dispersant technology, increasing regulatory and consumer demand for sustainable and green products, lignin offering a cost-effective alternative to synthetic dispersants, and added advantage of lignin dispersants in terms of versatility and compatibility with various formulations, including aqueous and solvent-based systems.

**By Form:** The report provides the bifurcation of the global lignin market into two segments on the basis of form: liquid and solid. Solid is the largest and fastest growing segment of global lignin market as a result of growing focus on reducing carbon emissions and transitioning to sustainable energy sources, easier storage and transportation, increasing demand for lightweight and strong materials in aerospace, automotive, and sports equipment industries, growing demand for solid lignin in soil amendments and fertilizers in sustainable agricultural practices, emergence of solid lignin in various new applications like biofuels, bioplastics, and carbon fibers, and

ongoing advancements in processing techniques enabling more efficient and cost-effective production of solid lignin.

**By Region:** The report provides insight into the global lignin market based on regions namely, North America, Europe, Asia Pacific, and rest of the world. Europe is the largest region of the global lignin market owing to strong regulatory support for sustainable materials, rising demand for compact motor vehicles, increasing incorporation of circular economy principles and waste valorization, ascending aromatic application of lignin in aromatic alcohol, region's well-established pulp and paper industries, robust biorefinery infrastructure, growing preference for sustainable and eco-friendly materials, ongoing developments of bio-based chemicals, and region's strong emphasis on environmental conservation.

Asia Pacific is the fastest growing region of global lignin market, owing to burgeoning industrialization, surging demand for electronics and automobiles, increasing demand for products sourced from bio based sources, rapidly developing construction sector, growing knowledge of the advantageous effects of lignin in livestock feed among breeders & keepers, presence of thriving pulp & paper-producing sector, rapid urbanization, increasing population, heightened demand for sustainable materials, especially in countries like China & India, and increasing acquisition of Lignin technology in the region.

#### Market Dynamics:

**Growth Drivers:** The global lignin market has been rapidly growing over the past few years, due to factors such as rising construction expenditure, growing demand for automobiles and electronics, robust growth of animal feed additives, rapidly expanding pulp and paper industry, favorable government initiatives and policies, etc. The automotive industry is adopting lignin-based materials for the production of lightweight and high-strength components, which help in improving fuel efficiency and reducing emissions, propelling the growth of the lignin market. Also, lignin being a renewable and eco-friendly material, is used in manufacturing various automotive components, including interior panels, seat cushions, and insulation materials. Furthermore, lignin has antimicrobial and antioxidant properties, which can contribute to the health & welfare of livestock by reducing the incidence of diseases and promoting overall animal health, thereby boosting its demand as a feed additive. Moreover, governments of various countries have imposed a few regulations to reduce greenhouse emissions & have compelled polymer manufacturing companies to increase investments in developing naturally derived raw materials.

**Challenges:** However, the global lignin market growth would be negatively impacted by various challenges such as, limited awareness and understanding, high extraction costs, etc. The extraction and purification of lignin can be costly, especially when aiming for high-purity lignin suitable for advanced applications. These high costs can limit the competitiveness of lignin-based products compared to conventional materials. In addition, effectively marketing of lignin-based products to highlight their environmental benefits and performance advantages can be challenging, especially in markets dominated by well-known synthetic materials.

**Trends:** The global lignin market is projected to grow at a fast pace during the forecasted period, due to advancements in lignin extraction technologies, growing use of lignin in biofuels and bio refinery catalysts, positive shift towards the use of sustainable products, increasing adoption of circular economy initiatives, etc. Rise in demand for sustainable and eco-friendly materials has been a major driver of the increasing interest in lignin as a raw material for a variety of applications. Lignin, derived from plant biomass, is considered a green alternative to synthetic chemicals and materials, leading to its increased adoption in products such as biodegradable plastics, adhesives, feed additives, resins, etc. In addition, bio-oil derived from lignin are refined into transportation fuels such as diesel and gasoline, while syngas are used as fuel for power generation. Therefore, rise in demand for lignin as a biofuel is creating opportunities to develop more sustainable & environmentally friendly sources of energy, and as technologies for the production of lignin-based biofuels continue to improve, lignin is likely to play an increasingly important role in the transition to a more sustainable energy future, accelerating the growth of global lignin market over the forecasted years.

