

India Facility Management Market By Type (Hard Services and Soft Services), By Sector Type (Unorganized and Organized), By End User (Commercial, Industrial, and Infrastructure), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

India Facility Management Market was valued at USD 27.72 Billion in 2024 and is anticipated to reach USD 60.97 Billion by 2030 with a CAGR of 13.87% through 2030. India Facility Management encompasses a range of services that ensure the functionality, comfort, safety, and efficiency of built environments by integrating people, place, process, and technology. This market includes services such as cleaning, security, maintenance, and operations management, provided to various sectors including commercial, industrial, residential, and public infrastructure. The rise of the India Facility Management market is driven by several factors. Firstly, the rapid urbanization and industrial growth in India have led to an increased need for organized facility management services. As more buildings and complexes are constructed, there is a growing demand for maintaining these facilities efficiently.

The shift towards outsourcing non-core activities to specialized facility management companies allows businesses to focus on their primary operations, driving the market further. The emphasis on sustainability and energy efficiency has prompted the adoption of advanced facility management solutions that optimize resource utilization and reduce operational costs. The advent of technology, such as IoT, AI, and data analytics, has revolutionized the facility management industry, enabling predictive maintenance, real-time monitoring, and smart building management. These technological advancements enhance service delivery and increase the appeal of

integrated facility management services. The government's initiatives to develop smart cities and improve infrastructure also contribute to market growth. The need for professional facility management services in public infrastructure projects is increasing, providing significant opportunities for market expansion. The growing awareness of hygiene and safety, especially post-pandemic, has heightened the demand for professional cleaning and maintenance services across various sectors. The expanding commercial real estate sector, with more offices, malls, and residential complexes, also fuels the market's growth. In conclusion, the India Facility Management market is poised for substantial growth due to urbanization, industrial expansion, technological advancements, government initiatives, and an increased focus on sustainability and efficiency. This growth trajectory reflects a shift towards more organized and professional facility management services that cater to the evolving needs of diverse sectors in India. The Indian government's allocation of INR 10 lakh crore (USD 122 billion) for capital expenditure in the Union Budget 2023-24, a 33% increase from the previous year, will drive infrastructure growth, leading to higher demand for facility management services. This budget boost supports urban development, commercial spaces, and industrial projects, expanding the market.

The anticipated growth of the Indian tourism industry, with an 11-12% annual increase and a target of 30.5 million international tourist arrivals by 2028, will drive demand for high-quality facility management services in hotels, resorts, airports, and other tourism-related infrastructure. This growth directly boosts the India Facility Management Market.

Key Market Drivers

Urbanization and Infrastructure Development

India's rapid urbanization and infrastructure development are primary drivers for the growth of the India Facility Management Market. Urbanization in India is occurring at an unprecedented pace, with projections indicating that by 2030, over 40% of the population will reside in urban areas. This significant demographic shift necessitates the development of new residential, commercial, and industrial spaces to accommodate the burgeoning urban population. As a result, there is an escalating demand for comprehensive facility management services to ensure these infrastructures are efficiently maintained and operated.

The Indian government's ambitious infrastructure projects, such as the Smart Cities Mission, aim to develop sustainable and inclusive urban centers. This initiative involves significant investment in constructing new buildings, roads, public utilities, and

transportation systems, all of which require professional facility management to maintain their functionality and enhance their lifespan. The rise in public-private partnerships in infrastructure development further bolsters the demand for facility management services, as these partnerships often stipulate high standards for maintenance and operations.

The growth of the commercial real estate sector, driven by the expansion of multinational companies and the increasing number of startups, has led to a proliferation of office spaces, malls, and industrial parks. These commercial entities require specialized facility management services to maintain optimal working conditions, ensure safety, and enhance the overall occupant experience. This trend underscores the critical role of facility management in supporting the infrastructure backbone of urbanized regions, thereby driving market growth. India plans to invest over INR 111 lakh crore (USD 1.6 trillion) under the National Infrastructure Pipeline (NIP) by 2025, much of which is directed toward urban infrastructure such as smart cities, housing, and metro rail projects, boosting the need for integrated facility management services.

