

U.S. Nuclear Medicine Market Size, Share & Trends Analysis Report By Product (Diagnostic (SPECT, PET), Therapeutic (Alpha, Beta Emitters, Brachytherapy)), By Application, By End-use, By Country, And Segment Forecasts, 2024 - 2030

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Abstracts

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U.S. Nuclear Medicine Market Growth & Trends

The U.S. nuclear medicine market size is anticipated to reach USD 12.27 billion by 2030, registering a CAGR of 12.6%, from 2024 to 2030, according to a new report by Grand View Research, Inc. The market is primarily driven by the increasing incidence of cancer and cardiovascular diseases. Cardiovascular diseases are the leading cause of death for people of most ethnic and racial groups in the U.S. According to the CDC estimates in May 2023, Division for Heart Disease and Stroke Prevention, in the U.S., about 805,000 people witness heart attack annually, of these 605,000 people witness first episode of heart attack.

Therefore, the U.S. government spent around USD 239 billion every year from 2018 to 2019 on prevention and treatment of heart diseases. This includes the cost of medicines and health care services. Certain factors such as alcohol consumption, improper diet, and lack of exercise can cause cancer and heart-related diseases. Hence, the rapid increase in the incidence of cancer and cardiovascular disorders is likely to boost the demand for nuclear medicine in the U.S. The overall increase in the prevalence of cancer will likely boost the number of patients undergoing treatment, which increases the need for early diagnosis and treatment, thereby driving market growth.

Technological advancement in the nuclear medicine is a growth driver for the nuclear medicine market. Technetium-99m stands out as one of the most extensively utilized radioisotopes in the realm of radiopharmaceuticals. Alongside Technetium-99m, other widely employed radioisotopes include Iodine-131, Indium-111, and Fluorine-18. These medical isotopes play crucial roles in radiopharmacology, facilitating the study of drug distribution and movement within laboratory subjects. Furthermore, recent approvals by the FDA are anticipated to catalyze further expansion in the nuclear medicine market.

In September 2023, the U.S. FDA approved Technegas developed by Cyclopharm for use in nuclear medicine perfusion/ventilation (V/Q) lung scans to diagnose pulmonary embolism. Technetium-99m (Tc-99m)-labeled Carbon Nanoparticles (CNP) are used in ventilation scintigraphy using the technology Technegas. Before undergoing lung imaging with a gamma camera, patients inhale the agent-produced nanoparticles, which are then aerosolized using on-site generators manufactured by Cyclopharm's subsidiary Cyclomedica.

Rising demand for accurate diagnostic & treatment methods serves as a growth driver for the nuclear medicine market. Currently, available cancer treatment options, such as chemotherapy and radiation therapy, involve the use of drugs & radiation, which may not be completely accurate. Moreover, these therapies have a major disadvantage of affecting the whole body or the healthy organs surrounding the target site. Radioisotopes offer an advantage over these techniques as they can specifically target the tumor without affecting the surrounding body parts. Thus, benefits associated with these diagnostic and treatment procedures will likely boost the demand for radiopharmaceuticals in these fields. An increase in organizations undertaking initiatives to help address the growing need for nuclear medicine is anticipated to impel market growth. For instance, in August 2023, National Nuclear Security Administration (NNSA) was planning to spend tens of billions of dollars to modernize its nuclear-related research and production infrastructure over the next two decades in the U.S. This is expected to expand patient access to nuclear medicine procedures, which is estimated to improve their overall health and wellbeing.

Increasing prevalence of chronic diseases, such as cancer and cardiovascular diseases, and emergence of nuclear medicine as a better option to existing treatment methodologies for treatment of these diseases is anticipated to have a positive impact on market growth. According to National Center for Biotechnology Information (NCBI) in March 2023, around 20 million nuclear medicine & imaging procedures are conducted every year in the U.S. This rising volume of these procedures is expected to open new

avenues in the market during the forecast period. To meet the increasing demand, companies are investing in R&D of new accelerator technology, detector systems, radiochemistry, imaging software, and automated processing modules for diagnosis and treatment of various diseases.

