

# Umami Flavors Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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## Abstracts

### Umami Flavors Market Summary

The umami flavors market represents a specialized segment within the global food flavoring and ingredients industry, encompassing taste enhancers and flavor compounds that provide the fifth basic taste alongside sweet, sour, salty, and bitter. Umami, derived from the Japanese word meaning 'pleasant savory taste,' is characterized by a rich, meaty, and satisfying flavor profile primarily delivered through glutamate compounds, nucleotides, and naturally occurring amino acids. The global umami flavors market is estimated to reach a valuation of approximately USD 3.5-5.5 billion in 2025, with compound annual growth rates projected in the range of 5%-10% through 2030. Growth momentum is driven by increasing consumer awareness of complex flavor profiles, rising demand for protein alternatives requiring enhanced taste, expanding Asian cuisine popularity worldwide, and food industry innovation in clean label formulations. The market benefits from growing health consciousness driving reduced sodium alternatives, culinary sophistication among consumers, and increasing application in processed foods requiring taste enhancement.

### Application Analysis and Market Segmentation

#### Food & Beverages Applications

Food and beverage applications dominate the umami flavors market with projected growth rates of 5%-9% annually, encompassing processed foods, snacks, soups, sauces, seasonings, and ready-to-eat meals. This segment benefits from widespread consumer acceptance and established supply chains across multiple food categories.

Umami flavors enhance taste perception while enabling sodium reduction in processed foods, addressing health concerns without compromising flavor satisfaction. Innovation focuses on natural umami sources, clean label formulations, and application in plant-based protein products requiring enhanced savory characteristics.

### Pet Food & Supplements Applications

Pet food applications demonstrate strong growth potential at 7%-12% annually, driven by increasing pet humanization trends and demand for premium pet nutrition products. Umami flavors enhance palatability in dry kibble, wet foods, and treats while supporting nutritional value through protein enhancement perception. This segment benefits from growing pet ownership, willingness to spend on premium pet products, and increasing awareness of pet taste preferences. Innovation emphasizes natural ingredients and specialized formulations for different pet species and life stages.

### Pharmaceuticals Applications

Pharmaceutical applications show emerging growth at 4%-8% annually, focusing on taste masking for bitter medications and enhancement of nutritional supplements. Umami compounds help improve medication compliance by reducing unpleasant tastes, particularly important for pediatric and elderly patients. This segment faces stringent regulatory requirements but offers opportunities for specialized formulations addressing taste challenges in therapeutic products.

### Type Analysis and Market Trends

#### Natural Umami Flavors

Natural umami flavors demonstrate robust growth potential with projected annual rates of 6%-12%, encompassing ingredients derived from fermentation, hydrolyzed proteins, yeast extracts, and naturally occurring sources such as mushrooms, seaweed, and aged cheeses. This segment benefits from clean label trends, consumer preference for natural ingredients, and regulatory advantages in organic and natural product formulations. Innovation focuses on sustainable sourcing, fermentation technology advancement, and novel extraction methods from traditional umami-rich ingredients.

#### Synthetic Umami Flavors

Synthetic umami flavors maintain steady growth rates of 3%-7% annually, including

monosodium glutamate and other chemically produced flavor enhancers that provide consistent taste profiles and cost-effective solutions. This segment benefits from precise flavor control, manufacturing scalability, and established applications in processed foods. Growth is constrained by consumer preferences for natural alternatives but continues through technical applications requiring specific taste characteristics and economic considerations in mass market products.

## Regional Market Distribution and Geographic Trends

Asia-Pacific exhibits the strongest growth momentum at 6%-12% annually, led by China, Japan, and South Korea with deep cultural understanding of umami taste and established consumption patterns. The region benefits from traditional fermentation industries, large-scale manufacturing capabilities, and domestic demand for umami-enhanced products. China drives growth through expanding processed food industries and increasing disposable income, while Japan contributes through innovation in natural extraction technologies and premium product development.

