

Duodenoscopes Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029F

Segmented By Product (flexible duodenoscopes, rigid duodenoscopes), By Application (diagnostics, therapeutics), By End User (Hospitals & Clinics, Ambulatory Care Centers, Others), By Region and Competition

<https://marketpublishers.com/r/DCA4CD9B89DBEN.html>

Date: February 2024

Pages: 175

Price: US\$ 4,900.00 (Single User License)

ID: DCA4CD9B89DBEN

Abstracts

Global Duodenoscopes Market was valued at USD 166.52 Million in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 5.25% through 2029. Duodenoscopes, a vital tool in modern medical endoscopy, have witnessed significant growth in demand and innovation in recent years. These specialized endoscopic devices are used for visualizing and treating conditions in the duodenum, the first part of the small intestine. The global duodenoscopes market has experienced substantial expansion due to technological advancements, increasing prevalence of gastrointestinal disorders, and a rising aging population. The duodenoscopes market is primarily driven by the growing incidence of gastrointestinal disorders, including pancreatic and biliary diseases, which often require diagnostic and therapeutic interventions. Additionally, the aging population worldwide has contributed to an increased demand for endoscopic procedures, as older individuals are more prone to gastrointestinal issues.

Key Market Drivers

Rising Incidence of Gastrointestinal Disorders is Driving the Global Duodenoscopes Market.

Gastrointestinal disorders have become increasingly prevalent worldwide, contributing to a surge in demand for advanced diagnostic and therapeutic procedures. One key player in the healthcare industry addressing this demand is the duodenoscopy market. Duodenoscopes are specialized endoscopes designed for examining and treating disorders in the upper gastrointestinal (GI) tract, particularly the duodenum. Gastrointestinal disorders encompass a broad spectrum of conditions affecting the digestive system, ranging from mild discomfort to severe, life-threatening diseases. Common gastrointestinal issues include gastroesophageal reflux disease (GERD), peptic ulcers, inflammatory bowel diseases (IBD), and various cancers such as stomach and pancreatic cancer. The incidence of these disorders has been on the rise globally due to various factors such as changes in lifestyle, dietary habits, and an aging population. Western diets, high in processed foods and low in fiber, have been linked to an increased prevalence of digestive issues. Additionally, the aging population is more prone to gastrointestinal problems, leading to a growing patient pool seeking diagnosis and treatment.

Duodenoscopes play a pivotal role in the diagnosis and treatment of upper gastrointestinal disorders. These flexible, lighted tubes with a camera on the end enable healthcare professionals to visualize and access the duodenum, providing a comprehensive assessment of the upper GI tract. One of the key applications of duodenoscopes is endoscopic retrograde cholangiopancreatography (ERCP). ERCP allows healthcare providers to diagnose and treat conditions affecting the pancreas and bile ducts, such as gallstones and tumors. The therapeutic capabilities of duodenoscopes make them indispensable in the management of complex gastrointestinal conditions.

The increasing incidence of gastrointestinal disorders has propelled the demand for diagnostic and therapeutic interventions, driving the growth of the global duodenoscopes market. Technological advancements have further enhanced the capabilities of duodenoscopes, offering improved imaging quality, better maneuverability, and enhanced patient safety. Major market players are investing in research and development to introduce innovations that address the evolving needs of healthcare professionals. This includes the integration of advanced imaging technologies, such as high-definition cameras and artificial intelligence, to enhance diagnostic accuracy and treatment outcomes.

Increasing Awareness and Early Detection is Driving the Global Duodenoscopes Market

The healthcare industry is witnessing a paradigm shift towards preventive and early

detection measures, with a growing emphasis on reducing the burden of diseases through timely diagnosis. In this context, the global duodenoscopes market is experiencing a surge, driven by the increasing awareness about gastrointestinal disorders and the importance of early detection. Duodenoscopes play a crucial role in the diagnosis and treatment of gastrointestinal conditions, providing physicians with a minimally invasive means to examine the duodenum, the first part of the small intestine. The market for duodenoscopes has seen substantial growth in recent years, and this trend is expected to continue as healthcare professionals and patients alike recognize the benefits of early detection and intervention.

