

Europe ICT Market By Hardware (Computers, Servers, Storage Devices, Networking Equipment, Peripherals), By Software (Operating Systems, Application Software, Enterprise Resource Planning Software, Security Software, Database Management Systems), By Services (IT Consulting, System Integration, Managed Services, Cloud Services, Technical Support), By Telecommunications (Mobile Services, Fixed-line Services, Internet Services, Data Services, Network Infrastructure), By Country, Competition, Forecast and Opportunities, 2019-2029F

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Abstracts

Europe ICT Market was valued at USD 2.28 Trillion in 2023 and is expected to reach USD 2.74 Trillion by 2029 with a CAGR of 2.96% during the forecast period.

The Europe ICT market refers to the sector that encompasses various technologies and services related to computing, telecommunications, internet infrastructure, and software development. It plays a critical role in enabling digital innovation and enhancing connectivity across industries such as healthcare, education, finance, manufacturing, and government. This market includes hardware, software, services, and telecommunications solutions that support data storage, processing, communication, and digital services delivery. The Europe ICT market is poised for significant growth driven by several key factors. The rising demand for digital transformation among businesses and public sectors is one of the primary drivers, as organizations seek to improve operational efficiency, enhance customer experiences, and stay competitive in

the digital age. The adoption of advanced technologies like cloud computing, artificial intelligence (AI), Internet of Things (IoT), and big data analytics is accelerating across various industries, creating opportunities for ICT providers. Additionally, the expansion of high-speed internet infrastructure, including 5G networks, is fueling the demand for connected devices and seamless communication services. The European Union's strong focus on digitalization initiatives, such as the Digital Single Market strategy and investments in smart cities and green technology, is further bolstering the ICT sector's expansion. Moreover, the increasing need for cybersecurity solutions and data protection is driving the market as organizations prioritize safeguarding their digital assets from cyber threats. With growing interest in remote work solutions, cloud-based services, and artificial intelligence for automation, the Europe ICT market is expected to experience sustained growth in the coming years. As businesses continue to embrace digital transformation and as technological advancements evolve, the ICT market in Europe will rise, enabling enhanced connectivity, innovation, and overall economic growth.

Key Market Drivers

Growing Demand for Digital Transformation Across Industries

The Europe Information and Communication Technology (ICT) market is experiencing a significant rise due to the increasing demand for digital transformation across various industries. Digital transformation refers to the integration of digital technologies into all areas of business operations, fundamentally changing how organizations operate and deliver value to their customers. This trend is particularly evident in industries such as manufacturing, healthcare, retail, financial services, and the public sector.

In the manufacturing sector, for instance, digital transformation has enabled the adoption of Industry 4.0 technologies such as automation, artificial intelligence, and the Internet of Things. These technologies are helping manufacturers optimize production processes, reduce operational costs, and improve product quality. Similarly, in the healthcare industry, digital tools such as telemedicine, electronic health records, and healthcare analytics are improving patient care, enhancing clinical outcomes, and reducing the overall cost of healthcare delivery. The retail industry is also undergoing significant digital transformation, driven by the rise of e-commerce, customer relationship management systems, and data analytics tools that enable personalized customer experiences.

One of the key factors driving this demand for digital transformation is the growing

pressure on businesses to remain competitive in an increasingly digital economy. Organizations across Europe are recognizing the need to leverage digital technologies to streamline operations, enhance customer engagement, and develop new revenue streams. In addition, the COVID-19 pandemic has further accelerated the need for digital transformation, as companies have had to rapidly adapt to new ways of working, such as remote work and online services. This has increased investment in technologies like cloud computing, collaboration tools, and cybersecurity solutions, all of which are essential components of the ICT market.

Furthermore, governments across Europe are actively supporting digital transformation initiatives through various programs and policies. For example, the European Commission has launched the Digital Single Market strategy, aimed at creating a more unified and digitally advanced European economy. This includes initiatives to improve digital infrastructure, promote the adoption of digital technologies by businesses, and enhance digital skills across the workforce. These government-backed programs are creating a favorable environment for the growth of the ICT market by encouraging businesses to invest in digital technologies and services.

Moreover, as digital transformation becomes a key priority for organizations, the demand for ICT solutions such as cloud services, software applications, data analytics, and cybersecurity tools will continue to grow. Companies are increasingly relying on these solutions to improve efficiency, enhance decision-making, and secure their digital assets. As a result, the Europe ICT market is expected to see sustained growth driven by the rising need for digital transformation across industries.

