

India Solar Rooftop Market Segmented By Capacity (1kW - 10 kW, 11 kW - 100kW and Above 100 kW), By Connectivity (On-Grid and Off-Grid), By End-User (Residential, Commercial and Industrial), By Region, and By Competition, 2019-2029

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Abstracts

India Solar Rooftop Market has valued at USD 5.36 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 15.29% through 2029. Various state governments have introduced schemes for rooftop solar subsidies, which provide financial support to consumers looking to install solar rooftops. These subsidies are instrumental in making solar power more accessible to a broader audience.

Key Market Drivers

Government Policy and Incentives

The rapid growth of the solar rooftop market in India can be attributed to a variety of drivers, with government policies and incentives playing a pivotal role. The Indian government has introduced several schemes and initiatives aimed at promoting solar energy adoption, particularly at the rooftop level. These policies provide a strong foundation for the expansion of the solar rooftop market.

One of the key drivers is the 'Rooftop Solar Subsidy' program, which offers financial incentives to residential, commercial, and industrial consumers to install solar panels on their rooftops. The government subsidizes a portion of the installation costs, making it more affordable for consumers to go solar. Additionally, several states in India have introduced net metering policies, allowing consumers to sell excess solar energy back to the grid. This incentivizes consumers to install larger solar systems, as they can

benefit from the surplus energy generated.

Furthermore, the Ministry of New and Renewable Energy (MNRE) has set ambitious targets for solar rooftop installations as part of the National Solar Mission. These targets drive both state governments and private enterprises to invest in solar energy projects. MNRE's guidelines and regulations provide a standardized framework for project implementation, ensuring quality and safety.

The government also offers tax incentives and accelerated depreciation benefits to businesses and industries installing solar rooftop systems. This not only reduces the upfront costs but also creates a favorable environment for businesses to invest in clean energy. Additionally, various state governments exempt solar equipment from value-added tax (VAT) and other levies, further reducing the cost of installation.

Overall, government policies and incentives create a conducive environment for the solar rooftop market in India. They reduce the financial burden on consumers and businesses, promote sustainable energy generation, and drive the growth of the solar industry, making India one of the most attractive markets for solar rooftop installations globally.

Declining Solar Panel Costs

Another significant driver for the solar rooftop market in India is the declining cost of solar panels. Over the past decade, the price of solar panels has witnessed a substantial decrease, making solar energy more economically viable for consumers and businesses.

The primary reason behind the falling costs is the global production scale and technological advancements in solar panel manufacturing. India has benefited from the economies of scale in the production of photovoltaic panels, with a growing number of manufacturers both domestically and internationally. As the manufacturing industry has matured, competition has intensified, leading to cost reductions.

Furthermore, improvements in solar panel efficiency have boosted the electricity generation capacity of each panel. This means that consumers can generate more energy with fewer panels, resulting in a higher return on investment.

In addition to production cost reductions, the Indian government has encouraged domestic manufacturing through schemes like the 'Production Linked Incentive (PLI)'

program. This incentivizes manufacturers to set up solar equipment production facilities in India, contributing to cost competitiveness.

The falling costs of solar panels have had a cascading effect on the entire solar rooftop market. They have made solar energy more accessible to a wider range of consumers, including those with limited budgets. This cost decline has been particularly significant for residential and small-scale commercial users, who can now enjoy shorter payback periods and lower electricity bills.

Overall, the declining cost of solar panels has been a major driver for the solar rooftop market in India, making it a cost-effective and sustainable energy solution for a diverse range of consumers and contributing to the nation's energy transition.

Environmental Concerns and Corporate Sustainability Goals

Environmental concerns and corporate sustainability goals are becoming increasingly important drivers of the solar rooftop market in India. As the world faces the challenges of climate change and environmental degradation, individuals and businesses are seeking cleaner and more sustainable energy alternatives.

Consumers are becoming more aware of the environmental impact of traditional fossil fuel-based electricity generation. They are choosing solar rooftop systems as a means to reduce their carbon footprint and contribute to a cleaner environment. India's air quality and pollution problems have further heightened the awareness of the environmental benefits of solar energy.

Corporate sustainability goals are also driving the adoption of solar rooftop systems. Many businesses in India are committing to reducing their carbon emissions and adopting cleaner energy sources. Solar rooftops not only help companies meet their sustainability targets but also demonstrate their commitment to responsible and ethical business practices, which can enhance their brand image and customer loyalty.

Many businesses are investing in solar rooftop installations as a part of their Corporate Social Responsibility (CSR) initiatives. This not only benefits the environment but also supports local communities by creating jobs and contributing to the development of renewable energy infrastructure.

