

North America Marine Engines Market By Stroke (Four Stroke, Two Stroke and Others), By Capacity (Up to 1,000 HP, 1,001–5,000 HP, 5,001–10,000 HP, 10,001–20,000 HP and Above 20,000 HP), By Fuel Type (Heavy Fuel Oil, Intermediate Fuel Oil and Others), By Ship Type (Bulk Carriers, General Cargo Ships, Container Ships, Ferries & Passenger Ships, Oil Tankers and Others), By Country, By Competition Forecast & Opportunities, 2018-2028

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Abstracts

North America Marine Engines Market has valued at USD 2.95 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 3.51% through 2028. The shift towards cleaner energy sources and decreased carbon emissions is exerting an impact on the maritime sector. With North America's transition to renewable energy gaining momentum, there is a rising demand for vessels utilized in offshore wind farms and other renewable energy initiatives. Consequently, this surge drives the North America Marine Engines Market.

Key Market Drivers

Increasing Demand for Fuel-Efficient and Environmentally Friendly Marine Engines

The North America Marine Engines Market is experiencing significant growth propelled by several key factors, with one of the most prominent factors being the increasing demand for fuel-efficient and environmentally friendly marine engines. This trend is being driven by both regulatory mandates and industry initiatives aimed at reducing the

environmental impact of maritime transportation.

One of the primary drivers behind this trend is the growing concern over the environmental impact of the shipping industry. Maritime transportation is a major contributor to greenhouse gas emissions, with cargo ships and other vessels emitting substantial amounts of carbon dioxide (CO₂) and other pollutants into the atmosphere. In response to this, governments and regulatory bodies in North America have been implementing stricter emission standards and regulations, such as the International Maritime Organization's (IMO) global sulfur cap, which limits the sulfur content in marine fuels. Shipowners and operators are increasingly turning to fuel-efficient and cleaner-burning marine engines to comply with these regulations and reduce their emissions.

Another driving force behind the demand for environmentally friendly marine engines is the desire to reduce operating costs. Fuel is one of the most significant operational expenses for shipowners, and fuel-efficient engines can significantly lower these costs. Advanced engine design, turbocharging, and exhaust gas cleaning systems are among the new technologies helping shipowners achieve greater fuel efficiency and lower fuel consumption. Additionally, some alternative fuels, such as liquefied natural gas (LNG) and hydrogen, are gaining traction as cleaner alternatives to traditional marine fuels.

Furthermore, the market is witnessing a shift towards hybrid and electric propulsion systems in the marine industry. These systems offer not only improved fuel efficiency but also reduced noise and vibration, contributing to a more comfortable and environmentally friendly maritime experience. Battery-electric and hybrid-electric propulsion systems are being explored for various types of vessels, from ferries to offshore supply vessels, and their adoption is expected to increase as technology advances and the infrastructure for charging or refueling electric vessels improves.

Growth in the Commercial Shipping Industry

The North America Marine Engines Market is currently experiencing robust growth, primarily driven by the expansion of the commercial shipping industry in the region. This growth can be attributed to several factors, including the surge in global trade, increasing consumer demand for goods, and the necessity for efficient and reliable vessels for cargo transportation.

A key factor behind the growth of the commercial shipping industry in North America is its strategic geographical location. North America serves as a crucial gateway for trade between Asia, Europe, and the Americas. The recent expansion of the Panama Canal

and improvements in port infrastructure have further solidified North America's role as a pivotal transit hub for container ships, bulk carriers, and other vessel types. Consequently, there has been a rising demand for larger and more powerful marine engines capable of propelling these massive vessels efficiently.

Furthermore, the rise of e-commerce and global supply chains has amplified the need for efficient and timely transportation of goods. This has led to an expansion in container shipping and an associated demand for container vessels equipped with advanced marine engines. These engines must not only be powerful but also fuel-efficient, enabling shipping companies to optimize their operational costs effectively.

Another significant factor driving the growth of the commercial shipping industry in North America is the increasing demand for energy resources. The region is a major producer and exporter of oil, natural gas, and other energy commodities. The transportation of these resources often requires specialized vessels, such as oil tankers and LNG carriers, which rely on high-performance marine engines to ensure the safe and efficient delivery of energy products.

Additionally, the cruise industry in North America continues to flourish, attracting millions of passengers annually. Cruise lines are investing in new ships with advanced amenities and propulsion systems to provide a superior passenger experience. These modern cruise vessels necessitate state-of-the-art marine engines that offer reliability, environmental sustainability, and operational efficiency.

Technological Advancements and Innovation in Marine Engines

The North America Marine Engines Market is currently witnessing a surge in growth due to ongoing technological advancements and innovations in marine engine design and manufacturing. This positive trend is driven by the pursuit of greater efficiency, reduced emissions, improved reliability, and enhanced performance in marine propulsion systems.