U.S. Nuclear Medicine Market Report Highlights

Based on product, diagnostic products held the largest revenue share of 71.2% in 2023 owing to presence of large patient base and availability of advanced technologies such as Single-Photon Emission Computed Tomography (SPECT) and Positron Emission Tomography (PET)

Based on application, the oncology segment dominated the market and is anticipated to maintain its dominance over the forecast period. This is attributed to the high prevalence of cancer and increased preference for radiopharmaceutical diagnosis. The probable approval of radiotherapeutic agents such as lomab-B (indicated for AML), coupled with growing target patient population, is expected to drive market growth

Based on end-use, the hospitals segment dominated the market and accounted for the largest revenue share. The segment is expected to continue its dominance over the forecast period. The nuclear medicine market in the U.S. is expanding due to the rise in the number of hospitals and clinics. The demand for nuclear medicine products is high owing to rising inpatient visits for diagnosis and treatment of diseases

Contents

CHAPTER 1. METHODOLOGY AND SCOPE

- 1.1. Market Segmentation & Scope
- 1.2. Segment Definitions
 - 1.2.1. Product
 - 1.2.2. Application
 - 1.2.3. End-use
 - 1.2.4. Country scope
 - 1.2.5. Estimates and forecasts timeline
- 1.3. Research Methodology
- 1.4. Information Procurement
 - 1.4.1. Purchased database
 - 1.4.2. GVR's internal database
 - 1.4.3. Secondary sources
 - 1.4.4. Primary research
 - 1.4.5. Details of primary research
 - 1.4.5.1. Data for primary interviews in U.S.
- 1.5. Information or Data Analysis
 - 1.5.1. Data analysis Models
- 1.6. Market Formulation & Validation
- 1.7. Model Details
 - 1.7.1. Commodity flow analysis (Model 1)
 - 1.7.2. Approach 1: Commodity flow approach
 - 1.7.3. Volume price analysis (Model 2)
 - 1.7.4. Approach 2: Volume price analysis
- 1.8. List of Secondary Sources
- 1.9. List of Primary Sources
- 1.10. Objectives

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. Market Outlook
- 2.2. Segment Outlook
 - 2.2.1. Product
 - 2.2.2. Application
 - 2.2.3. End-use
 - 2.2.4. Country outlook

