

Japan Pharmacy Automation Device Market, By Product (Medication Dispensing Systems, Packaging And Labeling Systems, Storage And Retrieval Systems, Automated Medication Compounding Systems, Tabletop Tablet Counters), By Distribution Channel (Retail Pharmacy, Online Pharmacies, Others), By Region, Competition, Opportunities & Forecast, 2020-2030F

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Abstracts

Japan Pharmacy Automation Device Market was valued at USD 110.22 million in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.62% through 2030. The Japan Pharmacy Automation Device Market is a dynamic sector marked by rapid technological advancements, evolving healthcare demands, and substantial regulatory influences. This market is experiencing significant growth, primarily driven by the need for enhanced efficiency, accuracy, and operational effectiveness in the pharmaceutical industry. It includes a variety of automation devices such as robotic dispensing systems, automated medication management tools, and inventory management solutions.

The market's expansion aligns with broader healthcare trends, including Japan's aging population, the increasing prevalence of chronic diseases, and ongoing technological innovations. Despite challenges like high initial costs and complex regulatory compliance, the market outlook remains positive. Continued innovation and growth are expected as automation technology advances and adapts to the evolving needs of the healthcare sector.

Key Market Drivers

Rising Demand for Efficiency and Accuracy

The rising demand for efficiency and accuracy is a critical factor driving the growth of the Japan Pharmacy Automation Device Market. The complexity of medication regimens has increased significantly due to the growing prevalence of chronic diseases and an aging population. In Japan, where the elderly demographic is substantial, patients often require multiple medications, leading to intricate dispensing processes. Automation devices, such as automated dispensing systems and robotic solutions, are designed to handle these complex regimens with high precision. They ensure accurate dosage and reduce the risk of medication errors, addressing the need for efficient and reliable medication management in a context where manual handling is prone to mistakes. Efficiency in pharmacy operations is crucial for managing high patient volumes and maintaining competitive advantage. Automated systems streamline various pharmacy tasks, including prescription filling, medication dispensing, and inventory management. By automating these processes, pharmacies can reduce the time and labor required for routine tasks, leading to faster service delivery and improved overall operational efficiency. This efficiency is particularly valuable in busy urban settings like Tokyo, where pharmacies face high demand and need to optimize their workflows to keep up with patient needs.

The risk of human error in manual medication dispensing can lead to serious consequences, including adverse drug reactions and patient safety issues. Pharmacy automation devices are engineered to minimize these errors by providing precise control over medication handling and dispensing. Features such as barcoding, automated pill counting, and real-time data verification enhance accuracy and reduce the likelihood of dispensing mistakes. As the healthcare industry increasingly prioritizes patient safety, the demand for automation technologies that ensure error-free operations is growing, driving the market for these devices. Japan's stringent healthcare regulations necessitate high standards of accuracy and efficiency in pharmacy practices. Automation devices help pharmacies comply with these regulations by providing detailed documentation, secure medication handling, and real-time tracking capabilities. By integrating with electronic health records (EHR) and other healthcare IT systems, automation solutions facilitate accurate record-keeping and reporting, which are essential for meeting regulatory requirements. The need to adhere to these standards propels the adoption of automation devices that support regulatory compliance and enhance operational transparency. As patients become more informed and proactive about their healthcare, there is increasing demand for services that offer

precision and reliability. Automated pharmacy systems cater to this expectation by ensuring accurate medication dosing and timely dispensing, thereby enhancing patient satisfaction. Automation also supports personalized medication management, providing tailored solutions that address individual patient needs. Meeting these evolving patient expectations drives the demand for advanced pharmacy automation technologies that deliver both accuracy and efficiency.