Rising Adoption of Cloud Computing and Edge Technologies

Cloud computing and edge technologies are playing a crucial role in the growth of the Europe Information and Communication Technology market. These technologies provide organizations with scalable, flexible, and cost-effective solutions that allow them to store, process, and manage data more efficiently. Cloud computing refers to the delivery of computing services such as servers, storage, databases, networking, software, and analytics over the internet, while edge computing brings data processing closer to the location where it is needed, reducing latency and improving performance.

The adoption of cloud computing in Europe has been on the rise, driven by the need for organizations to reduce their reliance on traditional on-premises IT infrastructure and take advantage of the scalability and flexibility that cloud services offer. With cloud computing, businesses can access the latest technologies and tools without the need

for significant upfront capital investment in hardware or software. This is particularly attractive for small and medium-sized enterprises (SMEs) that may not have the resources to build and maintain their own IT infrastructure.

In addition to cost savings, cloud computing offers a range of benefits such as enhanced collaboration, increased mobility, and improved disaster recovery capabilities. These advantages are driving the adoption of cloud-based solutions across industries such as retail, finance, education, and healthcare. For example, in the healthcare sector, cloud-based platforms are being used to store and share medical records, enabling healthcare providers to access patient information in real-time and deliver more efficient care.

Moreover, edge computing is emerging as a complementary technology to cloud computing, offering enhanced data processing capabilities at the edge of networks, closer to where data is generated. This is particularly important for applications that require real-time data processing, such as autonomous vehicles, smart cities, and industrial automation. Edge computing reduces the need to send large amounts of data to centralized cloud data centers, thus minimizing latency and improving response times. This is critical for industries that rely on time-sensitive operations, such as manufacturing, energy, and telecommunications.

Furthermore, the rise of 5G networks across Europe is accelerating the adoption of cloud and edge technologies by providing the high-speed, low-latency connectivity needed to support these solutions. 5G networks enable faster data transmission and improved network reliability, making it easier for organizations to deploy cloud and edge solutions that require real-time data processing and communication.

As businesses across Europe continue to embrace digital transformation, the adoption of cloud computing and edge technologies will remain a key driver of growth for the ICT market. These technologies enable organizations to enhance operational efficiency, improve customer experiences, and drive innovation, all of which contribute to the expansion of the ICT sector.

Expansion of High-Speed Internet Infrastructure and 5G Networks

The development and expansion of high-speed internet infrastructure, including the rollout of 5G networks, are major drivers of growth in the Europe Information and Communication Technology market. High-speed internet connectivity is essential for enabling the seamless operation of digital services, applications, and communication

technologies that form the backbone of the ICT sector. As the demand for faster and more reliable internet connections grows, governments and telecommunications providers across Europe are investing heavily in the deployment of high-speed fiber-optic networks and the expansion of 5G infrastructure.

The introduction of 5G networks is a particularly significant development for the ICT market, as it promises to revolutionize the way businesses and consumers interact with technology. 5G offers faster download and upload speeds, lower latency, and the ability to support a greater number of connected devices compared to previous generations of mobile networks. This is enabling the growth of new applications and services that rely on real-time data processing, such as smart cities, autonomous vehicles, industrial automation, and telemedicine.

For example, in the manufacturing sector, 5G networks are facilitating the adoption of advanced technologies such as robotics, artificial intelligence, and the Internet of Things. These technologies rely on real-time data transmission and communication between machines, sensors, and control systems to optimize production processes, improve product quality, and reduce operational costs. Similarly, in the healthcare sector, 5G is enabling the use of telemedicine and remote patient monitoring, allowing healthcare providers to deliver care more efficiently and improve patient outcomes.

Moreover, the expansion of high-speed internet infrastructure is also driving the growth of cloud computing, as faster internet speeds enable businesses to access cloud-based services and applications more easily. This is particularly important for small and medium-sized enterprises that may not have the resources to invest in their own IT infrastructure. By leveraging high-speed internet and cloud services, these businesses can improve operational efficiency, enhance collaboration, and reduce costs.

In addition to supporting new technologies and services, the expansion of 5G networks is expected to create new business opportunities in sectors such as entertainment, gaming, and media. The ability to stream high-quality video content, play online games with minimal latency, and access immersive virtual and augmented reality experiences will drive demand for ICT solutions that support these services.

Key Market Challenges

Data Privacy and Compliance Challenges

One of the major challenges facing the Europe Information and Communication

Technology market is the growing complexity of data privacy and compliance regulations. The European Union's General Data Protection Regulation (GDPR) is one of the most stringent data protection laws in the world, requiring organizations to handle personal data with a high level of transparency, security, and accountability. While this regulation has been essential in ensuring data privacy and protection, it has also created significant challenges for businesses operating in the ICT sector. Companies must invest heavily in compliance efforts to ensure they meet the regulatory requirements, which can be costly and time-consuming, especially for small and medium-sized enterprises.

