

Animal Antimicrobials and Antibiotics Market by Products (Tetracyclines, Penicillins, Sulfonamides, Aminoglycosides), Animals (Dog, Poultry, Swine), Mode Of Delivery (Premixes, Oral Powders and Solutions, Injections) - Global Forecasts to 2018

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Abstracts

Antimicrobials and antibiotics form a major share of the animal health market. Animal antimicrobials gained a greater importance in the animal health industry in the past 20 years, mainly due to growing need to preserve the health and welfare of animals. Most of the antimicrobial agents were also used as growth promoters as well. With this, the animal antimicrobials market witnessed a bullish growth from 1990's to 2006.

However, gradually, there were growing concerns about emergence of antibiotic-resistant bacteria which led to worldwide initiatives to minimize the use of antimicrobial agents as a growth promoter in food-producing animals. In Europe, in 2006, a complete ban was imposed on use of antimicrobial agents in food-producing animals, which brought a huge setback to the growing market for antimicrobial and antibiotics in Europe.

At present, the global antimicrobials and antibiotics market is driven by the growing need to preserve animal health owing to rising demand for animal proteins across the globe, and growing demand in the companion animals segment. Growing livestock population, increasing incidences of disease outbreaks and increase in the companion animal ownership are some of the factors driving the growth of this market to a certain extent. Besides the structural market drivers, there are strong geographic drivers for the growth of the animal antimicrobials and antibiotics market. The emerging markets are becoming increasingly attractive. The Asian and Latin American region form one of the most promising animal antimicrobials and antibiotics markets in the world. Developing

countries such as China and India have a relatively high CAGR rate and are expected to witness significant market growth in the forecast period. The growth in these regions is mainly attributed to the rise in demand for animal protein products, along with an increase in the trend of companion animal ownership in these regions.

Today, the animal antimicrobials and antibiotics market showcase a sluggish growth, owing to the regulatory authorities restricting their use, increased usage of in-feed enzymes, competitive exclusion products and probiotics as an alternative to antibiotics and prophylactic use of antibiotics being replaced by good husbandry, environment and hygienic practices.

Tetracyclines dominated the animal antimicrobials and antibiotics product segment in 2013, accounting for around 60% of the market revenue. This was followed by others segment, which accounted for 16% of the global animal antimicrobials and antibiotics product market in 2013. In the global antimicrobials and antibiotics animal market, pigs dominated the market with a share of close to 25%. In the mode of delivery segment of animal antimicrobials and antibiotics market, premix was the major revenue contributor in 2013, with an estimated share of nearly 49%.

North America dominated the animal antimicrobials and antibiotics market in 2013. However, the market share of this region will decrease to 27%, primarily due to the regulatory ban on the use of antibiotics announced in the U.S. At the same time, Asia and Latin America are poised to grow at a CAGR of 6% to 8% in the forecast period; this growth is largely driven by the increased urbanization, rising disposable incomes, increase in the demand for animal products and the increasing trend of pet ownerships in these regions.

The global animal antimicrobials and antibiotics market is consolidated with Zoetis Inc. (U.S.), Elanco Animal Health (U.S.), Merck Animal Health (U.S.), Merial (U.S.), Bayer Animal Health (Germany) holding around 75% of the total market. Other major players in this market are Virbac Animal Health (U.S.), and CEVA Santé Animale (U.S.).

Reasons to Buy the Report:

The report will enrich both established firms as well as new entrants/smaller firms to gauge the pulse of the market, which in turn will help firms in garnering greater market shares. Firms purchasing the report could use any one or a combination of the below mentioned five strategies (market penetration, product development/innovation, market development, market diversification, and competitive assessment) for increasing their

market shares.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on the product portfolios offered by the top players in the animal antimicrobials and antibiotics market. The report analyzes the animal antimicrobials and antibiotics market by animals type, mode of delivery type and by product type across all geographies.

Product Development/Innovation: Detailed insights on the upcoming trends, research and development activities, and new product launches in the animal antimicrobials and antibiotics market.

Market Development: Comprehensive information about the lucrative emerging markets by product, functionality, and geography.

