

# **Saudi Arabia Pediatric Hospitals Market By Therapeutics Area (Endocrinology, Gastroenterology, Cardiology, Nephrology, Neurology, Allergy & Immunology, Oncology, Respiratory, Ophthalmology, Anesthesiology, Other), By Type (Publicly/Government-Owned, Not-for-profit privately Owned, For-profit privately Owned), By Region, Competition, Forecast & Opportunities, 2020-2030F**

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## **Abstracts**

Saudi Arabia Pediatric Hospitals Market was valued at USD 1.45 Billion in 2024 and is anticipated to project steady growth in the forecast period with a CAGR of 4.18% through 2030. The pediatric healthcare sector in Saudi Arabia has witnessed growth, driven by the rising demand for specialized care, advancements in medical technology, and substantial investments from the government. A growing pediatric population with complex medical needs is amplifying the demand for advanced healthcare services. However, challenges such as a shortage of skilled healthcare professionals and uneven healthcare access across urban and rural areas continue to hinder the market's full potential. Overcoming these challenges is critical for ensuring sustainable growth and equitable healthcare delivery. The sector remains positioned for expansion, supported by favorable demographic trends, ongoing technological innovations, and strategic government initiatives. To capitalize on these opportunities, industry stakeholders must prioritize resolving existing workforce gaps and infrastructure disparities, positioning themselves for long-term success.

## **Key Market Drivers**

## Demographic Trends

Demographic trends play a pivotal role in driving the growth of the Saudi Arabian pediatric hospitals market. Saudi Arabia's population has reached 32.2 million, with foreign nationals comprising 42% of the total, and 63% of Saudi citizens under the age of 30, according to the General Authority for Statistics. The 2022 census, the first conducted in 12 years, revealed a median age of 29 across the population. Economy and Planning Minister Faisal Al-Ibrahim highlighted during a press conference in Riyadh that this census represents the most comprehensive and precise demographic survey in the kingdom's history, reflecting the government's commitment to accurate data for informed policy and economic planning. This demographic structure inherently drives a higher demand for pediatric healthcare services, as the number of children requiring medical care continues to grow. Pediatric healthcare providers must meet this expanding demand by offering specialized services and expanding their capacity to care for the increasing number of young patients.

Although Saudi Arabia's fertility rate has seen a decline in recent years, the birth rate remains relatively high compared to global averages, contributing to a steady increase in the pediatric patient population. The country's high birth rate is a direct contributor to the growth of the pediatric healthcare market, as more children require care from birth through adolescence. Healthcare systems must adapt to cater to this continued influx of new pediatric patients, driving the demand for additional facilities and specialized services. The growing number of children translates directly into increased demand for pediatric services. Children require healthcare services for a wide range of conditions, from routine check-ups to specialized care for chronic illnesses, congenital conditions, and pediatric surgeries. This creates a consistent and sustained need for pediatric hospital services, pushing the market to expand and adapt to the evolving healthcare needs of the young population. The rising incidence of childhood diseases, such as asthma, diabetes, and genetic disorders, further amplifies the need for specialized pediatric care. As awareness of child health issues increases, there is a growing emphasis on early diagnosis, preventive care, and interventions that help address health issues before they escalate. This shift in focus, spurred by the demographic growth of the pediatric population, has led to an expansion of specialized pediatric care facilities and services aimed at early detection and preventive treatment. Hospitals are increasingly investing in diagnostic tools, vaccinations, and preventive care programs designed to manage and prevent common childhood illnesses, which supports the demand for pediatric healthcare services.

Given the high proportion of children within the population, the Saudi government has

prioritized pediatric healthcare in its long-term health strategies. The government's Vision 2030 reform plan places strong emphasis on improving healthcare for children, including building more specialized pediatric hospitals and clinics. These initiatives aim to ensure that the growing pediatric population receives timely and specialized medical attention, creating a conducive environment for market growth. Saudi Arabia's family-centric culture places significant importance on children's health, leading parents to seek the best possible care for their children. As the population grows and health awareness increases, there is a heightened focus on quality pediatric care. Families are increasingly seeking hospitals and clinics that offer comprehensive, high-quality services for their children, further driving the demand for specialized pediatric healthcare facilities. The demographic trends in Saudi Arabia, particularly the youthful population structure, high birth rates, and increased health consciousness, are key drivers of growth in the pediatric hospitals market. These trends create an ongoing need for pediatric healthcare services, including both routine and specialized care, compelling healthcare providers to scale their operations and adapt their offerings to meet the expanding demand.