Data privacy regulations impose stringent obligations on organizations regarding the collection, storage, and processing of personal data. These regulations require companies to implement robust data protection measures such as encryption, secure storage, and proper disposal methods for personal information. Non-compliance can result in severe financial penalties, which has created a significant burden for businesses in terms of both financial and operational resources. Companies must allocate dedicated teams and resources to manage data privacy, which can divert attention from other critical areas of business growth and innovation.

Additionally, the dynamic nature of data privacy regulations adds complexity to compliance efforts. As governments and regulatory bodies continue to update and introduce new policies related to data protection, businesses must stay informed and adapt their operations accordingly. This requires constant monitoring of legal developments and proactive measures to adjust data management practices. For multinational corporations operating across various countries in Europe, the challenge becomes even more pronounced, as different jurisdictions may have varying interpretations and enforcement of data protection laws. Overall, the complexity and cost of ensuring data privacy and compliance pose significant challenges to the growth and scalability of companies in the ICT market.

Cybersecurity Threats and Vulnerabilities

Cybersecurity threats and vulnerabilities present another critical challenge for the Europe Information and Communication Technology market. As businesses and consumers increasingly rely on digital solutions and online platforms, the risk of cyberattacks has risen exponentially. Cybercriminals are constantly evolving their tactics to exploit vulnerabilities in software, networks, and systems, leading to a rise in data breaches, ransomware attacks, and other forms of cybercrime. This presents a major obstacle for businesses in the ICT sector, as they must continuously invest in

advanced cybersecurity solutions to safeguard their operations and protect sensitive data.

One of the key challenges related to cybersecurity is the growing sophistication of cyberattacks. Hackers are using more advanced techniques, such as artificial intelligence-powered attacks, phishing schemes, and zero-day exploits, to target organizations. The rapid pace of technological innovation has also created new vulnerabilities, as businesses adopt cloud computing, Internet of Things devices, and other emerging technologies that increase the attack surface for cybercriminals. Even large enterprises with dedicated cybersecurity teams are struggling to keep up with the growing complexity of the threat landscape, and smaller businesses with limited resources face even greater challenges in defending themselves against cyber threats.

In addition to the financial costs of implementing cybersecurity measures, businesses also face reputational risks in the event of a data breach or cyberattack. Customer trust is a critical component of business success, and a major security incident can erode that trust, leading to customer attrition, legal liabilities, and long-term damage to the company's brand. For companies operating in regulated industries such as healthcare, finance, and government, the stakes are even higher, as they must comply with strict regulations around data security and reporting breaches. Balancing the need for robust cybersecurity while maintaining business agility and innovation is a complex challenge that continues to impact the ICT market in Europe.

Key Market Trends

Rising Adoption of Cloud Computing Solutions

A significant trend in the Europe ICT market is the rapid adoption of cloud computing solutions across various industries. As businesses seek to enhance operational efficiency, scalability, and cost-effectiveness, cloud services have emerged as a preferred option for storing, managing, and processing data. Organizations are shifting away from traditional on-premises infrastructure towards cloud-based platforms that offer greater flexibility and agility. This trend is being driven by the increasing need for remote work solutions, data storage expansion, and access to advanced computing resources.

Moreover, the demand for hybrid and multi-cloud environments is growing as companies look for tailored solutions to meet their specific needs. Businesses are combining public and private cloud solutions to balance data security with the flexibility

of cloud services. Additionally, the integration of artificial intelligence and machine learning into cloud platforms is enabling businesses to automate processes and derive valuable insights from their data. The cloud computing trend is expected to continue driving growth in the Europe Information and Communication Technology market, as more industries recognize its transformative potential.

Expansion of 5G Networks and Connectivity

The expansion of 5G networks is another key trend shaping the Europe Information and Communication Technology market. 5G technology is revolutionizing the telecommunications landscape by providing faster data speeds, lower latency, and enhanced network reliability. This new generation of mobile connectivity is enabling advanced applications such as the Internet of Things, autonomous vehicles, smart cities, and augmented reality. As Europe continues to roll out 5G infrastructure, businesses and consumers are experiencing improved connectivity that supports innovation across various sectors.

Telecommunication companies are investing heavily in expanding their 5G networks to meet the growing demand for high-speed internet access. Governments and regulatory bodies in Europe are also supporting 5G deployment by providing funding and spectrum allocation to accelerate infrastructure development. The widespread adoption of 5G is expected to unlock new opportunities for digital transformation, driving growth in the Europe Information and Communication Technology market as businesses leverage faster, more reliable connections for advanced applications and services.