Patients are becoming more proactive in managing their health, leading to increased awareness of gastrointestinal health issues. Advocacy groups and awareness campaigns are playing a pivotal role in educating the public about the importance of early detection and timely medical intervention, thereby driving the demand for duodenoscopes. Governments and healthcare organizations worldwide are implementing policies to promote early detection and preventive healthcare measures. This includes investments in medical infrastructure, training programs for healthcare professionals, and initiatives to make advanced medical technologies more accessible. Such efforts are positively influencing the growth of the duodenoscopes market. The global demographic shift towards an aging population is associated with an increased prevalence of gastrointestinal diseases. As the elderly are more prone to such health issues, there is a growing need for diagnostic tools like duodenoscopes to address these concerns.

Key Market Challenges

Rising Cost of Healthcare

The global healthcare landscape is undergoing a profound transformation, marked by advancements in medical technology, improved patient care, and a growing emphasis on preventive medicine. However, this progress comes at a cost, and one of the major challenges faced by the healthcare industry is the rising cost of healthcare services and medical devices. This challenge is particularly pronounced in the Global Duodenoscopes Market, where the financial burden is impacting healthcare providers and, subsequently, patients. Developing innovative and technologically advanced duodenoscopes requires substantial investments in research and development. Manufacturers are compelled to recover these costs, leading to higher product prices.

Compliance with stringent regulatory standards, especially in terms of safety and

efficacy, adds an extra layer of cost to the production of medical devices. Manufacturers must invest in rigorous testing and quality control measures to meet these requirements. The maintenance of duodenoscopes and the training of healthcare professionals in their proper use contribute to the overall cost of these devices. Regular maintenance is essential to ensure the safety and effectiveness of the equipment. Disruptions in the global supply chain, whether due to geopolitical issues or public health crises, can lead to increased costs for raw materials and manufacturing, ultimately affecting the pricing of duodenoscopes.

Key Market Trends

Technological Advancements

In recent years, the field of medical technology has witnessed a remarkable surge in innovation, with groundbreaking advancements shaping the landscape of healthcare. One notable area experiencing significant growth is the global duodenoscopes market. Duodenoscopes, specialized instruments used for endoscopic procedures in the upper gastrointestinal tract, have undergone transformative changes, thanks to the integration of cutting-edge technologies. One of the key drivers behind the growth of the duodenoscopes market is the incorporation of advanced imaging technologies. Traditional duodenoscopes have been upgraded with high-definition (HD) and ultra-high-definition (UHD) imaging capabilities, providing healthcare professionals with clearer and more detailed visuals during procedures. This improvement in imaging not only aids in better diagnosis but also enhances the overall precision and safety of the procedures, contributing to the rising demand for duodenoscopes.

Advancements in miniaturization and portability have led to the development of compact and lightweight duodenoscopes. These devices are easier to handle and navigate through the gastrointestinal tract, resulting in improved patient comfort and reduced procedural complexities. The increased portability of duodenoscopes has expanded their applications beyond traditional hospital settings, allowing for greater accessibility in outpatient facilities and clinics. The integration of artificial intelligence (AI) in duodenoscope technology is a game-changer in the medical field. AI algorithms can analyze real-time imaging data, assisting healthcare professionals in identifying abnormalities, lesions, or potential issues during endoscopic procedures. This not only accelerates the diagnostic process but also contributes to early detection and improved patient outcomes. The use of AI in duodenoscopes exemplifies the synergy between technology and healthcare, driving the market forward.

Duodenoscopes equipped with 3D visualization and navigation capabilities provide a more immersive experience for healthcare professionals. This technology allows for better spatial awareness and depth perception during procedures, reducing the risk of errors and complications. The enhanced visualization offered by 3D duodenoscopes is particularly beneficial in intricate and challenging cases, cementing their role in the evolving landscape of gastrointestinal endoscopy. In response to concerns about infection transmission, manufacturers have focused on incorporating enhanced infection control features into duodenoscope designs. Single-use duodenoscopes and those with disposable components are gaining traction, reducing the risk of cross-contamination between patients. Moreover, the integration of advanced sterilization methods and materials with antimicrobial properties adds an extra layer of safety, addressing the critical issue of healthcare-associated infections.

Segmental Insights

Product Insights

Based on the category of Product, Flexible Duodenoscopes emerged as the dominant player in the global market for Duodenoscopes in 2023. Flexible duodenoscopes are specialized endoscopic instruments designed for the examination and treatment of the duodenum, the initial section of the small intestine. Unlike their rigid counterparts, flexible duodenoscopes offer improved maneuverability and flexibility, allowing physicians to navigate complex anatomical structures with greater ease. One of the key factors contributing to the dominance of flexible duodenoscopes is their advanced visualization technology. These devices are equipped with high-definition imaging systems that provide clear and detailed images of the duodenal anatomy. This enhanced visualization aids physicians in diagnosing and treating various gastrointestinal conditions with precision.

