

Small Drones Market by Platform (Civil & Commercial and Defense & Government), Type (Fixed Wing, Rotary Wing, and Hybrid), Application, Mode of Operation, Power Source (Fully Powered, Battery Powered) & Region – Global Forecast to 2030

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Abstracts

The small drones market is projected to grow from USD 5.8 billion in 2023 to USD 10.4 Billion by 2030, at a CAGR of 8.6% from 2023 to 2030. Rising procurement of small drones for commercial and military applications like product delivery, inspection and monitoring, ISR to drive the small drone market growth during the forecast period.

Currently, Small drones are being extensively used in various commercial applications, such as photography, 3D mapping, product and medicine delivery, data transmission, and inspection & monitoring in confined spaces. They are also used in agriculture, real estate, and oil & gas industries. In the agriculture industry, the use of small drones has led to the evolution of precision farming, which has enabled farmers to monitor the health of crops, keep track of irrigation equipment, and identify different types of weeds, among others. Modern drones use the Normalized Difference Vegetation Index (NDVI), a remote sensing technique that assesses the health and density of vegetation. Drones compare the reflected intensities of visible and near-infrared (NIR) light to provide high-resolution photographs of crops. By employing this reflected light in the visible and near-infrared bands, the NDVI index can identify and measure the presence of living, green vegetation.

On the other hand, the military application segment witnessed significant growth during the forecast period. The defense forces in various nations have increasingly turned to small drones for conducting military operations, including Intelligence, Surveillance & Reconnaissance (ISR) tasks and the management of battle damage. The effectiveness

of air, naval, and military operations greatly hinges on their ISR capabilities, leading to ongoing developments and advancements in this field. An example of such innovation is the Fifth Generation C4ISR, a joint battle management system capable of collecting, analyzing, and communicating data seamlessly across its components. This C4ISR system, powered by artificial intelligence (AI), utilizes machine learning to identify and categorize tanks and other vehicles, enhance image feeds, and provide early warnings about obstacles and changing ground conditions. Consequently, governments are swiftly adopting these technologies to bolster their defense capabilities.

Additionally, the growing adoption of small drones by defense forces for use as loitering munition represents another significant factor driving the procurement of these devices. Some remotely piloted small drones are specifically designed to function as loitering munition for defense purposes.

“Based on rotary wing type, the multirotor segment to grow at highest CAGR during forecast period.”

The market has been categorized into different types, including fixed wing, rotary wing, and hybrid. Within the fixed wing category, there are two subcategories: conventional take-off and landing (CTOL) and vertical take-off and landing (VTOL). Meanwhile, the rotary wing segment can be further divided into single rotors and multirotors. Among these, the multirotor segment is expected to experience the highest Compound Annual Growth Rate (CAGR) during the forecast period.

Rotary-wing drones, due to their VTOL capability, possess a more extensive range of operational environments compared to fixed-wing drones. They do not require additional setup or space for take-off and landing, making them versatile for various applications, such as filmmaking, surveillance, and imaging. Within the category of rotary-wing drones, there are two main types: single rotor and multirotor. Multirotor drones can be classified into several subtypes, including bi-copters, tri-copters, quadcopters, hexacopters, and octocopters.

Typically, small multi-copter drones rely on batteries as their power source, which contributes to their popularity in both industrial and recreational activities. Prominent players in the development of multirotor small drones include DJI (China), AeroVironment (US), and Israel Aerospace Industries (Israel).

“Based on mode of operation, fully autonomous segment witness strong growth in

market during the forecast period.”

The small drone market is segmented based on its mode of operation, including fully autonomous, remotely piloted, and optionally piloted categories. Among these, the fully autonomous segment is expected to experience significant growth during the forecast period. This growth can be attributed to the cost-effective utility of autonomous small drones in a wide range of applications, spanning from defense operations to surveys.

Autonomous small drones are essentially programmable robots capable of performing tasks at high altitudes with ample power capacity. These drones excel in operating within inaccessible areas and delivering high-quality results and data, thanks to their advanced technological systems. Presently, the market for autonomous drones is smaller than that of optionally piloted drones. Autonomous drones find extensive use in various military applications, with the United States being the largest market for these drones. The growth in the US market can be attributed to increased investment by the US Army in drone research and development.