Market Diversification: Exhaustive information about new products, growing geographies, recent developments, and investments in the animal antimicrobials and antibiotics market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, products, distribution networks, manufacturing capabilities, and SWOT analyses of the leading players in the animal antimicrobials and antibiotics market.

Contents

1 INTRODUCTION

- 1.1 Objectives Of The Study
- 1.2 Report Description

1.3 MARKETS COVERED

- 1.4 Stakeholders
- 1.5 Research Methodology
 - 1.5.1 Market Size Estimation
 - 1.5.2 Market Crackdown And Data Triangulation
 - 1.5.3 Market Share Estimation
 - 1.5.4 Key Data From Secondary Sources
 - 1.5.5 Key Data Points From Primary Sources
 - 1.5.6 Assumptions

2 EXECUTIVE SUMMARY

3 PREMIUM INSIGHTS

- 3.1 Growing Consumption Of Animal Protein Products Provides Significant Growth Opportunities For Antimicrobials Market
- 3.2 Growing Per Capita Companion Animal Health Expenditure To Drive The Market Growth
- 3.3 Regulatory Ban On Unauthorized Usage Of Antibiotics Curbing The Growth
- 3.4 High-Growth Potential Of Emerging Markets In Asia-Pacific, Middle East, And Latin America

4 MARKET OVERVIEW

- 4.1 Introduction
- 4.2 Market Segmentation
- 4.3 Market Dynamics
 - 4.3.1 Key Market Drivers
 - 4.3.1.1 Rising Demands For Livestock Products Due To Growing Livestock Population Worldwide
 - 4.3.1.2 Increasing Incidences Of Animal Disease Outbreaks Leading To High

Utilization Of Antibiotics

4.3.1.3 Increased Use Of Approved Antimicrobial Agents To Promote Growth And Feed Efficiency In Food Animals

4.3.1.4 Growing Demand For Animal Antimicrobials In China

4.3.1.5 Increase In The Companion Animal Ownership Across The World

4.3.2 Key Market Restraints

4.3.2.1 Regulatory Authorities Curbing The Growth Of Antimicrobials And Antibiotics Market

4.3.2.2 Dearth Of New Antibiotics In The Market

4.3.2.3 Routine Prophylactic Use Of Antibiotics Being Replaced By Good Husbandry, And Hygiene Practices

4.3.2.4 Increased Use Of In-Feed Enzymes, Competitive Exclusion Products Or Probiotics As An Alternatives To Antibiotics

4.3.3 Key Market Opportunities

4.3.3.1 Growing Demand For Pet Animals In The Emerging Markets

4.3.3.2 Rapid Growth In Pet Health Insurance Is Driving The Animal Antimicrobials And Antibiotics Market

4.4 Global Market Share Analysis

5 VETERINARY ANTIMICROBIALS AND ANTIBIOTICS MARKET, BY PRODUCT

5.1 Introduction

5.1.1 Tetracyclines

5.1.2 Penicillins

5.1.3 Sulfonamides

5.1.4 Macrolides

5.1.5 Aminoglycosides

5.1.6 Cephalosporins

5.1.7 Others

6 VETERINARY ANTIMICROBIALS AND ANTIBIOTICS MARKET, BY MODE OF DELIVERY

6.1. Introduction

6.1.1 Premixes

6.1.2 Oral Powders & Solutions

6.1.3 Injections

6.1.4 Intramammary Preparations

6.1.5 Other Preparations

7 VETERINARY ANTIMICROBIALS AND ANTIBIOTICS MARKET, BY TYPE OF ANIMAL

- 7.1 Introduction
- 7.2 Food-Producing Animals
 - 7.2.1 Cattle
 - 7.2.2 Pigs
 - 7.2.3 Poultry
 - 7.2.4 Sheep And Goats
- 7.3 Companion Animals
 - 7.3.1 Dogs
 - 7.3.2 Cats
 - 7.3.3 Horses
- 7.4 Other Animals

