

# **Saudi Arabia Over The Counter Drugs Market By Product (Cough, Cold and Flu; Vitamins, Mineral, and Supplements (VMS); Analgesics; Gastrointestinal Products; Dermatology Products; Others), By Route of Administration (Oral, Topical, Parenteral), By Dosage Form (Tablets, Capsules, Liquids & Solution, Creams/Lotions/Ointments, Others), By Distribution Channel (Retail Pharmacy, Hospital Pharmacy, E-Pharmacy), By Region, Competition, Forecast and Opportunities, 2019-2029F**

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## **Abstracts**

Saudi Arabia Over The Counter Drugs Market was valued at USD 1154.62 Million in 2023 and is expected to reach USD 1820.30 Million by 2029 with a CAGR of 7.84% during the forecast period. The Saudi Arabia over-the-counter (OTC) drugs market is driven by increasing health awareness, a growing focus on preventive healthcare, and rising consumer preference for self-medication. The expanding middle-class population, coupled with higher disposable incomes, enables more individuals to access and afford OTC medications. Advancements in retail and e-commerce platforms have improved the availability and convenience of purchasing OTC drugs. The government's initiatives to enhance healthcare access and regulatory reforms supporting OTC drug sales also contribute to market growth. Increasing prevalence of common ailments, such as colds, allergies, and minor aches, further fuels demand for readily available OTC solutions. These factors collectively drive the expansion of the OTC drugs market in Saudi Arabia.

## **Key Market Drivers**

## Rising Health Awareness and Preventive Healthcare

The surge in health awareness and a shift towards preventive healthcare are pivotal drivers of the Saudi Arabia over-the-counter (OTC) drugs market. In recent years, there has been a marked increase in the Saudi population's consciousness regarding health and wellness, which has significantly influenced their healthcare choices and behavior. This growing awareness emphasizes the importance of self-care and early intervention, leading to a heightened demand for OTC medications that can be used without a prescription for managing minor ailments and promoting overall health. Health education campaigns and government initiatives have been instrumental in driving this shift. The Saudi government and various health organizations have launched comprehensive campaigns aimed at educating the public about the benefits of maintaining good health, preventing diseases, and managing minor health issues through self-care practices. These initiatives include public service announcements, educational workshops, and community outreach programs that highlight the importance of proactive health management and the role of OTC drugs in achieving it. In April 2022, Saudi Arabia's leading retail pharmacy chain, Nahdi Medical Co., unveiled its largest flagship store in Riyadh, aimed at enhancing its retail experience. The new pharmacy, covering 2,800 square meters, will offer an extensive range of services, including curbside pickup, home delivery, e-pharmacist consultations, and self-checkout options.

As a result of these efforts, there has been a noticeable change in consumer behavior. Saudi citizens are increasingly turning to OTC medications to address common health concerns such as colds, headaches, and digestive problems. This preference for self-medication is driven by the desire for convenience and immediate relief without the need for a doctor's appointment. OTC drugs offer a practical solution for managing everyday health issues, enabling individuals to take control of their health in a more accessible and cost-effective manner. The rise in preventive healthcare also reflects a broader trend towards maintaining wellness and avoiding more serious health problems through early intervention. Consumers are now more aware of the benefits of addressing minor health issues promptly to prevent them from escalating into more significant conditions. This proactive approach to health management is encouraging people to utilize OTC products as a means of maintaining their health and preventing potential complications.

## Government Initiatives and Regulatory Support

Government initiatives and regulatory reforms play a crucial role in driving the OTC drugs market in Saudi Arabia. The Saudi government has implemented policies to enhance healthcare access and support the sale of OTC medications. Regulatory frameworks have been established to ensure the safety, efficacy, and quality of OTC products while promoting their availability to consumers. Initiatives to streamline the approval process for OTC drugs and encourage market entry for new products contribute to a more dynamic and competitive market. The government's support for OTC drug sales is also reflected in efforts to increase public awareness of the benefits of self-medication and preventive care.

### Prevalence of Common Ailments and Lifestyle-Related Health Issues

The prevalence of common ailments and lifestyle-related health issues plays a pivotal role in driving the over-the-counter (OTC) drugs market in Saudi Arabia. These conditions, which include colds, allergies, headaches, and digestive problems, are widespread among the population, creating a steady and ongoing demand for OTC medications. Lifestyle-related health problems such as stress, obesity, and sedentary habits exacerbate this demand by contributing to a range of symptoms that consumers seek to manage with OTC solutions. Colds and allergies are among the most frequent health complaints in Saudi Arabia, especially during certain seasons when environmental factors exacerbate these conditions. Colds, caused by viral infections, are common and lead to symptoms such as congestion, cough, and sore throat. Allergies, whether seasonal or triggered by environmental allergens, also result in symptoms such as sneezing, runny nose, and itchy eyes. The high prevalence of these conditions means that there is a significant market for OTC medications such as decongestants, antihistamines, and cough syrups, which offer quick relief from these symptoms without the need for a prescription.