Autonomous drones are programmed to launch ammunition and execute attacks independently, without the need for continuous data signals from an operator. An example of such a drone is the Kargu-2 Quadcopter developed by STM (Turkey), which possesses autonomous attack capabilities. According to the United Nations (UN), fully autonomous drones like the STM Kargu-2, or similar classified drones, were employed in a military conflict in Libya in 2020. These autonomous drones are categorized as lethal autonomous weapon systems (LAWS), utilizing machine learning and real-time image processing. According to the UN, LAWS are programmed to launch warheads autonomously and possess a "fire, forget, and find" capability, allowing munitions to guide themselves to targets independently.

“The Asia Pacific regions are projected to be high growth potential markets for the small drone during the forecast period.”

Over the course of the forecast period, the Asia Pacific small drone market is expected to rise rapidly. Many nations are concentrating on strengthening their defensive capacities due to the uncertain geopolitical environment in the Asia-Pacific region. In the upcoming years, the Asia Pacific small drone market is anticipated to grow at a rapid pace due to the prevalent tendency of emerging economies like China, Malaysia, and India purchasing drones. The world's adoption of drone technologies has grown exponentially after 2020. Throughout the projected period, the growing need for drone services and solutions from the military, commercial, government, and law enforcement

is expected to drive the small drone market's expansion.

In Asia Pacific, the retail and e-commerce industries lead, followed by the pharmaceutical and healthcare industries. China and Japan represent significant markets for commercial drone applications.

The continued globalization and the automation trends that are prevalent in China, India, and Australia are also driving growth in the small drone market in Asia Pacific. In China and Japan, small drones are being utilized more and more for inspections in the real estate, agriculture, and pollution monitoring sectors.

The break-up of the profiles of primary participants in the small drone market is as follows:

By Company Type: Tier 1–49%; Tier 2–37%; and Tier 3–14%

By Designation: C Level Executives–55%; Directors–27%; and Others–18%

By Region: North America–32%; Europe–32%; Asia Pacific–16%; Latin America–7%; Middle East–10%; and Africa–3%

Major players in the small drone market are DJI (China), Parrot Drone SAS (France), Israel Aerospace Industry Ltd. (Israel), AeroVironment, Inc. (US), and Lockheed Martin Corporation (US). These companies have strong distribution networks in the logistics business across North America, Europe, Asia Pacific and other regions, in turn driving the demand for last mile deliveries and drone package deliveries.

Research Coverage

This research report classifies the small drone market into various segments based on several criteria. These segments include:

Platform: The market is categorized into civil & commercial and defense & government sectors.

Application: Segments within this category include military, commercial, government & law, and consumer applications.

Type: The market is further divided into fixed wing, rotary wing, and hybrid types of drones.

Mode of Operation: The small drone market is segmented into remotely piloted, optionally piloted, and fully autonomous categories based on how the drones are operated.

Power Source: Drones in the market are grouped into Fuel Powered and Battery Powered categories based on their sources of power.

Geographic Regions: The report analyzes the small drone market across different regions, including North America, Europe, Asia Pacific, the Middle East, Latin America, and Africa.

The report's scope encompasses comprehensive details regarding key factors influencing the growth of the small drone market, including drivers, restraints, challenges, and opportunities. Additionally, the report conducts a thorough analysis of major industry players, providing insights into their business profiles, offered solutions and services, key strategies, as well as their involvement in contracts, joint ventures, partnerships, agreements, acquisitions, and new product launches related to the small drone market. Furthermore, the report includes a competitive analysis of emerging startups within the small drone market ecosystem.

Reasons to Buy this Report

This report is expected to help market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall small drone market and its segments. This study is also expected to provide region wise information about the end-use industrial sectors, wherein small drone is used. This report aims at helping the stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses, and plan suitable go-to-market strategies. This report is also expected to help them understand the pulse of the market and provide them with information on key drivers, restraints, challenges, and opportunities influencing the growth of the market.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on small drone offered by the

top players in the market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the small drone market

Market Development: Comprehensive information about lucrative markets – the report analyzes the small drone market across varied regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the small drone market

Market Growth: Supportive government regulations and initiatives to drive the market growth in near future

Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the small drone market

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 MARKET SCOPE

1.3.1 MARKETS COVERED

FIGURE 1 SMALL DRONE MARKET SEGMENTATION

1.3.2 REGIONS COVERED

1.3.3 YEARS CONSIDERED

1.4 CURRENCY & PRICING

TABLE 1 USD EXCHANGE RATES

1.5 INCLUSIONS AND EXCLUSIONS

TABLE 2 SMALL DRONE MARKET: INCLUSIONS AND EXCLUSIONS

1.6 STAKEHOLDERS

1.7 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 RESEARCH PROCESS FLOW

FIGURE 3 RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Key industry insights

2.1.2.3 Breakdown of primary interviews

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION

2.2 FACTOR ANALYSIS

2.2.1 INTRODUCTION

2.2.2 DEMAND-SIDE INDICATORS

2.2.3 SUPPLY-SIDE INDICATORS

2.3 MARKET SIZE ESTIMATION AND METHODOLOGY

2.3.1 BOTTOM-UP APPROACH

2.3.1.1 Regional split of small drone market

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

2.3.2 TOP-DOWN APPROACH

FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

2.4 MARKET BREAKDOWN AND DATA TRIANGULATION

FIGURE 7 MARKET BREAKDOWN AND DATA TRIANGULATION

2.5 RECESSION IMPACT ANALYSIS

2.5.1 KEY ELEMENTS

2.5.2 SCENARIO ANALYSIS

2.6 RESEARCH ASSUMPTIONS

2.7 RESEARCH LIMITATIONS

2.8 RISK ANALYSIS

3 EXECUTIVE SUMMARY

FIGURE 8 CIVIL & COMMERCIAL SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

FIGURE 9 COMMERCIAL SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD

FIGURE 10 ROTARY WING SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD

FIGURE 11 OPTIONALLY PILOTED SEGMENT TO HOLD LARGEST MARKET SHARE DURING FORECAST PERIOD

FIGURE 12 BATTERY OPERATED SEGMENT TO HOLD DOMINANT SHARE DURING FORECAST PERIOD

FIGURE 13 ASIA PACIFIC TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN SMALL DRONE MARKET

FIGURE 14 INCREASING GOVERNMENT FUNDING TO DRIVE MARKET

4.2 SMALL DRONE MARKET, BY CIVIL & COMMERCIAL PLATFORM

FIGURE 15 MICRO DRONE SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

4.3 SMALL DRONE MARKET, BY DEFENSE & GOVERNMENT PLATFORM

FIGURE 16 MINI DRONE SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD

4.4 SMALL DRONE MARKET, BY COMMERCIAL APPLICATION

FIGURE 17 INSPECTION & MONITORING SEGMENT TO HOLD LARGEST MARKET SHARE DURING FORECAST PERIOD

4.5 SMALL DRONE MARKET, BY MILITARY APPLICATION

FIGURE 18 ISR SEGMENT TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD

4.6 SMALL DRONE MARKET, BY GOVERNMENT & LAW APPLICATION

FIGURE 19 BORDER MANAGEMENT SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

4.7 SMALL DRONE MARKET, BY FIXED-WING TYPE

FIGURE 20 CTOL SEGMENT TO ACCOUNT FOR LARGER MARKET SHARE DURING FORECAST PERIOD

4.8 SMALL DRONE MARKET, BY ROTARY-WING TYPE

FIGURE 21 MULTIROTOR SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD

4.9 SMALL DRONE MARKET (ROTARY WING), BY MULTIROTOR SUB-TYPE

FIGURE 22 QUADCOPTERS SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

4.10 SMALL DRONE MARKET, BY BATTERY OPERATED POWER SOURCE

FIGURE 23 LITHIUM-ION SEGMENT TO HOLD LARGEST MARKET SHARE DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 24 SMALL DRONE MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Surge in adoption for civil and commercial applications

5.2.1.2 Rising procurement for military applications

TABLE 3 COUNTRIES USING LOITERING MUNITION

5.2.1.3 Supportive government regulations and initiatives

TABLE 4 COMMERCIAL INDUSTRIES EXEMPTED BY FAA

5.2.1.4 Growing demand for small patrolling drones for marine border security

5.2.2 RESTRAINTS

5.2.2.1 Information security risk and lack of standardized air traffic regulations

5.2.2.2 Limited number of certified drone operators

5.2.3 OPPORTUNITIES

5.2.3.1 High investments by governments and key market players

FIGURE 25 INVESTMENTS IN DRONE INDUSTRY, 2013–2022 (USD MILLION)

