

Europe & CIS 3-D Printing Market By Technology (Stereolithography (SLA), Fused Deposition Modeling (FDM), Selective Laser Sintering (SLS), Digital Light Processing (DLP), Inkjet Printing, Others), By Material (Plastics, Metals, Ceramics, Composites, Others), By End User (Aerospace, Automotive, Healthcare, Consumer Products, Electronics, Education, Others), By Country, Competition, Forecast and Opportunities, 2019-2029F

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Abstracts

Europe & CIS 3-D Printing Market was valued at USD 11.35 Billion in 2023 and is expected to reach USD 26.05 Billion by 2029 with a CAGR of 14.68% during the forecast period.

The Europe & CIS 3-D Printing Market refers to the adoption and integration of three-dimensional printing technology across various industries in the region, enabling the creation of physical objects from digital designs. This technology allows for the production of complex, customized parts and products layer by layer, using materials like plastics, metals, ceramics, and more. 3-D printing is revolutionizing manufacturing processes in industries such as aerospace, automotive, healthcare, and consumer goods by reducing costs, minimizing material waste, and shortening production times. In Europe & CIS, the 3-D printing market is set to rise significantly due to several key factors. The region is witnessing a surge in demand for personalized products, particularly in healthcare for prosthetics and implants, and in automotive and aerospace for highly specialized components. Additionally, the continuous advancement in additive manufacturing technologies, including the development of faster, more efficient printers

and new materials, is driving growth. Europe & CIS's strong commitment to sustainability is also playing a role, as 3-D printing supports environmentally friendly manufacturing processes by reducing material usage and allowing for more localized production, thus lowering transportation emissions. Moreover, the increasing investments from governments and private sectors in research and development for 3-D printing technologies are further accelerating market expansion. The rise of Industry 4.0, which integrates digital technologies into manufacturing, is another key factor contributing to the market's growth, as companies adopt smart manufacturing systems that leverage 3-D printing for prototyping, tooling, and direct production. As more industries across Europe & CIS recognize the cost-efficiency and flexibility of 3-D printing, its adoption is expected to grow, positioning the market for robust expansion in the coming years. This growth will be further fueled by collaborations between technology providers and end-user industries to develop innovative applications and solutions.

Key Market Drivers

Rising Demand for Customized and Personalized Products

The Europe & CIS 3-D Printing Market is being significantly driven by the increasing demand for customized and personalized products across various industries. This trend is especially evident in sectors such as healthcare, automotive, and consumer goods, where customers are seeking products tailored to their specific requirements. In healthcare, 3-D printing is revolutionizing the production of personalized medical devices, such as prosthetics, implants, and dental products, which are designed to fit individual patients precisely. For instance, orthopedic implants, hearing aids, and dental crowns are now being manufactured using 3-D printing technology to achieve superior fitting and performance. The ability to customize these products with precision not only enhances patient outcomes but also reduces the time required for design iterations and adjustments.

In the automotive industry, there is a growing demand for custom-made parts, especially in high-performance vehicles and motorsports, where precision and material optimization are crucial. Automotive manufacturers are leveraging 3-D printing to produce lightweight components, improve fuel efficiency, and reduce vehicle emissions. This has become particularly important in the context of Europe & CIS's stringent environmental regulations and the shift towards electric vehicles.

In the consumer goods sector, companies are increasingly using 3-D printing to create

personalized products that cater to individual preferences. Whether it is custom-designed fashion accessories, footwear, or home décor items, 3-D printing enables businesses to offer a high degree of customization, which enhances customer satisfaction and brand loyalty. This shift towards personalized production is expected to fuel the demand for 3-D printing solutions in Europe & CIS, as companies across industries embrace the technology to meet evolving consumer preferences and differentiate themselves in competitive markets.

The ability of 3-D printing to provide cost-effective, rapid, and precise customization of products is driving its widespread adoption in Europe & CIS. As consumer expectations for tailored products continue to rise, the 3-D Printing Market is poised for substantial growth, with companies investing in advanced printing technologies to offer bespoke solutions at scale.

Advancements in Additive Manufacturing Technologies

Technological advancements in additive manufacturing are playing a pivotal role in the growth of the Europe & CIS 3-D Printing Market. Additive manufacturing, commonly referred to as 3-D printing, has evolved rapidly over the past decade, with significant improvements in printing speed, material quality, and precision. These advancements have expanded the range of applications for 3-D printing and have made technology more accessible to a broader array of industries.

