

# Japan Respiratory Drugs Market, By Type (Asthma, Chronic Obstructive Pulmonary Disease, Idiopathic Pulmonary Fibrosis, Cystic Fibrosis), By Application (Hospitals, Ambulatory Care, Homecare, Pharmacies), By Age Group (Pediatric, Adult), By Distribution Channel (Prescription, Over-the-Counter), By Region, Competition Forecast & Opportunities, 2020-2030F

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## Abstracts

Japan Respiratory Drugs Market was valued at USD 404.95 Million in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.85% through 2030. The Japan Respiratory Drugs Market stands out as one of the largest and fastest-growing segments within the nation's pharmaceutical sector. This growth is fueled by several key factors, including an aging population, a rising incidence of respiratory diseases, and ongoing advancements in drug development. Market analysts forecast continued expansion, supported by the introduction of innovative therapies and increased healthcare spending.

The regulatory framework is overseen by the Pharmaceuticals and Medical Devices Agency (PMDA), which enforces rigorous approval processes and quality standards for respiratory drugs. While these regulations ensure high safety and efficacy standards, they also present challenges related to drug approval timelines and reimbursement.

The Japan Respiratory Drugs Market exhibits substantial growth potential. It is influenced by demographic trends, the prevalence of respiratory conditions, and progress in drug development. The competitive landscape features both global and local players, with the market dynamics shaped by regulatory, technological, and economic factors. The future outlook remains optimistic, with continued growth and

innovation anticipated to drive the market forward.

## Key Market Drivers

### Rising Incidence of Respiratory Diseases

The rising incidence of respiratory diseases is a pivotal factor driving the growth of the Japan Respiratory Drugs Market. As the incidence of respiratory diseases such as chronic obstructive pulmonary disease (COPD), asthma, and idiopathic pulmonary fibrosis (IPF) rises, the number of patients requiring treatment also increases. This growing patient population directly boosts the demand for respiratory drugs. With more individuals affected by these conditions, there is a heightened need for pharmaceutical interventions to manage and alleviate symptoms, leading to a larger market for respiratory medications. Respiratory diseases, particularly chronic conditions, often necessitate frequent medical visits, hospitalizations, and ongoing management. The increased burden of these diseases leads to higher healthcare utilization, including consultations with specialists and the use of various diagnostic and therapeutic services. This higher healthcare engagement translates into greater consumption of respiratory drugs, as patients seek effective treatments to manage their conditions and improve their quality of life.

The rising incidence of respiratory diseases stimulates pharmaceutical companies to invest in research and development to address the growing market demand. Companies are motivated to develop new and more effective therapies, including advanced inhalation devices, biologics, and combination treatments. The need to address a larger patient base drives innovation and the introduction of novel drug formulations and delivery systems, contributing to market growth. As the prevalence of respiratory diseases increases, so does the awareness and recognition of these conditions. Improved diagnostic capabilities and heightened public and professional awareness lead to earlier detection and more accurate diagnoses. This increased awareness results in more patients being identified and treated, further driving the demand for respiratory drugs. Enhanced diagnostic tools and practices also lead to the development and adoption of targeted therapies, addressing specific patient needs and driving market expansion.

The rising incidence of respiratory diseases places a significant strain on the healthcare system, prompting a focus on efficient disease management and treatment strategies. Governments and healthcare organizations may implement policies and programs aimed at improving the management of respiratory conditions, including funding for drug

research and subsidizing treatments. This systemic focus on addressing the impact of respiratory diseases drives the growth of the respiratory drugs market by ensuring better access to medications and supporting advancements in treatment. The economic impact of respiratory diseases, including costs associated with healthcare utilization, lost productivity, and long-term management, drives increased spending on respiratory drugs. Patients and healthcare systems are willing to invest in effective therapies to manage chronic conditions and reduce overall healthcare costs. This willingness to spend on treatments that improve health outcomes and quality of life further supports the growth of the respiratory drugs market.

### Advancements in Drug Development

Advancements in drug development are a significant driver of growth in the Japan Respiratory Drugs Market. Advances in drug development have led to the introduction of novel therapies for respiratory conditions, including chronic obstructive pulmonary disease (COPD), asthma, and idiopathic pulmonary fibrosis (IPF). New classes of drugs, such as biologics and targeted therapies, offer improved efficacy and safety profiles compared to traditional treatments. For example, the development of monoclonal antibodies for severe asthma provides a more targeted approach to managing inflammation and reducing exacerbations. These novel therapies address unmet medical needs and drive demand for cutting-edge treatments. Innovations in drug delivery technologies have transformed the management of respiratory diseases. The development of advanced inhalation devices, such as smart inhalers and nebulizers with improved drug delivery efficiency, enhances patient compliance and treatment outcomes. Smart inhalers equipped with digital sensors can track medication usage and provide feedback to both patients and healthcare providers, leading to better management of respiratory conditions. These advancements in delivery systems improve the overall effectiveness of treatments and drive market growth by offering more user-friendly and effective solutions.