The flexibility of these duodenoscopes not only benefits healthcare providers but also enhances the overall patient experience. The malleability of the instrument allows for smoother insertion and reduced discomfort for patients undergoing procedures. Additionally, the flexible design helps minimize the risk of injury or damage during insertion, contributing to improved patient safety. Flexible duodenoscopes address a critical concern in the medical community – the risk of infection transmission. Traditional duodenoscopes, with their complex design and intricate channels, posed challenges in terms of effective cleaning and disinfection. The newer flexible models are designed with features to mitigate infection risks, including disposable components and enhanced reprocessing capabilities. These measures have significantly reduced the likelihood of

infections associated with endoscopic procedures.

Application Insights

The Diagnostics segment is projected to experience rapid growth during the forecast period. The integration of diagnostic capabilities into duodenoscopes is revolutionizing the way gastrointestinal diseases are detected and treated. Modern duodenoscopes are equipped with advanced imaging technologies such as high-definition (HD) cameras, which provide clearer and more detailed images of the digestive tract. Additionally, the incorporation of fluorescence imaging and narrow-band imaging (NBI) enables better visualization of abnormalities, enhancing diagnostic accuracy. Furthermore, the integration of real-time diagnostic tools, such as ultrasound probes and confocal laser endomicroscopy (CLE), allows for on-the-spot evaluation of tissues and lesions. This real-time information aids clinicians in making immediate decisions about the course of treatment, reducing the need for additional diagnostic procedures.

The dominance of diagnostics in the global duodenoscopes market is reshaping the industry landscape. As healthcare providers increasingly recognize the value of integrated diagnostic features, demand for advanced duodenoscopes is on the rise. The market is witnessing a surge in research and development activities aimed at further improving diagnostic capabilities, including the integration of artificial intelligence for image analysis and interpretation.

Regional Insights

North America emerged as the dominant player in the global Duodenoscopes market in 2023, holding the largest market share in terms of value. North America has been at the forefront of technological innovations in the healthcare sector. The region is home to several leading medical device manufacturers and research institutions that continually invest in research and development. These investments have resulted in the creation of advanced duodenoscopes with enhanced imaging capabilities, improved maneuverability, and increased patient safety. The technological prowess of North American companies has given them a competitive edge in the global market. The prevalence of gastrointestinal disorders, including pancreatic and biliary diseases, has been steadily increasing in North America. Factors such as sedentary lifestyles, unhealthy dietary habits, and an aging population contribute to the higher incidence of these diseases. Duodenoscopes play a crucial role in the diagnosis and treatment of such conditions, further boosting the demand for these devices in the region.

Key Market Players

Custom Ultrasonics, Inc

Fujifilm Holdings Corporation

Hoya Corporation

KARL STORZ GmbH & Co. KG.

Olympus Corporation

PENTAX Medical Company

Ambu A/S

Boston Scientific Corporation

EndoMed Systems

HOYA Corp.

CONMED Corporation

Becton, Dickinson and Company

B. Braun Melsungen AG

Cook Group

SonoScape Medical Corp.

Report Scope:

In this report, the Global Duodenoscopes Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Duodenoscopes Market, By Product:

Flexible Duodenoscopes

Rigid Duodenoscopes

Duodenoscopes Market, By Application:

Diagnostics

Therapeutics

Duodenoscopes Market, By End User:

Hospitals & Clinics

Ambulatory Care Centers

Others

Duodenoscopes Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Duodenoscopes Market.

Available Customizations:

Global Duodenoscopes market report with the given market data, Tech Sci Research

Duodenoscopes Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029F Segmented By...

offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validations
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL DUODENOSCOPES MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Flexible duodenoscopes, Rigid duodenoscopes)
 - 5.2.2. By Application (Diagnostics, Therapeutics)
 - 5.2.3. By End User (Hospitals & Clinics, Ambulatory Care Centers, Others)
 - 5.2.4. By Region