Moreover, as environmental regulations become stricter, businesses are recognizing that a transition to clean energy can help them comply with future regulations and

reduce potential compliance costs. Solar energy offers a reliable and predictable source of electricity, reducing the dependency on fossil fuels and mitigating the risks associated with volatile fuel prices and supply disruptions.

In conclusion, environmental concerns and corporate sustainability goals are powerful drivers for the solar rooftop market in India. As individuals and businesses increasingly prioritize sustainability and environmental responsibility, solar energy offers a compelling solution that aligns with both economic and ecological interests, contributing to the continued growth of the solar rooftop market in the country.

Key Market Challenges

Financing and High Initial Costs

One of the significant challenges facing the solar rooftop market in India is the issue of financing and the high initial costs associated with solar installations. While solar power systems can deliver long-term cost savings, the upfront investment required can be a significant barrier for many potential consumers.

The initial costs for solar rooftop installations include solar panels, inverters, mounting structures, wiring, and installation labor. In addition to these hardware and labor costs, there are other expenses such as obtaining necessary permits, inspection fees, and any required grid connection upgrades. For residential consumers, these costs can be particularly burdensome, and for businesses, the initial investment can be substantial.

While various government incentives and subsidies exist to alleviate these costs, they may not always be sufficient to make solar energy financially feasible for all consumers. Financial institutions and banks need to play a more significant role in providing affordable and accessible loans and financing options for consumers and businesses interested in adopting solar rooftop systems. Additionally, simplifying the process of obtaining subsidies and incentives could make the transition to solar energy more attractive.

Another approach to mitigating this challenge is to promote innovative financing models like power purchase agreements (PPAs) and leasing arrangements, which allow consumers to pay for the solar system over time, typically without the need for a substantial upfront payment. Encouraging these models and making them more widely available could address the issue of high initial costs and accelerate the adoption of solar rooftop systems.

Grid Integration and Technical Challenges

Grid integration and technical challenges pose another significant obstacle to the growth of the solar rooftop market in India. Solar power generation is intermittent and depends on weather conditions and sunlight availability. As a result, ensuring a seamless integration of solar power into the existing electrical grid is a complex task.

One of the key technical challenges is grid stability and reliability. Solar power fluctuations can impact the grid's stability, leading to voltage issues and power quality problems. Without proper infrastructure and technology in place, grid integration can become problematic. The existing electrical grid in many parts of India was not designed to accommodate distributed energy sources like solar rooftops.

To address these challenges, significant investments in grid infrastructure and technology are necessary. This includes the implementation of smart grid solutions, advanced grid management systems, and energy storage technologies. Battery storage systems can help store excess solar energy for use during periods of low sunlight, thereby stabilizing the grid.

Another challenge is ensuring that solar installations comply with technical and safety standards. Poorly designed or installed solar systems can result in electrical hazards or inefficiencies. Therefore, there is a need for training and certification programs for solar installers and quality control mechanisms to ensure that solar rooftop systems meet high technical standards.

The successful integration of solar energy into the grid and the resolution of technical challenges are critical for the long-term sustainability and reliability of the solar rooftop market in India.

Regulatory and Administrative Hurdles

A significant challenge in the Indian solar rooftop market is the presence of regulatory and administrative hurdles that can hinder the adoption of solar power systems. The complexity of administrative processes, permitting, and regulatory compliance can deter individuals and businesses from investing in solar rooftops.

One major issue is the lack of uniformity in regulations and policies across Indian states and regions. Different states have their own rules and regulations related to solar

energy, creating confusion and slowing down the adoption process. A more standardized approach is needed to simplify compliance and reduce the administrative burden on consumers and businesses.

Additionally, the process of obtaining permits and approvals for solar installations can be time-consuming and cumbersome. Streamlining these processes and reducing bureaucratic red tape could encourage more people to invest in solar rooftops. This would not only benefit consumers but also help India achieve its ambitious renewable energy targets.

Another regulatory challenge is related to net metering policies, which allow consumers to sell excess solar power back to the grid. Disputes and changes in net metering regulations can impact the return on investment for solar system owners. Clear and consistent net metering policies are essential to provide financial incentives for adopting solar energy.

Furthermore, navigating the various subsidies and incentives offered by different state and central government agencies can be challenging for consumers and businesses. Ensuring that these incentives are easy to access and understand can simplify the adoption process.

In conclusion, addressing the regulatory and administrative hurdles in the Indian solar rooftop market is vital to making solar energy more accessible and attractive. Streamlining regulations, simplifying administrative processes, and providing clarity on incentives can help overcome these challenges and promote the growth of solar rooftop installations in India.

Key Market Trends

Technological Advancements and Innovations

One of the most significant and exciting trends in the Indian solar rooftop market is the rapid pace of technological advancements and innovations. These innovations are driving efficiency improvements, reducing costs, and expanding the capabilities of solar rooftop systems. Several key trends within this category are shaping the future of the market.