### Increased Awareness and Health Consciousness

Increased awareness and rising health consciousness among the population are significant factors driving the growth of the Saudi Arabia pediatric hospitals market. As parents and caregivers become more informed about the importance of pediatric health, there is a marked shift in healthcare-seeking behavior, which translates into greater demand for specialized pediatric services. Saudi parents are increasingly educated about the critical role early medical intervention plays in a child's health and development. Awareness campaigns by healthcare providers, government initiatives, and public health organizations have highlighted the importance of regular check-ups, vaccinations, and early diagnosis of childhood illnesses. This has led to a higher frequency of hospital visits and an increase in demand for preventive care and early-stage medical interventions. With the growing prevalence of lifestyle-related pediatric conditions, such as obesity, type 2 diabetes, and asthma, parents are prioritizing specialized healthcare services for their children. Urbanization and changes in lifestyle habits have exacerbated these health challenges, driving families to seek expert guidance from pediatric specialists and hospitals equipped to address such issues comprehensively. This demand encourages hospitals to expand their range of services, including nutritional counseling, chronic disease management, and rehabilitative care. There has been a cultural shift towards prioritizing preventive healthcare for children. Parents are increasingly proactive in scheduling routine health check-ups and screening for developmental and behavioral disorders, as well as genetic conditions. This change

in behavior drives demand for hospitals that offer comprehensive pediatric services, including early diagnosis and management plans for common and rare childhood ailments. A growing trend of health consciousness has emerged across the Middle East, with 71% of consumers reporting a shift towards healthier lifestyles during the pandemic. This shift is especially pronounced in Saudi Arabia, where 79% of consumers have indicated that they have become more health-conscious as a result of the pandemic.

Advancements in pediatric medicine, including cutting-edge diagnostic tools, minimally invasive surgical procedures, and innovative therapies, have increased public confidence in specialized pediatric hospitals. Awareness of these advancements, coupled with a desire for the best possible care, encourages parents to seek treatment from facilities equipped with the latest technologies and expertise. Pediatric hospitals that promote their advanced capabilities are better positioned to attract this informed demographic. The Saudi government and private healthcare providers have launched several public health campaigns to educate parents about common childhood diseases and the importance of timely treatment. These campaigns cover issues like vaccinations, proper nutrition, oral hygiene, and recognizing early symptoms of illnesses. Increased access to reliable health information has empowered families to make informed healthcare decisions, leading to greater utilization of pediatric hospital services. In Saudi Arabia's family-centric culture, children's health is considered a top priority. This cultural emphasis, combined with rising health awareness, has led families to actively seek high-quality pediatric care, even for minor ailments. Hospitals specializing in pediatric services are often seen as trusted institutions for safeguarding a child's well-being, further boosting the sector's growth.

The widespread use of digital platforms and social media has made health information more accessible to the general public. Parents can now research symptoms, treatments, and healthcare providers online, enabling them to make well-informed choices about their children's care. This technological shift has created a more informed patient base that demands higher standards of care, pushing pediatric hospitals to adopt best practices and continually improve their services. Increased health consciousness has led parents to seek integrated care packages that address their children's overall well-being. Pediatric hospitals offering comprehensive services—including preventive care, specialty treatments, counseling, and rehabilitation—are experiencing heightened demand. These bundled offerings appeal to health-conscious families who prefer a one-stop solution for their children's healthcare needs. The rising awareness and health consciousness among Saudi families are reshaping the pediatric healthcare landscape. As parents prioritize their children's well-

being and become more knowledgeable about advanced medical options, pediatric hospitals are compelled to expand their services, enhance quality standards, and integrate advanced technologies. This trend not only drives market growth but also sets the stage for continued investment and innovation in the pediatric healthcare sector.