5.2.5. By Company (2023)

5.3. Market Map

5.3.1. By Product

5.3.2. By Application

5.3.3. By End User

5.3.4. By Region

6. NORTH AMERICA DUODENOSCOPES MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product

6.2.2. By Application

6.2.3. By End User

6.2.4. By Country

6.2.4.1. United States Duodenoscopes Market Outlook

6.2.4.1.1. Market Size & Forecast

6.2.4.1.1.1. By Value

6.2.4.1.2. Market Share & Forecast

6.2.4.1.2.1. By Product

6.2.4.1.2.2. By Application

6.2.4.1.2.3. By End User

6.2.4.2. Canada Duodenoscopes Market Outlook

6.2.4.2.1. Market Size & Forecast

6.2.4.2.1.1. By Value

6.2.4.2.2. Market Share & Forecast

6.2.4.2.2.1. By Product

6.2.4.2.2.2. By Application

6.2.4.2.2.3. By End User

6.2.4.3. Mexico Duodenoscopes Market Outlook

6.2.4.3.1. Market Size & Forecast

6.2.4.3.1.1. By Value

6.2.4.3.2. Market Share & Forecast

6.2.4.3.2.1. By Product

6.2.4.3.2.2. By Application

6.2.4.3.2.3. By End User

7. EUROPE DUODENOSCOPES MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product
 - 7.2.2. By Application
 - 7.2.3. By End User
 - 7.2.4. By Country
 - 7.2.4.1. France Duodenoscopes Market Outlook
 - 7.2.4.1.1. Market Size & Forecast
 - 7.2.4.1.1.1. By Value
 - 7.2.4.1.2. Market Share & Forecast
 - 7.2.4.1.2.1. By Product
 - 7.2.4.1.2.2. By Application
 - 7.2.4.1.2.3. By End User
 - 7.2.4.2. Germany Duodenoscopes Market Outlook
 - 7.2.4.2.1. Market Size & Forecast
 - 7.2.4.2.1.1. By Value
 - 7.2.4.2.2. Market Share & Forecast
 - 7.2.4.2.2.1. By Product
 - 7.2.4.2.2.2. By Application
 - 7.2.4.2.2.3. By End User
 - 7.2.4.3. United Kingdom Duodenoscopes Market Outlook
 - 7.2.4.3.1. Market Size & Forecast
 - 7.2.4.3.1.1. By Value
 - 7.2.4.3.2. Market Share & Forecast
 - 7.2.4.3.2.1. By Product
 - 7.2.4.3.2.2. By Application
 - 7.2.4.3.2.3. By End User
 - 7.2.4.4. Italy Duodenoscopes Market Outlook
 - 7.2.4.4.1. Market Size & Forecast
 - 7.2.4.4.1.1. By Value
 - 7.2.4.4.2. Market Share & Forecast
 - 7.2.4.4.2.1. By Product
 - 7.2.4.4.2.2. By Application
 - 7.2.4.4.2.3. By End User
 - 7.2.4.5. Spain Duodenoscopes Market Outlook
 - 7.2.4.5.1. Market Size & Forecast
 - 7.2.4.5.1.1. By Value

7.2.4.5.2. Market Share & Forecast

7.2.4.5.2.1. By Product

7.2.4.5.2.2. By Application

7.2.4.5.2.3. By End User

8. ASIA PACIFIC DUODENOSCOPES MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Product

8.2.2. By Application

8.2.3. By End User

8.2.4. By Country

8.2.4.1. China Duodenoscopes Market Outlook

8.2.4.1.1. Market Size & Forecast

8.2.4.1.1.1. By Value

8.2.4.1.2. Market Share & Forecast

8.2.4.1.2.1. By Product

8.2.4.1.2.2. By Application

8.2.4.1.2.3. By End User

8.2.4.2. India Duodenoscopes Market Outlook

8.2.4.2.1. Market Size & Forecast

8.2.4.2.1.1. By Value

8.2.4.2.2. Market Share & Forecast

8.2.4.2.2.1. By Product

8.2.4.2.2.2. By Application

8.2.4.2.2.3. By End User

8.2.4.3. South Korea Duodenoscopes Market Outlook

8.2.4.3.1. Market Size & Forecast

8.2.4.3.1.1. By Value

8.2.4.3.2. Market Share & Forecast

8.2.4.3.2.1. By Product

8.2.4.3.2.2. By Application

8.2.4.3.2.3. By End User

8.2.4.4. Japan Duodenoscopes Market Outlook

8.2.4.4.1. Market Size & Forecast

8.2.4.4.1.1. By Value

8.2.4.4.2. Market Share & Forecast

- 8.2.4.4.2.1. By Product
- 8.2.4.4.2.2. By Application
- 8.2.4.4.2.3. By End User
- 8.2.4.5. Australia Duodenoscopes Market Outlook
 - 8.2.4.5.1. Market Size & Forecast
 - 8.2.4.5.1.1. By Value
 - 8.2.4.5.2. Market Share & Forecast
 - 8.2.4.5.2.1. By Product
 - 8.2.4.5.2.2. By Application
 - 8.2.4.5.2.3. By End User