8 GEOGRAPHIC ANALYSIS

- 8.1 Introduction
 - 8.1.1 North America
 - 8.1.1.1 U.S.
 - 8.1.1.2 Canada
 - 8.1.2 Europe
 - 8.1.2.1 U.K.
 - 8.1.2.2 Germany
 - 8.1.2.3 France
 - 8.1.2.4 Italy
 - 8.1.2.5 Spain
 - 8.1.2.6 Rest Of Europe
 - 8.1.3 Asia-Pacific
 - 8.1.3.1 Japan
 - 8.1.3.2 China
 - 8.1.3.3 India
 - 8.1.3.4 Rest Of Asia-Pacific
 - 8.1.4 Rest Of The World (Row)
 - 8.1.4.1 Latin America
 - 8.1.4.2 Middle East And Africa

9 COMPETITIVE LANDSCAPE

- 9.1 Introduction
- 9.2 Mergers And Acquisitions
- 9.3 New Product Launches
- 9.4 Agreements, Collaborations, And Partnerships
- 9.5 Expansions
- 9.6 Others

10 COMPANY PROFILES (BUSINESS OVERVIEW, PRODUCTS, FINANCIALS, GROWTH STRATEGY, RECENT DEVELOPMENTS, SWOT ANALYSIS, & MNM VIEW)

- 10.1 Zoetis, Inc.
- 10.2 Merck And Co., Inc.
- 10.3 Bayer Ag
- 10.4 Virbac Sa
- 10.5 Eli Lilly And Company
- 10.6 Boehringer Ingelheim
- 10.7 Sanofi
- 10.8 Novartis Ag
- 10.9 Ceva Sante Animale
- 10.10 Vetoquinol (Details On Business Overview, Products, Financials, Growth Strategy, & Recent Developments Might Not Be Captured In Case Of Unlisted Companies.)

List Of Tables

LIST OF TABLES

Table 1 Global Animal Antimicrobials And Antibiotics Market, By Product, 2011–2018 (\$Million)

Table 2 Global Tetracyclines Market, By Geography, 2011–2018 (\$Million)

Table 3 Global Penicillins Market, By Geography, 2011–2018 (\$Million)

Table 4 Global Sulfonamides Market, By Geography, 2011–2018 (\$Million)

Table 5 Global Macrolides Market, By Geography, 2011–2018 (\$Million)

Table 6 Global Aminoglycosides Market, By Geography, 2011–2018 (\$Million)

Table 7 Global Cephalosporins Market, By Geography, 2011–2018 (\$Million)

Table 8 Global Others Market, By Geography, 2011–2018 (\$Million)

Table 9 Global Veterinary Antimicrobials And Antibiotics Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 10 Global Premixes Market For Animal Antimicrobials And Antibiotics, By Geography, 2011–2018 (\$Million)

Table 11 Global Oral Powders And Solutions Market For Animal Antimicrobials And Antibiotics, By Geography, 2011–2018 (\$Million)

Table 12 Global Injections Market For Veterinary Antimicrobials And Antibiotics, By Geography, 2011–2018 (\$Million)

Table 13 Global Intramammary Preparations Market For Animal Antimicrobials And Antibiotics, By Geography, 2011–2018 (\$Million)

Table 14 Global Other Preparations Market For Animal Antimicrobials And Antibiotics, By Geography, 2011–2018 (\$Million)

Table 15 Global Animal Antimicrobials And Antibiotics Market, By Type Of Animal, 2011–2018 (\$Million)

Table 16 Global Antimicrobials And Antibiotics Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 17 Global Food-Producing Animals Antimicrobials And Antibiotics Market, By Country, 2011–2018 (\$Million)

Table 18 Global Animal Antimicrobials And Antibiotics Market For Cattle, By Country, 2011–2018 (\$Million)

Table 19 Global Market For Pigs, By Country, 2011–2018 (\$Million)

Table 20 Global Market For Poultry, By Country, 2011–2018 (\$Million)

Table 21 Global Market For Sheep And Goats, By Country, 2011–2018 (\$Million)

Table 22 Global Companion Animal Antimicrobials And Antibiotics Market, By Type Of Animal, 2011–2018 (\$Million)

