

# **Global Subscription E-commerce Market: Analysis By Application Type (Beauty and Personal Care, Food and Beverages, Entertainment and Others), By End User (Women, Men and Kids), By Mode of Payment (Online Payment and Cash On Delivery), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028**

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## **Abstracts**

The global subscription e-commerce market was valued at US\$96.61 billion in 2022. The market value is forecasted to grow to US\$2419.69 billion by 2028. Subscription e-commerce is a way of purchasing goods and services online in which customers can sign up for subscriptions to receive the products or services on a recurring basis. Customers who opt for subscriptions receive their products through monthly or weekly boxes, known as subscription boxes. Customers can subscribe to certain products with the seller which are required by them cyclically.

The factors such as growing use of subscriptions among millennials, rapid urbanization, rising popularity of online streaming services, increasing internet penetration and growing use of mobile devices, are expected to drive the overall market growth in the forecasted period. The market is anticipated to grow at a CAGR of approx. 71% during the forecasted period of 2023-2028.

Market Segmentation Analysis:

By Application Type: The report provides the bifurcation of the market into four segments based on application type: beauty and personal care, food and beverages, entertainment and others. Entertainment subscription e-commerce market is the fastest

growing segment of global subscription e-commerce market owing to rising penetration of internet, wide variety of exclusive content available in different languages, increased convenience of accessing these services from any device and cost effectiveness in terms of lower price charged as compared to TV cables.

**By End User:** The report provides the bifurcation of the market into three segments based on end user: women, men and kids. Women subscription e-commerce market is both the largest and fastest growing segment of global subscription e-commerce market owing to rising number of working women, increasing presence of startups which are offering numerous feminine products and cosmetics, increasing penetration of social media trends and expanding e-commerce sector.

**By Mode of Payment:** The report provides the bifurcation of the market into two segments based on mode of payment: online payment and cash on delivery. Online payment subscription e-commerce market is both the largest and fastest growing segment of global subscription e-commerce market owing to digitalization, increasing trend of online shopping, many digital subscription services complying to online payments, increasing government initiatives to promote cashless economy and rising scope of payment wallets among younger generation.

**By Region:** The report provides insight into the subscription e-commerce market based on the regions namely North America, Europe, Asia Pacific and rest of the world. North America subscription e-commerce market holds the largest share in global subscription e-commerce market owing to expanding e-commerce industry, growing influence of social media platforms & celebrity endorsements on consumer lifestyles, rapid digitalization of businesses and rising adoption of cloud solutions contributing significantly to the expansion of digital commerce in the region.

Whereas, Asia Pacific subscription e-commerce market is the fastest growing region of global subscription e-commerce market owing to large consumer base, rapid urbanization, increasing penetration of internet, massive sales volumes and thriving social and mobile commerce ecosystem along with continuous launch of innovative subscription boxes by leading brands. The Asia-Pacific subscription e-commerce market is divided into five regions on the basis of geographical operations, namely, China, Japan, India, South Korea and rest of Asia Pacific where China subscription e-commerce market holds the largest share of Asia Pacific subscription e-commerce market.

#### Market Dynamics:

**Growth Drivers:** The global subscription e-commerce market has been growing over the past few years, due to factors such as growing use of subscriptions among millennials, rapid urbanization, rising popularity of online streaming services, increasing internet penetration, growing usage of mobile devices, rising purchasing power, low cost of subscription boxes, etc. The preferences of the people, especially young generation, are shifting from traditional TV to online media because of the access to unlimited content provided to the users at a reasonable price. Moreover, online streaming services give the users the flexibility and convenience of watching a large number of TV shows, movies, news, sports, etc. from any device at any point of time. With rising disposable incomes, people are becoming more willing to pay for such subscription services in return for unlimited access to online media, creating a positive demand for subscription e-commerce services, boosting the growth of global subscription e-commerce market.

**Challenges:** However, the market growth would be negatively impacted by various challenges such as e-commerce fraud, low adoption of subscription boxes in developing countries, etc. The use of subscription-based services are prevalent in the developed regions of the world, such as the US, but the adoption of subscription boxes in developing countries is still quite low. A major portion of the population in developing countries have lower disposable income as compared to developed nations, making it difficult for the people to sign up for subscription boxes in these countries.