Efficiency gains from automation translate into cost savings for pharmacies. By reducing the need for manual labor and minimizing errors that can lead to costly corrections, automation devices help lower operational expenses. This financial incentive is particularly appealing in a competitive market, where pharmacies seek to optimize their resources and improve profitability. The cost-management benefits of automation contribute to its growing adoption and drive the market for these technologies. The rising demand for efficiency and accuracy drives the growth of the Japan Pharmacy Automation Device Market by addressing the complexities of medication regimens, enhancing operational efficiency, reducing errors, ensuring regulatory compliance, meeting patient expectations, and managing costs. These factors collectively make automation devices an essential component in modernizing pharmacy operations and improving overall healthcare delivery in Japan.

Aging Population and Chronic Disease Prevalence

The aging population and prevalence of chronic diseases significantly drive the growth of the Japan Pharmacy Automation Device Market. Japan has one of the highest proportions of elderly individuals globally, Japan's population is aging rapidly. According to the latest national data, over 10% of the population is now aged 80 or older. Additionally, nearly one-third of the population, estimated at 36.23 million individuals, is over the age of 65. This demographic shift leads to an increased need for medication management as elderly individuals often suffer from multiple chronic conditions such as hypertension, diabetes, and cardiovascular diseases. As a result, there is a higher demand for medications and a corresponding need for systems that can manage complex medication regimens effectively. Pharmacy automation devices, such as automated dispensing systems and medication management tools, are essential for handling these increased medication needs efficiently and accurately. Chronic diseases often require patients to adhere to complex medication regimens involving multiple prescriptions and varying dosages. This complexity can be challenging to manage manually and increases the risk of medication errors. Automation devices, including robotic dispensers and electronic medication management systems, are designed to handle these complexities by providing precise dosing, reducing

human error, and ensuring adherence to prescribed treatments. The growing prevalence of chronic conditions thus fuels the need for advanced automation solutions that can streamline medication management and improve patient outcomes. In Japan, the leading causes of death per 100,000 population in 2019 were as follows: Ischaemic heart disease at 129.1, stroke at 95.9, lower respiratory infections at 85, trachea, bronchus, and lung cancers at 62.8, chronic obstructive pulmonary disease at 61.5, colon and rectum cancers at 45.1, Alzheimer's disease and other dementias at 44.8, stomach cancer at 39.7, kidney diseases at 35.3, and pancreas cancer at 29.2.

Adherence to prescribed medication regimens is a critical factor in the effective management of chronic diseases. Non-adherence can lead to treatment failures, disease progression, and increased healthcare costs. Pharmacy automation devices contribute to improved medication adherence by offering features such as automated pill dispensing, reminder systems, and adherence tracking. These tools help patients follow their medication schedules accurately and consistently, which is particularly important for those managing multiple chronic conditions. The focus on enhancing medication adherence drives the demand for automation technologies that support this goal. The increase in the elderly population and chronic disease prevalence places a significant burden on healthcare facilities, including pharmacies. Managing a high volume of prescriptions and ensuring accurate dispensing requires significant resources and personnel. Pharmacy automation devices help alleviate this burden by streamlining operations, reducing the time and labor required for prescription filling, and minimizing the risk of errors. This operational efficiency is crucial for healthcare providers who need to manage large patient volumes and complex medication needs effectively.

Chronic disease management and elderly care can be costly, both for healthcare providers and patients. Automation devices contribute to cost management by optimizing pharmacy workflows, reducing manual labor, and minimizing errors that could lead to additional costs. For healthcare facilities, automation helps in allocating resources more efficiently, allowing staff to focus on more complex tasks and patient interactions. The cost benefits associated with automation are attractive in the context of rising healthcare expenses and the need for efficient resource management, driving market growth. The Japanese government and healthcare institutions recognize the challenges associated with an aging population and chronic disease prevalence. As part of their efforts to improve healthcare delivery and manage associated costs, there is a growing emphasis on adopting technologies that enhance efficiency and patient care. Supportive policies, subsidies, and funding initiatives for technology adoption in healthcare, including pharmacy automation, contribute to the market's expansion.