Technological Advancements and Smart Solutions

Technological advancements and the integration of smart solutions are pivotal drivers for the India Facility Management Market. The advent of technologies such as the Internet of Things (IoT), Artificial Intelligence (AI), Big Data, and cloud computing has revolutionized the facility management industry, offering innovative solutions that enhance efficiency, reduce costs, and improve service delivery.

IoT technology enables real-time monitoring and management of facility operations, facilitating predictive maintenance and reducing downtime. For instance, IoT sensors can detect anomalies in building systems such as HVAC, lighting, and plumbing, triggering alerts and maintenance actions before issues escalate into major problems. This proactive approach to facility management not only ensures the seamless operation of facilities but also extends the lifespan of assets, contributing to cost savings and sustainability.

AI and Big Data analytics further augment facility management by providing actionable insights derived from vast amounts of data collected from various building systems. These insights enable facility managers to optimize resource utilization, enhance energy efficiency, and improve occupant comfort. For example, AI-driven energy management systems can analyze usage patterns and adjust settings in real-time to minimize energy consumption while maintaining optimal indoor conditions.

Cloud-based facility management platforms facilitate seamless communication and coordination among various stakeholders, including facility managers, service providers, and occupants. These platforms offer centralized dashboards for monitoring and managing multiple facilities, streamlining operations, and ensuring compliance with regulatory standards. The integration of such advanced technologies not only enhances the efficiency and effectiveness of facility management services but also elevates the overall value proposition for clients, driving market growth.

Emphasis on Sustainability and Regulatory Compliance

The increasing emphasis on sustainability and regulatory compliance is a significant driver for the India Facility Management Market. As environmental concerns and resource scarcity become more pronounced, businesses and governments alike are prioritizing sustainable practices to minimize their ecological footprint and promote long-term resilience.

Sustainable facility management practices involve the adoption of energy-efficient technologies, waste reduction strategies, and the use of eco-friendly materials. For instance, the implementation of green building standards, such as LEED (Leadership in Energy and Environmental Design) and IGBC (Indian Green Building Council) certifications, necessitates professional facility management services to ensure compliance with stringent environmental criteria. These certifications not only enhance the environmental performance of buildings but also provide economic benefits through energy savings and increased property value.

The growing awareness of corporate social responsibility (CSR) among businesses drives the demand for sustainable facility management solutions. Companies are increasingly recognizing that sustainable practices not only benefit the environment but also improve their corporate image and stakeholder relations. As a result, there is a rising demand for facility management services that align with sustainability goals and contribute to the achievement of CSR objectives.

Regulatory compliance is another critical factor propelling the growth of the facility management market. The Indian government has implemented various regulations and standards aimed at ensuring the safety, health, and environmental sustainability of buildings and infrastructure. Compliance with these regulations requires specialized knowledge and expertise, which facility management service providers are well-equipped to deliver. For instance, adherence to fire safety regulations, waste

management guidelines, and occupational health and safety standards necessitates comprehensive facility management services to ensure compliance and avoid legal liabilities.

The emphasis on sustainability and regulatory compliance is driving the India Facility Management Market by necessitating specialized services that ensure buildings and infrastructure are environmentally sustainable, compliant with regulatory standards, and aligned with corporate sustainability goals. This trend reflects a broader shift towards responsible and sustainable facility management practices, underscoring the market's potential for continued growth. The Indian government is increasingly focusing on sustainability and energy-efficient building practices. Initiatives such as the National Action Plan on Climate Change (NAPCC) and various green building certifications like IGBC (Indian Green Building Council) and LEED (Leadership in Energy and Environmental Design) have propelled the adoption of sustainable practices in facility management. By the end of 2025, over 2,000 green building projects are expected to be implemented across India, driving the demand for facility management services that adhere to sustainability guidelines.

