

Japan Influenza Medications Market By Type (Antiviral Drugs, Antihistamines, Vaccines, Others), By Route of Administration (Oral, Inhaled), By Distribution Channel (Hospital Pharmacies, Retail Pharmacies, and Online Pharmacies), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Japan Influenza Medications Market was valued at USD 84.61 Million in 2024 and is expected to reach USD 123.61 Million by 2030 with a CAGR of 6.48% during the forecast period. The Japan Influenza Medications Market is primarily driven by several key factors. The rising incidence of influenza outbreaks and seasonal flu contributes significantly to market demand, necessitating effective antiviral medications and vaccines. Advances in pharmaceutical research and development have led to the introduction of more effective and targeted influenza treatments, further boosting market growth. Increased awareness and proactive healthcare measures, including annual vaccination campaigns and public health initiatives, drive demand for influenza medications. Government support for influenza control programs and investments in healthcare infrastructure also play crucial roles. The market benefits from continuous innovation in drug formulations and delivery systems, enhancing treatment efficacy and patient compliance. Demographic factors such as an aging population, which is more susceptible to severe influenza complications, also contribute to the growing need for effective influenza medications in Japan.

Key Market Drivers

Rising Incidence of Influenza Outbreaks

The increasing frequency of influenza outbreaks in Japan is a major factor driving the demand for influenza medications. Seasonal flu epidemics, which occur annually, and occasional pandemics, which may arise less frequently but with greater impact, create significant public health challenges. Each outbreak period sees a surge in cases that strain healthcare systems, prompting a heightened need for effective antiviral treatments to reduce the burden on hospitals, clinics, and other medical facilities. According to a report, “Surveillance of seasonal influenza viruses during the COVID-19 pandemic in Tokyo, Japan, 2018–2023, a single-center study”, Japan experienced a notable and extended decline in influenza cases, with reports for the winter of 2020–2021 showing fewer than 1/1000th of the usual number of cases, according to the National Institute of Infectious Diseases. The winter of 2021–2022 saw even lower numbers, marking a new record low. This two-year period of minimal influenza activity has raised concerns about potential reduced immunity, especially among the elderly, who are at higher risk for severe influenza-related complications and mortality.

Influenza viruses are highly adaptable, with the ability to mutate rapidly and generate new strains. This constant genetic variability necessitates ongoing surveillance and the development of updated vaccines and antiviral drugs. For instance, each flu season may bring new strains that may not be fully covered by last year's vaccine, requiring pharmaceutical companies and public health organizations to stay vigilant and responsive. This cyclical nature of influenza outbreaks drives both public health initiatives and private sector investments aimed at maintaining an effective arsenal of treatments. Healthcare providers and governments play crucial roles in managing influenza outbreaks. Governments often implement vaccination programs and public health campaigns to increase awareness and vaccination rates. Healthcare providers rely on effective antiviral medications to treat infected individuals and prevent the spread of the virus. The demand for these medications spikes during outbreak periods, emphasizing the need for robust and readily available antiviral options. This consistent demand fosters a dynamic market environment, where pharmaceutical companies are encouraged to innovate and develop new treatments to address emerging strains and improve overall efficacy.

Government and Public Health Initiatives

Government and public health initiatives are pivotal drivers of the Japan Influenza Medications Market. In Japan, both the national government and various public health organizations play an active role in promoting strategies to manage and mitigate influenza's impact. These efforts are crucial in controlling the spread of the virus and

reducing the associated healthcare burden on the system. The Japanese government, through its Ministry of Health, Labour and Welfare (MHLW), formulates and enforces policies and guidelines that significantly influence the Japan Influenza Medications Market. The MHLW's directives include seasonal vaccination programs, which are critical in preventing influenza outbreaks and ensuring that the population remains protected. These programs are supported by public health campaigns that emphasize the importance of vaccination and early antiviral treatment, thus increasing public awareness and driving the demand for influenza medications.

Annual vaccination campaigns spearheaded by the government are aimed at educating the public about the benefits of receiving the influenza vaccine. By providing clear communication on the advantages of vaccination—such as reduced severity of illness and prevention of virus spread—these campaigns help to boost vaccination rates. The government's efforts to make vaccines readily available through subsidization and public health programs further enhance accessibility, contributing to increased medication usage. Public health organizations also play a crucial role in driving the Japan Influenza Medications Market. They collaborate with healthcare providers to implement best practices in influenza management and ensure that antiviral medications are used effectively. These organizations often conduct outreach programs and provide educational resources to healthcare professionals and the public. By disseminating information on the latest treatment options and guidelines, they help ensure that patients receive timely and appropriate care.