Advances in personalized medicine have enabled more tailored approaches to treating respiratory diseases. By leveraging genetic, molecular, and biomarker information, pharmaceutical companies can develop personalized therapies that cater to individual patient profiles. This approach ensures that treatments are more effective and have fewer side effects. Personalized medicine in respiratory care allows for the optimization of drug regimens based on specific patient characteristics, leading to better outcomes and increased demand for advanced, customized treatments. The development of improved drug formulations and combination therapies is another driver of market growth. Combination therapies, which combine multiple active ingredients in a single

formulation, offer synergistic effects and simplify treatment regimens for patients. For example, fixed-dose combinations of inhaled corticosteroids and long-acting beta-agonists provide enhanced control of asthma and COPD symptoms with a single inhaler. These advancements reduce the pill burden and improve adherence, thereby expanding the market for respiratory drugs.

The drive for new and innovative respiratory drugs is supported by increased investment in research and development (R&D) by pharmaceutical companies. Investment in R&D enables the exploration of novel drug targets, the development of new therapeutic classes, and the optimization of existing treatments. As companies invest in cutting-edge research, they bring new products to market, contributing to the growth of the respiratory drugs market and addressing the evolving needs of patients. Advances in regulatory processes and faster approval pathways also play a role in market growth. Regulatory agencies, such as Japan's Pharmaceuticals and Medical Devices Agency (PMDA), have streamlined approval processes for innovative therapies. Initiatives such as priority reviews and accelerated pathways facilitate the quicker introduction of new drugs to the market. This regulatory support helps bring advancements in drug development to patients more rapidly, fueling market growth.

### Rising Aging Population

The rising aging population is a crucial driver of growth in the Japan Respiratory Drugs Market. As the population ages, the prevalence of age-related respiratory conditions such as chronic obstructive pulmonary disease (COPD), asthma, and idiopathic pulmonary fibrosis (IPF) rises. Older adults are more susceptible to these conditions due to the natural decline in lung function, increased exposure to environmental pollutants over time, and the cumulative effects of lifestyle factors such as smoking. The higher incidence of these conditions among the elderly drives demand for effective respiratory medications tailored to their specific needs.

Older individuals typically require more frequent medical care compared to younger populations, including regular check-ups, diagnostic tests, and ongoing management for chronic conditions. The increased healthcare utilization among the elderly results in a higher consumption of respiratory drugs, as older patients often need continuous medication to manage their respiratory health. This increased demand for healthcare services and medications contributes to market growth. Respiratory conditions in elderly patients often necessitate long-term management strategies. Chronic diseases such as COPD require consistent medication to control symptoms and prevent exacerbations. The chronic nature of these conditions means that older adults will likely be on long-

term or even lifelong drug regimens. This sustained demand for respiratory drugs drives growth in the market as pharmaceutical companies develop and offer a range of treatment options to address long-term needs. The growing elderly population stimulates the development of innovative respiratory drugs and adaptations tailored to older patients. This includes the creation of formulations and delivery systems that cater to the unique needs of elderly individuals, such as ease of use and reduced side effects. Advances in drug technology, including improved inhalers and combination therapies, are driven by the need to address the specific challenges faced by older patients. This innovation contributes to market expansion by enhancing the efficacy and convenience of treatments.

The rising number of elderly individuals has led to an increased focus on geriatric healthcare, including respiratory care. Government policies and healthcare programs are increasingly directed towards addressing the health needs of the aging population. This focus includes funding for research on age-related respiratory conditions, incentives for developing age-specific treatments, and programs aimed at improving the management of chronic respiratory diseases in older adults. Such initiatives support market growth by promoting the development and accessibility of respiratory drugs. The economic impact of an aging population includes increased healthcare expenditures related to chronic disease management. The financial burden of treating age-related respiratory conditions drives investments in pharmaceutical solutions and supports the growth of the respiratory drugs market. Healthcare systems and patients are willing to invest in medications that improve health outcomes and reduce overall costs associated with managing chronic conditions.

