

# **India Oxygen Concentrators Market By Type (Portable and Stationary), By Technology (Continuous Flow, Pulse Flow, Continuous/Pulse Flow), By Flow-rate (0-5l/min, 5-10l/min, Above 10l/min), By Source (Import, Domestic), By Distribution Channel (Wholesalers/Distributors/Suppliers, Online, Direct Sales), By Offering (Rental , New Sales), By Application (COPD, Lung Cancer, Asthma, COVID-19, Others), By End User (Hospitals & Clinics, Ambulatory Care Centers, Home Care), By Region, Competition, Forecast & Opportunities, 2020-2030F**

<https://marketpublishers.com/r/I9682D18F996EN.html>

Date: May 2024

Pages: 80

Price: US\$ 3,500.00 (Single User License)

ID: I9682D18F996EN

## **Abstracts**

India Oxygen Concentrators Market was valued at USD 128.45 Million in 2024 and is anticipated to project a growth in the forecast period with a CAGR of 0.41% through 2030. The Oxygen Concentrators Market in India is a thriving and rapidly growing industry that encompasses the production, distribution, and sale of oxygen concentrators within the country. These innovative and life-saving devices play a crucial role in healthcare by extracting, purifying, and concentrating oxygen from the surrounding air, ensuring a continuous and reliable supply of high-quality oxygen for patients in need. With the increasing demand for reliable and efficient oxygen therapy, the market has witnessed substantial growth, attracting not only local manufacturers but also international players and investors who recognize the immense potential and opportunities in this sector. The rising prevalence of respiratory disorders, coupled with the need for portable and cost-effective oxygen delivery systems, has further fueled the expansion of the market.

The industry's evolution is driven by continuous advancements in technology and strategic collaborations. Manufacturers are investing in research and development to enhance the performance and efficiency of oxygen concentrators, making them more user-friendly and accessible to a wider population. Partnerships and collaborations between healthcare providers, medical device manufacturers, and government agencies are fostering innovation and ensuring the widespread availability of life-saving oxygen therapy across the nation. The Oxygen Concentrators Market in India is poised for significant growth and development, with a focus on improving patient outcomes, expanding access to healthcare facilities, and meeting the increasing demand for oxygen therapy. This industry plays a vital role in saving lives and improving the quality of care for individuals across the nation, making it a key sector to watch in the healthcare landscape.

## Key Market Drivers

### Increasing Prevalence of Respiratory Disorders

The increasing incidence of respiratory disorders in India is propelling the demand for oxygen concentrators. Factors such as escalating air pollution levels, rising smoking habits, and the growing prevalence of chronic obstructive pulmonary disorders (COPD), asthma, and sleep apnea contribute to this surge in respiratory ailments. Especially in urban regions, where the impact of industrialization and vehicular pollution is profound, the cases of respiratory diseases are skyrocketing.

As the population continues to grow and urbanization progresses, the need for oxygen concentrators is growing at an unprecedented rate. These devices, which concentrate oxygen from a gas supply by selectively removing diluting gases, provide an oxygen-enriched gas stream that serves as a lifeline for patients with severe respiratory disorders. They allow these individuals to maintain their oxygen levels and lead a more comfortable life. Healthcare providers are now prioritizing the procurement of these devices to deal with the current health crisis and prepare for any future eventualities. The significance of oxygen concentrators in improving the quality of life for respiratory patients cannot be overstated, making their availability a critical aspect of healthcare infrastructure. By ensuring an adequate supply of oxygen concentrators, healthcare providers can better cater to the needs of patients and mitigate the impact of respiratory diseases on public health.

### Rising Geriatric Population

The rising geriatric population in India is leading to an increased demand for oxygen concentrators. As the aging population continues to grow, there is a correlating rise in the prevalence of respiratory diseases such as Chronic Obstructive Pulmonary Disease (COPD), Asthma, and other lung disorders. This is due to various factors, including lifestyle changes, environmental factors, and genetic predispositions. As a result, there is a growing need for effective respiratory support and management.

