

E-Health Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Type (Electronic Health Record (EHR), Vendor Neutral Archive (VNA), Telehealth, Prescribing Solutions, Medical Apps, and Others), By Services (Remote Monitoring, Diagnoses & Consultation, Healthcare System Strengthening, Treatment, Database Management), By End User (Healthcare Providers, Payers, Healthcare Consumers, and Others), By Region and Competition

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Abstracts

The global E-health Market was valued at USD 85.47 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 12.80% through 2028. E-health, or the utilization of information and communication technologies (ICTs) in healthcare delivery, plays a crucial role in enhancing access, efficiency, and quality of healthcare services. It encompasses a wide range of electronic functionalities such as physical and psychological diagnosis, treatment, vital signs monitoring, teleconsultation, and electronic prescriptions. Particularly in remote and underserved areas, where healthcare services are limited or unavailable, E-health has emerged as a vital solution. With the increasing internet penetration worldwide, E-health has gained significant recognition in facilitating easier identification of optimal treatments and early detection of illnesses. Moreover, it enables seamless communication between users and healthcare professionals through various mediums like email, text, audio, and video.

Key Market Drivers

Growing Demand for Telemedicine

The increasing demand for decentralized care, aimed at improving the cost-effectiveness of healthcare services, is driving the adoption of telemedicine and fueling the growth of the E-health industry. With the rising demand for personalized healthcare, the deployment of telemedicine is witnessing significant growth. The growing trend of preventive healthcare, coupled with the emergence of mobile health, is boosting the popularity of wearable devices and driving market growth. Furthermore, the introduction of favorable government initiatives to accelerate the adoption of E-health is further propelling market growth. For example, in October 2020, the Indian government collaborated with the Dutch government to facilitate digital health facilities and security, thereby enabling the digital transformation of the healthcare sector in both countries.

Rising Demand for Digital Healthcare Products and Services

The growing adoption of innovative, digital, and patient-centric care technologies is a key driver of the global E-health market's expansion. Demand for digital healthcare products and services is rising among hospitals and patients worldwide. The convenience and constant availability of health professionals through various E-health platforms have significantly increased the demand for services like consultations and education. Investments in telecommunications and IT infrastructure, coupled with the widespread adoption of smartphones and internet usage, are fostering the growth of the E-health market. According to ITU, approximately 4 billion people had internet access by the end of 2019, with a majority accessing it through smartphones. Health professionals are leveraging E-health platforms to provide consultations and other services, extending the reach of medical services to rural areas. E-health platforms such as medical apps, Telehealth, and telemedicine are becoming vital distribution channels for physicians. Therefore, the rising demand for E-health platforms among consumers and health professionals is propelling the growth of the global E-health market.

Surging Prevalence of Various Non-Communicable Diseases

The increasing prevalence of non-communicable diseases, including cancer, cardiovascular diseases, diabetes, neurological disease, and respiratory diseases, is driving the adoption of E-health platforms among consumers. Additionally, the significant growth of the global geriatric population is further fueling market expansion. According to the United Nations, the global geriatric population is projected to reach 2

billion by 2050. Moreover, the growing number of healthcare units worldwide is boosting the adoption of E-health, which facilitates recording patients' medical health and provides valuable insights to doctors during treatment. This enhances patient care services in healthcare units. Furthermore, as elderly individuals are more susceptible to various diseases, they require frequent diagnosis and monitoring. E-health platforms enable remote monitoring and cater to the monitoring needs of geriatric patients. The increasing penetration of various E-health platforms worldwide is driving market growth.

Growing Necessity to Ensure Regulatory Compliance

The growing necessity to ensure regulatory compliance has led to the utilization of e-health solutions, fueling the market's growth. Significant advancements in healthcare I.T. have paved the way for successful and profitable alternatives to manual methods in managing complex tasks. Electronic health records offer numerous advantages, including meeting strict regulatory requirements and effectively managing compliance risks. The healthcare industry is experiencing a paradigm shift due to evolving regulatory demands, which is expected to drive the demand for e-health tools among stakeholders worldwide. These tools provide an efficient means of achieving critical care quality goals while reducing costs. Several factors contribute to the market's growth, such as the gradual transition to a digital healthcare system for patient analysis and management, the rise in chronic diseases, and the increasing number of mobile and internet users. Digital healthcare, an innovative medical care delivery system that leverages various digital technologies, aims to enhance the accessibility, affordability, and sustainability of high-quality medical care. Notably, the healthcare sector is the primary domain where digital technologies find extensive application.