These measures reflect a broader strategy to address the implications of demographic changes and chronic disease management through technological solutions. The aging population and prevalence of chronic diseases drive the growth of the Japan Pharmacy Automation Device Market by increasing medication needs, complicating medication regimens, enhancing adherence, improving operational efficiency, managing costs, and receiving institutional support. These factors collectively create a strong demand for advanced pharmacy automation technologies that address the challenges of managing complex and evolving healthcare requirements.

Technological Advancements

Technological advancements are a major driver of growth in the Japan Pharmacy Automation Device Market, influencing various aspects of the industry. Technological innovations have significantly expanded the functional capabilities of pharmacy automation devices. Modern systems incorporate advanced features such as robotic dispensing, automated pill counting, and sophisticated medication storage solutions. For instance, robotic dispensing systems can efficiently manage high volumes of prescriptions, handle a wide range of medications, and ensure precise dosage with minimal human intervention. These enhanced capabilities improve operational efficiency and accuracy, driving the adoption of advanced automation devices in pharmacies. The integration of artificial intelligence into pharmacy automation devices has revolutionized medication management. AI algorithms can analyze large datasets to predict medication needs, optimize inventory management, and identify potential drug interactions. AI-driven systems can also facilitate personalized medication plans by analyzing patient data and tailoring treatments accordingly. The use of AI enhances decision-making processes, improves patient outcomes, and drives demand for advanced automation solutions that leverage these technologies.

The rise of data analytics and connectivity technologies has transformed pharmacy automation systems. Modern devices can now integrate with electronic health records (EHR) and other healthcare IT systems to facilitate seamless data exchange and real-time monitoring. This connectivity allows for better coordination between different healthcare providers, ensures accurate medication records, and supports informed decision-making. The ability to harness and analyze data effectively enhances the functionality and value of pharmacy automation devices, driving their adoption in the market. Technological advancements have led to the development of more intuitive and user-friendly interfaces for pharmacy automation devices. Enhanced touchscreen interfaces, simplified software, and user-friendly controls make it easier for pharmacy staff to operate and manage automation systems. These improvements in usability

reduce the learning curve for new technologies, increase user satisfaction, and encourage the adoption of automation solutions. As devices become more accessible and easier to use, their integration into pharmacy operations becomes more widespread. Robotic and automated technologies have become increasingly prevalent in pharmacy automation. Robotic systems are used for various tasks, including dispensing medications, managing inventory, and preparing prescriptions. Automation technologies also include automated packaging and labeling systems that ensure accuracy and efficiency. The advancement of these technologies enhances the capability of automation devices to handle complex tasks with high precision, reducing errors and improving overall workflow efficiency in pharmacies.

Technological advancements have led to the development of innovative medication adherence solutions, such as smart pill dispensers and adherence tracking systems. These devices provide features such as automated reminders, tracking of medication usage, and integration with mobile apps for patient engagement. By supporting adherence to prescribed treatment regimens, these technologies improve patient outcomes and reduce the risk of non-compliance. The growing focus on medication adherence drives demand for automation devices that offer these advanced features. Advances in technology have made it possible for pharmacy automation devices to be more scalable and customizable. Systems can now be tailored to meet the specific needs of different pharmacy settings, from small community pharmacies to large hospital pharmacies. Scalable solutions allow for gradual implementation and expansion, making it easier for pharmacies of all sizes to adopt automation technologies. Customizable features ensure that devices can be adapted to fit unique operational requirements, enhancing their appeal and driving market growth. Technological advancements drive the growth of the Japan Pharmacy Automation Device Market by enhancing functional capabilities, integrating AI, improving data analytics and connectivity, offering better user interfaces, advancing robotic and automated technologies, innovating medication adherence solutions, and providing scalability and customization. These technological improvements contribute to more efficient, accurate, and personalized medication management, fueling the demand for advanced pharmacy automation solutions.

Key Market Challenges

High Initial Investment Costs

One of the primary challenges hindering the growth of the pharmacy automation device market in Japan is the high initial investment required for advanced automation

systems. The cost of purchasing and installing sophisticated pharmacy automation devices can be substantial, encompassing not only the price of the equipment itself but also installation, maintenance, and training expenses. This financial burden can be particularly challenging for smaller pharmacies or healthcare facilities with limited budgets. As a result, the high cost of entry may restrict market adoption and slow down the widespread implementation of automation technologies, especially among smaller or independent pharmacy operators.