Key Market Challenges

Fragmented Market and Lack of Standardization

One of the significant challenges facing the India Facility Management Market is its fragmented nature and the lack of standardization. The facility management industry in India comprises a diverse array of service providers, ranging from large multinational companies to small local vendors. This fragmentation leads to inconsistencies in service quality and delivery, as different providers adhere to varying standards and practices. The absence of a unified regulatory framework exacerbates this issue, making it difficult to ensure uniformity and reliability across the market.

The fragmented nature of the market poses several challenges for clients seeking facility management services. With numerous players offering a wide range of services, clients often face difficulties in evaluating and selecting service providers that meet their specific needs and quality expectations. This challenge is particularly pronounced for large corporations and multinational companies that require consistent service standards across multiple locations. The lack of standardization also hampers the ability to benchmark performance and implement best practices, leading to inefficiencies and suboptimal outcomes.

The informal sector's prevalence in facility management services adds another layer of complexity. Many small and unorganized vendors operate without formal contracts or adherence to established standards, leading to issues such as unreliable service, poor compliance with safety and environmental regulations, and inadequate employee training. These issues not only compromise the quality of facility management but also pose significant risks to clients, including legal liabilities and reputational damage.

To address these challenges, the industry needs to move towards greater standardization and professionalization. Establishing industry-wide standards and certification programs can help ensure a consistent level of service quality and reliability. Increased collaboration between industry stakeholders, including service providers, clients, and regulatory bodies, can facilitate the development of best practices and the adoption of standardized procedures. Encouraging the formalization of the informal sector through training and certification initiatives can also enhance service quality and compliance. While these measures require concerted effort and investment, they are essential for overcoming the fragmentation and lack of standardization that currently impede the growth and efficiency of the India Facility Management Market.

Talent Acquisition and Retention

Talent acquisition and retention represent another major challenge for the India Facility Management Market. The industry is labor-intensive, requiring a diverse workforce with skills ranging from basic maintenance and cleaning to advanced technical and managerial expertise. However, attracting and retaining skilled personnel remains a significant hurdle due to various factors, including the perception of facility management as a low-status job, inadequate training and development opportunities, and competitive labor markets.

The perception of facility management roles as low-status and low-paying jobs deters many potential candidates, especially those with higher education and specialized skills, from entering the industry. This perception is compounded by the fact that many facility management positions are seen as menial or auxiliary, rather than as integral to the core operations of businesses and organizations. Consequently, the industry struggles to attract talent that can drive innovation and improve service quality.

Inadequate training and development opportunities further exacerbate the talent challenge. Many facility management companies do not invest sufficiently in employee training and career development programs, leading to a workforce that may lack the

necessary skills and competencies to deliver high-quality services. This skills gap is particularly problematic given the increasing complexity of facility management tasks, which now often require knowledge of advanced technologies such as the Internet of Things (IoT), Artificial Intelligence (AI), and Building Information Modeling (BIM). Without adequate training, employees may struggle to leverage these technologies effectively, reducing the overall efficiency and effectiveness of facility management operations.

Competitive labor markets also contribute to high turnover rates in the facility management industry. Skilled workers are often lured away by better-paying opportunities in other sectors, leading to a constant cycle of hiring and training new employees. High turnover not only increases recruitment and training costs but also disrupts service continuity and affects client satisfaction. To address these challenges, facility management companies need to adopt comprehensive talent management strategies. This includes improving the perception of facility management careers through branding and outreach initiatives, investing in robust training and development programs, and offering competitive compensation and benefits packages. Creating clear career progression pathways and providing opportunities for continuous learning and skill enhancement can help retain talent and build a more skilled and motivated workforce. By addressing the talent acquisition and retention challenge, the India Facility Management Market can enhance its service quality, drive innovation, and sustain long-term growth.