Oxygen concentrators play a vital role in managing these conditions, providing the patient with the required oxygen levels thereby improving quality of life. These devices are designed to extract oxygen from the surrounding air and deliver it in concentrated form to the patient. They are portable, convenient, and can be used in a variety of settings, including homes, hospitals, and clinics. The increased demand for oxygen concentrators can also be attributed to the growing awareness and accessibility of healthcare services in India. With advancements in medical technology and infrastructure, more people have access to healthcare facilities and are seeking appropriate treatments for their respiratory conditions. This, combined with the government's recent initiatives to improve healthcare infrastructure and services in the country, has created a favorable environment for the adoption of oxygen concentrators. In addition to these factors, the evolving home healthcare market is bolstering the need for oxygen concentrators. With a growing preference for personalized care and cost-effectiveness, many individuals are opting for home-based healthcare solutions. Oxygen concentrators provide a convenient and reliable option for respiratory support in the comfort of one's own home, without the need for frequent hospital visits.

Manufacturers of oxygen concentrators are working diligently to meet this growing demand, constantly innovating and expanding their product offerings to cater to the varying needs of this demographic. They are focusing on improving device efficiency, portability, and user-friendliness, while also ensuring affordability and accessibility. The combination of an aging population, increased prevalence of respiratory diseases, improved healthcare services, the impact of the global pandemic, and the rise of the home healthcare market are all significant factors contributing to the increased demand for oxygen concentrators in India. As the healthcare landscape continues to evolve, it is crucial to address the respiratory needs of the population and ensure the availability of reliable and effective respiratory support devices.

### Growing Preference for Home-Based Therapy

In recent years, there has been a significant rise in the demand for oxygen concentrators in India, driven by various factors. One of the key drivers is the growing preference for home-based therapy, which offers convenience, cost-effectiveness, and comfort to patients with chronic respiratory diseases or those requiring long-term oxygen therapy. This shift toward home-based care has allowed patients to maintain their standard of living and daily routines without the frequent need for hospital visits.

As the Indian population continues to age and healthcare infrastructure evolves, the trend of home-based therapy is anticipated to remain strong. There is also a growing awareness about respiratory diseases and a greater emphasis on cost-effective treatment options. These factors are likely to contribute to the sustained demand for oxygen concentrators in India, ensuring that patients have access to the necessary care and support for their respiratory health.

### Rising Demand for Portable Oxygen Concentrators

India's healthcare industry is currently experiencing a remarkable surge in the demand for Oxygen Concentrators, driven primarily by the rising need for Portable Oxygen Concentrators. This increasing trend can be attributed to various factors, including an aging population, growing health awareness, and the prevalence of respiratory diseases.

Portable Oxygen Concentrators, with their convenient and user-friendly design, are rapidly becoming the preferred choice for patients requiring home-based oxygen therapy. These devices, known for their compactness and lightweight nature, offer patients the freedom to maintain an active lifestyle while ensuring their oxygen levels remain stable. The recent COVID-19 pandemic has further highlighted the critical importance of these devices, resulting in a significant upswing in demand during this crisis. With a surge in hospital admissions and home isolations due to the virus, the use of oxygen concentrators has become essential. The portable feature of these devices has proven to be particularly beneficial for patients recovering at home, providing them with the necessary oxygen support while allowing them to remain comfortable.

The expanding home healthcare market in India, coupled with government initiatives aimed at promoting affordable healthcare, is further fueling the demand for Portable Oxygen Concentrators. As a result, the overall demand for Oxygen Concentrators in India is witnessing a substantial increase, with a particular emphasis on the need for

portable solutions. The rising need for Portable Oxygen Concentrators is significantly contributing to the overall surge in demand for Oxygen Concentrators in India. The combination of various factors, including an aging population, increasing health awareness, and the impact of the COVID-19 pandemic, has further intensified the demand for these life-saving devices in the country.