One of the primary factors propelling innovation in marine engines is the imperative to comply with increasingly stringent environmental regulations. In order to mitigate greenhouse gas emissions and minimize the environmental impact of maritime transport, marine engine manufacturers are investing in extensive research and development to create cleaner and more fuel-efficient engines. Advancements in combustion technology, exhaust gas treatment systems, and alternative fuels are all contributing to the development of eco-friendly marine engines.

Moreover, digitalization and the adoption of smart technologies are revolutionizing the marine engine industry. Integrated control systems and predictive maintenance solutions are becoming standard features in modern marine engines. These technologies optimize fuel consumption, reduce downtime, and improve the lifespan of engines, thereby enhancing the overall performance of vessels. Additionally, the utilization of data analytics and machine learning enables real-time monitoring of engine performance, enabling shipowners and operators to make data-driven decisions to maximize efficiency.

Innovation in the marine engine sector is not solely focused on emission reduction and efficiency improvement; it also extends to the development of new propulsion systems. Hybrid and electric propulsion solutions are gaining momentum, particularly in sectors such as ferries and short-sea shipping. These technologies promise reduced fuel consumption, lower maintenance costs, and quieter operation, making them appealing options for shipowners aiming to modernize their fleets.

Furthermore, materials science plays a significant role in advancing marine engine technology. The application of lightweight and corrosion-resistant materials in engine construction leads to improved power-to-weight ratios and extended engine lifespans.

Key Market Challenges

Stringent Environmental Regulations and Emission Standards

One of the most critical challenges facing the North America Marine Engines Market is the increasingly stringent environmental regulations and emission standards. Governments and international organizations are imposing strict limits on emissions of pollutants, including sulfur oxides (SO_x), nitrogen oxides (NO_x), and particulate matter, from marine engines. These regulations are aimed at reducing the environmental impact of the shipping industry, which is a significant contributor to air and water pollution.

One notable regulation in this regard is the International Maritime Organization's (IMO) global sulfur cap, which restricts the sulfur content in marine fuels to 0.5%. Compliance with such regulations necessitates the use of cleaner fuels or the installation of exhaust gas cleaning systems, also known as scrubbers. While these measures help to reduce emissions, they come with substantial costs and complexities for shipowners and operators.

Meeting emission standards also requires continuous innovation in engine design and technology. Manufacturers must invest in research and development to create engines that are not only compliant but also highly efficient. Developing and implementing new technologies to reduce emissions while maintaining or improving engine performance is a considerable challenge, as it requires significant financial resources and engineering expertise.

Another challenge related to emissions is the patchwork of regional and national regulations in North America. Different states and provinces may have their emission standards, creating a complex regulatory landscape for shipowners who operate in multiple jurisdictions. This can lead to compliance challenges and additional costs as vessels may need to switch fuels or retrofit exhaust gas cleaning systems to meet varying standards.

Volatility in Fuel Prices and Availability

The North America Marine Engines Market confronts a persistent challenge in the form of fuel price volatility and fuel availability issues. These challenges exert a substantial impact on the operating costs and profitability of shipowners and operators.

Maritime vessels rely primarily on fossil fuels, such as heavy fuel oil (HFO) and marine diesel oil (MDO), for propulsion. The prices of these fuels are subject to global market dynamics, geopolitical events, and supply-demand imbalances. Consequently, shipowners often encounter unpredictable fluctuations in fuel prices, leading to budgetary uncertainty and affecting the competitiveness of their operations.

Furthermore, the availability of compliant fuels, especially low-sulfur fuels required to meet emission standards, can pose a challenge. The transition to cleaner fuels, such as low-sulfur marine gas oil (LSMGO) or liquefied natural gas (LNG), necessitates infrastructure investments by fuel suppliers. In certain regions, the availability of these fuels may be limited, resulting in logistical challenges for vessels requiring refueling with compliant options.

To mitigate these challenges, shipowners often contemplate retrofitting vessels with exhaust gas cleaning systems (scrubbers) to continue utilizing traditional high-sulfur fuels. Although this approach can prove cost-effective in the long run, it entails significant upfront investments and engineering complexities.

The uncertainties surrounding fuel prices and availability also impede ship owners' ability to make informed decisions regarding fuel-efficient engine technologies, alternative fuels, or propulsion systems like hybrid or electric. These uncertainties can discourage investments in more sustainable and efficient engine options, thereby hindering progress in reducing the environmental impact of the maritime sector.

Technological Complexity and Integration

The North America Marine Engines Market encounters the formidable task of managing technological intricacies and integration as it strives to meet evolving demands for efficiency, emissions reduction, and performance. The marine engine industry must consistently innovate and assimilate cutting-edge technologies to remain competitive and address these demands.