## Key Market Challenges

### Regulatory and Reimbursement Hurdles

The Japanese healthcare system imposes stringent regulatory and reimbursement requirements for new respiratory drugs. Obtaining regulatory approval from the Pharmaceuticals and Medical Devices Agency (PMDA) involves a rigorous and lengthy process, including extensive clinical trials and documentation. Additionally, the reimbursement process can be complex, with drugs requiring favorable evaluations to receive coverage under Japan's National Health Insurance system. These regulatory and reimbursement hurdles can delay the market entry of new therapies and limit the accessibility of innovative treatments for patients. Companies may face financial and operational challenges in navigating these processes, impacting their ability to introduce new products and expand market presence.

## High Drug Costs and Economic Pressures

The cost of advanced respiratory drugs, particularly biologics and novel therapies, can be prohibitive for patients and healthcare systems. While these drugs offer significant benefits in terms of efficacy and management of severe conditions, their high price points pose a challenge for affordability and accessibility. Economic pressures on Japan's healthcare system, including budget constraints and cost-containment measures, may lead to restrictive formulary listings and limitations on drug availability. This can hinder patient access to the latest treatments and create financial burdens for both healthcare providers and patients.

## Market Competition and Saturation

The respiratory drugs market in Japan is highly competitive, with numerous pharmaceutical companies vying for market share. Established companies and new entrants alike are continually innovating and launching new products. This intense competition can lead to market saturation, where the availability of multiple treatment options may reduce the profitability of individual products. Additionally, generic and biosimilar drugs contribute to price competition, further impacting market dynamics. Companies must invest heavily in research and development, marketing, and differentiation strategies to maintain a competitive edge, which can strain resources and impact profitability.

## Key Market Trends

### Advancements in Drug Development and Delivery Technologies

The ongoing innovation in drug development and delivery systems is a significant trend propelling market growth. Researchers and pharmaceutical companies are focusing on developing more effective and targeted therapies for respiratory conditions, including advanced inhalation devices, biologics, and combination therapies. These advancements aim to improve the efficacy, safety, and convenience of respiratory treatments. For instance, the introduction of novel inhalers with enhanced drug delivery capabilities and smart inhalers equipped with digital monitoring can lead to better disease management and adherence. The development of biologics for severe asthma and COPD represents a substantial leap forward, offering more tailored and effective treatment options for patients with complex needs.

## Growing Prevalence of Respiratory Diseases

The increasing prevalence of respiratory diseases, such as chronic obstructive pulmonary disease (COPD), asthma, and idiopathic pulmonary fibrosis (IPF), is a crucial factor driving market expansion. Japan's aging population, combined with lifestyle factors such as smoking and urban pollution, contributes to the rising incidence of these conditions. As the number of individuals affected by chronic respiratory diseases grows, so does the demand for effective medications and management solutions. The increasing burden of respiratory diseases on the healthcare system necessitates the development and availability of advanced therapeutic options, further fueling market growth.

## Integration of Digital Health and Telemedicine

The integration of digital health technologies and telemedicine is transforming the respiratory drugs market. Digital health solutions, such as remote monitoring devices and telehealth platforms, enable patients to manage their respiratory conditions more effectively from home. This trend is particularly significant in managing chronic respiratory diseases, where continuous monitoring and timely intervention are crucial. Telemedicine facilitates remote consultations with healthcare providers, reducing the need for frequent hospital visits and allowing for more personalized and responsive care. The adoption of digital health tools not only improves patient outcomes but also supports the efficient delivery and adherence to respiratory drug therapies, driving the growth of the market.

## Segmental Insights

### Type Insights

Based on the category of type, the Chronic Obstructive Pulmonary Disease segment emerged as the dominant in the market for Japan Respiratory Drugs in 2024. COPD is one of the most common respiratory conditions in Japan, driven by an aging population and high rates of smoking, which remain prevalent despite anti-smoking campaigns. The high incidence and prevalence of COPD lead to substantial demand for medications, making it the largest segment within the respiratory drugs market.

The COPD segment commands a significant share of the market due to the chronic nature of the disease, which requires long-term management with pharmacological treatments. This results in a steady and ongoing demand for drugs such as

bronchodilators, corticosteroids, and combination therapies. The continuous need for effective management and treatment contributes to the segment's dominance. The COPD market benefits from ongoing advancements in drug development and innovations in treatment options. New therapies, including long-acting beta-agonists (LABAs), long-acting muscarinic antagonists (LAMAs), and fixed-dose combinations, have been introduced to better manage the symptoms and progression of COPD. These advancements enhance treatment efficacy and patient compliance, further driving the segment's growth. COPD patients often require frequent medical consultations and hospitalizations, leading to higher healthcare utilization compared to other respiratory conditions. This increased healthcare interaction results in higher drug consumption and expenditure, reinforcing the COPD segment's prominence in the market.