Table 23 Global Companion Animal Antimicrobials And Antibiotics Market, By Country,

2011–2018 (\$Million)

Table 24 Global Market For Dogs, By Country, 2011–2018 (\$Million)

Table 25 Global Market For Cats, By Country, 2011–2018 (\$Million)

Table 26 Global Market For Horses, By Country, 2011–2018 (\$Million)

Table 27 Global Market For Other Animals (Fishes And Rabbits) Market, By Country, 2011–2018 (\$Million)

Table 28 Animal Antimicrobials And Antibiotics Market, By Geography, 2011–2018 (\$Million)

Table 29 North America: Veterinary Antimicrobials And Antibiotics Market, By Country, 2011–2018 (\$Million)

Table 30 North America: Market, By Product, 2011–2018 (\$Million)

Table 31 North America: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 32 North America: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 33 North America: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 34 North America: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 35 U.S.: Veterinary Antimicrobials And Antibiotics Market, By Product, 2011–2018 (\$Million)

Table 36 U.S.: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 37 U.S.: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 38 U.S.: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 39 U.S.: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 40 Canada: Veterinary Antimicrobials And Antibiotics Market, By Product, 2011–2018 (\$Million)

Table 41 Canada: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 42 Canada: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 43 Canada: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 44 Canada: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 45 Europe: Veterinary Antimicrobials And Antibiotics Market, By Country, 2011–2018 (\$Million)

Table 46 Europe: Market, By Product, 2011–2018 (\$Million)

Table 47 Europe: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 48 Europe: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 49 Europe: Market For Food Producing Animals, By Type Of Animal, 2011–2018

(\$Million)

Table 50 Europe: Market For Companion Animals, By Type Of Animal, 2011–2018

(\$Million)

Table 51 U.K.: Animal Antimicrobials And Antibiotics Market, By Product, 2011–2018

(\$Million)

Table 52 U.K.: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 53 U.K.: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 54 U.K.: Market For Food-Producing Animals, By Type Of Animal, 2011–2018

(\$Million)

Table 55 U.K.: Market For Companion Animals, By Type Of Animal, 2011–2018

(\$Million)

Table 56 Germany: Animal Antimicrobials And Antibiotics Market, By Product, 2011–2018 (\$Million)

Table 57 Germany: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 58 Germany: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 59 Germany: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 60 Germany: Market For Companion Animals, By Type Of Animal, 2011–2018

(\$Million)

Table 61 France: Animal Antimicrobials And Antibiotics Market, By Product, 2011–2018

(\$Million)

Table 62 France: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 63 France: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 64 France: Market For Food-Producing Animals, By Type Of Animal, 2011–2018

(\$Million)

Table 65 France: Market For Companion Animals, By Type Of Animal, 2011–2018

(\$Million)

Table 66 Italy: Animal Antimicrobials And Antibiotics Market, By Product, 2011–2018

(\$Million)

Table 67 Italy: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 68 Italy: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 69 Italy: Market For Food-Producing Animals, By Type Of Animal, 2011–2018

(\$Million)

Table 70 Italy: Market For Companion Animals, By Type Of Animal, 2011–2018

(\$Million)

Table 71 Spain: Animal Antimicrobials And Antibiotics Market, By Product, 2011–2018

(\$Million)

Table 72 Spain: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 73 Spain: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 74 Spain: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 75 Spain: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 76 Roe: Animal Antimicrobials And Antibiotics Market, By Product, 2011–2018 (\$Million)

Table 77 Roe: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 78 Roe: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 79 Roe: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 80 Roe: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 81 Apac: Animal Antimicrobials And Antibiotics Market, By Country, 2011–2018 (\$Million)

Table 82 Apac: Market, By Product, 2011–2018 (\$Million)

Table 83 Apac: Market, By Mode Of Delivery , 2011–2018 (\$Million)

Table 84 Apac: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 85 Apac: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 86 Apac: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 87 Japan: Animal Antimicrobials And Antibiotics Market, By Product, 2011–2018 (\$Million)