**Trends:** The market is projected to grow at a fast pace during the forecasted period, due to various latest trends such as rising use of social media in marketing, increasing adoption of subscription among men, busy and hectic lifestyles, etc. Majority of the customers purchasing goods online are influenced by the feedbacks given by other users on several social media platforms. Their decisions are also impacted by social media influencers and the reviews given by famous personalities about a particular product or service. Social media helps the companies in online marketing, thereby enabling them to establish a strong web presence. The rapidly growing use of social networking platforms by the people would provide a huge opportunity to the players in the subscription e-commerce industry to advertise about the subscription services provided by them, boosting the growth of global subscription e-commerce market in the upcoming 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 the spread of virus led to the closure of local retail shops, malls and supermarkets, incentivizing consumers to shift towards online shopping and use of e-commerce websites for the purchase of essential items, increasing the demand for e-commerce services and boosting the growth of subscription e-commerce market. As a result of rising awareness about online shopping and a positive shift in people's attitude towards the use of subscription services, which were able to offer predictability and convenience in terms of availability and home delivery of essential items, the subscription e-commerce market would grow substantially. Therefore, the global impact of COVID-19 on subscription e-commerce market turned out to be positive.

#### Competitive Landscape:

The market for subscription e-commerce has been moderately fragmented due to the presence of large number of e-commerce platforms that operate in e-commerce subscription market. The key players of subscription e-commerce market are:

Amazon.com, Inc.

Unilever PLC (Dollar Shave Club)

Blue Apron Holdings, Inc.

Beauty For All Industries (IPSY)

HelloFresh SE

Netflix, Inc.

The Walt Disney Company

Femtec Health, Inc. (Birchbox, Inc.)

Peloton Interactive, Inc.

Stitch Fix, Inc.

Loot Crate, Inc.

FabFitFun, Inc.

Strategic partnerships and collaborations are the key strategies followed by the companies operating in the subscription e-commerce market as these collaborations enable companies to extend their market share and gain a competitive edge in the market. For instance, on December 15, 2022, Netflix, Inc. announced that the company teamed up with boAt to launch a first-of-its-kind 'Stream Edition' audio range in India. The product range would feature True Wireless Earbuds (TWS), Headphones (On-Ear), and a Wireless Neckband. With the noise cancelling feature, the limited-edition audio range would enable users to enjoy watching Netflix in an enhanced way, by blocking out the sounds that the user don't want to hear and focusing on those that the user do.

## Contents

### 1. EXECUTIVE SUMMARY

### 2. INTRODUCTION

- 2.1 Subscription E-commerce: An Overview
  - 2.1.1 Definition of Subscription E-commerce
  - 2.1.2 Advantages of Subscription E-commerce Model
  - 2.1.3 Subscription E-commerce Classification
- 2.2 Subscription E-commerce Segmentation: An Overview
  - 2.2.1 Subscription E-commerce Market Segmentation

### 3. GLOBAL MARKET ANALYSIS

- 3.1 Global Subscription E-commerce Market: An Analysis
  - 3.1.1 Global Subscription E-commerce Market: An Overview
  - 3.1.2 Global Subscription E-commerce Market by Value
  - 3.1.3 Global Subscription E-commerce Market by Application Type (Beauty and Personal Care, Food and Beverages, Entertainment and Others)
  - 3.1.4 Global Subscription E-commerce Market by End User (Women, Men and Kids)
  - 3.1.5 Global Subscription E-commerce Market by Mode of Payment (Online Payment and Cash On Delivery)
  - 3.1.6 Global Subscription E-commerce Market by Region (North America, Europe, Asia Pacific and Rest of the World)
- 3.2 Global Subscription E-commerce Market: Application Type Analysis
  - 3.2.1 Global Subscription E-commerce Market by Application Type : An Overview
  - 3.2.2 Global Beauty and Personal Care Subscription E-commerce Market by Value
  - 3.2.3 Global Food and Beverages Subscription E-commerce Market by Value
  - 3.2.4 Global Entertainment Subscription E-commerce Market by Value
  - 3.2.5 Global Others Subscription E-commerce Market by Value
- 3.3 Global Subscription E-commerce Market: End User Analysis
  - 3.3.1 Global Subscription E-commerce Market by End User: An Overview
  - 3.3.2 Global Women Subscription E-commerce Market by Value
  - 3.3.3 Global Men Subscription E-commerce Market by Value
  - 3.3.4 Global Kids Subscription E-commerce Market by Value
- 3.4 Global Subscription E-commerce Market: Mode of Payment Analysis
  - 3.4.1 Global Subscription E-commerce Market by Mode of Payment: An Overview
  - 3.4.2 Global Online Payment Subscription E-commerce Market by Value