### Government Initiatives and Investments

Government initiatives and investments are critical drivers of growth in the Saudi Arabia pediatric hospitals market, as they create a robust foundation for expanding healthcare infrastructure, improving service delivery, and addressing the growing needs of the pediatric population. Launched in 2016, Saudi Arabia's Vision 2030 aims to transform the healthcare sector by enhancing service accessibility, quality, and disease prevention. The Health Sector Transformation Program is centered on modernizing healthcare infrastructure, strengthening the workforce, and integrating advanced technologies to drive improvement. These goals have driven substantial investments in pediatric hospitals, spurring sectoral growth and innovation. Significant government funding has been allocated to build and upgrade pediatric hospitals and specialized units across the country. This includes establishing state-of-the-art pediatric intensive care units (PICUs), neonatal intensive care units (NICUs), and child-focused specialty centers for oncology, cardiology, and other medical disciplines. By increasing the availability of advanced facilities, the government ensures a broader reach of high-quality pediatric care, fostering market growth.

The Saudi government actively encourages public-private partnerships (PPPs) to enhance healthcare service delivery. These partnerships attract private sector expertise and investment to complement government resources. In pediatrics, PPPs have facilitated the development of specialized hospitals and the introduction of innovative technologies and practices. This collaborative approach not only addresses infrastructure gaps but also accelerates the availability of high-standard pediatric services. The introduction of universal healthcare initiatives under the Ministry of Health ensures access to medical services for all Saudi citizens, including children.

Government funding for healthcare subsidies and insurance schemes makes pediatric services more affordable and accessible. This accessibility drives increased utilization of pediatric hospitals, boosting overall market demand. To address the shortage of skilled pediatric healthcare professionals, the Saudi government has invested heavily in medical education and training programs. Scholarships for specialized pediatric training, partnerships with global healthcare institutions, and the establishment of pediatric research centers ensure a steady supply of qualified doctors, nurses, and allied professionals. These initiatives enhance the capacity and capability of pediatric



hospitals to deliver advanced care. Recognizing disparities in healthcare access between urban and rural regions, the government has prioritized the establishment of pediatric healthcare facilities in underserved areas. Mobile clinics, telemedicine services, and regional hospitals are being developed to bridge the gap, ensuring equitable access to pediatric care across the country. This focus expands the geographic reach of pediatric services, fueling market growth.

The Saudi government is channeling significant resources into healthcare research and the adoption of advanced technologies. This includes funding for pediatric research to better understand childhood diseases prevalent in the region and to develop tailored treatments. Additionally, investments in telemedicine, artificial intelligence, and robotics have enabled more efficient and effective pediatric care, attracting patients to advanced facilities. Public health initiatives targeting childhood diseases, vaccination programs, and awareness campaigns are integral to government efforts. These programs drive demand for preventive and routine pediatric care services, encouraging families to seek care at hospitals. Comprehensive immunization drives and campaigns against conditions such as malnutrition and genetic disorders have also contributed to improved pediatric health outcomes. The government's partnerships with global healthcare institutions to establish international standards in pediatric care have bolstered the sector's reputation. Accreditation programs ensure that Saudi pediatric hospitals meet or exceed global benchmarks, attracting both domestic and international patients. This focus on quality has reinforced trust in pediatric healthcare services, driving higher utilization rates. Government initiatives and investments serve as the backbone of the Saudi Arabia pediatric hospitals market. By aligning national healthcare strategies with the specific needs of the pediatric population, the government has not only expanded infrastructure but also enhanced accessibility, affordability, and quality of care. These efforts ensure sustained growth in the sector while positioning Saudi Arabia as a leader in pediatric healthcare within the region. To capitalize on these opportunities, stakeholders must collaborate with government agencies and leverage these initiatives to further strengthen their market presence.