First, the trend toward increased solar panel efficiency is notable. Solar panel manufacturers are continually developing and refining their products to capture more

sunlight and convert it into electricity. High-efficiency solar panels can generate more power from a smaller rooftop area, making them attractive for residential and commercial installations. These advancements are crucial for urban areas with limited rooftop space, where maximizing energy generation per square foot is essential.

Second, the integration of energy storage solutions with solar rooftop systems is gaining traction. Battery storage technology, including lithium-ion batteries, is becoming more affordable and efficient. This trend is particularly significant in India, where grid reliability can be a challenge in some regions. Energy storage allows solar system owners to store excess electricity during sunny periods and use it when the sun is not shining, ensuring a consistent power supply. It is also vital for harnessing the benefits of off-grid solar systems in rural and remote areas.

Third, the emergence of smart and connected solar systems is transforming the way solar energy is managed. Internet of Things (IoT) technology and cloud-based monitoring systems allow users to remotely monitor, control, and optimize their solar rooftop systems. These smart systems can track energy production, diagnose performance issues, and even predict maintenance needs. This trend enhances user convenience and maximizes the return on investment by ensuring that the system operates at peak efficiency.

Finally, building-integrated photovoltaics (BIPV) is another exciting trend. BIPV involves incorporating solar panels directly into building materials, such as roofing, windows, or facades. This approach not only generates electricity but also enhances the aesthetic appeal of structures. BIPV systems are becoming increasingly popular in India, as they seamlessly blend with architectural designs and promote energy efficiency in new construction projects.

Overall, technological advancements and innovations are reshaping the Indian solar rooftop market by making solar energy more efficient, accessible, and integrated with other cutting-edge technologies.

Growth in the Commercial and Industrial Sectors

Another prominent trend in the Indian solar rooftop market is the increasing adoption of solar power systems in the commercial and industrial sectors. While residential installations have been a common starting point for solar energy in India, the potential for significant growth in the commercial and industrial segments is now being realized.

Commercial and industrial establishments are recognizing the cost-saving potential of solar rooftop systems. These sectors typically have larger rooftops, making them ideal candidates for solar installations. The trend is driven by several key factors.

First, businesses in India are under pressure to reduce operating costs, including electricity expenses. Solar energy offers a compelling solution to lower electricity bills while also demonstrating a commitment to sustainability. As a result, more businesses are investing in solar rooftop systems to harness these financial benefits.

Second, government incentives and policies, such as accelerated depreciation benefits and tax incentives, are enticing for commercial and industrial players. These incentives reduce the payback period and enhance the return on investment, making solar installations more appealing.

Third, corporate social responsibility (CSR) initiatives play a significant role in driving solar adoption. Many large corporations have made commitments to reduce their carbon footprint and promote sustainability. Investing in solar rooftops is a tangible way for these businesses to meet their CSR goals and showcase their commitment to environmental responsibility.

Additionally, the 'Group Captive' model, which allows multiple industrial and commercial consumers to collectively invest in a solar power plant and share the electricity generated, is gaining popularity. This model enables businesses to benefit from economies of scale, further reducing costs.

Furthermore, the introduction of 'Open Access' policies in some Indian states allows businesses to purchase solar power directly from off-site solar projects. This flexibility empowers businesses to access renewable energy even if they lack suitable rooftops for installations.

In conclusion, the trend of increasing adoption of solar rooftop systems in the commercial and industrial sectors in India is a promising development. As more businesses realize the financial and environmental benefits of solar energy, this trend is expected to continue, contributing to the growth of the Indian solar rooftop market.

Segmental Insights

Connectivity Insights

The On-Grid segment emerged as the dominating segment in 2023. The on-grid segment refers to solar rooftop systems that are connected to the electrical grid and can feed excess energy back into the grid. The on-grid segment of the India Solar Rooftop Market has witnessed robust growth in recent years. This growth is fueled by the increasing demand for grid-connected solar systems, both in residential and commercial sectors. Key drivers for this growth include government incentives, falling solar panel costs, and rising awareness about the environmental benefits of solar energy.

Government policies and incentives play a significant role in shaping the on-grid solar rooftop market. Schemes like net metering and feed-in tariffs allow consumers to sell excess energy to the grid, providing a financial incentive for solar adoption. Various state governments in India have also introduced subsidies and tax benefits to encourage on-grid solar installations.

Ensuring the seamless integration of on-grid solar systems with the existing electrical grid is a crucial aspect. While feeding excess energy into the grid is an attractive feature, it necessitates proper grid infrastructure and technology to manage the intermittent nature of solar power. Grid stability and reliability must be maintained to prevent issues like voltage fluctuations and power quality problems. This integration requires investments in smart grid technology and grid management systems.