Increasing Focus on Digital Transformation in Businesses

Digital transformation is a major trend influencing the Europe Information and Communication Technology market, as businesses across industries are accelerating their efforts to adopt digital technologies. Companies are increasingly investing in digital tools such as artificial intelligence, big data analytics, automation, and Internet of Things solutions to enhance productivity, customer engagement, and operational efficiency. The digitalization of business processes has become a top priority as companies seek to remain competitive in a rapidly evolving market landscape.

In particular, industries such as manufacturing, healthcare, finance, and retail are undergoing significant digital transformation. The integration of digital solutions is helping businesses streamline operations, improve decision-making, and deliver personalized customer experiences. Moreover, the COVID-19 pandemic has further

accelerated the adoption of digital technologies, as businesses have had to adapt to remote work environments and changing consumer behaviors. As digital transformation becomes a strategic imperative for companies across Europe, it is expected to fuel growth in the Information and Communication Technology market, with increasing demand for digital solutions and services.

Segmental Insights

Hardware Insights

Based on Hardware segment, the Networking Equipment segment dominated the Europe Information and Communication Technology market and is expected to maintain its dominance during the forecast period. The growth of this segment is largely driven by the increasing demand for advanced network infrastructure to support the rapid adoption of digital technologies such as cloud computing, Internet of Things, and artificial intelligence across various industries. As businesses continue to invest in upgrading their network capabilities to accommodate higher data traffic, enhanced connectivity, and the expansion of remote working environments, the demand for networking equipment has surged. The rollout of 5G networks and the ongoing development of smart city projects across Europe have further fueled the need for robust networking solutions, enabling faster data transfer, improved connectivity, and reduced latency. Additionally, the rise of cybersecurity concerns has led to increased spending on secure networking equipment to safeguard critical business operations and sensitive data. With governments and enterprises prioritizing digital transformation and connectivity improvements, the networking equipment segment is expected to remain a crucial component of the Europe Information and Communication Technology market, sustaining its dominance throughout the forecast period. The increasing reliance on digital communication, along with innovations in wireless and fiber optic technologies, will continue to drive growth in this segment, solidifying its leadership in the market.

Country Insights

In 2023, Germany dominated the Europe Information and Communication Technology market and is expected to maintain its leadership throughout the forecast period. As one of the largest and most advanced economies in Europe, Germany's robust industrial base, strong digital infrastructure, and extensive adoption of advanced technologies have positioned it as a key player in the Information and Communication Technology market. The country's focus on innovation, digital transformation, and research and development across sectors such as manufacturing, automotive, and healthcare has

driven significant investments in Information and Communication Technology solutions. Germany's leadership in Industry 4.0 initiatives, which emphasize smart manufacturing and automation, has further accelerated the demand for Information and Communication Technology products and services, particularly in networking equipment, cloud computing, and artificial intelligence.

Moreover, the German government's commitment to advancing its digital agenda, with strategic initiatives aimed at strengthening its broadband infrastructure and fostering a digitally inclusive society, has bolstered the Information and Communication Technology market. The expansion of 5G networks and support for emerging technologies such as the Internet of Things and artificial intelligence have further propelled the growth of the market in the region. Additionally, Germany's role as a central hub for European and global businesses, coupled with its highly skilled workforce and strong research institutions, has contributed to its dominance in the market. With continued investments in digital infrastructure, innovation, and cybersecurity, Germany is well-positioned to maintain its dominance in the Europe Information and Communication Technology market during the forecast period.

Key Market Players

Huawei Technologies Co., Ltd.

Samsung Electronics Co., Ltd.

Sony Corporation

Toshiba Corporation

Nokia Corporation

Intel Corporation

Cisco Systems, Inc.

Lenovo Group Limited

ZTE Corporation

NEC Corporation.

Report Scope:

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

Europe ICT Market, By Hardware:

Computers

Servers

Storage Devices

Networking Equipment

Peripherals

Europe ICT Market, By Software:

Operating Systems

Application Software

Enterprise Resource Planning Software

Security Software

Database Management Systems

Europe ICT Market, By Services:

IT Consulting

System Integration

Managed Services

Cloud Services

Technical Support

Europe ICT Market, By Telecommunications:

Mobile Services

Fixed-line Services

Internet Services

Data Services

Network Infrastructure

Europe ICT Market, By Country:

Germany

Spain

France

Italy

United Kingdom

Belgium

Netherlands

Rest of Europe

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Europe ICT Market.

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Available Customizations:

Europe ICT 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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