### 3.4.3 Global Cash on Delivery Subscription E-commerce Market by Value

## 4. REGIONAL MARKET ANALYSIS

### 4.1 North America Subscription E-commerce Market: An Analysis

#### 4.1.1 North America Subscription E-commerce Market: An Overview

#### 4.1.2 North America Subscription E-commerce Market by Value

#### 4.1.3 North America Subscription E-commerce Market by Application Type (Beauty and Personal Care, Food and Beverages, Entertainment and Others)

#### 4.1.4 North America Beauty and Personal Care Subscription E-commerce Market by Value

#### 4.1.5 North America Food and Beverages Subscription E-commerce Market by Value

#### 4.1.6 North America Entertainment Subscription E-commerce Market by Value

#### 4.1.7 North America Others Subscription E-commerce Market by Value

#### 4.1.8 North America Subscription E-commerce Market by Region (The US, Canada and Mexico)

#### 4.1.9 The US Subscription E-commerce Market by Value

#### 4.1.10 Canada Subscription E-commerce Market by Value

#### 4.1.11 Mexico Subscription E-commerce Market by Value

### 4.2 Europe Subscription E-commerce Market: An Analysis

#### 4.2.1 Europe Subscription E-commerce Market: An Overview

#### 4.2.2 Europe Subscription E-commerce Market by Value

#### 4.2.3 Europe Subscription E-commerce Market by Region (UK, Germany, France, Spain and Rest of Europe)

#### 4.2.4 UK Subscription E-commerce Market by Value

#### 4.2.5 Germany Subscription E-commerce Market by Value

#### 4.2.6 France Subscription E-commerce Market by Value

#### 4.2.7 Spain Subscription E-commerce Market by Value

#### 4.2.8 Rest of Europe Subscription E-commerce Market by Value

### 4.3 Asia Pacific Subscription E-commerce Market: An Analysis

#### 4.3.1 Asia Pacific Subscription E-commerce Market: An Overview

#### 4.3.2 Asia Pacific Subscription E-commerce Market by Value

#### 4.3.3 Asia Pacific Subscription E-commerce Market by Region (China, Japan, India, South Korea and Rest of Asia Pacific)

#### 4.3.4 China Subscription E-commerce Market by Value

#### 4.3.5 Japan Subscription E-commerce Market by Value

#### 4.3.6 India Subscription E-commerce Market by Value

#### 4.3.7 South Korea Subscription E-commerce Market by Value

#### 4.3.8 Rest of Asia Pacific Subscription E-commerce Market by Value

- 4.4 Rest of the World Subscription E-commerce Market: An Analysis
  - 4.4.1 Rest of the World Subscription E-commerce Market: An Overview
  - 4.4.2 Rest of the World Subscription E-commerce Market by Value

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

- 5.1 Impact of COVID-19 on Subscription E-commerce Market
  - 5.1.1 Impact of COVID-19 on Subscription Business
  - 5.1.2 Increased Focus of Subscription E-Commerce Businesses on Flexibility
- 5.2 Post COVID-19 Impact on Subscription E-commerce Market