## Key Market Drivers

### Risk of Diseases due to Contamination of the Equipment

Oxygen concentrators have become indispensable medical devices, particularly in the midst of the ongoing health crisis. Their importance cannot be overstated, as they play a critical role in delivering oxygen therapy to patients in need. However, in India, there has been a noticeable decline in the demand for these devices. This decline can be attributed to growing concerns over the potential risk of diseases that may arise from equipment contamination.

Improper or inadequate sanitization of oxygen concentrators can lead to the spread of infections among users, which has fueled apprehension and reluctance among potential consumers. It is crucial to highlight that the fear of disease due to contamination is a significant barrier to the widespread adoption of these life-saving devices in India. Adding to the challenge is the absence of stringent guidelines and standardized procedures for the sanitization of oxygen concentrators. This lack of clarity and consistency has further exacerbated concerns among individuals. Consequently, many individuals are opting for alternatives such as oxygen cylinders, despite the challenges they present.

To address this pressing issue, it is imperative for manufacturers and healthcare professionals to prioritize rigorous sanitization protocols. This includes implementing comprehensive cleaning and maintenance procedures, as well as educating users on the proper use and care of the equipment. By doing so, not only can we assuage users' fears but also instill confidence in the safety and efficacy of these critical devices. Ultimately, the goal should be to ensure that oxygen concentrators are seen as reliable and trustworthy medical devices. This can be achieved through concerted efforts from all stakeholders involved, including manufacturers, healthcare professionals, and regulatory bodies. By promoting strict sanitization practices and providing clear guidelines for users, we can overcome the fear of contamination and pave the way for the widespread adoption of oxygen concentrators in India.



## Adverse Effects such as Skin Irritation

The demand for Oxygen Concentrators in India has been facing a downward trend due to certain Adverse Effects, particularly, Skin Irritation. Oxygen concentrators supply oxygen-enriched gas, assisting individuals who require higher oxygen levels due to various health conditions. However, users often complain of significant skin irritation caused by the continuous flow of oxygen, particularly around the nasal region. This discomfort, in some cases leading to severe dryness, redness, and even skin breakdown, is deterring potential users, thereby reducing demand. Many patients are now opting for alternatives, seeking respite from these adverse effects. As a result, the market for portable oxygen cylinders and liquid oxygen systems has witnessed a surge in demand. These alternatives provide a viable solution for users who experience skin-related issues with oxygen concentrators.

The lack of broad awareness about proper humidification techniques exacerbates this issue, leading to an even sharper decline in demand. Inadequate humidity levels can further contribute to skin dryness and irritation. Therefore, it is crucial for healthcare providers and manufacturers to address this concern promptly. One possible solution is to improve product design by minimizing direct skin contact. This can be achieved through the use of soft and hypoallergenic materials in the nasal cannula or by incorporating adjustable straps to ensure a comfortable fit. Educating users on proper humidification techniques and the use of moisturizers can also help alleviate skin irritation. By taking these steps, healthcare providers and manufacturers can restore the fading confidence in oxygen concentrators, ensuring that individuals in need of higher oxygen levels have access to a safe and comfortable solution.

## Key Market Trends

### Escalating Demand by Travelers and Mountaineers

The burgeoning demand for oxygen concentrators in India is significantly driven by the increasing number of travelers and mountaineers. As adventure tourism flourishes, more individuals are embarking on high-altitude expeditions, seeking to conquer the majestic peaks and explore the breathtaking landscapes. In such challenging environments, where oxygen levels are scarce, the need for reliable and portable sources of oxygen becomes paramount. Oxygen concentrators have emerged as vital survival equipment for these intrepid explorers. These innovative devices provide a continuous supply of purified oxygen, ensuring that mountaineers can breathe comfortably at high altitudes, mitigating the risk of altitude sickness and its potentially

life-threatening consequences. By carrying their own reliable source of oxygen, adventurers are empowered to push their limits, explore uncharted territories, and fulfill their wanderlust dreams.

The growing popularity of high-altitude adventures and the increasing awareness of the importance of safety have contributed to the surge in consumer demand for oxygen concentrators. With the assurance of having their own reliable oxygen supply, adventurers can now embark on high-altitude expeditions with greater confidence and peace of mind. The rise in demand for oxygen concentrators in India is expected to continue on its upward trajectory, as more individuals embrace the thrill of mountaineering and seek to conquer the heights of their dreams, knowing that a reliable source of oxygen is always within reach.