Complex Regulatory and Compliance Requirements

The pharmacy automation device market in Japan is subject to stringent regulatory and compliance requirements imposed by national and local authorities. These regulations cover various aspects, including device safety, efficacy, data security, and interoperability with existing healthcare systems. Navigating the complex regulatory landscape can be challenging for manufacturers and vendors, as they must ensure their products meet all necessary standards and obtain required certifications. Additionally, ongoing compliance with evolving regulations can involve significant administrative and operational efforts. The complexity of regulatory requirements may pose a barrier to market entry and expansion for new and existing players, impacting the overall growth of the market.

Integration and Interoperability Issues

Successful implementation of pharmacy automation devices often requires seamless integration with existing healthcare IT systems, such as electronic health records (EHR) and pharmacy management systems. However, achieving interoperability between diverse systems and technologies can be challenging. Incompatibilities and technical difficulties during integration can lead to operational inefficiencies, data discrepancies, and increased implementation time. Furthermore, varying standards and protocols across different healthcare settings can complicate the integration process. These interoperability issues can hinder the effective deployment of automation devices and limit their potential benefits, affecting the overall growth and adoption of pharmacy automation technologies in Japan.

Key Market Trends

Integration of Artificial Intelligence (AI) and Machine Learning

The integration of AI and machine learning technologies into pharmacy automation

devices is transforming the market landscape. AI-powered systems are enhancing the capabilities of medication dispensing systems, improving predictive analytics, and facilitating more personalized medication management. For example, AI algorithms can analyze patient data to forecast medication needs, optimize inventory levels, and identify potential drug interactions. This level of sophistication not only boosts operational efficiency but also elevates the quality of patient care. As these technologies become more advanced and accessible, their adoption in pharmacy automation will drive significant growth, as healthcare providers seek to leverage AI for better decision-making and streamlined processes.

Increased Demand for Customized and Patient-Centric Solutions

There is a growing trend towards personalized and patient-centric healthcare solutions, driven by an emphasis on tailored treatment plans and individual patient needs. Pharmacy automation devices are evolving to accommodate this trend by offering customizable features that cater to specific patient requirements. For instance, medication dispensing systems are now capable of handling complex medication regimens, managing dosage variations, and providing patient-specific adherence reminders. The shift towards more personalized healthcare solutions aligns with the broader move towards precision medicine, where treatments are tailored to individual characteristics. This trend is likely to propel the demand for sophisticated automation devices that can support customized medication regimens and enhance patient outcomes.

Expansion of Tele pharmacy and Remote Monitoring

The rise of tele pharmacy and remote health monitoring is another significant trend influencing the growth of the pharmacy automation market. As telemedicine becomes increasingly prevalent, there is a growing need for automation solutions that can integrate with remote health platforms and facilitate seamless communication between patients, pharmacists, and healthcare providers. Pharmacy automation devices are being developed to support remote prescription management, electronic prescription verification, and virtual consultations. Additionally, remote monitoring systems enable real-time tracking of medication adherence and patient health metrics. The expansion of tele pharmacy and remote monitoring not only addresses the growing demand for remote healthcare services but also drives the need for advanced automation solutions that can support these innovative care models.

Segmental Insights

Product Insights

Based on Product, the Medication Dispensing Systems segment emerged as the dominant in the market for Japan Pharmacy Automation Device in 2024. Medication dispensing systems are crucial in enhancing the efficiency and accuracy of drug dispensing processes. In Japan, where precision in healthcare is highly prioritized, these systems significantly reduce the risk of human errors, such as incorrect dosages or medication mix-ups. Their ability to automate and streamline dispensing processes meets the demand for error-free and reliable medication management, making them indispensable in pharmacies and healthcare facilities.