Headaches are another common ailment affecting many individuals in Saudi Arabia. The reasons behind frequent headaches can vary, including stress, dehydration, or even changes in sleep patterns. OTC analgesics, such as ibuprofen and acetaminophen, are widely used to manage headache pain and provide relief. The consistent occurrence of headaches among the population drives demand for these easily accessible medications, reinforcing the market for OTC pain relief products. Digestive problems, including issues like indigestion, constipation, and acid reflux, are prevalent and often linked to dietary habits and lifestyle choices. The growing consumption of fast food and processed foods, combined with sedentary lifestyles, contributes to an increase in digestive disorders. OTC medications such as antacids, laxatives, and digestive aids are commonly sought after to address these issues. The

convenience of obtaining these products without a prescription further drives their consumption and supports the growth of the OTC drugs market.

### Increased Awareness of Self-Medication Benefits

Increased awareness of the benefits of self-medication is a significant driver of the OTC drugs market. As consumers become more informed about the advantages of self-medication, including its cost-effectiveness and convenience, there is a growing preference for OTC products. Educational campaigns and health information dissemination have played a role in shaping public perception of self-medication as a viable and effective option for managing minor health issues. This growing awareness encourages consumers to seek OTC solutions for everyday health concerns, driving market expansion. The emphasis on self-care and personal responsibility for health management further supports the demand for OTC drugs.

### Key Market Challenges

#### Regulatory and Compliance Challenges

The Saudi Arabia OTC drugs market faces significant regulatory and compliance challenges, which can impact market dynamics and growth. The regulatory landscape in Saudi Arabia, overseen by the Saudi Food and Drug Authority (SFDA), mandates stringent requirements for the approval, marketing, and distribution of OTC drugs. Companies must navigate a complex regulatory framework that includes rigorous testing, documentation, and compliance with safety standards. One major challenge is the lengthy and often unpredictable approval process for new OTC products. The SFDA's stringent requirements for clinical trials, product safety, and efficacy testing can delay the introduction of new products to the market. This extended time frame not only affects the market entry of new OTC medications but also increases operational costs for pharmaceutical companies.

Regulatory changes and updates can impact product compliance and market strategy. The SFDA periodically revises regulations to align with international standards and address emerging health concerns. Companies must stay abreast of these changes to ensure ongoing compliance, which can require significant resources and adjustments to existing processes. Failure to comply with regulatory requirements can result in penalties, product recalls, or market withdrawals, further complicating market dynamics. The regulatory landscape for OTC drugs often involves navigating varying requirements for product labeling, advertising, and packaging. Companies must ensure that their

products meet specific labeling standards, including ingredient disclosures, dosage instructions, and safety warnings. Missteps in this area can lead to regulatory fines and damage to brand reputation. Overall, the regulatory and compliance challenges in the Saudi OTC drugs market require companies to invest in robust compliance systems and stay vigilant about regulatory changes. Effective management of these challenges is crucial for maintaining market access and achieving long-term success.

## Market Competition and Pricing Pressure

The Saudi Arabia OTC drugs market is highly competitive, with numerous local and international players vying for market share. This competitive environment creates significant pricing pressure and challenges for companies operating in the sector. The presence of established global brands and local manufacturers intensifies competition, making it challenging for new entrants and smaller players to gain a foothold in the market. Pricing pressure is a major challenge as companies strive to balance profitability with consumer affordability. The need to offer competitive prices while maintaining product quality and innovation can strain profit margins. In a market where consumers are increasingly price-sensitive, especially for everyday health products, companies must carefully manage pricing strategies to attract and retain customers.

Competition drives the need for continuous product innovation and differentiation. To stand out in a crowded market, companies must invest in research and development to introduce new and improved OTC products. This can involve significant costs related to formulation development, clinical testing, and marketing. Failure to innovate or differentiate can result in decreased market share and reduced competitiveness. The competitive landscape also impacts distribution channels and market access. Companies must navigate relationships with pharmacies, retailers, and e-commerce platforms to ensure their products are readily available to consumers. Strong competition may lead to reduced shelf space or less favorable terms with distributors, further affecting market presence and profitability. To address these challenges, companies must adopt effective pricing strategies, invest in innovation, and develop robust marketing and distribution plans. Understanding consumer preferences and market trends is crucial for staying competitive and achieving growth in the dynamic Saudi OTC drugs market.