One of the key technological advancements driving market growth is the development of multi-material printing. This innovation allows manufacturers to print complex objects using multiple materials in a single production process. This capability is particularly valuable in industries such as aerospace, automotive, and electronics, where different materials with distinct properties must be integrated into a single component. Multi-material printing reduces the need for assembly and enhances the performance of the final product, leading to increased adoption of 3-D printing solutions.

Additionally, the introduction of new materials suitable for 3-D printing, such as high-performance polymers, metals, and ceramics, has opened up new possibilities for the technology. Industries that require high-strength, heat-resistant, or biocompatible materials are now able to use 3-D printing for a wider range of applications, including functional parts, tooling, and end-use products. For instance, the aerospace industry is increasingly using 3-D printing to manufacture complex metal parts that are lighter and stronger than those produced through traditional methods, resulting in improved fuel efficiency and performance.

Another critical advancement is the improvement in 3-D printing software and design tools. Modern software solutions allow for greater design flexibility and optimization, enabling manufacturers to create intricate geometries that were previously impossible or cost-prohibitive with traditional manufacturing techniques. The ability to simulate and test designs before printing also reduces the time and cost associated with prototyping, making 3-D printing a more efficient and cost-effective solution for product development.

As technological advancements continue to enhance the capabilities of 3-D printing, industries across Europe & CIS are increasingly adopting additive manufacturing for a wide range of applications. These innovations are expected to drive further growth in the 3-D Printing Market as companies leverage cutting-edge technologies to improve efficiency, reduce costs, and meet the demands of complex manufacturing processes.

Focus on Sustainability and Eco-Friendly Manufacturing

The Europe & CIS 3-D Printing Market is also experiencing growth due to the increasing focus on sustainability and eco-friendly manufacturing practices. Environmental concerns have become a top priority for industries across the region, and 3-D printing is emerging as a key technology that supports more sustainable production processes.

One of the primary ways in which 3-D printing contributes to sustainability is by minimizing material waste. Traditional manufacturing processes, such as subtractive manufacturing, often result in significant material waste as excess material is removed during production. In contrast, 3-D printing is an additive process, meaning that material is added layer by layer to create the final product, with minimal waste generated. This efficiency is particularly valuable in industries that use expensive or rare materials, such as aerospace and medical devices, where material savings can result in significant cost reductions.

In addition to reducing material waste, 3-D printing also supports more localized production, which can reduce transportation-related emissions. By enabling on-demand manufacturing at or near the point of use, 3-D printing reduces the need for long-distance shipping and the associated environmental impact. This is particularly relevant in Europe & CIS, where environmental regulations and sustainability initiatives are driving companies to rethink their supply chains and adopt more localized production strategies.

Moreover, 3-D printing allows for the use of recycled and biodegradable materials,

further enhancing its environmental credentials. For example, some manufacturers are experimenting with using recycled plastics and bio-based materials for 3-D printing, which reduces the reliance on virgin resources and lowers the environmental impact of production. This aligns with Europe & CIS's broader goals of reducing plastic waste and promoting a circular economy.

As industries in Europe & CIS continue to prioritize sustainability, the adoption of 3-D printing is expected to increase. The technology's ability to reduce waste, support localized production, and incorporate eco-friendly materials makes it an attractive option for companies seeking to improve their environmental performance. This trend is likely to drive further growth in the Europe & CIS 3-D Printing Market as sustainability becomes a central consideration in manufacturing decisions.

Key Market Challenges

High Initial Capital Investment and Operational Costs

One of the most significant challenges facing the Europe & CIS 3-D Printing Market is the high initial capital investment and ongoing operational costs associated with adopting and implementing 3-D printing technologies. While the benefits of 3-D printing, such as customization and material efficiency, are well-documented, the upfront financial commitment required to purchase advanced 3-D printers, materials, and associated software can be a barrier, especially for small and medium-sized enterprises. High-end industrial-grade 3-D printers, which are necessary for producing high-quality, durable parts in industries such as aerospace, automotive, and healthcare, can be prohibitively expensive. These costs are further compounded by the need for specialized materials, such as metal powders or high-performance polymers, which are more costly than traditional manufacturing materials.

In addition to the purchase of equipment, companies must also invest in skilled labor and training to operate the machines effectively. Unlike traditional manufacturing processes, 3-D printing requires expertise in digital design, computer-aided design software, and machine maintenance. Hiring and retaining qualified personnel with expertise in these areas adds to the overall operational costs. Furthermore, the learning curve associated with adopting 3-D printing technology can lead to delays in realizing a return on investment, as companies may need to undergo extensive trial and error during the initial phases of implementation. For businesses with limited resources, this challenge can create hesitancy in adopting 3-D printing technologies, despite the long-term potential benefits.