Key Market Trends

Integration of Smart Technologies

The integration of smart technologies is a significant trend transforming the India Facility Management Market. With the advent of the Internet of Things (IoT), Artificial Intelligence (AI), and Big Data, facility management is evolving into a more intelligent and data-driven industry. Smart buildings equipped with IoT sensors and devices enable real-time monitoring and management of various systems such as HVAC, lighting, and security. These technologies facilitate predictive maintenance, reducing downtime and operational costs by addressing issues before they escalate into major problems.

Artificial Intelligence enhances facility management by providing data analytics and insights that optimize resource utilization and improve decision-making processes. AI-powered systems can analyze patterns in energy consumption, space utilization, and

occupant behavior, allowing facility managers to implement strategies that enhance efficiency and sustainability. Smart technologies support remote monitoring and control, enabling facility managers to oversee operations from centralized locations and respond promptly to any anomalies or emergencies.

The integration of smart technologies not only improves the operational efficiency of facility management but also enhances the overall occupant experience. For instance, smart lighting and climate control systems can adjust settings based on occupancy levels and individual preferences, creating a more comfortable and productive environment. As businesses increasingly recognize the benefits of smart facility management solutions, the demand for technology-driven services is expected to grow, driving further innovation and investment in the India Facility Management Market.

Emphasis on Sustainability and Green Building Practices

The emphasis on sustainability and green building practices is a growing trend in the India Facility Management Market. As environmental concerns become more pressing, businesses and governments are prioritizing sustainable practices to reduce their ecological footprint and promote long-term resilience. This trend is driving the adoption of green building standards such as Leadership in Energy and Environmental Design (LEED) and Indian Green Building Council (IGBC) certifications, which require comprehensive facility management to ensure compliance with stringent environmental criteria.

Sustainable facility management practices involve the implementation of energy-efficient technologies, waste reduction strategies, and the use of eco-friendly materials. For instance, energy management systems that optimize lighting, heating, and cooling can significantly reduce energy consumption and operational costs. Waste management programs that focus on recycling and responsible disposal contribute to environmental conservation and regulatory compliance.

The growing emphasis on corporate social responsibility (CSR) also fuels the demand for sustainable facility management solutions. Companies are increasingly recognizing that sustainable practices not only benefit the environment but also enhance their corporate image and stakeholder relations. Facility management providers that offer green and sustainable services are well-positioned to capitalize on this trend, as clients seek partners that align with their sustainability goals. This shift towards sustainability is expected to drive market growth and innovation in eco-friendly facility management solutions.

Rise of Integrated Facility Management Services

The rise of integrated facility management services is a notable trend in the India Facility Management Market. Integrated facility management (IFM) refers to the consolidation of multiple facility management services under a single contract and management structure. This approach offers several advantages, including streamlined operations, cost efficiencies, and improved service quality. By outsourcing a comprehensive suite of services such as maintenance, cleaning, security, and energy management to a single provider, clients can achieve greater operational synergy and reduce administrative burdens.

Integrated facility management services enhance coordination and communication between different service areas, resulting in more cohesive and effective management. This integration allows for better resource allocation and more strategic planning, as facility managers can take a holistic view of the facility's needs and performance. IFM providers often leverage advanced technologies and data analytics to deliver more proactive and responsive services, further enhancing operational efficiency and client satisfaction.

The trend towards integrated facility management is driven by the increasing complexity of managing modern facilities and the desire for cost-effective and efficient solutions. As businesses seek to focus on their core operations, the demand for integrated services that provide comprehensive and streamlined facility management is expected to grow. This trend is likely to drive consolidation in the market, with larger providers expanding their service offerings to meet the evolving needs of clients, thereby shaping the future of the India Facility Management Market.