2.3. Competitive Insights

CHAPTER 3. U.S. NUCLEAR MEDICINE MARKET VARIABLES, TRENDS & SCOPE

3.1. Market Lineage Outlook

3.1.1. Parent market outlook

3.1.2. Related/ancillary market outlook

3.2. Market Dynamics

3.2.1. Market driver analysis

3.2.1.1. Rising incidence of cancer and cardiovascular diseases

3.2.1.2. Technological advancement in nuclear medicine

3.2.1.3. Growing demand for accurate diagnostic & treatment methods

3.2.2. Market restraint analysis

3.2.2.1. Stringent regulations pertaining to production, storage, and usage nuclear medicines

3.2.2.2. High cost associated with diagnostic and therapeutic procedures

3.3. U.S. Nuclear Medicine Market Analysis Tools

3.3.1. Industry Analysis - Porter's

3.3.1.1. Supplier power

3.3.1.2. Buyer power

3.3.1.3. Substitution threat

3.3.1.4. Threat of new entrant

3.3.1.5. Competitive rivalry

3.3.2. PESTEL Analysis

3.3.2.1. Political landscape

3.3.2.2. Technological landscape

3.3.2.3. Economic landscape

3.3.3. Pricing Analysis

3.3.4. Pipeline Analysis

3.3.5. Procedural Volume Analysis

3.3.5.1. Diagnostic Procedures

3.3.5.1.1. SPECT

3.3.5.1.2. PET

3.3.5.2. Therapeutic Procedure

CHAPTER 4. U.S. NUCLEAR MEDICINE MARKET: PRODUCT ESTIMATES & TREND ANALYSIS

4.1. U.S. Nuclear Medicine Market: Product Dashboard

4.2. U.S. Nuclear Medicine Market: Product Movement Analysis

4.3. U.S. Nuclear Medicine Market by Product, Revenue

4.4. Diagnostic Products

4.4.1. Diagnostic Products market estimates and forecasts 2018 to 2030 (USD Million)

4.4.2. SPECT

4.4.2.1. SPECT market estimates and forecasts 2018 to 2030 (USD Million)

4.4.2.1.1. TC-99m

4.4.2.1.2. TL-201

4.4.2.1.3. GA-67

4.4.2.1.4. I-123

4.4.2.1.5. Other SPECT Products

4.4.3. PET

4.4.3.1. PET market estimates and forecasts 2018 to 2030 (USD Million)

4.4.3.1.1. F-18

4.4.3.1.2. SR-82/RB-82

4.4.3.1.3. Other PET products

4.5. Therapeutic Products

4.5.1. Therapeutic Products market estimates and forecasts 2018 to 2030 (USD Million)

4.5.2. Alpha Emitters

4.5.2.1. Alpha Emitters market estimates and forecasts 2018 to 2030 (USD Million)

4.5.2.1.1. RA-223

4.5.2.1.2. Others

4.5.3. Beta Emitters

4.5.3.1. Beta Emitters market estimates and forecasts 2018 to 2030 (USD Million)

4.5.3.1.1. I-131

4.5.3.1.2. Y-90

4.5.3.1.3. SM-153

4.5.3.1.4. Re-186

4.5.3.1.5. Lu-117

4.5.3.1.6. Other Beta Emitters

4.5.4. Brachytherapy

4.5.4.1. Brachytherapy market estimates and forecasts 2018 to 2030 (USD Million)

4.5.4.1.1. Cesium-131

4.5.4.1.2. Iodine-125

4.5.4.1.3. Palladium-103

4.5.4.1.4. Iridium-192

4.5.4.1.5. Other Brachytherapy Products

CHAPTER 5. U.S. NUCLEAR MEDICINE MARKET: PRODUCT ESTIMATES & TREND ANALYSIS

5.1. U.S. Nuclear Medicine Market: Product Dashboard

5.2. U.S. Nuclear Medicine Market: Product Movement Analysis

5.3. U.S. Nuclear Medicine Market by Product (Procedural Volume)

5.4. Diagnostic Procedures

5.4.1. Diagnostic Procedures market estimates and forecasts 2018 to 2030 (USD Million)

5.4.2. SPECT

5.4.2.1. SPECT market estimates and forecasts 2018 to 2030 (USD Million)

5.4.3. PET

5.4.3.1. PET market estimates and forecasts 2018 to 2030 (USD Million)

5.4.4. Therapeutic Applications

5.4.4.1. Therapeutic applications market estimates and forecasts 2018 to 2030 (USD Million)

5.5. Neurology

5.5.1. Neurology market estimates and forecasts 2018 to 2030 (USD Million)

5.6. Oncology

5.6.1. Oncology market estimates and forecasts 2018 to 2030 (USD Million)

5.7. Thyroid

5.7.1. Thyroid market estimates and forecasts 2018 to 2030 (USD Million)

5.7.2. SPECT

5.7.2.1. SPECT market estimates and forecasts 2018 to 2030 (USD Million)

5.7.3. Therapeutic Applications

5.7.3.1. Therapeutic applications market estimates and forecasts 2018 to 2030 (USD Million)

5.8. Neurology

5.8.1. Neurology market estimates and forecasts 2018 to 2030 (USD Million)

5.9. Oncology

5.9.1. Oncology market estimates and forecasts 2018 to 2030 (USD Million)

5.10. Thyroid

5.10.1. Thyroid market estimates and forecasts 2018 to 2030 (USD Million)

5.10.1.1. SPECT

5.10.1.2. SPECT market estimates and forecasts 2018 to 2030 (USD Million)

5.10.1.3. Therapeutic Applications

5.10.1.4. Therapeutic applications market estimates and forecasts 2018 to 2030 (USD Million)

5.11. Lymphoma

- 5.11.1. Lymphoma market estimates and forecasts 2018 to 2030 (USD Million)
- 5.12. Bone Metastasis
 - 5.12.1. Bone Metastasis market estimates and forecasts 2018 to 2030 (USD Million)
 - 5.12.1.1. SPECT
 - 5.12.1.2. SPECT market estimates and forecasts 2018 to 2030 (USD Million)
 - 5.12.1.3. Therapeutic Applications
 - 5.12.1.4. Therapeutic applications market estimates and forecasts 2018 to 2030 (USD Million)
- 5.13. Endocrine Tumor
 - 5.13.1. Endocrine Tumor market estimates and forecasts 2018 to 2030 (USD Million)
- 5.14. Pulmonary Scans
 - 5.14.1. Pulmonary Scans market estimates and forecasts 2018 to 2030 (USD Million)
- 5.15. Others
 - 5.15.1. Others market estimates and forecasts 2018 to 2030 (USD Million)