### Technological Advancements

Technological advancement is significantly influencing the demand for Oxygen Concentrators in India. Given the recent pandemic circumstances and the urgent need for efficient and reliable oxygen delivery devices, the demand for Oxygen Concentrators has surged immensely. Advanced technology has played a pivotal role in the development of lightweight and portable Oxygen Concentrators that are not only effective but also user-friendly, addressing the specific needs of patients. With the integration of machine intelligence, these devices now offer precise control of oxygen flow, allowing for personalized adjustments based on individual patient requirements.

The improvement in accessibility and usability of Oxygen Concentrators has resulted in their growing popularity among a broad consumer base. Technology has facilitated large-scale production and distribution, ensuring the availability of Oxygen Concentrators even in remote locations of the country where access to healthcare resources may be limited. In the Indian context, where the healthcare infrastructure can sometimes face challenges, these technological strides have played a vital role in saving numerous lives and providing essential support to patients in need. Considering the increased dependence on technology, coupled with the ongoing health crisis, the demand for Oxygen Concentrators is expected to remain strong in the foreseeable future. The continuous advancements in technology and the ability to tailor oxygen delivery according to individual patient needs will further drive the adoption and usage of Oxygen Concentrators, ultimately contributing to improved patient care and outcomes.

### Segmental Insights

## Type Insights

Based on the type, in the Indian Oxygen Concentrators market, the Portable type is projected to dominate due to several factors. There is an increasing demand for lightweight and easy-to-carry oxygen concentrators, which is particularly significant among the growing elderly population and individuals with chronic respiratory conditions. These portable devices provide a convenient and flexible solution, allowing patients to maintain their oxygen therapy schedule even while on the go. The dominance of portable oxygen concentrators is further supported by their ability to enhance the quality of life for patients. By offering the freedom to move around and engage in daily activities without interruption, these devices empower individuals to lead a more independent and active lifestyle. The convenience of portable oxygen concentrators eliminates the need for patients to rely solely on stationary devices, providing them with greater flexibility and peace of mind.

With their compact design and advanced technology, portable oxygen concentrators are revolutionizing the way patients manage their respiratory health. As the demand for these devices continues to grow, manufacturers are constantly innovating to ensure the highest level of performance, reliability, and user-friendliness. This dedication to improvement, combined with the increasing awareness of the benefits of portable oxygen concentrators, solidifies their projected dominance in the Indian market. The dominance of portable oxygen concentrators in the Indian market is driven by the increasing demand for lightweight and easy-to-carry devices, the growing elderly population, and the convenience and flexibility they offer in maintaining oxygen therapy while on the move. With their positive impact on the quality of life and advancements in technology, portable oxygen concentrators are poised to continue their reign as the preferred choice for respiratory support in India.

## Technology Insights

Based on technology, Continuous Flow category will continue to dominate the Oxygen Concentrators Market in India. This dominance can be primarily attributed to the exceptional reliability and high flow rate that continuous flow oxygen concentrators offer to patients, ensuring a consistent and efficient supply of oxygen. These cutting-edge features make them particularly beneficial and sought after by individuals with higher oxygen requirements, such as those with chronic respiratory conditions or undergoing intensive medical procedures.



Continuous flow oxygen concentrators play a vital role in improving patient outcomes and quality of life. By delivering a steady flow of oxygen, they help alleviate symptoms, enhance respiratory function, and support overall well-being. This, in turn, reduces the need for hospitalization and enables patients to lead more independent and fulfilling lives. As the healthcare industry continues to evolve and prioritize patient care, the significance of continuous flow oxygen concentrators in meeting the needs of these individuals becomes increasingly evident. Their advanced technology, combined with the growing demand for reliable and efficient oxygen therapy, further drives the market's growth. With the rising awareness about respiratory health and the increasing prevalence of respiratory conditions, continuous flow oxygen concentrators are poised to play a crucial role in ensuring optimal patient care and improving health outcomes across India.