The declining cost of solar panels has made on-grid solar installations more financially viable. However, the initial investment can still be a barrier for many consumers. While government incentives and subsidies can offset some costs, payback periods vary depending on factors such as the location, system size, and electricity consumption. For businesses, a shorter payback period is often a priority, whereas residential consumers may focus on long-term savings.

End-User Insights

The Commercial segment is projected to experience rapid growth during the forecast period. This growth is attributed to several factors, including government incentives, increasing environmental awareness, and the desire of commercial enterprises to reduce operating costs through sustainable energy solutions.

Government policies and incentives play a vital role in shaping the commercial solar rooftop market in India. Various state and central government schemes promote the installation of solar systems in the commercial sector. These incentives include accelerated depreciation benefits, net metering, subsidies, and tax exemptions.

Additionally, the government's emphasis on renewable energy targets is driving businesses to adopt solar solutions as part of their corporate social responsibility (CSR) initiatives.

Cost savings are a significant driver for the commercial segment. Businesses seek to reduce electricity expenses, and solar installations offer the potential for substantial long-term savings. The return on investment (ROI) for commercial solar systems can be attractive, especially with decreasing solar panel costs and government incentives, which significantly reduce the payback period. Moreover, the power purchase agreements (PPAs) and leasing options make it easier for commercial entities to adopt solar without a substantial upfront investment.

Commercial properties often have larger rooftop spaces compared to residential properties, making them ideal candidates for solar installations. These larger spaces allow for the installation of larger solar arrays, which can generate more electricity, offset a higher percentage of energy consumption, and lead to greater cost savings.

As environmental regulations become stricter, businesses find value in adopting clean energy sources to meet compliance requirements. Solar power is seen as a sustainable and responsible way to reduce carbon emissions and environmental impact.

In conclusion, the commercial segment of the India Solar Rooftop Market is experiencing significant growth, driven by cost savings, government incentives, environmental awareness, and a desire for sustainability. The availability of larger rooftop spaces on commercial properties makes these installations appealing.

Regional Insights

South India emerged as the dominating region in the India Solar Rooftop market in 2023, holding the largest market share. South India, comprising the states of Andhra Pradesh, Telangana, Karnataka, Kerala, and Tamil Nadu, presents a unique landscape for the India Solar Rooftop Market. The region has distinct characteristics and opportunities that influence the adoption and growth of solar rooftop installations. South India benefits from high solar irradiation levels due to its proximity to the equator. This makes the region an ideal location for solar energy generation. The abundance of sunlight throughout the year enhances the efficiency of solar rooftop systems, leading to greater energy production and shorter payback periods for consumers.

South Indian states have shown commitment to renewable energy and have introduced

various policies and incentives to promote solar rooftop installations. These policies include net metering, subsidies, tax exemptions, and feed-in tariffs. For instance, states like Tamil Nadu and Karnataka have introduced progressive net metering regulations, which encourage the adoption of grid-connected solar systems.

South India has rapidly growing urban centers, including Bangalore, Chennai, and Hyderabad, which are hubs of commercial and industrial activity. The presence of commercial and industrial entities with larger rooftop spaces creates significant opportunities for solar rooftop installations. Businesses in these regions are increasingly adopting solar power to reduce electricity expenses and demonstrate environmental responsibility.

South India is not only home to thriving urban areas but also has a significant residential market for solar rooftops. The high population density in urban centers and the growing awareness of environmental sustainability have led to an increasing number of homeowners considering solar installations to reduce their carbon footprint and energy bills.

In conclusion, South India presents a dynamic landscape for the India Solar Rooftop Market. It benefits from favorable solar conditions, supportive policies, a growing urban population, and a commitment to sustainability. These factors position the region as a key contributor to the overall growth and success of the solar rooftop market in India.

Key Market Players

Cleantech Energy Corporation Pte Ltd.

Fourth Partner Energy Pvt. Ltd.

Amplus Solar Power Pvt. Ltd.

Clean Max Enviro Energy Solutions Pvt. Ltd.

Sunsource Energy Pvt. Ltd.

Orb Energy Pvt. Ltd.

Tata Power Solar Systems Limited

Mahindra Susten Pvt. Ltd.

Growatt New Energy Technology Co. Ltd.

Roofsol Energy Pvt. Ltd.

Report Scope:

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

India Solar Rooftop Market, By Capacity:

1kW - 10 kW

11 kW - 100kW

Above 100 kW

India Solar Rooftop Market, By Connectivity:

On-Grid

Off-Grid

India Solar Rooftop Market, By End-User:

Residential

Commercial

Industrial

India Solar Rooftop Market, By Region:

North India

South India

West India

East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Solar Rooftop Market.

Available Customizations:

India Solar Rooftop 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).

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