## **6. MARKET DYNAMICS**

- 6.1 Growth Drivers
  - 6.1.1 Growing Use of Subscriptions among Millennials
  - 6.1.2 Rapid Urbanization
  - 6.1.3 Rising Popularity of Online Streaming Services
  - 6.1.4 Increasing Internet Penetration
  - 6.1.5 Growing Usage of Mobile Devices
  - 6.1.6 Rising Purchasing Power
  - 6.1.7 Low Cost of Subscription Boxes
- 6.2 Challenges
  - 6.2.1 E-commerce Fraud
  - 6.2.2 Low Adoption of Subscription Boxes in Developing Countries
- 6.3 Market Trends
  - 6.3.1 Rising Use of Social Media in Marketing
  - 6.3.2 Increasing Integration of Artificial Intelligence (AI)
  - 6.3.3 Increasing Adoption of Subscription among Men
  - 6.3.4 Curation-based and Membership Subscription Models
  - 6.3.5 Busy and Hectic Lifestyles

## **7. COMPETITIVE LANDSCAPE**

- 7.1 Global Subscription E-commerce Market Players by Total Number of Online Visits
- 7.2 Global Subscription E-commerce Market Players by Subscription Model

## **8. COMPANY PROFILES**

- 8.1 Amazon.com, Inc.



- 8.1.1 Business Overview
- 8.1.2 Operating Segment
- 8.1.3 Business Strategy
- 8.2 Unilever PLC (Dollar Shave Club)
  - 8.2.1 Business Overview
  - 8.2.2 Operating Segment
  - 8.2.3 Business Strategy
- 8.3 HelloFresh SE
  - 8.3.1 Business Overview
  - 8.3.2 Operating Segment
  - 8.3.3 Business Strategy
- 8.4 Netflix, Inc.
  - 8.4.1 Business Overview
  - 8.4.2 Operating Geographic Region
  - 8.4.3 Business Strategy
- 8.5 The Walt Disney Company
  - 8.5.1 Business Overview
  - 8.5.2 Operating Segment
  - 8.5.3 Business Strategy
- 8.6 Peloton Interactive, Inc.
  - 8.6.1 Business Overview
  - 8.6.2 Operating Segment
  - 8.6.3 Business Strategy
- 8.7 Blue Apron Holdings, Inc.
  - 8.7.1 Business Overview
  - 8.7.2 Business Strategy
- 8.8 Beauty For All Industries (IPSY)
  - 8.8.1 Business Overview
  - 8.8.2 Business Strategy
- 8.9 Femtec Health, Inc. (Birchbox, Inc.)
  - 8.9.1 Business Overview
  - 8.9.2 Business Strategy
- 8.10 Stitch Fix, Inc.
  - 8.10.1 Business Overview
  - 8.10.2 Business Strategy
- 8.11 FabFitFun, Inc.
  - 8.11.1 Business Overview
  - 8.11.2 Business Strategy
- 8.12 Loot Crate, Inc.

## 8.12.1 Business Overview

## List Of Figures

### LIST OF FIGURES

Figure 1: Advantages of Subscription E-commerce Model

Figure 2: Advantages of Subscription Boxes and Subscription-based Media

Figure 3: Subscription E-commerce Market Segmentation

Figure 4: Global Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 5: Global Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 6: Global Subscription E-commerce Market by Application Type; 2022  
(Percentage, %)

Figure 7: Global Subscription E-commerce Market by End User; 2022 (Percentage, %)

Figure 8: Global Subscription E-commerce Market by Mode of Payment; 2022  
(Percentage, %)

Figure 9: Global Subscription E-commerce Market by Region; 2022 (Percentage, %)

Figure 10: Global Beauty and Personal Care Subscription E-commerce Market by  
Value; 2018-2022 (US\$ Billion)

Figure 11: Global Beauty and Personal Care Subscription E-commerce Market by  
Value; 2023-2028 (US\$ Billion)

Figure 12: Global Food and Beverages Subscription E-commerce Market by Value;  
2018-2022 (US\$ Billion)

Figure 13: Global Food and Beverages Subscription E-commerce Market by Value;  
2023-2028 (US\$ Billion)

Figure 14: Global Entertainment Subscription E-commerce Market by Value; 2018-2022  
(US\$ Billion)

Figure 15: Global Entertainment Subscription E-commerce Market by Value; 2023-2028  
(US\$ Billion)

Figure 16: Global Others Subscription E-commerce Market by Value; 2018-2022 (US\$  
Billion)

Figure 17: Global Others Subscription E-commerce Market by Value; 2023-2028 (US\$  
Billion)

Figure 18: Global Women Subscription E-commerce Market by Value; 2018-2022 (US\$  
Billion)