Contemporary marine engines are highly sophisticated systems that integrate a multitude of components, encompassing propulsion systems, exhaust gas treatment systems, control systems, and safety mechanisms. Achieving optimal performance and meeting emission standards necessitates seamless integration and coordination among these components.

One of the key challenges lies in the integration of emission reduction technologies, such as exhaust gas cleaning systems (scrubbers) or selective catalytic reduction (SCR) systems, into marine engines. Retrofitting vessels with these technologies can be intricate, as they must be customized to fit the specific engine and vessel design. Moreover, integrating emission reduction systems can have implications for the vessel's weight distribution, stability, and overall performance, requiring meticulous engineering and testing.

Furthermore, the trend towards digitalization and the utilization of data analytics in marine engines introduces new challenges pertaining to cybersecurity and data management. Safeguarding the security of onboard systems and data is of paramount importance, particularly as vessels become more interconnected and reliant on digital technologies for monitoring and control.

The development and integration of hybrid and electric propulsion systems also pose challenges. These systems involve a fusion of traditional internal combustion engines and electric motors, necessitating sophisticated control systems to manage power distribution and optimize efficiency. The transition to electric power introduces new complexities relating to energy storage, charging infrastructure, and the utilization of

alternative fuels such as hydrogen.

Additionally, the training and skill development of marine engineers and crew members are vital to ensure their effective operation and maintenance of these technologically advanced engines. Keeping abreast of the latest advancements and troubleshooting issues related to complex systems can present significant challenges for the industry.

Key Market Trends

Adoption of Sustainable and Alternative Fuels in Marine Engines

One notable trend observed in the North America Marine Engines Market is the growing inclination towards adopting sustainable and alternative fuels. With increasing environmental concerns, there is a strong impetus to reduce the carbon footprint of the maritime industry. This trend is driving the exploration and implementation of cleaner and more environmentally friendly fuel options.

A key sustainable fuel trend is the utilization of liquefied natural gas (LNG) as a marine fuel. LNG offers significant environmental benefits, with lower emissions of sulfur oxides (SOx), nitrogen oxides (NOx), and particulate matter compared to traditional marine fuels like heavy fuel oil (HFO). The availability of LNG infrastructure, including bunkering facilities, is expanding in North America, making it a viable option for shipowners aiming to minimize emissions.

Another emerging trend is the exploration of hydrogen as a marine fuel. Hydrogen has the potential to be a zero-emission fuel when produced using renewable energy sources. Fuel cell technology is currently being developed for use in marine applications, offering a clean and efficient propulsion option for vessels.

Biofuels derived from sustainable sources, such as algae or waste materials, are also gaining attention as potential marine fuels. These biofuels have the advantage of being renewable and can potentially provide a more sustainable alternative to traditional fossil fuels.

In addition to these sustainable fuels, the trend towards hybrid and electric propulsion systems is gaining momentum. Hybrid systems combine traditional internal combustion engines with electric propulsion, offering improved fuel efficiency and reduced emissions. Fully electric vessels are also being explored for specific applications, such as ferries and short-sea shipping routes.

Digitalization and Connectivity for Enhanced Performance and Efficiency

The North America Marine Engines Market is currently witnessing a significant shift towards digitalization and connectivity in marine engines and propulsion systems. This prominent trend involves the seamless integration of advanced sensors, data analytics, and connectivity solutions to optimize engine performance, enhance fuel efficiency, and enable predictive maintenance.

An integral aspect of this trend revolves around the utilization of condition monitoring systems and sensors that are installed on marine engines. These sensors continuously gather data on key engine parameters such as temperature, pressure, vibration, and fuel consumption. Subsequently, this data is transmitted to shore-based control centers or cloud-based platforms for meticulous analysis. Shipowners and operators can access real-time information regarding engine health and performance, which empowers them to make informed decisions aimed at enhancing efficiency and reducing downtime.

The utilization of data analytics and machine learning plays a pivotal role in this trend by facilitating predictive maintenance. Through the analysis of historical data and real-time sensor data, predictive maintenance algorithms can proactively identify potential issues or failures in advance. This proactive approach enables the implementation of timely maintenance, consequently reducing unplanned downtime and minimizing repair costs.

Connectivity solutions, including satellite communication and 5G technology, are of utmost importance in facilitating seamless data transmission between vessels and shore-based facilities. These technological advancements enable remote monitoring and control of marine engines, even in remote or offshore locations. Moreover, they facilitate the exchange of operational data and performance analytics between vessels and fleet management teams.