#### 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. Lockdown policies imposed by the government to prevent virus spread forced various end user industries to either shut down or run low on production capacity, resulting in lower production and manufacturing activities and a sudden fall in the demand of lignin based products. Also, many construction and infrastructure projects were put on hold or canceled during the period, diminishing the demand for lignin used in concrete admixtures and other construction materials.

#### Competitive Landscape:

*Global Lignin Market: Analysis By Type (Lignosulfonates, Kraft Lignin, and Others), By Form (Solid, and Liquid...*

The global lignin market is relatively fragmented with large number of companies, ranging from established brands to smaller regional players and niche manufacturers catering to the industry demand. Most of the businesses are investing substantially in R&D activities to expand product portfolio and increase their lignin market share. The key players of the market are:

Borregaard AS  
Aditya Birla Group (Domsj? Fabriker)  
Stora Enso Oyj  
Sappi Limited  
Suzano S/A  
Burgo Group S.p.A.  
Mets? Group  
Ingevity Corporation  
UPM  
Green Agrochem  
Tokyo Chemical Industry Co., Ltd.

Major companies in the market are adopting collaboration strategies to increase their product reach and increase the availability of their products & services in diverse geographical areas and gain competitive edge. For instance, on May 29, 2023, Mets? Group announced that Mets? Fibre in collaboration with ANDRITZ, plan to build a demonstration plant for a modified lignin product, to develop the process to separate lignin from black liquor in pulp production and to further process it for new end-uses. The lignin market in North America is also highly competitive due to the presence of well-established and dominating North America and regional market manufacturers competing based on product quality, price, and product differentiation. The entry barriers, such as the requirement of moderate to high capital investment and high competition from well-established players, pose increasing threat to new market players entering into the market. The majority of the lignin is produced in the paper & pulp industry, as a byproduct of processing. Thus, it is difficult for the new player to enter the market due to the highly dominant players, moderate technological development cost, and availability of raw materials.

## Contents

### 1. EXECUTIVE SUMMARY

### 2. INTRODUCTION

#### 2.1 Lignin: An Overview

##### 2.1.1 Definition of Lignin

##### 2.1.2 Benefits of Lignin

#### 2.2 Lignin Segmentation: An Overview

##### 2.2.1 Lignin Segmentation

### 3. GLOBAL MARKET ANALYSIS

#### 3.1 Global Lignin Market: An Analysis

##### 3.1.1 Global Lignin Market: An Overview

##### 3.1.2 Global Lignin Market by Value

##### 3.1.3 Global Lignin Market by Type (Lignosulfonates, Kraft Lignin, and Others)

##### 3.1.4 Global Lignin Market by Application (Dispersants, Construction Material, Carbon Fiber & Bio-Base Carbons, Resins & Glues, Biopolymer, Animal Feed, and Other Applications)