North America demonstrates solid growth rates of 4%-8% annually, with the United States market emphasizing health-conscious applications and Asian cuisine integration. The region benefits from growing multicultural food preferences, health trends supporting reduced sodium alternatives, and innovation in plant-based products requiring flavor enhancement. Canada contributes through natural ingredient development and regulatory frameworks supporting clean label products.

Europe shows moderate growth rates of 3%-6% annually, with Germany, France, and the United Kingdom focusing on natural umami applications and regulatory compliance. The region emphasizes sustainability, organic formulations, and traditional fermentation methods adapted for modern applications. European markets benefit from sophisticated consumer preferences and regulatory frameworks supporting natural ingredient innovation.

Latin America exhibits growth rates of 5%-9% annually, driven by Brazil and Mexico with expanding processed food markets and increasing urbanization. The region benefits from growing middle-class populations, adoption of international food trends, and local ingredient development from traditional fermentation practices.

Middle East & Africa demonstrates emerging growth at 4%-7% annually, supported by expanding food processing industries and growing consumer sophistication. The region benefits from increasing urban populations, rising disposable incomes, and adoption of

global food trends requiring flavor enhancement.

### Key Market Players and Competitive Landscape

Ajinomoto Co., Inc. operates as the global market leader with comprehensive umami flavor portfolio and extensive research capabilities in amino acid technology. The company maintains competitive advantages through fermentation expertise, global manufacturing networks, and established relationships with food processors worldwide. Ajinomoto benefits from decades of umami research and development of both traditional and innovative application methods.

Kikkoman Corporation contributes through traditional fermentation expertise and soy sauce-based umami extracts, leveraging centuries of Japanese brewing knowledge and premium positioning strategies. The company benefits from brand recognition, natural product positioning, and expanding international presence in Asian cuisine ingredients.

Givaudan operates through comprehensive flavor development capabilities and customer collaboration in umami applications, emphasizing natural solutions and technical expertise. The company benefits from global reach, innovation capabilities, and integration with broader flavor systems for complex product development.

International Flavors & Fragrances Inc. provides technical expertise and custom umami solutions for diverse applications, leveraging research capabilities and customer partnerships. The company benefits from scientific approach to flavor development and regulatory expertise supporting global applications.

DSM-Firmenich contributes through nutritional and flavor ingredients with emphasis on natural umami sources and sustainable production methods. The company benefits from biotechnology capabilities and focus on health-enhancing ingredients.

### Industry Value Chain Analysis

The umami flavors value chain encompasses raw material sourcing, fermentation and processing, formulation development, manufacturing, and application integration, with significant value creation in technical expertise and application development.

Raw Material Supply involves sourcing of protein sources, agricultural materials for fermentation, and specialty ingredients for natural umami extraction. Suppliers add value through quality assurance, sustainable sourcing practices, and specialized

material development for fermentation and extraction processes.

Fermentation and Processing encompass biotechnology applications, traditional fermentation methods, and extraction technologies that convert raw materials into umami-rich compounds. Manufacturers create value through process optimization, quality control, and development of standardized flavor profiles suitable for industrial applications.

Formulation and Technical Development involve creating application-specific umami solutions, taste optimization, and integration with existing food formulations. Technical specialists add value through flavor expertise, regulatory knowledge, and customer collaboration in product development.

Manufacturing and Quality Control encompass production scaling, consistency maintenance, and regulatory compliance across different markets and applications. Manufacturers create value through efficiency, reliability, and ability to meet diverse customer specifications.

Application Integration and Customer Support represent critical value addition through technical assistance, formulation guidance, and ongoing optimization of umami applications in customer products. Service providers create value through expertise, responsiveness, and relationship management.

## Market Opportunities and Challenges

### Opportunities

Growing health consciousness and sodium reduction initiatives create demand for umami flavors as natural taste enhancers that maintain flavor satisfaction while supporting nutritional goals. Plant-based protein market expansion provides opportunities for umami enhancement addressing taste challenges in meat alternatives and protein-rich products. Asian cuisine globalization creates opportunities for traditional umami applications adapted for international markets and fusion food concepts. Clean label trends support natural umami development and premium positioning for fermentation-based and naturally derived flavor solutions.