9. SOUTH AMERICA DUODENOSCOPES MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product
 - 9.2.2. By Application
 - 9.2.3. By End User
 - 9.2.4. By Country
 - 9.2.4.1. Brazil Duodenoscopes Market Outlook
 - 9.2.4.1.1. Market Size & Forecast
 - 9.2.4.1.1.1. By Value
 - 9.2.4.1.2. Market Share & Forecast
 - 9.2.4.1.2.1. By Product
 - 9.2.4.1.2.2. By Application
 - 9.2.4.1.2.3. By End User
 - 9.2.4.2. Argentina Duodenoscopes Market Outlook
 - 9.2.4.2.1. Market Size & Forecast
 - 9.2.4.2.1.1. By Value
 - 9.2.4.2.2. Market Share & Forecast
 - 9.2.4.2.2.1. By Product
 - 9.2.4.2.2.2. By Application
 - 9.2.4.2.2.3. By End User
 - 9.2.4.3. Colombia Duodenoscopes Market Outlook
 - 9.2.4.3.1. Market Size & Forecast
 - 9.2.4.3.1.1. By Value
 - 9.2.4.3.2. Market Share & Forecast
 - 9.2.4.3.2.1. By Product

- 9.2.4.3.2.2. By Application
- 9.2.4.3.2.3. By End User

10. MIDDLE EAST & AFRICA DUODENOSCOPES MARKET OUTLOOK

10.1. Market Size & Forecast

- 10.1.1. By Value

10.2. Market Share & Forecast

- 10.2.1. By Product
- 10.2.2. By Application
- 10.2.3. By End User
- 10.2.4. By Country

10.2.4.1. South Africa Duodenoscopes Market Outlook

10.2.4.1.1. Market Size & Forecast

- 10.2.4.1.1.1. By Value

10.2.4.1.2. Market Share & Forecast

- 10.2.4.1.2.1. By Product
- 10.2.4.1.2.2. By Application
- 10.2.4.1.2.3. By End User

10.2.4.2. Saudi Arabia Duodenoscopes Market Outlook

10.2.4.2.1. Market Size & Forecast

- 10.2.4.2.1.1. By Value

10.2.4.2.2. Market Share & Forecast

- 10.2.4.2.2.1. By Product
- 10.2.4.2.2.2. By Application
- 10.2.4.2.2.3. By End User

10.2.4.3. UAE Duodenoscopes Market Outlook

10.2.4.3.1. Market Size & Forecast

- 10.2.4.3.1.1. By Value

10.2.4.3.2. Market Share & Forecast

- 10.2.4.3.2.1. By Product
- 10.2.4.3.2.2. By Application
- 10.2.4.3.2.3. By End User

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Recent Development
- 12.2. Mergers & Acquisitions
- 12.3. Product Launches

13. COMPETITIVE LANDSCAPE

- 13.1. Custom Ultrasonics, Inc
 - 13.1.1. Business Overview
 - 13.1.2. Product Offerings
 - 13.1.3. Recent Developments
 - 13.1.4. Key Personnel
 - 13.1.5. SWOT Analysis
- 13.2. Fujifilm Holdings Corporation
- 13.3. Hoya Corporation
- 13.4. KARL STORZ GmbH & Co. KG.
- 13.5. Olympus Corporation
- 13.6. PENTAX Medical Company
- 13.7. Ambu A/S
- 13.8. Boston Scientific Corporation
- 13.9. EndoMed Systems
- 13.10. HOYA Corp.
- 13.11. CONMED Corporation
- 13.12. Becton, Dickinson and Company
- 13.13. B. Braun Melsungen AG
- 13.14. Cook Group
- 13.15. SonoScape Medical Corp.

14. STRATEGIC RECOMMENDATIONS

15. ABOUT US & DISCLAIMER

I would like to order

Product name: Duodenoscopes Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029F Segmented By Product (flexible duodenoscopes, rigid duodenoscopes), By Application (diagnostics, therapeutics), By End User (Hospitals & Clinics, Ambulatory Care Centers, Others), By Region and Competition

Product link: <https://marketpublishers.com/r/DCA4CD9B89DBEN.html>

Price: US\$ 4,900.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/DCA4CD9B89DBEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below
and fax the completed form to +44 20 7900 3970