The economic burden of COPD, including costs associated with hospital admissions, emergency visits, and long-term medication use, contributes to the substantial market size. The need for cost-effective and innovative treatments drives pharmaceutical companies to focus significantly on this segment. The Japanese government has prioritized respiratory health due to the high burden of chronic diseases like COPD. Policies and healthcare initiatives aimed at improving COPD management and patient outcomes further stimulate the market for related drugs. These factors are expected to drive the growth of this segment.

### Application Insights

The Hospitals segment is projected to experience rapid growth during the forecast period. Hospitals are the primary setting for the management of acute and severe respiratory conditions, including chronic obstructive pulmonary disease (COPD) exacerbations, severe asthma attacks, and complicated cases of idiopathic pulmonary fibrosis (IPF) and cystic fibrosis. The need for intensive treatment and monitoring drives significant demand for respiratory drugs within hospital settings.

Hospitals are equipped with advanced medical technologies and diagnostic tools necessary for the effective treatment of complex respiratory conditions. The availability of sophisticated equipment, such as high-flow oxygen systems, ventilators, and nebulizers, supports the use of specialized respiratory drugs that are often prescribed in these settings. Hospitals provide access to specialized care and multidisciplinary teams, including pulmonologists, respiratory therapists, and other healthcare professionals. This collaborative approach enables the administration of complex and multi-faceted treatment regimens, leading to a higher utilization of respiratory drugs in hospitals



compared to other settings. Patients with severe respiratory conditions often require inpatient management for extended periods. Hospitals, with their capacity for prolonged observation and intensive care, handle the majority of such cases, which translates to a higher volume of drug administration and expenditure in this segment.

Hospitals frequently use specialized drug formulations and delivery methods that are not commonly available in outpatient settings or pharmacies. These include intravenous medications, high-dose inhalers, and complex combination therapies tailored for inpatients, further reinforcing the dominance of this segment. Japan's healthcare system provides comprehensive coverage for hospital treatments, including respiratory drug therapies. This financial support reduces the barriers to accessing high-cost medications and advanced treatments in hospitals, driving their use in this setting. These factors collectively contribute to the growth of this segment.

## Regional Insights

Kanto emerged as the dominant in the Japan Respiratory Drugs market in 2024, holding the largest market share in terms of value. The Kanto Region boasts advanced healthcare infrastructure and a high concentration of medical facilities. This concentration ensures that patients have better access to respiratory treatments and specialists, thereby increasing the demand for respiratory drugs. The presence of world-class hospitals and research institutions supports the effective distribution and utilization of these medications.

The Kanto Region is an economic powerhouse, contributing significantly to Japan's GDP. Its economic strength translates into higher healthcare expenditure, including on respiratory drugs. This economic capacity allows for greater investment in both innovative treatments and advanced drug delivery systems, which fuels market growth. The Kanto Region is the most populous region in Japan, with a high density of urban and suburban areas. This large population base increases the incidence of respiratory conditions such as asthma, chronic obstructive pulmonary disease (COPD), and allergic rhinitis, thereby driving demand for respiratory medications.

Many leading pharmaceutical companies have their headquarters or significant operations in the Kanto Region. This concentration of industry players fosters a competitive environment that accelerates the development, approval, and marketing of new respiratory drugs. Additionally, it facilitates partnerships and collaborations with research institutions, enhancing drug innovation and availability. The Japanese government has been supportive of pharmaceutical and healthcare advancements in

the Kanto Region through various policies and initiatives. These include funding for research and development, as well as incentives for pharmaceutical companies to invest in the region. Such support helps streamline the introduction of new respiratory drugs and technologies to the market.

### Key Market Players

Cardinal Health

Covidien (Medtronic)

Drägerwerk AG & Co. KGaA

DeVilbiss Healthcare GmbH

Fisher & Paykel Healthcare Limited

Getinge AB

Hamilton Medical

Invacare Corporation

NSPIRE Healthcare

### Report Scope:

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

Japan Respiratory Drugs Market, By Type:

Asthma

Chronic Obstructive Pulmonary Disease

Idiopathic Pulmonary Fibrosis

Cystic Fibrosis

Japan Respiratory Drugs Market, By Application:

Hospitals

Ambulatory Care

Homecare

Pharmacies

Japan Respiratory Drugs Market, By Age Group:

Pediatric

Adult

Japan Respiratory Drugs Market, By Distribution Channel:

Prescription

Over the Counter

Japan Respiratory Drugs 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 Respiratory Drugs Market.

## Available Customizations:

Japan Respiratory Drugs 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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