##### 3.1.5 Global Lignin Market by Form (Solid and Liquid)

##### 3.1.6 Global Lignin Market by Region (North America, Europe, Asia Pacific, and Rest of the World)

#### 3.2 Global Lignin Market: Type Analysis

##### 3.2.1 Global Lignin Market: Type Overview

##### 3.2.2 Global Lignosulfonates Lignin Market by Value

##### 3.2.3 Global Kraft Lignin Market by Value

##### 3.2.4 Global Others Lignin Market by Value

#### 3.3 Global Lignin Market: Application Analysis

##### 3.3.1 Global Lignin Market: Application Overview

##### 3.3.2 Global Lignin Dispersants Market by Value

##### 3.3.3 Global Lignin Construction Material Market by Value

##### 3.3.4 Global Lignin Carbon Fiber & Bio-base Carbons Market by Value

##### 3.3.5 Global Lignin Resins & Glues Market by Value

##### 3.3.6 Global Lignin Biopolymer Market by Value

##### 3.3.7 Global Lignin Animal Feed Market by Value

##### 3.3.8 Global Others Lignin Market by Value

#### 3.4 Global Lignin Market: Form Analysis



- 3.4.1 Global Lignin Market: Form Overview
- 3.4.2 Global Solid Lignin Market by Value
- 3.4.3 Global Liquid Lignin Market by Value

## **4. REGIONAL MARKET ANALYSIS**

### 4.1 Europe Lignin Market: An Analysis

- 4.1.1 Europe Lignin Market: An Overview
- 4.1.2 Europe Lignin Market by Value
- 4.1.3 Europe Lignin Market by Region (Germany, UK, France, Italy, and rest of Europe)
- 4.1.4 Germany Lignin Market by Value
- 4.1.5 France Lignin Market by Value
- 4.1.6 Italy Lignin Market by Value
- 4.1.7 UK Lignin Market by Value
- 4.1.8 Rest of Europe Lignin Market by Value

### 4.2 North America Lignin Market: An Analysis

- 4.2.1 North America Lignin Market: An Overview
- 4.2.2 North America Lignin Market by Value
- 4.2.3 North America Lignin Market by Type (Lignosulfonates, Kraft Lignin, and Others)
- 4.2.4 North America Lignin Market Type by Value
- 4.2.5 North America Lignin Market by Form (Solid and Liquid)
- 4.2.6 North America Lignin Market Form by Value
- 4.2.7 North America Lignin Market by Region (The US, Canada, and Mexico)
- 4.2.8 The US Lignin Market by Value
- 4.2.9 Canada Lignin Market by Value
- 4.2.10 Mexico Lignin Market by Value

### 4.3 Asia Pacific Lignin Market: An Analysis

- 4.3.1 Asia Pacific Lignin Market: An Overview
- 4.3.2 Asia Pacific Lignin Market by Value
- 4.3.3 Asia Pacific Lignin Market by Region (China, Japan, South Korea, India, and rest of Asia Pacific)
- 4.3.4 China Lignin Market by Value
- 4.3.5 Japan Lignin Market by Value
- 4.3.6 India Lignin Market by Value
- 4.3.7 South Korea Lignin Market by Value
- 4.3.8 Rest of Asia Pacific Lignin Market by Value