Increased Awareness and Preventive Measures

Rising awareness about influenza prevention and treatment plays a crucial role in driving the Japan Influenza Medications Market. This growing awareness stems from comprehensive public awareness campaigns, educational initiatives, and extensive media coverage that emphasize the significance of early intervention and preventive measures. Public awareness campaigns are instrumental in informing the general population about the risks associated with influenza and the benefits of vaccination and antiviral treatments. These campaigns are often spearheaded by government health agencies, non-profit organizations, and healthcare providers, and they aim to educate the public about the importance of timely vaccination and effective treatment options. By highlighting the potential severity of influenza, particularly for high-risk groups such as the elderly, children, and individuals with chronic health conditions, these initiatives underscore the need for proactive health measures.

Educational initiatives are another key driver of increased awareness. Schools,

workplaces, and community centers frequently host informational sessions and workshops that teach individuals about influenza, its symptoms, and preventive strategies. These initiatives often include distribution of educational materials such as brochures, posters, and online resources that provide valuable information on the importance of flu vaccination and the availability of antiviral medications. By engaging with various community segments, these programs help to disseminate critical knowledge and encourage individuals to take preventive actions. Media coverage also plays a significant role in enhancing public awareness. News outlets, social media platforms, and health-focused media frequently feature stories and updates about influenza outbreaks, vaccine availability, and treatment options. This constant media presence helps keep influenza in the public eye and reinforces the messages delivered through awareness campaigns and educational programs. For example, during flu season, news reports might highlight the benefits of getting vaccinated and the effectiveness of antiviral medications, thereby motivating individuals to seek out these treatments.

Evolving Influenza Virus Strains

The continuous evolution of influenza virus strains is a major driving force behind the demand for updated medications and vaccines in Japan. Influenza viruses are highly mutable and exhibit significant genetic variability, which results in the frequent emergence of new strains. These genetic shifts, including point mutations and reassortments, can lead to the development of novel virus variants that may bypass the immunity conferred by previous vaccinations or past infections. This constant change in the viral landscape creates a pressing need for new and updated therapeutic and preventive measures. Each flu season, the influenza virus undergoes genetic changes that can alter its antigenic properties. This phenomenon, known as antigenic drift, occurs when small mutations accumulate in the virus's surface proteins, hemagglutinin (HA) and neuraminidase (NA). These minor changes can lead to the emergence of new strains that are sufficiently different from those that circulated in previous seasons. Consequently, individuals who were previously vaccinated or infected may not have adequate immunity against these new strains, underscoring the need for updated vaccines and antiviral drugs.

In addition to antigenic drift, a more dramatic form of genetic change known as antigenic shift can occur. Antigenic shift involves the reassortment of genetic material between different influenza virus strains, potentially creating a novel influenza subtype with significantly different HA or NA proteins. This can lead to the emergence of pandemic strains to which the population has little pre-existing immunity. Historical examples

include the H1N1 pandemic of 2009, which was caused by a new strain resulting from antigenic shift. The potential for such major shifts necessitates ongoing vigilance and rapid response in vaccine and drug development to address emergent threats.

Pharmaceutical companies and research institutions play a crucial role in responding to these evolving viral strains. They continuously monitor influenza virus trends through global surveillance networks, such as the World Health Organization's (WHO) Global Influenza Surveillance and Response System (GISRS). These networks provide real-time data on circulating strains, enabling scientists to identify which virus variants are most likely to dominate in the upcoming flu season. This information is critical for the timely development of vaccines and antiviral medications that are effective against the currently circulating strains.

Key Market Challenges

Resistance to Antiviral Drugs

One of the major challenges facing the Japan Influenza Medications Market is the increasing resistance of influenza viruses to antiviral drugs. Over time, influenza viruses can develop mutations that render existing antiviral medications less effective. This resistance can arise due to the overuse or inappropriate use of antiviral drugs, which can lead to selective pressure on the viruses to evolve mechanisms that bypass drug action. For instance, resistance to commonly used antivirals like oseltamivir (Tamiflu) and zanamivir (Relenza) has been reported, complicating treatment options and necessitating the development of new and more effective drugs. This resistance not only impacts the effectiveness of current treatments but also places an additional burden on healthcare systems and pharmaceutical companies to innovate and develop new antiviral agents. The challenge is further compounded by the need for ongoing surveillance of influenza strains to monitor and address resistance patterns, requiring significant investment in research and development.

High Costs of Medication and Vaccines

The high cost of influenza medications and vaccines poses a significant challenge in the Japan Influenza Medications Market. The development and production of antiviral drugs and vaccines involve substantial research and development expenses, which are often passed on to consumers and healthcare providers. The cost of maintaining a comprehensive vaccination program can strain public health budgets, especially during years with severe flu seasons or pandemics. While vaccines and medications are crucial for controlling influenza outbreaks, their high cost can limit accessibility for some

segments of the population, particularly in economically disadvantaged areas or for those without sufficient insurance coverage. This financial barrier can lead to lower vaccination rates and reduced effectiveness of flu management strategies. Addressing this challenge requires balancing affordability with the need to incentivize pharmaceutical innovation and ensure widespread access to effective treatments.