Table 88 Japan: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 89 Japan: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 90 Japan: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 91 Japan: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 92 China: Animal Antimicrobials And Antibiotics Market, By Product, 2011–2018 (\$Million)

Table 93 China: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 94 China: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 95 China: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 96 China : Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 97 India: Animal Antimicrobials And Antibiotics Market, By Product, 2011–2018 (\$Million)

Table 98 India: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 99 India: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 100 India: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 101 India: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 102 Rest Of Apac: Animal Antimicrobials And Antibiotics Market, By Products, 2011–2018 (\$Million)

Table 103 Rest Of Apac: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 104 Rest Of Apac: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 105 Rest Of Apac: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 106 Rest Of Apac: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 107 Row: Veterinary Antimicrobials And Antibiotics Market, By Geography, 2011–2018 (\$Million)

Table 108 Row: Market, By Product, 2011–2018 (\$Million)

Table 109 Row: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 110 Row: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 111 Row: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 112 Row: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 113 Latin America: Veterinary Antimicrobials And Antibiotics Market, By Product, 2011–2018 (\$Million)

Table 114 Latin America: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 115 Latin America: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 116 Latin America: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 117 Latin America: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 118 Middle East And Africa: Veterinary Antimicrobials And Antibiotics Market, By Product, 2011–2018 (\$Million)

Table 119 Middle East And Africa: Market, By Mode Of Delivery, 2011–2018 (\$Million)

Table 120 Middle East And Africa: Market, By Type Of Animal, 2011–2018 (\$Million)

Table 121 Middle East And Africa: Market For Food-Producing Animals, By Type Of Animal, 2011–2018 (\$Million) (\$Million)

Table 122 Middle East And Africa: Market For Companion Animals, By Type Of Animal, 2011–2018 (\$Million)

Table 123 Growth Strategy Matrix, 2010–2014

Table 124 Mergers And Acquisitions, 2010–2014

Table 125 New Product Launches, 2010–2014

Table 126 Agreements, Collaborations, And Partnerships, 2010–2014

Table 127 Expansions, 2010–2014

Table 128 Other Developments, 2010–2014

About

The successful treatment of infectious diseases requires the availability of effective antimicrobials and antibiotics. The global use of these agents has improved the quality and life expectancy for a large number of animal species. The discovery of antimicrobials and antibiotics can be termed as one of the major medical advances of the century.

The global animal antimicrobials and antibiotics market was estimated to be worth \$XX million in 2013 and is expected to reach \$XX million by 2018. The animal antimicrobials and antibiotics market is mainly driven by increasing incidences of disease outbreaks, increasing number of companion animals, increasing demand for food products from animals, rising public awareness about animal diseases, and increasing use of antibiotics for animal husbandry in emerging countries like China.

However, factors such as the regulatory ban on use of antibiotics due to emergence of antibiotic-resistant strains of bacteria, prophylactic use of antibiotics being replaced by good husbandry and hygiene practices which avoids using antibiotics in animals, increased use of in-feed enzymes, competitive exclusion products, or probiotics as alternatives to antibiotics are restraining the growth of the animal antimicrobials and antibiotics market.

In the companion animals segment, market growth is largely driven by rapid growth in the pet health insurance industry, which is driving animal health expenditure by pet owners. In the emerging markets, the growth in demand for animal antimicrobials and antibiotics in companion animals is driven by growing pet adoption and increasing awareness and per capita animal health expenditure on companion animals.

North America was the largest market for animal antimicrobials and antibiotics in 2013, with a share of about XX% of the global animal antimicrobials and antibiotics market, followed by Europe with a share of XX% in 2013. However, countries in the Asia-Pacific and RoW regions represent the fastest-growing markets due to the increasing pet population, rising disposable incomes and growing awareness of animal health.

The top five players in the global animal antimicrobials and antibiotics market are Zoetis Inc. (U.S.), Merck Animal Health (U.S.), Bayer Animal Health (Germany), Virbac SA (France), and Elanco Animal Health (U.S.). These companies accounted for a share of XX% the global antimicrobials and antibiotics market in 2013.

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