### 4.4 Rest of the World Lignin Market: An Analysis

- 4.4.1 Rest of the World Lignin Market: An Overview

#### 4.4.2 Rest of the World Lignin Market by Value

### **5. IMPACT OF COVID-19**

#### 5.1 Impact of COVID-19 on Global Lignin Market

#### 5.2 Post COVID-19 Impact on Global Lignin Market

### **6. MARKET DYNAMICS**

#### 6.1 Growth Drivers

##### 6.1.1 Rising Construction Expenditure

##### 6.1.2 Growing Demand for Automobiles And Electronics

##### 6.1.3 Robust Growth of Animal Feed Additives

##### 6.1.4 Rapidly Expanding Pulp and Paper Industry

##### 6.1.5 Favorable Government Initiatives and Policies

#### 6.2 Challenges

##### 6.2.1 Limited Awareness and Understanding

##### 6.2.2 High Extraction Costs

#### 6.3 Market Trends

##### 6.3.1 Advancements in Lignin Extraction Technologies

##### 6.3.2 Growing Use of Lignin in Biofuels and Bio Refinery Catalysts

##### 6.3.3 Positive Shift Towards the Use of Sustainable Products

##### 6.3.4 Increasing Adoption of Circular Economy Initiatives

### **7. COMPETITIVE LANDSCAPE**

#### 7.1 Global Lignin Market: Competitive Landscape

#### 7.2 Global Lignin Market Players: Product Comparison

### **8. COMPANY PROFILES**

#### 8.1 Borregaard AS

##### 8.1.1 Business Overview

##### 8.1.2 Operating Segments

##### 8.1.3 Business Strategy

#### 8.2 Aditya Birla Group (Domsj? Fabriker)

##### 8.2.1 Business Overview

##### 8.2.2 Operating Segments

##### 8.2.3 Business Strategy



- 8.3 Stora Enso Oyj
  - 8.3.1 Business Overview
  - 8.3.2 Operating Segments
  - 8.3.3 Business Strategy
- 8.4 Sappi Limited
  - 8.4.1 Business Overview
  - 8.4.2 Operating Segments
  - 8.4.3 Business Strategy
- 8.5 Suzano S/A
  - 8.5.1 Business Overview
  - 8.5.2 Operating Segments
  - 8.5.3 Business Strategy
- 8.6 Burgo Group S.p.A.
  - 8.6.1 Business Overview
  - 8.6.2 Business Segments
  - 8.6.3 Business Strategy
- 8.7 Mets? Group
  - 8.7.1 Business Overview
  - 8.7.2 Operating Segments
  - 8.7.3 Business Strategy
- 8.8 Ingevity Corporation
  - 8.8.1 Business Overview
  - 8.8.2 Operating Segments
  - 8.8.3 Business Strategy
- 8.9 UPM
  - 8.9.1 Business Overview
  - 8.9.2 Business Areas
  - 8.9.3 Business Strategy
- 8.10 Green Agrochem
  - 8.10.1 Business Overview
- 8.11 Tokyo Chemical Industry Co., Ltd.
  - 8.11.1 Business Overview

## List Of Figures

### LIST OF FIGURES

Figure 1: Benefits of Lignin

Figure 2: Lignin Segmentation

Figure 3: Global Lignin Market by Value; 2019-2023 (US\$ Million)

Figure 4: Global Lignin Market by Value; 2024-2029 (US\$ Billion)

Figure 5: Global Lignin Market by Type; 2023 (Percentage, %)

Figure 6: Global Lignin Market by Application; 2023 (Percentage, %)

Figure 7: Global Lignin Market by Form; 2023 (Percentage, %)

Figure 8: Global Lignin Market by Region; 2023 (Percentage, %)

Figure 9: Global Lignosulfonates Lignin Market by Value; 2019-2023 (US\$ Million)

Figure 10: Global Lignosulfonates Lignin Market by Value; 2024-2029 (US\$ Billion)

Figure 11: Global Kraft Lignin Market by Value; 2019-2023 (US\$ Million)

Figure 12: Global Kraft Lignin Market by Value; 2024-2029 (US\$ Million)

Figure 13: Global Others Lignin Market by Value; 2019-2023 (US\$ Million)

Figure 14: Global Others Lignin Market by Value; 2024-2029 (US\$ Million)

Figure 15: Global Lignin Dispersants Market by Value; 2019-2023 (US\$ Million)

Figure 16: Global Lignin Dispersants Market by Value; 2024-2029 (US\$ Billion)

Figure 17: Global Lignin Construction Material Market by Value; 2019-2023 (US\$ Million)

Figure 18: Global Lignin Construction Material Market by Value; 2024-2029 (US\$ Billion)

Figure 19: Global Lignin Carbon Fiber & Bio-base Carbons Market by Value; 2019-2023 (US\$ Million)

Figure 20: Global Lignin Carbon Fiber & Bio-base Carbons Market by Value; 2024-2029 (US\$ Billion)

Figure 21: Global Lignin Resins & Glues Market by Value; 2019-2023 (US\$ Million)