CHAPTER 6. U.S. NUCLEAR MEDICINE MARKET: END-USE ESTIMATES & TREND ANALYSIS

- 6.1. U.S. Nuclear Medicine Market: End-use Dashboard
- 6.2. U.S. Nuclear Medicine Market: End-use Movement Analysis
- 6.3. U.S. Nuclear Medicine Market by End-use, Revenue
- 6.4. Hospitals & Clinics
 - 6.4.1. Hospitals & Clinics market estimates and forecasts 2018 to 2030 (USD Million)
- 6.5. Diagnostic Centers
 - 6.5.1. Diagnostic Centers market estimates and forecasts 2018 to 2030 (USD Million)
- 6.6. Others
 - 6.6.1. Others market estimates and forecasts 2018 to 2030 (USD Million)
 - 6.6.1.1.

CHAPTER 7. COMPETITIVE LANDSCAPE

- 7.1. Recent Developments & Impact Analysis, By Key Market Participants
- 7.2. Company/Competition Categorization
- 7.3. Vendor Landscape
 - 7.3.1. List of key distributors and channel partners
 - 7.3.2. Key customers
 - 7.3.3. Key company market share analysis, 2023
 - 7.3.4. Eckert & Ziegler
 - 7.3.4.1. Company overview

- 7.3.4.2. Financial performance
- 7.3.4.3. Product benchmarking
- 7.3.4.4. Strategic initiatives
- 7.3.5. Curium
 - 7.3.5.1. Company overview
 - 7.3.5.2. Financial performance
 - 7.3.5.3. Product benchmarking
 - 7.3.5.4. Strategic initiatives
- 7.3.6. GE Healthcare
 - 7.3.6.1. Company overview
 - 7.3.6.2. Financial performance
 - 7.3.6.3. Product benchmarking
 - 7.3.6.4. Strategic initiatives
- 7.3.7. Jubilant Life Sciences Ltd.
 - 7.3.7.1. Company overview
 - 7.3.7.2. Financial performance
 - 7.3.7.3. Product benchmarking
 - 7.3.7.4. Strategic initiatives
- 7.3.8. Bracco Imaging S.P.A
 - 7.3.8.1. Company overview
 - 7.3.8.2. Financial performance
 - 7.3.8.3. Product benchmarking
 - 7.3.8.4. Strategic initiatives
- 7.3.9. Nordion (Canada), Inc.
 - 7.3.9.1. Company overview
 - 7.3.9.2. Financial performance
 - 7.3.9.3. Product benchmarking
 - 7.3.9.4. Strategic initiatives
- 7.3.10. The Institute For Radioelements (IRE)
 - 7.3.10.1. Company overview
 - 7.3.10.2. Financial performance
 - 7.3.10.3. Product benchmarking
 - 7.3.10.4. Strategic initiatives
- 7.3.11. NTP Radioisotopes SOC Ltd.
 - 7.3.11.1. Company overview
 - 7.3.11.2. Financial performance
 - 7.3.11.3. Product benchmarking
 - 7.3.11.4. Strategic initiatives
- 7.3.12. Eczac?ba??-Monrol

- 7.3.12.1. Company overview
- 7.3.12.2. Financial performance
- 7.3.12.3. Product benchmarking
- 7.3.12.4. Strategic initiatives
- 7.3.13. Lantheus Medical Imaging, Inc.
 - 7.3.13.1. Company overview
 - 7.3.13.2. Financial performance
 - 7.3.13.3. Product benchmarking
 - 7.3.13.4. Strategic initiatives
- 7.3.14. The Australian Nuclear Science and Technology Organization
 - 7.3.14.1. Company overview
 - 7.3.14.2. Financial performance
 - 7.3.14.3. Product benchmarking
 - 7.3.14.4. Strategic initiatives
- 7.3.15. Novartis (Advanced Accelerator Applications)
 - 7.3.15.1. Company overview
 - 7.3.15.2. Financial performance
 - 7.3.15.3. Product benchmarking
 - 7.3.15.4. Strategic initiatives
- 7.3.16. Siemens Healthineers AG
 - 7.3.16.1. Company overview
 - 7.3.16.2. Financial performance
 - 7.3.16.3. Product benchmarking
 - 7.3.16.4. Strategic initiatives