Another factor contributing to the high operational costs is the ongoing maintenance of 3-D printing equipment. Industrial 3-D printers require regular upkeep to ensure precision and performance, which can lead to additional costs for businesses. In some cases, maintenance and downtime can disrupt production schedules, impacting the overall efficiency of operations. As the technology continues to evolve, companies may also need to upgrade their equipment to stay competitive, further increasing the financial burden. While advancements in technology and the introduction of more affordable 3-D printers are expected to mitigate these challenges over time, the high capital investment and operational costs remain a key hurdle for companies in Europe & CIS looking to adopt 3-D printing on a large scale.

Limited Availability and High Cost of Materials

Another critical challenge facing the Europe & CIS 3-D Printing Market is the limited availability and high cost of materials suitable for additive manufacturing. While 3-D printing technology has advanced significantly, the range of materials that can be used for high-performance, industrial-grade applications remains limited compared to traditional manufacturing methods. In industries such as aerospace, automotive, and healthcare, the quality and properties of the materials used in 3-D printing are crucial for ensuring the durability, strength, and functionality of the final products. However, many of the materials that meet these stringent requirements, such as metal powders, high-performance polymers, and biocompatible materials, are not only scarce but also expensive.

The high cost of these specialized materials can significantly impact the overall cost-effectiveness of 3-D printing, particularly for companies that require large quantities of materials for mass production. While 3-D printing is often lauded for its ability to reduce material waste through its additive process, the upfront cost of materials can offset some of these savings, especially for industries that require premium materials. For instance, in the aerospace sector, where lightweight and heat-resistant materials are essential, the high cost of advanced metal powders such as titanium can be a limiting factor in the widespread adoption of 3-D printing for large-scale production.

The supply chain for 3-D printing materials is still relatively underdeveloped in Europe & CIS compared to traditional manufacturing materials. Many companies face challenges in sourcing the materials they need, particularly if they require specialized or custom formulations. This can lead to delays in production and increased costs as businesses are forced to import materials from other regions. Additionally, the quality and

consistency of 3-D printing materials are not always guaranteed, with some manufacturers experiencing variability in material properties that can affect the performance and reliability of printed components. This lack of standardization and the difficulty in sourcing affordable, high-quality materials pose a significant challenge to the growth of the Europe & CIS 3-D Printing Market, especially for industries that require consistent material performance for critical applications.

Key Market Trends

Increasing Adoption of 3-D Printing in Healthcare

One of the most prominent trends in the Europe & CIS 3-D Printing Market is the growing adoption of 3-D printing technologies in the healthcare sector. The ability to create customized medical devices, implants, and prosthetics tailored to individual patients' needs is driving the widespread use of 3-D printing in hospitals and healthcare facilities across Europe & CIS. This technology enables medical professionals to produce highly precise and patient-specific products, reducing the time it takes to design and manufacture custom solutions for complex medical cases.

In addition to prosthetics and implants, 3-D printing is being increasingly used for surgical planning, as it allows healthcare professionals to create accurate models of patient anatomy for pre-surgical simulations. These models help improve the precision and success rate of surgeries while reducing the risk of complications. Moreover, the potential for bioprinting, where living tissues can be printed using biological materials, is expected to revolutionize regenerative medicine and organ transplantation. Although this application is still in its early stages, the advances in 3-D printing for healthcare are set to significantly transform the industry and improve patient outcomes.

Expansion of Metal 3-D Printing for Industrial Applications

Another key trend in the Europe & CIS 3-D Printing Market is the expanding use of metal 3-D printing for industrial applications. Metal 3-D printing, also known as additive manufacturing, is gaining significant traction in industries such as aerospace, automotive, and defense, where high-performance, lightweight, and durable components are essential. The ability to manufacture complex metal parts with intricate geometries that traditional manufacturing methods cannot achieve has made 3-D printing an attractive option for producing parts for these industries.

Companies are increasingly using metal 3-D printing to produce components that

reduce material waste, enhance production efficiency, and lower overall manufacturing costs. Moreover, metal 3-D printing enables the production of lightweight parts without compromising strength, which is especially beneficial for industries such as aerospace, where weight reduction is a critical factor in improving fuel efficiency and reducing carbon emissions. As advancements in metal printing technologies continue, the adoption of 3-D printing for industrial applications is expected to grow further, driving innovation and increasing production capabilities across Europe & CIS.

