

Saudi Arabia Refined Petroleum Products Market, By Product Type (Diesel, Gasoline, Fuel Oils, Kerosene, Others), By Application (Fuel, Chemical, Others), By Fraction (Light Distillates, Middle Distillates, Heavy Oils), By Region, Competition, Forecast & Opportunities, 2019-2029F

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Abstracts

Saudi Arabia Refined Petroleum Products Market was valued at USD 31.07 Billion in 2023 and is expected to reach USD 45.31 Billion by 2029 with a CAGR of 6.33% during the forecast period.

The Refined Petroleum Products market refers to the global industry that encompasses the production, distribution, and sale of petroleum products derived from the refining of crude oil. These products include fuels such as gasoline, diesel, jet fuel, and kerosene, as well as non-fuel products like lubricants, asphalt, and petrochemicals used in manufacturing.

The refining process involves separating and converting crude oil into various fractions to meet different industrial and consumer needs. The market is driven by demand from transportation, industrial manufacturing, energy generation, and chemical production. Transportation fuel, particularly gasoline and diesel, forms the largest segment, given its critical role in powering vehicles and heavy machinery.

Key players in the market include major oil companies, refiners, and distributors, which operate across multiple stages of the value chain, from refining crude oil to supplying end products to consumers. Market dynamics are influenced by global oil prices, geopolitical factors, regulatory standards on emissions, and the transition toward

cleaner energy alternatives. Despite the growth of renewable energy, the refined petroleum products market remains significant due to the ongoing reliance on fossil fuels for many sectors of the global economy.

Key Market Drivers

Growing Domestic Energy Demand

One of the primary drivers of the Saudi Arabia refined petroleum products market is the growing domestic demand for energy. Saudi Arabia, being one of the largest economies in the Middle East, has witnessed significant industrial growth, urbanization, and population expansion over the past few decades. This increase in economic activity has translated into a higher demand for energy, particularly in the form of refined petroleum products such as gasoline, diesel, and jet fuel.

The transportation sector, which relies heavily on gasoline and diesel, is a significant contributor to this demand. As the population grows and urban areas expand, there has been a surge in the number of vehicles on Saudi roads, driving up the consumption of gasoline. Similarly, the industrial sector, which includes petrochemicals, construction, and manufacturing, has a growing need for energy inputs like diesel for heavy machinery and power generation. Furthermore, the aviation sector, both domestically and internationally, has seen increased activity, leading to a higher consumption of jet fuel. Saudi Arabia's strategic geographic location and its role as a major hub for global air travel, particularly during the Hajj pilgrimage season, has further driven demand for refined petroleum products in aviation. In addition, electricity generation in Saudi Arabia relies heavily on petroleum products, particularly diesel and heavy fuel oil, although there has been a growing shift toward natural gas and renewable energy. This dependency on petroleum for power generation, especially during peak summer months when electricity demand surges due to air conditioning, remains a key factor contributing to the demand for refined petroleum products.

As the country continues to modernize and diversify its economy, it is expected that the domestic energy demand, especially for refined petroleum products, will remain strong. While there are efforts to increase energy efficiency and promote cleaner energy sources under Saudi Arabia's Vision 2030, the transition is expected to be gradual, ensuring that petroleum products will continue to play a vital role in meeting the country's energy needs in the near to medium term.

Strategic Role in Global Energy Markets

Saudi Arabia's strategic role in the global energy markets is another key driver of its refined petroleum products market. As one of the world's leading producers of crude oil and a member of OPEC, Saudi Arabia plays a pivotal role in maintaining global oil supply and influencing oil prices. This position not only impacts its crude oil exports but also its refined petroleum products market, which benefits from the Kingdom's vast oil reserves and refining capacity.

Saudi Arabia has made significant investments in its refining infrastructure over the years. The country boasts some of the largest and most advanced refineries in the world, including the Ras Tanura Refinery and the Jubail Refinery. These facilities are capable of producing large volumes of refined products, not only to meet domestic demand but also for export. The Kingdom's ability to refine crude oil into products like gasoline, diesel, jet fuel, and petrochemical feedstocks ensures its place as a key player in the global supply chain of refined petroleum products. Furthermore, Saudi Arabia's geographical location offers it a strategic advantage for global trade. Situated between Europe, Asia, and Africa, the Kingdom has access to major shipping routes, allowing it to efficiently transport refined petroleum products to various markets around the world. Saudi Aramco, the state-owned oil company, has established strong international trade relationships, ensuring that Saudi Arabia remains a dominant supplier of refined products to regions with growing energy needs, particularly in Asia and Africa. In addition to exports, Saudi Arabia has been expanding its investments in refining projects overseas. Through joint ventures and partnerships, Saudi Aramco has established refining capacities in countries such as China, South Korea, and the United States, further solidifying its presence in global energy markets. These investments allow Saudi Arabia to not only sell crude oil but also add value by exporting refined products to key markets, thus enhancing its revenue streams.

As global energy demand continues to grow, particularly in emerging economies, Saudi Arabia's ability to meet this demand through its refining sector ensures that the refined petroleum products market remains robust. While the global shift toward renewable energy poses challenges, Saudi Arabia's strategic role in the energy sector ensures that its refined products will remain in demand for the foreseeable future.

Diversification and Industrial Growth under Vision 2030

Saudi Arabia's Vision 2030 initiative is a key driver of the refined petroleum products market as it focuses on diversifying the economy away from its heavy reliance on crude

oil exports. The ambitious plan includes the development of various industrial sectors such as manufacturing, petrochemicals, and logistics, all of which require significant energy inputs, including refined petroleum products. As these industries grow, they contribute to an increasing demand for products such as diesel, fuel oil, and petrochemical feedstocks.