Key Market Trends

Growing Demand for Preventive Vaccines

The growing demand for preventive vaccines is a major catalyst for the Japan Influenza Medications Market. Influenza vaccines are essential in controlling the spread of the virus and mitigating the severity of illness, making them a cornerstone of public health strategies. The importance of preventive vaccination has been underscored by public health campaigns that promote annual flu shots as a key measure to protect individuals and communities from the influenza virus. In Japan, annual vaccination campaigns are actively supported by public health authorities, healthcare providers, and government agencies. These campaigns aim to increase awareness about the benefits of vaccination, particularly targeting vulnerable populations such as the elderly, children, and individuals with chronic health conditions. By emphasizing the importance of timely vaccination before the flu season starts, these campaigns contribute significantly to higher vaccination rates, which in turn drives demand for influenza vaccines.

The development of new and improved vaccines is a direct response to the increasing demand for effective prevention. Innovations in vaccine technology have led to the creation of vaccines with broader strain coverage, offering protection against a wider range of influenza virus variants. This is crucial as influenza viruses constantly mutate, leading to the emergence of new strains each season. By providing coverage against multiple strains, these advanced vaccines enhance their effectiveness and appeal, encouraging more individuals to get vaccinated. Advancements in vaccine formulations have led to the development of vaccines with enhanced efficacy. Research and development efforts are focused on improving the immune response elicited by vaccines, resulting in more effective protection against influenza. For instance, high-dose or adjuvanted vaccines have been developed to boost immunity, especially in older adults who may have a weaker immune response to standard vaccines. These innovations cater to the increasing demand for vaccines that offer superior protection and help reduce the overall burden of influenza.

Advancements in Pharmaceutical Research and Development

Ongoing advancements in pharmaceutical research and development are crucial in driving the Japan Influenza Medications Market. Continuous innovations in drug discovery focus on enhancing the efficacy, safety, and convenience of influenza medications. Research efforts are dedicated to developing more effective antivirals and vaccines, with new agents targeting a broader spectrum of influenza strains and improved resistance profiles. This is essential in combating the rapidly evolving influenza virus, which can develop resistance to existing treatments. Advancements in drug delivery systems, such as inhalable or rapid-release formulations, offer more accessible and user-friendly treatment options. Investments in research and development ensure that pharmaceutical companies can offer cutting-edge treatments that address current and emerging strains of influenza, thereby driving market growth and improving patient care. According to an article, "Pharmacoeconomic study of anti-influenza virus drugs in Japan based on a network meta-analysis", A study was conducted in Japan to evaluate the most cost-effective neuraminidase inhibitor for treating influenza from a healthcare payer's perspective. This analysis revisited a previous study that had limitations, including the lack of probabilistic sensitivity analysis and the use of EQ-5D-3L quality of life scores instead of the more current EQ-5D-5L. The earlier study also used a decision tree model that considered only three health conditions. In the updated analysis, new data from a network meta-analysis were incorporated, and a revised decision tree model was constructed to include seven health conditions. Costs were assessed based on the 2020 Japanese medical fee index, including both medical costs and drug prices. Effectiveness was measured using EQ-5D-5L questionnaires for adult patients with recent influenza virus infections over a 14-day period. Deterministic and probabilistic sensitivity analyses were conducted to assess uncertainty. The initial analysis confirmed that oseltamivir was more cost-effective compared to laninamivir, zanamivir, and peramivir, establishing it as the most cost-effective neuraminidase inhibitor. The updated examination further validated that oseltamivir continued to dominate the other neuraminidase inhibitors. Both deterministic and probabilistic sensitivity analyses consistently supported oseltamivir as the most cost-effective option among the four drugs.

Segmental Insights

Type Insights

Based on the type, vaccines was the dominated category among antiviral drugs, antihistamines, and vaccines. Vaccines play a critical role in the prevention and control of influenza, significantly influencing the market dynamics. They are pivotal in reducing

the incidence of influenza and mitigating the severity of the disease, particularly during flu seasons and pandemics.

The dominance of vaccines in the Japan Influenza Medications Market is driven by several factors. The Japanese government and public health authorities emphasize preventive measures to manage influenza outbreaks. Annual vaccination campaigns, supported by subsidies and public health initiatives, encourage widespread vaccination among the population. This focus on prevention helps reduce the burden on healthcare systems by decreasing the number of influenza cases and hospitalizations. Consequently, vaccines receive substantial support and funding, which fuels their market dominance. The efficacy of influenza vaccines in preventing the disease and reducing its spread enhances their appeal. Vaccines are designed to provide immunity against multiple strains of the influenza virus, including those anticipated to be prevalent during the flu season. The development of new and improved vaccines, such as those with broader strain coverage or enhanced efficacy, further drives their market dominance. Innovations in vaccine technology, including needle-free delivery systems and combination vaccines, also contribute to higher vaccination rates and increased market demand.