Key Market Challenges

Shortage of Qualified Professionals

The adoption of e-health services and solutions is impeded by a scarcity of adequately trained professionals. In many developing countries, both healthcare practitioners and patients are unaware of e-health. E-health overcomes barriers by employing methods that differ significantly from traditional healthcare solutions. However, its effectiveness largely depends on the willingness of end-users, particularly healthcare professionals, to transition from paper-based patient records to electronic solutions. The primary reason for hesitancy among traditional healthcare providers, especially those in developing nations, is a lack of IT knowledge. Moreover, these providers perceive the adoption of electronic solutions as time-consuming with minimal clinical benefits. Consequently,

healthcare professionals are reluctant to embrace healthcare IT technology, resulting in a shortage of skilled personnel and a potential slowdown in market expansion. The growth of the e-health market is expected to be constrained by fraudulent activities, usability issues, privacy concerns, and security risks associated with e-health services. Information systems place paramount importance on privacy and security. Digitalizing healthcare services enables access to individual health information from any electronic device with an internet connection worldwide. One of the notable advantages of ubiquitous access to medical information is the improvement of patient's understanding of their conditions and the enhancement of medical care.

High initial Investment and Maintenance Costs

The increasing occurrences of IT breaches and data security issues, coupled with constrained budgets, have placed financial pressures on hospitals and physicians. This, in turn, has driven the adoption of digital health solutions. However, the significant capital expenses associated with consulting, planning, and implementing technologically complex systems have hindered the growth of the digital health market. Nevertheless, ongoing research and development efforts have spurred the creation of innovative digital technologies with advanced features at more affordable costs. Furthermore, as the healthcare ecosystem continues to evolve, digital technology plays a crucial role in maintaining affordability across the sector. This, in turn, benefits consumers as digital platforms make healthcare more accessible and cost-effective. The lack of supporting infrastructure in emerging countries, coupled with the high cost of health IT tools, is expected to impede the growth of the E-health market. Information security and protection emerge as significant challenges to address. The digital innovation landscape revolves around healthcare professionals and a patient-centric approach. Challenges in the E-health sector include limited availability of medical professionals, low medical insurance coverage, and affordability of healthcare services, which further hinder the growth of the E-health market. The presence of substantial infrastructure gaps, along with compliance concerns, regulatory issues, cultural and social biases, financial constraints, and a lack of quality mentorship, are additional factors that pose obstacles to market expansion.

Key Market Trends

Advancements in Electronic Health Records (EHR)

Technological advancements and innovations in electronic health records (EHR) are driving the adoption of E-health solutions, thereby fueling market growth. Providers are

increasingly striving to develop safer and more intelligent electronic health records systems to enhance accessibility, leading to rapid growth in the E-health market. Additionally, the development of cost-effective EHR systems with enhanced functionality and user-friendliness is propelling the adoption of E-health services, making a significant contribution to market growth. The emergence of value-based care models is also driving the demand for E-health, further accelerating industry growth. Moreover, the integration of artificial intelligence (AI) and machine learning to automate patient information storage and healthcare professionals' data entry workload while ensuring information access and security is playing a significant role in industry growth. This integration is also expected to increase patient engagement by enhancing patient-oriented services, which in turn is projected to bolster market growth. Furthermore, increasing research and development (R&D) activities aimed at advancing interoperability and integration of electronic health records to enhance data accessibility for healthcare professionals are anticipated to provide further impetus to market growth.

Emerging High-Profitable Market in Developing Countries

Due to advancements in e-health services and increased accessibility of affordable healthcare options, developing regions such as Asia-Pacific and LAMEA exhibit significant growth potential. The Asia-Pacific region, in particular, offers favorable opportunities for the expansion of the e-health industry. This can be attributed to the rapid population growth of India, China, and South Korea, followed by South Korea as the three economies with the largest populations. As these economies continue to grow, their governments are making considerable efforts to meet the rising demand for improved medical infrastructure and services. E-health plays a crucial role in establishing real-time connectivity across various healthcare services, thereby reducing errors caused by manual labor and contributing to the overall reduction of healthcare costs. Furthermore, the e-health industry in India is currently in a promising stage, with a projected increase in demand for e-health solutions in the forecast period. This can be attributed to the alarming rise in chronic disorders, improvements in healthcare infrastructure, government initiatives to adopt e-health solutions and services, and a growing demand for enhanced healthcare services. For instance, the Ministry of Health and Family Welfare (MoHFW) of the Government of India supports e-health as a means to improve the public healthcare delivery system through the utilization of information and communication technology. This involves reaching services to citizens and empowering them through information dissemination. Consequently, it is expected that increased investments from central and local government agencies, as well as investments from prominent regional players, will present lucrative opportunities in the industry.