### Regional Insights

The North region of India, particularly the Delhi NCR area, is currently experiencing significant dominance in the Oxygen Concentrators Market. This can be attributed to various factors, including the exceptionally high population density in this region and the subsequent surge in medical requirements resulting from recent health crises. The region's advanced healthcare infrastructure plays a crucial role in the growth of the Oxygen Concentrators Market. With state-of-the-art hospitals and medical facilities, the North region ensures efficient and timely access to critical care equipment like oxygen concentrators. This availability of top-tier healthcare resources contributes to the region's reputation as a hub for medical advancements and technological innovations.

The presence of renowned medical research institutions in the North region further strengthens its position as a leader in the industry. These institutions, coupled with the expertise of highly skilled healthcare professionals, drive continuous progress in the field of medical technology. All these factors combined create a highly favorable and conducive environment for the growth and expansion of the Oxygen Concentrators Market in the North region of India, solidifying its leading position in the industry. With a focus on meeting the increasing demand for medical equipment, the region continues to thrive and contribute to the overall healthcare landscape in the country.

### Regional Insights

In March 2022, GRS India has developed a smartphone-based portable oxygen kit named Oxygen Plus. This emergency oxygen concentrator, housed in a field-

portable smart bag pack, was developed by New Delhi-based GRS India, a startup recognized by the Department for Promotion of Industry and Internal Trade (DIPP) of the Government of India. The project received support from the Northeast Centre For Technology Application and Reach (NECTAR), an autonomous organization under the Department of Science and Technology (DST).

## Key Market Players

Philips India Limited

BPL Medical Technologies Private Limited

Nidek Medical India Private Limited

Sanrai Med India Private Limited

Kannu Impex (India) Private Limited

Monarch Meditech

MediKart HealthCare Systems Private Limited

Technocare Medisystems

GPC Medical Limited

Nareena Life Sciences Private Limited

## Report Scope:

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

India Oxygen Concentrators Market, By Type:

Portable

Stationary

India Oxygen Concentrators Market, By Technology:

Continuous Flow

Pulse Flow

Continuous/Pulse Flow

India Oxygen Concentrators Market, By Flowrate:

5l/min

5-10l/min

Above 10l/min

India Oxygen Concentrators Market, By Source:

Import

Domestic

India Oxygen Concentrators Market, By Offering:

Rental

New Sales

India Oxygen Concentrators Market, By Application:

COPD

Lung Cancer

Asthma

COVID-19

Others

India Oxygen Concentrators Market, By Distribution Channel:

Wholesalers/Distributors/Suppliers

Online

Direct Sales

India Oxygen Concentrators Market, By End User:

Hospitals & Clinics

Ambulatory Care Centers

Home Care

India Oxygen Concentrators Market, By Region:

North

South

West

East

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Oxygen Concentrators Market.

Available Customizations:

India Oxygen Concentrators 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

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

### 2. RESEARCH METHODOLOGY

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

### 3. EXECUTIVE SUMMARY

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

### 4. VOICE OF CUSTOMER

### 5. INDIA OXYGEN CONCENTRATORS MARKET OUTLOOK

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Type (Portable, Stationary)
  - 5.2.2. By Technology (Continuous Flow, Pulse Flow, Continuous/Pulse Flow)
  - 5.2.3. By Flowrate (0-5l/min, 5-10l/min, Above 10l/min)

- 5.2.4. By Source (Import, Domestic)
  - 5.2.5. By Offering (Rental, New Sales)
  - 5.2.6. By Application (COPD, Lung Cancer, Asthma, COVID-19, Others)
  - 5.2.7. By Distribution Channel (Wholesalers/Distributors/Suppliers, Online, Direct Sales)
  - 5.2.8. By End User (Hospitals & Clinics, Ambulatory Care Centers, Home Care)
  - 5.2.9. By Region
    - 5.2.9.1. By State (Top 3 States)
  - 5.2.10. By Company (2024)
- 5.3. Market Map