Japan's stringent regulatory standards for pharmaceutical practices necessitate the use of advanced technology to ensure compliance. Medication dispensing systems are designed to adhere to these regulations, providing features like detailed medication records, secure storage, and real-time tracking. This compliance ensures that healthcare facilities can meet the high standards set by regulatory authorities, thereby driving the adoption of these systems. Japan has an aging population with a high prevalence of chronic diseases, leading to increased medication management needs. Medication dispensing systems are particularly effective in managing the complex medication regimens often required by elderly patients and those with multiple health conditions. This growing demographic demand fuels the market for sophisticated dispensing solutions that can handle large volumes of medication efficiently.

The continuous advancement in technology has led to the development of more sophisticated medication dispensing systems. Innovations such as robotic dispensing units, automated pill counters, and integrated electronic health records (EHR) systems enhance the functionality and appeal of these devices. The Japanese market, known for its technological affinity, readily adopts these cutting-edge solutions to stay at the forefront of pharmaceutical technology. Medication dispensing systems contribute to overall healthcare efficiency by optimizing pharmacy workflows and reducing manual labor. By automating routine tasks, these systems help lower operational costs, such as staffing expenses and error-related costs. For healthcare facilities aiming to improve operational efficiency and reduce costs, investing in automated dispensing solutions offers a clear financial benefit. These factors collectively contribute to the growth of this segment.

Regional Insights

Kant%li%emerged as the dominant in the Japan Pharmacy Automation Device market in 2024, holding the largest market share in terms of value. The Kant%li%region, encompassing Tokyo, Yokohama, and other major cities, is the economic engine of Japan. Tokyo, as the capital city, is a global financial hub with a high concentration of wealth and business activities. This economic strength translates int%li%substantial investments in healthcare infrastructure and technology, including pharmacy automation devices.

The Kant%li%region boasts a well-developed healthcare infrastructure with numerous hospitals, clinics, and pharmacies. The density and sophistication of healthcare facilities in this region create a high demand for advanced pharmacy automation solutions. These devices help streamline pharmacy operations, reduce errors, and improve efficiency, which is crucial in such a densely populated and highly regulated healthcare environment. Kant%li%is a center for technological innovation and research. The presence of leading tech companies and research institutions fosters a favorable environment for the development and adoption of cutting-edge pharmacy automation technologies. The region's emphasis on technological advancement ensures that the latest pharmacy automation solutions are readily available and integrated int%li%healthcare practices.

Venture capital and private equity investments in the Kant%li%region support the growth of technology-driven industries, including pharmacy automation. The region's financial institutions are more inclined t%li%fund startups and established companies specializing in pharmacy automation, further driving market expansion. The Kant%li%region benefits from a relatively favorable regulatory environment for the adoption of new healthcare technologies. The Japanese government and local authorities have established frameworks that support innovation and the integration of automation solutions in healthcare settings. This regulatory support facilitates the rapid deployment and widespread use of pharmacy automation devices.

Key Market Players

OMRON Corporation

Panasonic Corporation

AmerisourceBergen Corporation

Accu-Chart Plus Healthcare Systems, Inc

Omniceil, Inc.

MCKESSON CORPORATION

Pearson Medical Technologies

Baxter International, Inc.

Becton Dickinson and Company

Fulcrum Pharmacy Management Inc

Report Scope:

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

Japan Pharmacy Automation Device Market, By Product:

Medication Dispensing Systems

Packaging And Labeling Systems

Storage And Retrieval Systems

Automated Medication Compounding Systems

Tabletop Tablet Counters

Japan Pharmacy Automation Device Market, By Distribution Channel:

Retail Pharmacy

Online Pharmacies

Others

Japan Pharmacy Automation Device Market, By Region:

Hokkaido

Tohoku

Kanto

Chubu

Kansai

Chugoku

Shikoku

Kyushu

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Japan Pharmacy Automation Device Market.

Available Customizations:

Japan Pharmacy Automation Device 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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