## Key Market Challenges

### Workforce Shortages

A critical challenge facing the Saudi pediatric hospitals market is the shortage of skilled healthcare professionals specializing in pediatrics. The number of qualified pediatricians, nurses, and allied health professionals is insufficient to meet the growing demand for specialized pediatric care. This is particularly evident in areas requiring

advanced skills, such as neonatology, pediatric cardiology, and pediatric oncology. Saudi Arabia heavily relies on expatriate medical professionals to fill gaps in its healthcare workforce. However, this dependence can lead to staffing instability, as foreign professionals may face visa restrictions or choose to relocate, causing disruptions in service delivery. While the government has made significant investments in medical education, the time required to train and retain local pediatric specialists is lengthy. Furthermore, competitive global demand for healthcare professionals makes it difficult for Saudi hospitals to retain skilled staff.

This shortage not only impacts the quality of care but also limits the ability of hospitals to expand their services, restricting market growth.

### Disparities in Healthcare Access

Unequal access to pediatric healthcare between urban and rural regions presents a significant barrier to market development.

While major cities like Riyadh, Jeddah, and Dammam host state-of-the-art pediatric hospitals, rural and remote areas often lack adequate healthcare facilities. This urban-centric development leaves large segments of the population underserved, particularly in regions where travel to urban centers for care is costly and time-consuming. The lack of infrastructure, including specialized hospitals and trained professionals, exacerbates healthcare inequalities. Rural populations often depend on general hospitals with limited pediatric services, which may not be equipped to handle complex medical cases. Delivering advanced medical technologies and medicines to remote areas poses logistical difficulties. Telemedicine, while promising, has not yet been fully adopted, leaving a gap in reaching underserved populations. These disparities hinder the overall market growth by preventing equitable service delivery and reducing patient access to quality pediatric care.

### Key Market Trends

#### Digital Transformation and Smart Healthcare Solutions

The integration of digital technologies and smart healthcare solutions is redefining pediatric care in Saudi Arabia, driving efficiency, accessibility, and personalization. Telemedicine is becoming a cornerstone of healthcare delivery, allowing families to access pediatric specialists remotely, particularly in underserved or rural areas. This trend enhances convenience, reduces travel-related barriers, and ensures timely

medical intervention. Artificial intelligence (AI) is increasingly being utilized to enhance diagnostic accuracy and predict disease progression in children. AI-powered tools analyze medical data, such as imaging and genetic profiles, to provide early detection of conditions like congenital anomalies and developmental disorders. Connected medical devices are gaining traction, enabling real-time monitoring of pediatric patients. For instance, wearable devices for tracking vital signs in infants and children are improving health outcomes while reducing hospital admissions. Investments in smart hospital infrastructure, featuring integrated digital systems for patient management, treatment planning, and data analytics, are creating a seamless and efficient pediatric care ecosystem. These advancements are revolutionizing care delivery, positioning the Saudi market at the forefront of healthcare innovation.

### Personalized and Precision Medicine for Pediatrics

The shift toward personalized and precision medicine is becoming a transformative trend in pediatric healthcare, offering tailored treatments based on individual genetic, environmental, and lifestyle factors. Advances in genetic testing and sequencing are enabling early identification of hereditary and rare pediatric conditions. This allows for customized treatment plans that address the unique needs of each child, improving outcomes for conditions such as metabolic disorders and pediatric cancers. Precision medicine is fostering the development of targeted therapies for chronic and complex pediatric conditions. For instance, biologic drugs and gene therapies are being used to treat autoimmune diseases and inherited genetic disorders in children. Understanding how a child's genetic makeup affects their response to medications is enabling safer and more effective treatments. This approach minimizes adverse effects and ensures optimal drug efficacy. The adoption of precision medicine enhances the appeal of pediatric hospitals, attracting families seeking advanced and individualized care.

### Segmental Insights

#### Therapeutics Area Insights

Based on the category of Therapeutics Area, the Respiratory segment emerged as the dominant in the Saudi Arabia Pediatric Hospital market in 2024. Respiratory conditions such as asthma, bronchitis, pneumonia, and upper respiratory tract infections (URTIs) are among the most common health issues affecting children in Saudi Arabia. The region's arid climate, frequent sandstorms, and high levels of airborne pollutants contribute to the rising incidence of respiratory conditions in children. Poor air quality, particularly in urban areas, exacerbates conditions such as asthma and allergic rhinitis.