Segmental Insights

Type Insights

The market segmentation of E-Health Services, based on type, includes EHR, e-prescribing, telemedicine, big data systems, clinical decision support, and consumer health IT. In 2022, the EHR segment dominated the E-Health Services market, driven by the growing demand from hospitals to streamline paperwork and ensure convenient and portable access to patient health records in developed nations. The expansion of the EHR industry can be attributed to government initiatives aimed at digitizing hospital operations and enhancing operational efficiency. In Australia, My Health Record serves as a platform for digital health records.

Service Insights

Based on service, the E-health market is categorized into remote monitoring, diagnoses & consultation, healthcare system strengthening, treatment, and database management services. During the forecast period, the remote monitoring segment is projected to hold the largest market share. The market growth of the remote monitoring segment is driven by the rising demand for self-monitoring devices and automatic monitors for various physical activities. Additionally, factors such as the increasing prevalence of chronic diseases and lifestyle disorders, along with the growing preference for home healthcare, contribute to the overall market growth of E-health.

Regional Insights

The North America e-health Services market held the largest market share and is projected to exhibit a significant CAGR growth during the study period. This is attributed to the region's highly developed healthcare sector, substantial R&D expenditures on e-health solutions, increasing rates of product approval, and the presence of numerous e-health businesses. Athena Health (HER) has recently released a state-of-the-art Telehealth tool integrated with electronic health records. This technology enables practitioners to conduct virtual visits without the need for additional software or third-party apps. Organizations in the market employ strategies such as new product development, partnerships, expansions, mergers, and acquisitions. The Europe E-Health Services market accounts for the second-largest market share. Due to increased government spending on advanced healthcare facilities, Europe is expected to hold the fastest-growing market share. Furthermore, the UK E-Health Services market held the

largest market share, while the Germany E-Health Services market witnessed the highest growth rate within the region. The Asia Pacific E-Health Services Market is projected to grow at the fastest CAGR from 2022 to 2028. The demand for E-health platforms is driven by increased government spending on sophisticated and digital healthcare infrastructure. Additionally, the market will expand due to the rising prevalence of various diseases and the rapidly growing geriatric population. By 2050, the United Nations estimates that 80% of the world's elderly population will reside in low- and middle-income countries. Furthermore, technological advancements, increased smartphone usage, and internet penetration are expected to positively impact market growth in the Asia Pacific region. Moreover, the China E-Health Services market held the largest market share, while the India E-Health Services market experienced the highest growth rate within the region.

Key Market Players

Boston Scientific Corporation

Allscripts Healthcare Solutions, Inc.

Koninklijke Philips N.V.

Athenahealth, Inc.

Cerner Corporation

CompuMed, Inc.

IBM healthcare

Medisafe Limited

SetPoint Medical Corporation

Motion Computing, Inc.

Report Scope:

In this report, the Global E-health Market has been segmented into the following

E-Health Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Type...

categories, in addition to the industry trends, which have also been detailed below:

E-health Market, By Type:

Electronic Health Record (EHR)

Vendor Neutral Archive (VNA)

Telehealth

Prescribing Solutions

Medical Apps

Others

E-health Market, By Services:

Remote Monitoring

Diagnoses & Consultation

Healthcare System Strengthening

Treatment

Database Management

E-health Market, By End User:

Healthcare Providers

Payers

Healthcare Consumers

Others

E-health 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

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global E-health Market.

Available Customizations:

Global E-health market report with the given market data, Tech Sci Research 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

2. RESEARCH METHODOLOGY

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL E-HEALTH MARKET OUTLOOK

5.1. Market Size & Forecast

5.1.1. By Value

5.2. Market Share & Forecast

5.2.1. By Product Type (Intensive Care Unit/Critical Care, Transport/Portable/Ambulatory, and Neonatal Care)

5.2.2. By Component (Devices and Services)

5.2.3. By Interface (Non-invasive Ventilation and Invasive Ventilation)

5.2.4. By End User (Hospital & Clinic, Home Care, and Ambulatory Surgical Centre)

5.2.5. By Region

5.2.6. By Company (2022)

5.3. Market Map

6. NORTH AMERICA E-HEALTH MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product Type

6.2.2. By Component

6.2.3. By Interface

6.2.4. By End User

6.2.5. By Country

6.3. North America: Country Analysis

6.3.1. United States E-health Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

- 6.3.1.2.1. By Product Type
- 6.3.1.2.2. By Component
- 6.3.1.2.3. By Interface
- 6.3.1.2.4. By End User
- 6.3.2. Canada E-health Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Product Type
 - 6.3.2.2.2. By Component
 - 6.3.2.2.3. By Interface
 - 6.3.2.2.4. By End User
- 6.3.3. Mexico E-health Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Product Type
 - 6.3.3.2.2. By Component
 - 6.3.3.2.3. By Interface
 - 6.3.3.2.4. By End User