List Of Tables

LIST OF TABLES

Table 1 List of abbreviation

Table 2 U.S. Nuclear Medicine Market, 2018 - 2030 (USD Million)

Table 3 U.S. Nuclear Medicine Market, by Product, 2018 - 2030 (USD Million)

Table 4 U.S. Nuclear Medicine Market, by Product (Procedural Volume), 2018 - 2030
(Number of procedures)

Table 5 U.S. Nuclear Medicine Market, by Application, 2018 - 2030 (USD Million)

Table 6 U.S. Nuclear Medicine Market, by End-use, 2018 - 2030 (USD Million)

List Of Figures

LIST OF FIGURES

- Fig. 1 Market research process
- Fig. 2 Data triangulation techniques
- Fig. 3 Primary research pattern
- Fig. 4 Primary interviews in U.S.
- Fig. 5 Market research approaches
- Fig. 6 Value-chain-based sizing & forecasting
- Fig. 7 QFD Modeling for market share assessment
- Fig. 8 Market formulation & validation
- Fig. 9 U.S. Nuclear Medicine Market: market outlook
- Fig. 10 Parent market outlook
- Fig. 11 Related/ancillary market outlook
- Fig. 12 U.S. Nuclear Medicine Market driver impact
- Fig. 13 U.S. Nuclear Medicine Market restraint impact
- Fig. 14 U.S. Nuclear Medicine Market: Product movement analysis
- Fig. 15 U.S. Nuclear Medicine Market: Product outlook and key takeaways
- Fig. 16 Diagnostic Products market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 17 SPECT market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 18 TC-99m market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 19 TL-201 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 20 GA-67 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 21 I-123 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 22 Other SPECT Products market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 23 PET market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 24 F-18 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 25 SR-82/RB-82 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 26 Other PET products market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 27 Therapeutic Products market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 28 Alpha Emitters market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 29 RA-223 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 30 Others market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 31 Beta Emitters products market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 32 I-131 market estimates and forecast, 2018 - 2030 (USD Million)

- Fig. 33 Y-90 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 34 SM-153 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 35 Re-186 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 36 Lu-117 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 37 Other Beta Emitters market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 38 Brachytherapy market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 39 Cesium-131 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 40 Iodine-125 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 41 Palladium-103 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 42 Iridium-192 market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 43 Other Brachytherapy Products market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 44 Diagnostic procedures estimate and forecast, 2018 - 2030 (Number of procedures)
- Fig. 45 SPECT procedures estimate and forecast, 2018 - 2030 (Number of procedures)
- Fig. 46 PET procedures estimate and forecast, 2018 - 2030 (Number of procedures)
- Fig. 47 Therapeutic procedures estimate and forecast, 2018 - 2030 (Number of procedures)
- Fig. 48 U.S. Nuclear Medicine Market: Application movement analysis
- Fig. 49 U.S. Nuclear Medicine Market: Application outlook and key takeaways
- Fig. 50 Cardiology market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 51 SPECT market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 52 PET market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 53 Therapeutic Applications market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 54 Neurology market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 55 Oncology market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 56 Thyroid Market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 57 SPECT market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 58 Therapeutic Applications market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 59 Lymphoma market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 60 Bone Metastasis market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 61 SPECT market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 62 Therapeutic Applications market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 63 Endocrine Tumor market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 64 Pulmonary Scans market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 65 Others market estimates and forecast, 2018 - 2030 (USD Million)

- Fig. 66 U.S. Nuclear Medicine Market: End-use movement analysis
- Fig. 67 U.S. Nuclear Medicine Market: End-use outlook and key takeaways
- Fig. 68 Hospitals & Clinics market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 69 Diagnostic Centers market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 70 Others market estimates and forecast, 2018 - 2030 (USD Million)
- Fig. 71 U.S. Nuclear Medicine Market: Country movement analysis
- Fig. 72 U.S. Nuclear Medicine Market: Country outlook and key takeaways
- Fig. 73 U.S. Nuclear Medicine Market share and leading players
- Fig. 74 Market share of key market players- U.S. Nuclear Medicine Market

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