## Key Market Trends

### Expansion of Retail and E-commerce Channels

The expansion of retail and e-commerce platforms has significantly reshaped the over-the-counter (OTC) drugs market in Saudi Arabia. The rapid growth of online shopping has enabled consumers to conveniently purchase OTC medications from the comfort of their homes. This shift towards digital platforms has provided easier access to a broad range of OTC products, from common pain relievers and cold remedies to specialized health supplements. The increased availability and accessibility offered by online pharmacies and e-commerce sites have revolutionized the market, allowing consumers to compare prices, read reviews, and select products without the constraints of physical store inventories. The growth of brick-and-mortar retail chains has further enhanced market reach, making OTC drugs more readily available in various locations across the country. This dual expansion in both digital and physical retail environments has driven market growth by offering greater convenience and choice for consumers seeking OTC solutions. In December 2023, Chefaa, a pharmacy platform focused on patient needs, has secured USD 5.25 million in a significant funding round from both new and existing investors. The investment was co-led by Newtown Partners (South Africa) and Global Brain (Japan), with participation from GMS Capital Partners LLC (US), Verod-Kepple Africa Ventures (Nigeria), and M3, Inc. (Japan). This funding follows Chefaa's successful entry into the Saudi Arabia market, where it now operates across eight cities. The strategic capital will enable Chefaa to scale its digital supply chain models and enhance stakeholder engagement, thereby improving user experiences and treatment adherence. Chefaa's primary objective remains to drive the safe digital transformation of healthcare with a patient-focused, comprehensive approach.

## Innovations & New Product Developments

Innovations and new product developments are pivotal drivers of growth in Saudi Arabia's over-the-counter (OTC) drugs market. Pharmaceutical companies are actively engaged in advancing the OTC sector by introducing new and improved products that cater to an expanding range of health concerns. These innovations encompass various aspects of drug development, including formulation improvements, advanced delivery mechanisms, and enhanced packaging solutions.

Modern advancements in drug formulations have led to the creation of more effective OTC medications that provide targeted relief and greater efficacy. For instance, the development of fast-acting pain relievers, improved antihistamines, and more effective gastrointestinal remedies demonstrates how companies are addressing specific health needs with greater precision. Enhanced delivery mechanisms, such as extended-release formulations and dissolvable tablets, further improve patient compliance and convenience, ensuring that OTC medications are both effective and user-friendly.

Innovations in packaging have made OTC products more accessible and practical for consumers. Child-resistant packaging, tamper-evident seals, and user-friendly designs contribute to safer and more convenient medication use. These packaging advancements not only enhance product safety but also help in preserving the efficacy and shelf life of OTC drugs.

The continuous introduction of novel OTC products generates significant consumer interest and drives market growth by addressing evolving health needs. For example, the launch of new supplements, vitamins, and wellness products reflects a growing trend towards proactive health management and preventive care. Such innovations not only expand the range of available OTC solutions but also cater to emerging consumer preferences for natural and holistic health options. Advancements in product development often lead to the introduction of specialized OTC medications that address specific conditions or symptoms previously underserved by existing products. This expansion into niche areas of the market allows consumers to find tailored solutions for their health issues, thereby increasing demand and driving market growth.

## Segmental Insights

### Product Insights

Based on the Product, Vitamins, Minerals, and Supplements (VMS) is the dominant segment. This dominance is driven by a combination of growing health awareness, an increasing emphasis on preventive care, and the rising popularity of self-medication among the Saudi population. The increasing focus on preventive healthcare and wellness has significantly boosted the demand for vitamins, minerals, and dietary supplements. As more individuals become aware of the benefits of maintaining optimal nutrient levels for overall health, there is a rising trend towards the regular use of VMS products. This is partly driven by the widespread public education campaigns highlighting the importance of nutritional balance and the role of supplements in supporting a healthy lifestyle. Consumers are increasingly turning to VMS products to address specific health concerns, such as immune support, energy levels, and bone health, which further fuels market growth.

The growing prevalence of chronic health conditions, such as diabetes, cardiovascular diseases, and obesity, has led to a greater focus on dietary management and nutritional supplementation. Many consumers view VMS products as a way to complement their dietary intake and manage these conditions more effectively. The market has responded with a diverse range of VMS products designed to address various health

needs, contributing to its dominant position in the OTC drugs sector. The Saudi Arabia market also benefits from a strong retail and e-commerce presence for VMS products. The proliferation of online shopping platforms and increased access to digital channels have made it easier for consumers to purchase these products conveniently. This ease of access, coupled with a broad selection of VMS options available through both physical and online retailers, has driven significant consumer uptake.