Young children have underdeveloped immune and respiratory systems, making them particularly susceptible to infections and respiratory complications. This vulnerability drives consistent demand for specialized respiratory care in pediatric hospitals. The high burden of respiratory disorders ensures that the segment remains a focal point for pediatric healthcare providers.

Pediatric hospitals in Saudi Arabia are investing in advanced diagnostic tools and treatments tailored to respiratory care, reinforcing the dominance of this therapeutic area. Technologies such as pulmonary function tests (PFTs), imaging modalities, and advanced spirometry are widely used to diagnose and monitor respiratory conditions in children accurately. Hospitals offer cutting-edge treatments, including nebulization therapy, inhaled corticosteroids, and biologic drugs for severe asthma cases. These interventions provide effective management options for complex respiratory conditions, attracting families seeking high-quality care. Pediatric hospitals emphasize long-term management of chronic respiratory diseases, including education on trigger avoidance, medication adherence, and routine check-ups. These capabilities enhance the reputation of pediatric hospitals, positioning them as centers of excellence in respiratory care. The Saudi government and healthcare authorities have recognized the importance of addressing pediatric respiratory health, implementing targeted policies and programs. Initiatives to promote vaccination against common respiratory infections, such as influenza and pneumococcal diseases, are reducing the incidence of severe respiratory conditions and ensuring better outcomes. Campaigns to educate families about the prevention and management of respiratory conditions have increased the frequency of early medical consultations, driving patient volumes in pediatric hospitals. Government funding for state-of-the-art pediatric hospitals with dedicated respiratory care units supports the development of specialized services in this segment. These efforts create an enabling environment for the respiratory segment to thrive, further consolidating its market leadership. These factors collectively contribute to the growth of this segment.

## Regional Insights

Northern & Central emerged as the dominant in the Saudi Arabia Pediatric Hospital market in 2024, holding the largest market share in terms of value. Riyadh, located in the Central region, serves as the political, economic, and healthcare hub of Saudi Arabia, making it a focal point for pediatric hospital development. Riyadh houses several world-class pediatric hospitals and medical centers equipped with state-of-the-art technologies and specialized departments. Facilities like King Abdullah Specialist Children's Hospital are renowned for their comprehensive pediatric care. As the capital city, Riyadh benefits from proximity to government healthcare authorities and decision-

making bodies, ensuring prioritized funding and policy support for healthcare initiatives. The Central region has a high population density, including a significant pediatric demographic. This drives demand for specialized pediatric care, contributing to the region's market dominance. The strategic importance of Riyadh positions the Central region as a leader in pediatric healthcare services.

The Northern region is emerging as a critical market player, supported by government-led development initiatives aimed at enhancing healthcare access and quality. The Northern region has seen increased investments in healthcare as part of Saudi Arabia's Vision 2030 initiative, which focuses on balanced regional development. This includes building new hospitals and upgrading existing facilities to cater to underserved populations. Government programs have prioritized expanding pediatric healthcare infrastructure in the Northern region, addressing disparities in access and ensuring equitable service delivery. The Northern region's proximity to neighboring countries drives cross-border demand for pediatric healthcare services, further boosting its market significance. The strategic focus on regional development enhances the Northern region's contribution to the pediatric hospitals market.

### Key Market Players

King Abdullah Specialized Children Hospital (KASCH)

Salam Hospital

King Faisal Specialist Hospital

NEOM Hospital

Al Aziziyah Children Hospital

AlKhamis Maternity and Children Hospital

### Report Scope:

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

## Saudi Arabia Pediatric Hospitals Market, By Therapeutics Area:

Endocrinology

Gastroenterology

Cardiology

Nephrology

Neurology

Allergy & Immunology

Oncology

Respiratory

Ophthalmology

Anesthesiology

Other

## Saudi Arabia Pediatric Hospitals Market, By Type:

Publicly/Government-Owned

Not-for-profit privately Owned

For-profit privately Owned

## Saudi Arabia Pediatric Hospitals Market, By Region:

Eastern

Western

Northern & Central

## Southern

### Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Saudi Arabia Pediatric Hospitals Market.

### Available Customizations:

Saudi Arabia Pediatric Hospitals 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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