### Challenges

Consumer misconceptions about MSG and synthetic umami compounds create market

resistance and require ongoing education about safety and natural alternatives. Regulatory complexity across global markets affects ingredient approval and labeling requirements, particularly for novel natural sources and fermentation-derived products. Cost pressures in processed food markets limit adoption of premium natural umami solutions, requiring balance between quality and economic viability. Technical challenges in maintaining umami taste stability during processing and storage affect product performance and customer satisfaction. Competition from alternative flavor enhancement technologies and taste modification approaches creates pressure for continuous innovation and differentiation.

## Contents

### **CHAPTER 1 EXECUTIVE SUMMARY**

### **CHAPTER 2 ABBREVIATION AND ACRONYMS**

### **CHAPTER 3 PREFACE**

3.1 Research Scope

3.2 Research Sources

3.2.1 Data Sources

3.2.2 Assumptions

3.3 Research Method

Chapter Four Market Landscape

4.1 Market Overview

4.2 Classification/Types

4.3 Application/End Users

### **CHAPTER 5 MARKET TREND ANALYSIS**

5.1 Introduction

5.2 Drivers

5.3 Restraints

5.4 Opportunities

5.5 Threats

### **CHAPTER 6 INDUSTRY CHAIN ANALYSIS**

6.1 Upstream/Suppliers Analysis

6.2 Umami Flavors Analysis

6.2.1 Technology Analysis

6.2.2 Cost Analysis

6.2.3 Market Channel Analysis

6.3 Downstream Buyers/End Users

### **CHAPTER 7 LATEST MARKET DYNAMICS**

7.1 Latest News

7.2 Merger and Acquisition

- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

## **CHAPTER 8 HISTORICAL AND FORECAST UMAMI FLAVORS MARKET IN NORTH AMERICA (2020-2030)**

- 8.1 Umami Flavors Market Size
- 8.2 Umami Flavors Market by End Use
- 8.3 Competition by Players/Suppliers
- 8.4 Umami Flavors Market Size by Type
- 8.5 Key Countries Analysis
  - 8.5.1 United States
  - 8.5.2 Canada
  - 8.5.3 Mexico

## **CHAPTER 9 HISTORICAL AND FORECAST UMAMI FLAVORS MARKET IN SOUTH AMERICA (2020-2030)**

- 9.1 Umami Flavors Market Size
- 9.2 Umami Flavors Market by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Umami Flavors Market Size by Type
- 9.5 Key Countries Analysis
  - 9.5.1 Brazil
  - 9.5.2 Argentina
  - 9.5.3 Chile
  - 9.5.4 Peru

## **CHAPTER 10 HISTORICAL AND FORECAST UMAMI FLAVORS MARKET IN ASIA & PACIFIC (2020-2030)**

- 10.1 Umami Flavors Market Size
- 10.2 Umami Flavors Market by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Umami Flavors Market Size by Type
- 10.5 Key Countries Analysis
  - 10.5.1 China
  - 10.5.2 India
  - 10.5.3 Japan

- 10.5.4 South Korea
- 10.5.5 Southeast Asia
- 10.5.6 Australia

## **CHAPTER 11 HISTORICAL AND FORECAST UMAMI FLAVORS MARKET IN EUROPE (2020-2030)**

- 11.1 Umami Flavors Market Size
- 11.2 Umami Flavors Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Umami Flavors Market Size by Type
- 11.5 Key Countries Analysis
  - 11.5.1 Germany
  - 11.5.2 France
  - 11.5.3 United Kingdom
  - 11.5.4 Italy
  - 11.5.5 Spain
  - 11.5.6 Belgium
  - 11.5.7 Netherlands
  - 11.5.8 Austria
  - 11.5.9 Poland
  - 11.5.10 Russia

## **CHAPTER 12 HISTORICAL AND FORECAST UMAMI FLAVORS MARKET IN MEA (2020-2030)**

- 12.1 Umami Flavors Market Size
- 12.2 Umami Flavors Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Umami Flavors Market Size by Type
- 12.5 Key Countries Analysis
  - 12.5.1 Egypt
  - 12.5.2 Israel
  - 12.5.3 South Africa
  - 12.5.4 Gulf Cooperation Council Countries
  - 12.5.5 Turkey