Figure 19: Global Women Subscription E-commerce Market by Value; 2023-2028 (US\$  
Billion)

Figure 20: Global Men Subscription E-commerce Market by Value; 2018-2022 (US\$  
Billion)

Figure 21: Global Men Subscription E-commerce Market by Value; 2023-2028 (US\$  
Billion)

Figure 22: Global Kids Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 23: Global Kids Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 24: Global Online Payment Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 25: Global Online Payment Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 26: Global Cash on Delivery Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 27: Global Cash on Delivery Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 28: North America Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 29: North America Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 30: North America Subscription E-commerce Market by Application Type; 2022 (Percentage, %)

Figure 31: North America Beauty and Personal Care Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 32: North America Beauty and Personal Care Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 33: North America Food and Beverages Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 34: North America Food and Beverages Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 35: North America Entertainment Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 36: North America Entertainment Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 37: North America Others Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 38: North America Others Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 39: North America Subscription E-commerce Market by Region; 2022 (Percentage, %)

Figure 40: The US Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 41: The US Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 42: Canada Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 43: Canada Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 44: Mexico Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 45: Mexico Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 46: Europe Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 47: Europe Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 48: Europe Subscription E-commerce Market by Region; 2022 (Percentage, %)

Figure 49: UK Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 50: UK Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 51: Germany Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 52: Germany Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 53: France Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 54: France Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 55: Spain Subscription E-commerce Market by Value; 2018-2022 (US\$ Million)

Figure 56: Spain Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 57: Rest of Europe Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 58: Rest of Europe Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 59: Asia Pacific Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 60: Asia Pacific Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 61: Asia Pacific Subscription E-commerce Market by Region; 2022 (Percentage, %)

Figure 62: China Subscription E-commerce Market by Value; 2018-2022 (US\$ Billion)

Figure 63: China Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 64: Japan Subscription E-commerce Market by Value; 2018-2022 (US\$ Million)

Figure 65: Japan Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 66: India Subscription E-commerce Market by Value; 2018-2022 (US\$ Million)

Figure 67: India Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 68: South Korea Subscription E-commerce Market by Value; 2018-2022 (US\$ Million)

Figure 69: South Korea Subscription E-commerce Market by Value; 2023-2028 (US\$ Billion)

Figure 70: Rest of Asia Pacific Subscription E-commerce Market by Value; 2018-2022 (US\$ Million)

Figure 71: Rest of Asia Pacific Subscription E-commerce Market by Value; 2023-2028

(US\$ Billion)

Figure 72: Rest of the World Subscription E-commerce Market by Value; 2018-2022

(US\$ Billion)

Figure 73: Rest of the World Subscription E-commerce Market by Value; 2023-2028

(US\$ Billion)

Figure 74: Impact of Covid-19 on Subscription Business; 2020 (Percentage, %)

Figure 75: Global Annual Aggregate Income by Generation; 2020-2025 (US\$ Trillion)

Figure 76: Global Share of Urban Population in Total Population; 2016, 2021 & 2050

(Percentage, %)

Figure 77: Global Netflix Paid Streaming Subscribers; 2019-2022 (Million)

Figure 78: Global Number of Internet Users; 2017–2022 (Billion)

Figure 79: Global Number of Mobile Devices; 2020–2025 (Billion)

Figure 80: Global Number of Social Media Users; 2018-2027 (Billion)

Figure 81: Global Artificial Intelligence Market Size; 2021–2025 (US\$ Billion)

Figure 82: Global Subscription E-commerce Market Players by Total Number of Online

Visits; December 2022 (Million)

Figure 83: Global Subscription E-commerce Market Players by Subscription Model

Figure 84: Amazon.com, Inc. Net Sales by Reportable Segments; 2021 (Percentage, %)

Figure 85: Unilever PLC Revenue by Segments; 2021 (Percentage, %)

Figure 86: HelloFresh SE Revenue by Segments; 2021 (Percentage, %)

Figure 87: Netflix, Inc. Revenue by Geographic Region; 2021 (Percentage, %)

Figure 88: The Walt Disney Company Revenue by Segments; 2021 (Percentage, %)

Figure 89: Peloton Interactive, Inc. Revenue by Reportable Segments; 2022

(Percentage, %)

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