Figure 22: Global Lignin Resins & Glues Market by Value; 2024-2029 (US\$ Billion)

Figure 23: Global Lignin Biopolymer Market by Value; 2019-2023 (US\$ Million)

Figure 24: Global Lignin Biopolymer Market by Value; 2024-2029 (US\$ Billion)

Figure 25: Global Lignin Animal Feed Market by Value; 2019-2023 (US\$ Million)

Figure 26: Global Lignin Animal Feed Market by Value; 2024-2029 (US\$ Billion)

Figure 27: Global Others Lignin Market by Value; 2019-2023 (US\$ Million)

Figure 28: Global Others Lignin Market by Value; 2024-2029 (US\$ Billion)

Figure 29: Global Solid Lignin Market by Value; 2019-2023 (US\$ Million)

Figure 30: Global Solid Lignin Market by Value; 2024-2029 (US\$ Billion)

Figure 31: Global Liquid Lignin Market by Value; 2019-2023 (US\$ Million)

- Figure 32: Global Liquid Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 33: Europe Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 34: Europe Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 35: Europe Lignin Market by Region; 2023 (Percentage, %)
- Figure 36: Germany Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 37: Germany Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 38: France Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 39: France Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 40: Italy Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 41: Italy Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 42: UK Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 43: UK Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 44: Rest of Europe Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 45: Rest of Europe Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 46: North America Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 47: North America Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 48: North America Lignin Market by Type; 2023 (Percentage, %)
- Figure 49: North America Lignin Market Type by Value; 2019-2023 (US\$ Million)
- Figure 50: North America Lignin Market Type by Value; 2024-2029 (US\$ Million)
- Figure 51: North America Lignin Market by Form: 2023 (Percentage, %)
- Figure 52: North America Lignin Market Form by Value; 2019-2023 (US\$ Million)
- Figure 53: North America Lignin Market Form by Value; 2024-2029 (US\$ Million)
- Figure 54: North America Lignin Market by Region; 2023 (Percentage, %)
- Figure 55: The US Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 56: The US Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 57: Canada Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 58: Canada Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 59: Mexico Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 60: Mexico Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 61: Asia Pacific Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 62: Asia Pacific Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 63: Asia Pacific Lignin Market by Region; 2023 (Percentage, %)
- Figure 64: China Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 65: China Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 66: Japan Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 67: Japan Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 68: India Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 69: India Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 70: South Korea Lignin Market by Value; 2019-2023 (US\$ Million)

- Figure 71: South Korea Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 72: Rest of Asia Pacific Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 73: Rest of Asia Pacific Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 74: Rest of the World Lignin Market by Value; 2019-2023 (US\$ Million)
- Figure 75: Rest of the World Lignin Market by Value; 2024-2029 (US\$ Million)
- Figure 76: The US Private and Public Construction Spending; 2019-2023 (US\$ Billion)
- Figure 77: Global Car Manufacturing Industry Revenue; 2020-2023 (US\$ Trillion)
- Figure 78: Global Consumer Electronics Market Revenue; 2022-2028 (US\$ Billion)
- Figure 79: Borregaard AS Revenue by Segments; 2023 (Percentage, %)
- Figure 80: Aditya Birla Group Revenue by Segments; 2023 (Percentage, %)
- Figure 81: Stora Enso Sales by Segments; 2023 (Percentage, %)
- Figure 82: Sappi Limited Sales by Segments; 2023 (Percentage, %)
- Figure 83: Suzano S/A Net Sales by Segments; 2023 (Percentage, %)
- Figure 84: Burgo Group S.p.A. Revenue by Business Segments; 2023 (Percentage, %)
- Figure 85: Mets? Group Sales by Operating Segments; 2023 (Percentage, %)
- Figure 86: Ingevity Corporation Net Sales by Operating Segments; 2023 (Percentage, %)
- Figure 87: UPM Sales by Business Areas; 2023 (Percentage, %)
- Table 1: Global Lignin Market Players: Product Comparison

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