Furthermore, the adoption of digital twin technology is gaining momentum within the marine engine sector. Digital twins are virtual replicas of physical assets, such as marine engines, and find utility in simulation, testing, and optimization. They allow engineers to model and simulate engine performance under various conditions, ultimately leading to more efficient design and operation.

Segmental Insights

Stroke Insights

The Two Stroke emerged as the dominant segment in 2022. Compliance with emissions regulations, such as the IMO's Tier III standards for NOx emissions in Emission Control Areas (ECAs), has driven innovation in two-stroke engine design. Manufacturers have developed advanced technologies, including exhaust gas cleaning systems (scrubbers) and high-pressure common rail (HPCR) fuel injection, to meet these standards. The shift towards sustainable and alternative fuels is benefiting the two-stroke segment. Some two-stroke engines can be adapted to run on liquefied natural gas (LNG), making them an appealing choice for vessel owners seeking emission reduction.

Research and development efforts are currently being undertaken to adapt two-stroke engines for sustainable fuels, such as hydrogen and ammonia. These endeavors align with the industry's commitment to reducing its carbon footprint. In conclusion, the Two-Stroke segment of the North America Marine Engines Market remains essential for powering large vessels that play a critical role in international trade and commerce.

Capacity Insights

The Above 20,000 HP segment is projected to experience rapid growth during the forecast period. Manufacturers in this category are currently exploring hybrid solutions for vessels. These solutions combine high-horsepower engines with electric propulsion systems to enhance operational flexibility and reduce emissions, particularly during low-load conditions. Research and development efforts are focused on adapting high-horsepower engines to utilize sustainable fuels such as hydrogen and ammonia. These initiatives are aligned with industry commitments to minimize carbon emissions.

In conclusion, the Above 20,000 HP segment of the North America Marine Engines Market caters to specialized vessels that play a critical role in global trade and commerce. While this segment faces challenges related to emissions reduction and fuel efficiency, it also embraces ongoing innovation, digitalization, and the exploration of sustainable and alternative fuels. As environmental regulations continue to evolve, this segment is expected to adapt to meet increasingly stringent standards while meeting the high-power requirements of large vessels.

Country Insights

United States emerged as the dominant country in 2022. The market has witnessed consistent growth over the years, primarily driven by factors such as increased global trade, the expansion of the offshore energy sector, and the growing cruise industry.

Despite periodic economic fluctuations, the demand for marine engines in North America remains robust.

Stringent environmental regulations, including emission standards set by the International Maritime Organization (IMO) and regional bodies, play a significant role in driving the market. Compliance with these regulations necessitates the adoption of cleaner and more fuel-efficient marine engines. The market is also being shaped by the transition to sustainable and alternative fuels, such as LNG and hydrogen. The availability of LNG bunkering infrastructure and the exploration of hydrogen as a marine fuel are key factors driving the market's direction.

The industry is undergoing a transformation due to the trend towards digitalization and connectivity. Digital technologies, including data analytics and predictive maintenance, are enhancing engine performance, reducing operational costs, and improving overall efficiency. Furthermore, the development and adoption of hybrid and electric propulsion systems are gaining momentum, driven by the need for reduced emissions and fuel consumption. These technologies find particular relevance in applications such as ferries and offshore vessels.

The expansion of LNG bunkering infrastructure and sustainable fuel supply chains in North America is facilitating the adoption of cleaner marine engines. Infrastructure development plays a crucial role in enabling the usage of sustainable fuels. As the industry moves forward, there will be an increasing focus on sustainability, with a growing emphasis on reducing emissions, adopting alternative fuels, and improving fuel efficiency.

Key Market Players

Caterpillar Inc.

Cummins Inc.

Volvo Penta

MAN Energy Solutions

Wärtsilä Corporation

Yanmar Marine International

Detroit Diesel Corporation

John Deere Power Systems

Mercury Marine

PACCAR Inc.

Report Scope:

In this report, the North America Marine Engines Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

North America Marine Engines Market, By Stroke:

Four Stroke

Two Stroke

Others

North America Marine Engines Market, By Capacity:

Up to 1,000 HP

1,001–5,000 HP

5,001–10,000 HP

10,001–20,000 HP

Above 20,000 HP

North America Marine Engines Market, By Fuel Type:

Heavy Fuel Oil

Intermediate Fuel Oil

Others

North America Marine Engines Market, By Ship Type:

Bulk Carriers

General Cargo Ships

Container Ships

Ferries & Passenger Ships

Oil Tankers

Others

North America Marine Engines Market, By Country:

United States

Canada

Mexico

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the North America Marine Engines Market.

Available Customizations:

North America Marine Engines 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

North America Marine Engines Market By Stroke (Four Stroke, Two Stroke and Others), By Capacity (Up to 1,000 H...

Detailed analysis and profiling of additional market players (up to five).

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