Segmental Insights

Type Insights

In 2024, the India Facility Management Market was predominantly dominated by the Soft Services segment, a trend anticipated to persist throughout the forecast period. Soft Services encompass a range of non-technical facility management functions crucial for maintaining cleanliness, security, and operational efficiency within buildings and facilities. These services include janitorial and cleaning services, landscaping and grounds maintenance, pest control, waste management, security services, and catering. The dominance of Soft Services in the market can be attributed to several factors.

The heightened emphasis on hygiene, cleanliness, and safety, particularly in response to global health challenges such as the COVID-19 pandemic, has significantly boosted the demand for professional cleaning and sanitization services across various sectors including commercial offices, healthcare facilities, hospitality venues, educational institutions, and residential complexes. The outsourcing of non-core functions to specialized service providers allows organizations to focus on their core business activities, driving the adoption of comprehensive soft service solutions. The increasing complexity and scale of urban development and infrastructure projects in India have further propelled the need for integrated facility management solutions that include robust soft services to ensure a conducive and healthy environment for occupants. As technological advancements continue to enhance the efficiency and effectiveness of soft services, such as the use of IoT (Internet of Things) for real-time monitoring and AI (Artificial Intelligence) for predictive analytics in cleaning and maintenance operations, the demand for these services is expected to grow. The strategic integration of soft services not only enhances operational efficiency but also improves occupant satisfaction and overall facility performance, underscoring their pivotal role in shaping the future trajectory of the Facility Management Market in India.

Region Insights

In 2024, the India Facility Management Market was dominated by the Northern region, and this dominance is anticipated to continue throughout the forecast period. The Northern region, encompassing major cities such as Delhi, Gurgaon, and Noida, has emerged as a pivotal hub for economic and commercial activities, driving substantial demand for facility management services. This region is characterized by its significant concentration of corporate offices, industrial zones, IT parks, and residential complexes, all of which necessitate comprehensive facility management solutions to ensure operational efficiency, safety, and sustainability.

The rapid urbanization and infrastructural development in the Northern region have led to the construction of numerous high-rise buildings, shopping malls, and public infrastructure projects, further amplifying the need for both Hard and Soft Services. The presence of numerous multinational corporations and large domestic enterprises in this region has heightened the demand for professional facility management services that adhere to international standards. These businesses increasingly outsource facility management to focus on their core competencies, thereby driving market growth. The Northern region also benefits from a favorable business environment, robust connectivity, and government initiatives aimed at promoting smart city projects and

sustainable urban development, which collectively enhance the demand for advanced facility management solutions. The heightened focus on hygiene and safety post-pandemic has reinforced the necessity for specialized cleaning and sanitization services, particularly in densely populated urban centers. The integration of smart technologies, such as Internet of Things (IoT) and Artificial Intelligence (AI), in facility management practices is further optimizing service delivery and operational efficiency, making the Northern region a frontrunner in adopting innovative solutions. Consequently, the Northern region's strategic economic significance, coupled with its ongoing infrastructural expansion and technological adoption, positions it to maintain its dominance in the India Facility Management Market throughout the forecast period.

Key Market Players

Sodexo India Services Private Limited

BVG India Limited

ISS Facility Services India Private Limited

G4S Secure Solutions (India) Private Limited

Tenon Facility Management India Private Limited

Jones Lang Lasalle Property Consultants (India) Private Limited

Quess Corp Limited

Colliers International (India) Property Services Private Limited

CBRE South Asia Private Limited

SIS India Pvt. Ltd.

Report Scope:

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

India Facility Management Market, By Type:

Hard Services

Soft Services

India Facility Management Market, By Sector Type:

Unorganized

Organized

India Facility Management Market, By End User:

Commercial

Industrial

Infrastructure

India Facility Management Market, By Region:

North India

West India

South India

East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Facility Management Market.

Available Customizations:

India Facility Management market report with the given market data, TechSci Research

India Facility Management Market By Type (Hard Services and Soft Services), By Sector Type (Unorganized and Or...

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

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

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