Integration of Artificial Intelligence in 3-D Printing Processes

The integration of artificial intelligence in 3-D printing processes is another emerging trend in the Europe & CIS 3-D Printing Market. Artificial intelligence is being increasingly used to enhance the precision, efficiency, and automation of 3-D printing, allowing for more optimized designs and production processes. Through machine learning algorithms, artificial intelligence can analyze vast amounts of data from previous print jobs to identify patterns and optimize printing parameters, such as temperature, speed, and material usage.

This level of automation reduces human error and improves the overall quality of the final printed products. Artificial intelligence can also be used to predict potential failures in the 3-D printing process, enabling real-time adjustments and reducing the likelihood of defective parts. Additionally, artificial intelligence-powered design software allows engineers and designers to create more complex structures that push the boundaries of what is possible with traditional design methods. As artificial intelligence continues to evolve, its integration into 3-D printing processes will enhance production efficiency, reduce waste, and improve product quality, positioning Europe & CIS as a leader in advanced manufacturing technologies.

Segmental Insights

Technology Insights

In 2023, the Fused Deposition Modeling (FDM) segment dominated the Europe & CIS 3-D Printing Market and is expected to maintain its dominance during the forecast period. Fused Deposition Modeling is the most widely adopted 3-D printing technology across various industries due to its affordability, simplicity, and versatility. The technology is extensively used for prototyping, small-scale manufacturing, and educational purposes, making it accessible to both large-scale manufacturers and small businesses alike. Fused Deposition Modeling uses thermoplastic materials, which are

readily available and relatively inexpensive, further driving its widespread use. Additionally, its ease of use and ability to create functional parts with a range of material options, including ABS and PLA, have contributed to its popularity in the market. The technology is also evolving, with advancements in multi-material printing and improved precision, enhancing its appeal across industries such as automotive, aerospace, and consumer goods. Fused Deposition Modeling is preferred for producing lightweight, durable parts with complex geometries, which are increasingly in demand in sectors that prioritize customization and cost-efficiency. The scalability and continual development of Fused Deposition Modeling systems are likely to sustain its leadership position in the Europe & CIS 3-D Printing Market throughout the forecast period, as it remains a reliable and cost-effective solution for a wide range of applications, from rapid prototyping to functional part production.

Country Insights

In 2023, Germany dominated the Europe & CIS 3-D Printing Market and is expected to maintain its leading position during the forecast period. Germany's dominance is largely attributed to its advanced industrial infrastructure, strong engineering capabilities, and significant investment in research and development across various sectors such as automotive, aerospace, and healthcare. The country is home to several global leaders in manufacturing and technology, making it a hub for innovation in 3-D printing. German companies are increasingly adopting 3-D printing technologies to improve production efficiency, reduce material waste, and enable mass customization of products. Additionally, Germany has a robust network of universities and research institutions that collaborate with industry players, further driving advancements in additive manufacturing technologies.

The country's focus on Industry 4.0 initiatives, which emphasize the integration of digital technologies like 3-D printing into manufacturing processes, has further accelerated its adoption across the industrial sector. The German government has also been supportive, offering incentives and funding for companies looking to implement advanced manufacturing technologies. With its strong industrial base, a well-established ecosystem of suppliers, and a highly skilled workforce, Germany remains at the forefront of 3-D printing innovation. The country's continued leadership in the automotive and aerospace industries, where 3-D printing is increasingly being used for lightweight components and complex parts, ensures that Germany will continue to drive the growth of the Europe & CIS 3-D Printing Market throughout the forecast period.

Key Market Players

3D Systems Corporation.

Stratasys, Inc.

HP Inc

EOS GmbH

Materialise NV

Desktop Metal, Inc.

Renishaw plc.

GE Aerospace

Ultimaker B.V

Nanoscribe GmbH & Co. KG.

Report Scope:

In this report, the Europe & CIS 3-D Printing Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Europe & CIS 3-D Printing Market, By Technology:

Stereolithography (SLA)

Fused Deposition Modeling (FDM)

Selective Laser Sintering (SLS)

Digital Light Processing (DLP)

Inkjet Printing

Others

Europe & CIS 3-D Printing Market, By Material:

Plastics

Metals

Ceramics

Composites

Others

Europe & CIS 3-D Printing Market, By End User:

Aerospace

Automotive

Healthcare

Consumer Products

Electronics

Education

Others

Europe & CIS 3-D Printing Market, By Country:

Germany

Spain

France

Italy

United Kingdom

Belgium

Netherlands

Russia

Rest of Europe & CIS

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Europe & CIS 3-D Printing Market.

Available Customizations:

Europe & CIS 3-D Printing Market report with the given market data, TechSci 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).

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