## **CHAPTER 13 SUMMARY FOR GLOBAL UMAMI FLAVORS MARKET (2020-2025)**

- 13.1 Umami Flavors Market Size
- 13.2 Umami Flavors Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Umami Flavors Market Size by Type

## **CHAPTER 14 GLOBAL UMAMI FLAVORS MARKET FORECAST (2025-2030)**

- 14.1 Umami Flavors Market Size Forecast
- 14.2 Umami Flavors Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Umami Flavors Type Forecast

## **CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS**

- 15.1 Ajinomoto Co.
  - 15.1.1 Company Profile
  - 15.1.2 Main Business and Umami Flavors Information
  - 15.1.3 SWOT Analysis of Ajinomoto Co.
  - 15.1.4 Ajinomoto Co. Umami Flavors Revenue, Gross Margin and Market Share (2020-2025)
- 15.2 Inc.
  - 15.2.1 Company Profile
  - 15.2.2 Main Business and Umami Flavors Information
  - 15.2.3 SWOT Analysis of Inc.
  - 15.2.4 Inc. Umami Flavors Revenue, Gross Margin and Market Share (2020-2025)
- 15.3 Kikkoman Corporation
  - 15.3.1 Company Profile
  - 15.3.2 Main Business and Umami Flavors Information
  - 15.3.3 SWOT Analysis of Kikkoman Corporation
  - 15.3.4 Kikkoman Corporation Umami Flavors Revenue, Gross Margin and Market Share (2020-2025)
- 15.4 Fufeng Group
  - 15.4.1 Company Profile
  - 15.4.2 Main Business and Umami Flavors Information
  - 15.4.3 SWOT Analysis of Fufeng Group
  - 15.4.4 Fufeng Group Umami Flavors Revenue, Gross Margin and Market Share (2020-2025)
- 15.5 Givaudan
  - 15.5.1 Company Profile

15.5.2 Main Business and Umami Flavors Information

15.5.3 SWOT Analysis of Givaudan

15.5.4 Givaudan Umami Flavors Revenue, Gross Margin and Market Share  
(2020-2025)

15.6 Urban Platter

15.6.1 Company Profile

15.6.2 Main Business and Umami Flavors Information

15.6.3 SWOT Analysis of Urban Platter

15.6.4 Urban Platter Umami Flavors Revenue, Gross Margin and Market Share  
(2020-2025)

15.7 International Flavors & Fragrances Inc. (IFF)

15.7.1 Company Profile

15.7.2 Main Business and Umami Flavors Information

15.7.3 SWOT Analysis of International Flavors & Fragrances Inc. (IFF)

15.7.4 International Flavors & Fragrances Inc. (IFF) Umami Flavors Revenue, Gross  
Margin and Market Share (2020-2025)

15.8 Kerry Group

15.8.1 Company Profile

15.8.2 Main Business and Umami Flavors Information

15.8.3 SWOT Analysis of Kerry Group

15.8.4 Kerry Group Umami Flavors Revenue, Gross Margin and Market Share  
(2020-2025)

Please ask for sample pages for full companies list

## Tables & Figures

### TABLES AND FIGURES

Table Abbreviation and Acronyms

Table Research Scope of Umami Flavors Report

Table Data Sources of Umami Flavors Report

Table Major Assumptions of Umami Flavors Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Umami Flavors Picture