### Route of Administration Insights

Based on the Route of Administration, oral formulations dominated as the leading segment. This prominence is largely due to their convenience, effectiveness, and wide range of applications in managing common health issues. Oral OTC drugs encompass various types of medications, including analgesics, vitamins and supplements, gastrointestinal remedies, and cold and flu treatments, making them a preferred choice for consumers seeking accessible and user-friendly solutions. The dominance of oral OTC medications can be attributed to several factors. The convenience of oral drugs is a significant driver of their popularity. Oral formulations, such as tablets, capsules, and liquid suspensions, are easy to administer and require no special equipment or medical expertise. This simplicity makes them an attractive option for consumers who prefer straightforward and hassle-free solutions for managing their health conditions.

Oral OTC drugs offer a broad spectrum of uses, which contributes to their leading position in the market. For instance, common analgesics and antipyretics like acetaminophen and ibuprofen are widely used for pain relief and fever reduction. Similarly, vitamins and dietary supplements are available in various oral forms to support general health and well-being. The versatility of oral medications in addressing a wide range of ailments, from minor issues like headaches and digestive discomfort to more complex health concerns, ensures their continued dominance. Another key factor driving the popularity of oral OTC drugs is their effectiveness and ease of use. Oral medications can provide systemic relief by being absorbed into the bloodstream and distributed throughout the body. This method of delivery is effective for managing various health conditions, from gastrointestinal problems to systemic pain. Advancements in drug formulation technology have led to the development of oral medications with improved bioavailability and faster onset of action, enhancing their appeal to consumers. The widespread availability of oral OTC medications also plays a crucial role in their market dominance. Oral drugs are commonly found in retail pharmacies, supermarkets, and online platforms, making them easily accessible to a broad consumer base. The high availability and accessibility of oral OTC products contribute to their popularity and continued market leadership.



## Regional Insights

The Central Region stand out as the dominated area. This prominence is attributed to several key factors, including its economic significance, population density, and the concentration of healthcare facilities and retail outlets. The Central Region, encompassing Riyadh—the capital city of Saudi Arabia—serves as the political, economic, and cultural heart of the country. Riyadh's status as a major urban center means that it attracts a substantial portion of the population, which drives significant demand for OTC medications. The concentration of both residents and transient populations, such as business professionals and expatriates, further amplifies the market for OTC products. The city's large population and its role as a hub for administrative and commercial activities contribute to the high consumption of OTC drugs.

The Central Region benefits from an extensive network of healthcare facilities and retail outlets. Riyadh and its surrounding areas host numerous pharmacies, supermarkets, and specialized retail stores that stock a wide range of OTC products. The presence of these retail channels ensures easy accessibility for consumers, fostering greater utilization of OTC medications. The high density of healthcare facilities, including hospitals and clinics, increases awareness and availability of OTC products, reinforcing their market dominance in the region. Economic factors also play a crucial role in the Central Region's dominance. Riyadh's economic prosperity, driven by its status as the financial and business center of Saudi Arabia, supports higher disposable incomes among residents. This economic affluence translates into greater spending capacity for health and wellness products, including OTC medications. As a result, consumers in the Central Region are more likely to invest in OTC drugs for managing health and maintaining well-being. The Central Region's strategic importance in the national healthcare infrastructure further supports its leading position in the OTC drugs market. Government initiatives and investments aimed at improving healthcare services are often concentrated in Riyadh and its vicinity, leading to enhanced healthcare access and the proliferation of OTC products. The region's focus on healthcare development aligns with the increased availability and consumption of OTC medications.

## Key Market Players

Novartis Saudi Arabia

Pfizer Saudi Limited Corporate

Glenmark Saudi Arabia

Sitco Pharma Co

CAD Middle East Pharmaceutical Industries LLC

Sudair Pharmaceutical Company

Tabuk Pharmaceuticals Manufacturing Co.

Jamjoom Pharmaceuticals Co

GSK Saudi Arabia

AstraZeneca Saudi Arabia

#### Report Scope:

In this report, the Saudi Arabia Over The Counter Drugs Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Over The Counter Drugs Market, By Product:

Cough, Cold and Flu

Vitamins, Mineral, and Supplements (VMS)

Analgesics

Gastrointestinal Products

Dermatology Products

Others

Saudi Arabia Over The Counter Drugs Market, By Route of Administration:

Oral

Topical

Parenteral

Saudi Arabia Over The Counter Drugs Market, By Dosage Form:

Tablets

Capsules

Liquids & Solution

Creams/Lotions/Ointments

Others

Saudi Arabia Over The Counter Drugs Market, By Distribution Channel:

Retail Pharmacy

Hospital Pharmacy

E-Pharmacy

Saudi Arabia Over The Counter Drugs Market, By Region:

Western Region

Central Region

Southern Region

Eastern Region

Northern Region

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Over The Counter Drugs Market.

## Available Customizations:

Saudi Arabia Over The Counter 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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