## **6. NORTH INDIA OXYGEN CONCENTRATORS MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Type
  - 6.2.2. By Technology
  - 6.2.3. By Flowrate
  - 6.2.4. By Source
  - 6.2.5. By Offering
  - 6.2.6. By Application
  - 6.2.7. By Distribution Channel
  - 6.2.8. By End User

## **7. WEST INDIA OXYGEN CONCENTRATORS MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By Type
  - 7.2.2. By Technology
  - 7.2.3. By Flowrate
  - 7.2.4. By Source
  - 7.2.5. By Offering
  - 7.2.6. By Application
  - 7.2.7. By Distribution Channel
  - 7.2.8. By End User

## **8. SOUTH INDIA OXYGEN CONCENTRATORS MARKET OUTLOOK**

### **8.1. Market Size & Forecast**

#### **8.1.1. By Value**

### **8.2. Market Share & Forecast**

#### **8.2.1. By Type**

#### **8.2.2. By Technology**

#### **8.2.3. By Flowrate**

#### **8.2.4. By Source**

#### **8.2.5. By Offering**

#### **8.2.6. By Application**

#### **8.2.7. By Distribution Channel**

#### **8.2.8. By End User**

## **9. EAST INDIA OXYGEN CONCENTRATORS MARKET OUTLOOK**

### **9.1. Market Size & Forecast**

#### **9.1.1. By Value**

### **9.2. Market Share & Forecast**

#### **9.2.1. By Type**

#### **9.2.2. By Technology**

#### **9.2.3. By Flowrate**

#### **9.2.4. By Source**

#### **9.2.5. By Offering**

#### **9.2.6. By Application**

#### **9.2.7. By Distribution Channel**

#### **9.2.8. By End User**

## **10. MARKET DYNAMICS**

### **10.1. Drivers**

### **10.2. Challenges**

## **11. MARKET TRENDS & DEVELOPMENTS**

### **11.1. Merger & Acquisition (If Any)**

### **11.2. Product Launches (If Any)**

### **11.3. Recent Developments**

## **12. INDIA OXYGEN CONCENTRATORS MARKET: SWOT ANALYSIS**

## **13. PORTER'S FIVE FORCES ANALYSIS**

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Products

## **14. COMPETITIVE LANDSCAPE**

- 14.1. Philips India Limited
  - 14.1.1. Business Overview
  - 14.1.2. Company Snapshot
  - 14.1.3. Products & Services
  - 14.1.4. Financials (As Reported)
  - 14.1.5. Recent Developments
  - 14.1.6. Key Personnel Details
  - 14.1.7. SWOT Analysis
- 14.2. BPL Medical Technologies Private Limited
- 14.3. Nidek Medical India Private Limited
- 14.4. Sanrai Med India Private Limited
- 14.5. Kannu Impex (India) Private Limited
- 14.6. Monarch Meditech
- 14.7. MediKart HealthCare Systems Private Limited
- 14.8. Technocare Medisystems
- 14.9. GPC Medical Limited
- 14.10. Nareena Life Sciences Private Limited

## **15. STRATEGIC RECOMMENDATIONS**

## **16. ABOUT US & DISCLAIMER**

## I would like to order

Product name: India Oxygen Concentrators Market By Type (Portable and Stationary), By Technology (Continuous Flow, Pulse Flow, Continuous/Pulse Flow), By Flow-rate (0-5l/min, 5-10l/min, Above 10l/min), By Source (Import, Domestic), By Distribution Channel (Wholesalers/Distributors/Suppliers, Online, Direct Sales), By Offering (Rental , New Sales), By Application (COPD, Lung Cancer, Asthma, COVID-19, Others), By End User (Hospitals & Clinics, Ambulatory Care Centers, Home Care), By Region, Competition, Forecast & Opportunities, 2020-2030F

Product link: <https://marketpublishers.com/r/I9682D18F996EN.html>

Price: US\$ 3,500.00 (Single User License / Electronic Delivery)

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

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/I9682D18F996EN.html>