Table Umami Flavors Classification

Table Umami Flavors Applications

Table Drivers of Umami Flavors Market

Table Restraints of Umami Flavors Market

Table Opportunities of Umami Flavors Market

Table Threats of Umami Flavors Market

Table Raw Materials Suppliers

Table Different Production Methods of Umami Flavors

Table Cost Structure Analysis of Umami Flavors

Table Key End Users

Table Latest News of Umami Flavors Market

Table Merger and Acquisition

Table Planned/Future Project of Umami Flavors Market

Table Policy of Umami Flavors Market

Table 2020-2030 North America Umami Flavors Market Size

Figure 2020-2030 North America Umami Flavors Market Size and CAGR

Table 2020-2030 North America Umami Flavors Market Size by Application

Table 2020-2025 North America Umami Flavors Key Players Revenue

Table 2020-2025 North America Umami Flavors Key Players Market Share

Table 2020-2030 North America Umami Flavors Market Size by Type

Table 2020-2030 United States Umami Flavors Market Size

Table 2020-2030 Canada Umami Flavors Market Size

Table 2020-2030 Mexico Umami Flavors Market Size

Table 2020-2030 South America Umami Flavors Market Size

Figure 2020-2030 South America Umami Flavors Market Size and CAGR

Table 2020-2030 South America Umami Flavors Market Size by Application

Table 2020-2025 South America Umami Flavors Key Players Revenue

Table 2020-2025 South America Umami Flavors Key Players Market Share

Table 2020-2030 South America Umami Flavors Market Size by Type  
Table 2020-2030 Brazil Umami Flavors Market Size  
Table 2020-2030 Argentina Umami Flavors Market Size  
Table 2020-2030 Chile Umami Flavors Market Size  
Table 2020-2030 Peru Umami Flavors Market Size  
Table 2020-2030 Asia & Pacific Umami Flavors Market Size  
Figure 2020-2030 Asia & Pacific Umami Flavors Market Size and CAGR  
Table 2020-2030 Asia & Pacific Umami Flavors Market Size by Application  
Table 2020-2025 Asia & Pacific Umami Flavors Key Players Revenue  
Table 2020-2025 Asia & Pacific Umami Flavors Key Players Market Share  
Table 2020-2030 Asia & Pacific Umami Flavors Market Size by Type  
Table 2020-2030 China Umami Flavors Market Size  
Table 2020-2030 India Umami Flavors Market Size  
Table 2020-2030 Japan Umami Flavors Market Size  
Table 2020-2030 South Korea Umami Flavors Market Size  
Table 2020-2030 Southeast Asia Umami Flavors Market Size  
Table 2020-2030 Australia Umami Flavors Market Size  
Table 2020-2030 Europe Umami Flavors Market Size  
Figure 2020-2030 Europe Umami Flavors Market Size and CAGR  
Table 2020-2030 Europe Umami Flavors Market Size by Application  
Table 2020-2025 Europe Umami Flavors Key Players Revenue  
Table 2020-2025 Europe Umami Flavors Key Players Market Share  
Table 2020-2030 Europe Umami Flavors Market Size by Type  
Table 2020-2030 Germany Umami Flavors Market Size  
Table 2020-2030 France Umami Flavors Market Size  
Table 2020-2030 United Kingdom Umami Flavors Market Size  
Table 2020-2030 Italy Umami Flavors Market Size  
Table 2020-2030 Spain Umami Flavors Market Size  
Table 2020-2030 Belgium Umami Flavors Market Size  
Table 2020-2030 Netherlands Umami Flavors Market Size  
Table 2020-2030 Austria Umami Flavors Market Size  
Table 2020-2030 Poland Umami Flavors Market Size  
Table 2020-2030 Russia Umami Flavors Market Size  
Table 2020-2030 MEA Umami Flavors Market Size  
Figure 2020-2030 MEA Umami Flavors Market Size and CAGR  
Table 2020-2030 MEA Umami Flavors Market Size by Application  
Table 2020-2025 MEA Umami Flavors Key Players Revenue  
Table 2020-2025 MEA Umami Flavors Key Players Market Share  
Table 2020-2030 MEA Umami Flavors Market Size by Type