7. EUROPE E-HEALTH MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product Type
 - 7.2.2. By Component
 - 7.2.3. By Interface
 - 7.2.4. By End User
 - 7.2.5. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany E-health Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Product Type
 - 7.3.1.2.2. By Component
 - 7.3.1.2.3. By Interface

- 7.3.1.2.4. By End User
- 7.3.2. United Kingdom E-health Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Product Type
 - 7.3.2.2.2. By Component
 - 7.3.2.2.3. By Interface
 - 7.3.2.2.4. By End User
- 7.3.3. Italy E-health Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Product Type
 - 7.3.3.2.2. By Component
 - 7.3.3.2.3. By Interface
 - 7.3.3.2.4. By End User
- 7.3.4. France E-health Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product Type
 - 7.3.4.2.2. By Component
 - 7.3.4.2.3. By Interface
 - 7.3.4.2.4. By End User
- 7.3.5. Spain E-health Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Product Type
 - 7.3.5.2.2. By Component
 - 7.3.5.2.3. By Interface
 - 7.3.5.2.4. By End User

8. ASIA-PACIFIC E-HEALTH MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast

- 8.2.1. By Product Type
- 8.2.2. By Component
- 8.2.3. By Interface
- 8.2.4. By End User
- 8.2.5. By Country
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China E-health Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product Type
 - 8.3.1.2.2. By Component
 - 8.3.1.2.3. By Interface
 - 8.3.1.2.4. By End User
 - 8.3.2. India E-health Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product Type
 - 8.3.2.2.2. By Component
 - 8.3.2.2.3. By Interface
 - 8.3.2.2.4. By End User
 - 8.3.3. Japan E-health Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product Type
 - 8.3.3.2.2. By Component
 - 8.3.3.2.3. By Interface
 - 8.3.3.2.4. By End User
 - 8.3.4. South Korea E-health Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Product Type
 - 8.3.4.2.2. By Component
 - 8.3.4.2.3. By Interface
 - 8.3.4.2.4. By End User
 - 8.3.5. Australia E-health Market Outlook

- 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
- 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Product Type
 - 8.3.5.2.2. By Component
 - 8.3.5.2.3. By Interface
 - 8.3.5.2.4. By End User

9. SOUTH AMERICA E-HEALTH MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product Type
 - 9.2.2. By Component
 - 9.2.3. By Interface
 - 9.2.4. By End User
 - 9.2.5. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil E-health Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product Type
 - 9.3.1.2.2. By Component
 - 9.3.1.2.3. By Interface
 - 9.3.1.2.4. By End User
 - 9.3.2. Argentina E-health Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product Type
 - 9.3.2.2.2. By Component
 - 9.3.2.2.3. By Interface
 - 9.3.2.2.4. By End User
 - 9.3.3. Colombia E-health Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast

- 9.3.3.2.1. By Product Type
- 9.3.3.2.2. By Component
- 9.3.3.2.3. By Interface
- 9.3.3.2.4. By End User

10. MIDDLE EAST AND AFRICA E-HEALTH MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Product Type
 - 10.2.2. By Component
 - 10.2.3. By Interface
 - 10.2.4. By End User
 - 10.2.5. By Country
- 10.3. MEA: Country Analysis
 - 10.3.1. South Africa E-health Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Product Type
 - 10.3.1.2.2. By Component
 - 10.3.1.2.3. By Interface
 - 10.3.1.2.4. By End User
 - 10.3.2. Saudi Arabia E-health Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Product Type
 - 10.3.2.2.2. By Component
 - 10.3.2.2.3. By Interface
 - 10.3.2.2.4. By End User
 - 10.3.3. UAE E-health Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Product Type
 - 10.3.3.2.2. By Component
 - 10.3.3.2.3. By Interface

10.3.3.2.4. By End User

11. MARKET DYNAMICS

12. MARKET TRENDS & DEVELOPMENTS

13. GLOBAL E-HEALTH MARKET: SWOT ANALYSIS

14. COMPETITIVE LANDSCAPE

14.1. Business Overview

14.2. Product Offerings

14.3. Recent Developments

14.4. Key Personnel

14.5. SWOT Analysis

14.5.1. Getinge AB

14.5.2. Medtronic PLC

14.5.3. Koninklijke Philips NV

14.5.4. Smiths Medical

14.5.5. ResMed Inc.

14.5.6. Drägerwerk AG & Co. KGaA

14.5.7. GE Healthcare

14.5.8. Mindray Medical International Limited

14.5.9. Nihon Kohden Corporation

14.5.10. Vyair Medical Inc.

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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