5.2.3.2 Enhancing critical infrastructure protection and law enforcement with aerial

remote sensing

5.2.3.3 Growing use in providing wireless coverage

5.2.3.4 Rising adoption for real-time traffic monitoring

5.2.4 CHALLENGES

5.2.4.1 Lack of sustainable power sources to improve endurance

FIGURE 26 ENERGY DENSITY OF VARIOUS ENERGY SOURCES

5.2.4.2 Severe weather conditions

5.2.4.3 Safety and privacy concerns

5.2.4.4 Time-consuming regulatory approval

TABLE 5 RESTRICTIONS IMPOSED ON SMALL DRONES IN VARIOUS COUNTRIES

5.3 VALUE CHAIN ANALYSIS

FIGURE 27 VALUE CHAIN ANALYSIS

5.4 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS

5.4.1 REVENUE SHIFT AND NEW REVENUE POCKETS FOR SMALL DRONE MARKET

FIGURE 28 REVENUE SHIFT IN SMALL DRONE MARKET

5.5 CASE STUDY ANALYSIS

5.5.1 AGRICULTURAL MONITORING

TABLE 6 SMALL DRONES REVOLUTIONIZING CROP MANAGEMENT AND YIELD

5.5.2 AEROVIRONMENT'S MARITIME INITIATIVE

TABLE 7 AEROVIRONMENT UAS FOR MARITIME COUNTER-TRAFFICKING OPERATIONS

5.5.3 CARGO DRONE FIELD TESTS IN AMAZON FOREST, PERU

TABLE 8 FIELD TESTS USING CARGO DRONES TO DELIVER VACCINES AND BLOOD SAMPLES

5.5.4 MAPPING CANYONS OF ANCIENT NATIONAL MONUMENT IN COLORADO, US

TABLE 9 MAPPING CANYONS OF ANCIENT NATIONAL MONUMENT

5.6 PRICING ANALYSIS

5.6.1 AVERAGE SELLING PRICE TREND OF KEY PLAYERS

FIGURE 29 AVERAGE SELLING PRICE OF KEY PLAYERS

TABLE 10 PRICE OF SMALL DRONES

5.6.2 AVERAGE SELLING PRICE TREND, BY REGION

FIGURE 30 AVERAGE SELLING PRICE TREND, BY REGION

5.7 ECOSYSTEM ANALYSIS

5.7.1 PLATFORM MANUFACTURERS

5.7.2 SUBSYSTEM MANUFACTURERS

5.7.3 SERVICE PROVIDERS

5.7.4 SOFTWARE PROVIDERS

5.7.5 MISCELLANEOUS

FIGURE 31 ECOSYSTEM MAP

TABLE 11 ROLE OF COMPANIES IN ECOSYSTEM

5.8 TRADE DATA ANALYSIS

5.8.1 IMPORT DATA ANALYSIS

5.8.1.1 Unmanned aircraft, with maximum take-off weight > 150 kg (HS Code: 880699)

FIGURE 32 TOP 10 IMPORTING COUNTRIES, 2022 (USD THOUSAND)

5.8.2 EXPORT DATA ANALYSIS

5.8.2.1 Unmanned aircraft, with maximum take-off weight > 150 kg (HS Code: 880699)

FIGURE 33 TOP 10 EXPORTING COUNTRIES, 2022 (USD THOUSAND)

5.9 OPERATIONAL DATA

TABLE 12 SMALL DRONE MARKET, BY REGION, 2020–2022 (UNITS)

5.10 TECHNOLOGY ANALYSIS

5.10.1 AI IN SMALL DRONES

TABLE 13 COMPANIES WORKING ON DEVELOPMENT OF DRONE SOFTWARE WITH AI

TABLE 14 COMPANIES WORKING ON DEVELOPMENT OF DRONE EQUIPMENT WITH AI

5.10.2 LIDAR DRONES

TABLE 15 USE OF DRONES IN AGRICULTURE

5.11 KEY CONFERENCES AND EVENTS

TABLE 16 KEY CONFERENCES AND EVENTS, 2024–2025

5.12 REGULATORY LANDSCAPE

5.12.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 17 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 18 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 19 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 20 MIDDLE EAST: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 21 LATIN AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 22 DRONE REGULATIONS AND APPROVALS FOR COMMERCIAL SECTOR, BY COUNTRY