Route of Administration Insights

Based on Route of Administration, oral medications dominated over inhaled formulations. Oral medications, including antiviral drugs and symptomatic treatments, represent a significant portion of the market due to their widespread use, ease of administration, and established efficacy. One of the primary reasons oral medications lead the market is their convenience and broad acceptance among patients. Oral antiviral drugs, such as neuraminidase inhibitors (e.g., oseltamivir) and polymerase inhibitors (e.g., baloxavir), are commonly prescribed to manage influenza. These drugs are effective in reducing the severity and duration of influenza symptoms when taken within a specified period after the onset of symptoms. Oral medications are generally easier to administer compared to inhaled alternatives, making them more suitable for a wide range of patients, including those who may have difficulty using inhalers.

The ease of use associated with oral medications contributes to their dominance. Patients find oral tablets or capsules more straightforward to take compared to inhalers, which may require proper technique and coordination to ensure effective delivery of medication to the respiratory system. This simplicity in administration promotes higher adherence to prescribed treatments and contributes to the sustained preference for oral formulations in managing influenza. Oral medications have been well-established in the

market with extensive clinical evidence supporting their safety and efficacy. Pharmaceutical companies have invested significantly in developing and refining oral antiviral drugs, leading to a robust portfolio of options for healthcare providers. The well-documented benefits and effectiveness of these oral treatments reinforce their position as the preferred choice for both doctors and patients.

Regional Insights

In the Japan Influenza Medications Market, the Kanto region was dominated, surpassing other regions in terms of market activity and demand for influenza medications. The Kanto region, which includes major urban centers such as Tokyo and Yokohama, is the most populous and economically significant region in Japan. This region's dominance in the Japan Influenza Medications Market can be attributed to several factors, including its large population, advanced healthcare infrastructure, and high rate of influenza incidences.

Tokyo, the capital city of Japan, is a major healthcare hub with a concentration of medical facilities, research institutions, and pharmaceutical companies. This concentration leads to a higher demand for influenza medications due to the dense population and the significant healthcare needs of the residents. The presence of numerous hospitals, clinics, and specialized centers in Tokyo ensures that there is a robust infrastructure for diagnosing and treating influenza, thereby driving up the usage and demand for influenza drugs. The economic strength of the Kanto region supports extensive healthcare spending and investments in influenza medications. As one of Japan's leading economic centers, Tokyo and its surrounding areas benefit from substantial public and private investments in healthcare, which includes funding for the latest antiviral drugs, vaccines, and treatment options. This economic capacity enables the region to maintain high levels of healthcare service quality and innovation, further boosting the market for influenza medications.

The high population density in the Kanto region also contributes to its leading position in the Japan Influenza Medications Market. Dense urban areas are more prone to influenza outbreaks due to the close proximity of individuals, which increases the need for effective preventive and therapeutic measures. As a result, there is a higher demand for influenza vaccines and antiviral medications to manage and control outbreaks, driving the market growth in this region. Healthcare infrastructure in Kanto is another critical factor. The region is home to many top-tier medical institutions and research facilities that contribute to the development and distribution of new influenza treatments. Hospitals and clinics in Tokyo and other major cities in the Kanto region are equipped

with advanced diagnostic and treatment technologies, facilitating the prompt and effective management of influenza cases. This infrastructure supports the widespread availability and utilization of influenza medications, reinforcing the region's dominance in the market.

Key Market Players

Novartis Pharma K.K.

AbbVie GK

Janssen Pharmaceuticals K.K.

Asahi Kasei Pharma Corporation

Sun Pharma Japan Limited

Kyowa Pharmaceutical Industry Co., Ltd.

Santen Pharmaceutical Co., Ltd.

Otsuka Pharmaceutical Co., Ltd.

Senju Pharmaceutical Co., Ltd.

Taisho Pharmaceutical Co., Ltd.

Report Scope:

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

Japan Influenza Medications Market, By Type:

Antiviral Drugs

Antihistamines

Vaccines

Others

Japan Influenza Medications Market, By Route of Administration:

Oral

Inhaled

Japan Influenza Medications Market, By Distribution Channel:

Hospital Pharmacies

Retail Pharmacies

Online Pharmacies

Japan Influenza Medications Market, By Region:

Hokkaido

Tohoku

Kanto

Chubu

Kansai

Chugoku

Shikoku

Kyushu

Competitive Landscape

Japan Influenza Medications Market By Type (Antiviral Drugs, Antihistamines, Vaccines, Others), By Route of Ad...

Company Profiles: Detailed analysis of the major companies present in the Japan Influenza Medications Market.

Available Customizations:

Japan Influenza Medications 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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