Table 2020-2030 Egypt Umami Flavors Market Size  
Table 2020-2030 Israel Umami Flavors Market Size  
Table 2020-2030 South Africa Umami Flavors Market Size  
Table 2020-2030 Gulf Cooperation Council Countries Umami Flavors Market Size  
Table 2020-2030 Turkey Umami Flavors Market Size  
Table 2020-2025 Global Umami Flavors Market Size by Region  
Table 2020-2025 Global Umami Flavors Market Size Share by Region  
Table 2020-2025 Global Umami Flavors Market Size by Application  
Table 2020-2025 Global Umami Flavors Market Share by Application  
Table 2020-2025 Global Umami Flavors Key Vendors Revenue  
Figure 2020-2025 Global Umami Flavors Market Size and Growth Rate  
Table 2020-2025 Global Umami Flavors Key Vendors Market Share  
Table 2020-2025 Global Umami Flavors Market Size by Type  
Table 2020-2025 Global Umami Flavors Market Share by Type  
Table 2025-2030 Global Umami Flavors Market Size by Region  
Table 2025-2030 Global Umami Flavors Market Size Share by Region  
Table 2025-2030 Global Umami Flavors Market Size by Application  
Table 2025-2030 Global Umami Flavors Market Share by Application  
Table 2025-2030 Global Umami Flavors Key Vendors Revenue  
Figure 2025-2030 Global Umami Flavors Market Size and Growth Rate  
Table 2025-2030 Global Umami Flavors Key Vendors Market Share  
Table 2025-2030 Global Umami Flavors Market Size by Type  
Table 2025-2030 Umami Flavors Global Market Share by Type  
Table Ajinomoto Co. Information  
Table SWOT Analysis of Ajinomoto Co.  
Table 2020-2025 Ajinomoto Co. Umami Flavors Revenue Gross Profit Margin  
Figure 2020-2025 Ajinomoto Co. Umami Flavors Revenue and Growth Rate  
Figure 2020-2025 Ajinomoto Co. Umami Flavors Market Share  
Table Inc. Information  
Table SWOT Analysis of Inc.  
Table 2020-2025 Inc. Umami Flavors Revenue Gross Profit Margin  
Figure 2020-2025 Inc. Umami Flavors Revenue and Growth Rate  
Figure 2020-2025 Inc. Umami Flavors Market Share  
Table Kikkoman Corporation Information  
Table SWOT Analysis of Kikkoman Corporation  
Table 2020-2025 Kikkoman Corporation Umami Flavors Revenue Gross Profit Margin  
Figure 2020-2025 Kikkoman Corporation Umami Flavors Revenue and Growth Rate  
Figure 2020-2025 Kikkoman Corporation Umami Flavors Market Share  
Table Fufeng Group Information

Table SWOT Analysis of Fufeng Group

Table 2020-2025 Fufeng Group Umami Flavors Revenue Gross Profit Margin

Figure 2020-2025 Fufeng Group Umami Flavors Revenue and Growth Rate

Figure 2020-2025 Fufeng Group Umami Flavors Market Share

Table Givaudan Information

Table SWOT Analysis of Givaudan

Table 2020-2025 Givaudan Umami Flavors Revenue Gross Profit Margin

Figure 2020-2025 Givaudan Umami Flavors Revenue and Growth Rate

Figure 2020-2025 Givaudan Umami Flavors Market Share

Table Urban Platter Information

Table SWOT Analysis of Urban Platter

Table 2020-2025 Urban Platter Umami Flavors Revenue Gross Profit Margin

Figure 2020-2025 Urban Platter Umami Flavors Revenue and Growth Rate

Figure 2020-2025 Urban Platter Umami Flavors Market Share

Table International Flavors & Fragrances Inc. (IFF) Information

Table SWOT Analysis of International Flavors & Fragrances Inc. (IFF)

Table 2020-2025 International Flavors & Fragrances Inc. (IFF) Umami Flavors Revenue  
Gross Profit Margin

Figure 2020-2025 International Flavors & Fragrances Inc. (IFF) Umami Flavors  
Revenue and Growth Rate

Figure 2020-2025 International Flavors & Fragrances Inc. (IFF) Umami Flavors Market  
Share

Table Kerry Group Information

Table SWOT Analysis of Kerry Group

Table 2020-2025 Kerry Group Umami Flavors Revenue Gross Profit Margin

Figure 2020-2025 Kerry Group Umami Flavors Revenue and Growth Rate

Figure 2020-2025 Kerry Group Umami Flavors Market Share

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