5.12.2 NORTH AMERICA

5.12.2.1 US

TABLE 23 US: RULES AND GUIDELINES BY FAA FOR OPERATING DRONES

5.12.2.2 Canada

TABLE 24 CANADA: RULES AND GUIDELINES FOR OPERATING DRONES

5.12.3 EUROPE

5.12.3.1 UK

TABLE 25 UK: RULES AND GUIDELINES BY CAA FOR OPERATING DRONES

5.12.3.2 Germany

TABLE 26 GERMANY: RULES AND GUIDELINES FOR OPERATING DRONES

5.12.3.3 France

TABLE 27 FRANCE: RULES AND GUIDELINES FOR OPERATING DRONES

TABLE 28 DRONE REGULATIONS, BY COUNTRY

5.13 KEY STAKEHOLDERS AND BUYING CRITERIA

5.13.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 34 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP 3 APPLICATIONS

TABLE 29 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP 3 APPLICATIONS (%)

5.13.2 BUYING CRITERIA

FIGURE 35 KEY BUYING CRITERIA FOR TOP 3 APPLICATIONS

TABLE 30 KEY BUYING CRITERIA FOR TOP 3 APPLICATIONS

6 INDUSTRY TRENDS

6.1 INTRODUCTION

6.2 TECHNOLOGY TRENDS

6.2.1 MICROTURBINE ENGINE-POWERED DRONES

6.2.2 HIGH-ALTITUDE PSEUDO-SATELLITE

6.2.3 AERIAL TARGET DRONES

6.2.4 DRONE MANUFACTURING USING ADVANCED MATERIALS

FIGURE 36 MULTIFUNCTIONAL MATERIALS USED IN MANUFACTURING OF SMALL DRONES

6.2.5 INSPECTION DRONES FOR CONFINED SPACES

6.2.6 SMALL DRONE SWARM TECHNOLOGY

6.2.7 MULTI-SENSOR DATA FUSION FOR SMALL DRONE NAVIGATION

6.2.8 MICROMECHANICAL FLYING INSECTS

6.2.9 SYNTHETIC APERTURE RADAR

6.3 IMPACT OF MEGATRENDS

6.3.1 3D PRINTING

6.3.2 ARTIFICIAL INTELLIGENCE

6.3.3 NANOTECHNOLOGY

6.4 PATENT ANALYSIS

FIGURE 37 NUMBER OF PATENTS GRANTED, 2013-2023

TABLE 31 KEY PATENTS, 2020–2023

6.5 TECHNOLOGY ROADMAP

FIGURE 38 TECHNOLOGY ROADMAP

FIGURE 39 TECHNOLOGY ROADMAP FOR SMALL DRONE MARKET

FIGURE 40 EMERGING TRENDS

7 SMALL DRONE MARKET, BY PLATFORM

7.1 INTRODUCTION

FIGURE 41 CIVIL & COMMERCIAL SEGMENT TO GROW AT HIGHER CAGR DURING FORECAST PERIOD

TABLE 32 SMALL DRONE MARKET, BY PLATFORM, 2020–2022 (USD MILLION)

TABLE 33 SMALL DRONE MARKET, BY PLATFORM, 2023–2030 (USD MILLION)

7.2 CIVIL & COMMERCIAL

7.2.1 WIDE RANGE OF CIVIL AND COMMERCIAL APPLICATIONS TO DRIVE MARKET

TABLE 34 CIVIL & COMMERCIAL: SMALL DRONE MARKET, BY TYPE, 2020–2022 (USD MILLION)

TABLE 35 CIVIL & COMMERCIAL: SMALL DRONE MARKET, BY TYPE, 2023–2030 (USD MILLION)

7.2.2 MICRO (250G–2KG)

7.2.3 SMALL (2 KG–25 KG)

7.3 DEFENSE & GOVERNMENT

7.3.1 SURVEILLANCE AND RECONNAISSANCE ACTIVITIES AND BORDER SECURITY APPLICATIONS IN DEFENSE INDUSTRY TO DRIVE MARKET

TABLE 36 DEFENSE & GOVERNMENT: SMALL DRONE MARKET, BY TYPE, 2020–2022 (USD MILLION)

TABLE 37 DEFENSE & GOVERNMENT: SMALL DRONE MARKET, BY TYPE, 2023–2030 (USD MILLION)

7.3.2 NANO (

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