The Vision 2030 initiative has prioritized the growth of the petrochemical sector, which relies on refined petroleum products as feedstock for manufacturing various chemicals and materials. Saudi Arabia has already established itself as a global leader in petrochemical production, and the government's push to expand this industry will likely increase the consumption of refined products like naphtha, a key feedstock in petrochemical manufacturing. By adding value to its raw materials and expanding downstream industries, Saudi Arabia is positioning itself as a major player in the global petrochemical market, further driving the demand for refined petroleum products. Additionally, the government's emphasis on expanding the industrial base—such as steel production, mining, and manufacturing—also fuels the demand for refined petroleum products, particularly diesel and heavy fuel oil. Industries like construction and mining require significant amounts of energy to power machinery, transport goods, and run manufacturing plants. This industrial growth will ensure that the demand for refined petroleum products remains strong in the coming years.

Moreover, Vision 2030 emphasizes developing Saudi Arabia as a global logistics hub. This will likely lead to increased transportation needs, both for domestic logistics and international trade. The Kingdom's strategic location and plans to enhance infrastructure such as ports, airports, and highways will further drive demand for transportation fuels like gasoline, diesel, and jet fuel.

As Saudi Arabia continues to diversify its economy and reduce its reliance on crude oil exports, the refined petroleum products market will play a crucial role in supporting industrial growth and development. The ongoing expansion of industrial activities, fueled by Vision 2030, ensures that demand for these products will remain robust, even as the country pursues a long-term shift toward cleaner energy alternatives.

Key Market Challenges

Volatility in Global Oil Prices

One of the significant challenges facing the Saudi Arabia refined petroleum products market is the inherent volatility in global oil prices. As a major oil producer, Saudi

Arabia's economy and its petroleum industry are highly sensitive to fluctuations in crude oil prices, which directly affect the cost of refining and the profitability of refined products. Price volatility can arise from a variety of factors, including geopolitical tensions, supply-demand imbalances, and shifts in global energy policies.

For example, geopolitical tensions in oil-producing regions, such as the Middle East or North Africa, can disrupt global oil supplies, leading to sudden spikes or drops in crude prices. These price fluctuations can create uncertainty in the refined petroleum products market, making it difficult for refineries and distributors to maintain stable profit margins. During periods of low oil prices, refining companies may struggle with reduced profitability as the value of the crude oil they process decreases, while operating costs remain relatively constant. Additionally, global economic shifts, such as recessions or slowdowns in major economies like China or the United States, can lead to a reduction in demand for crude oil and refined petroleum products. For instance, during the COVID-19 pandemic, global demand for transportation fuels like gasoline and jet fuel plummeted due to lockdowns and travel restrictions. This led to a significant drop in oil prices, which, in turn, negatively impacted the profitability of Saudi Arabia's refining sector.

Another factor contributing to price volatility is the growing influence of renewable energy sources and environmental regulations. As more countries adopt cleaner energy policies and transition toward renewable sources such as wind, solar, and electric vehicles, the demand for fossil fuels, including refined petroleum products, is expected to decline. This shift may further contribute to price fluctuations as the balance between supply and demand changes.

For Saudi Arabia, managing this price volatility is crucial for the stability of its refined petroleum products market. While the Kingdom has significant financial reserves to weather short-term disruptions, long-term volatility poses risks to its economic diversification goals. To mitigate these challenges, Saudi Arabia may need to focus on further developing downstream industries, enhancing refining efficiency, and investing in alternative energy sources to reduce its dependence on oil price fluctuations.

Transition to Renewable Energy and Global Decarbonization Efforts

The global shift toward renewable energy and decarbonization poses a significant challenge to the Saudi Arabia refined petroleum products market. As countries around the world intensify their efforts to reduce greenhouse gas emissions and

combat climate change, the demand for fossil fuels, including refined petroleum products, is expected to decline over time. This transition presents a long-term risk to Saudi Arabia, which relies heavily on its oil and refining industries for economic growth and revenue generation.

One of the main drivers of this challenge is the increasing adoption of renewable energy sources such as wind, solar, and hydroelectric power. Many countries are investing heavily in these technologies as part of their strategies to achieve carbon neutrality and reduce their dependence on fossil fuels. As renewable energy becomes more cost-competitive, it is likely to displace traditional energy sources, particularly in sectors like electricity generation, transportation, and manufacturing. This shift could lead to a decline in global demand for refined petroleum products like gasoline, diesel, and jet fuel, which are critical to Saudi Arabia's refining industry.

Another factor contributing to this challenge is the rise of electric vehicles (EVs). With many governments setting targets to phase out internal combustion engine vehicles in favor of EVs, the demand for gasoline and diesel is expected to decrease in the long run. Saudi Arabia, which has traditionally been a major supplier of transportation fuels, could face reduced export opportunities as the global transportation sector moves toward electrification. Additionally, the increasing use of biofuels and hydrogen as alternative energy sources in aviation and heavy industries could further reduce the demand for conventional refined petroleum products. Moreover, international efforts to impose stricter environmental regulations on emissions and fuel quality standards are putting pressure on Saudi Arabia's refining sector. Many countries, particularly in Europe and North America, have introduced regulations aimed at reducing carbon emissions from transportation and industrial activities. To remain competitive in these markets, Saudi Arabia's refineries may need to invest in advanced technologies to produce cleaner fuels that meet stringent environmental standards. However, such investments can be costly and time-consuming, posing a challenge to the profitability and long-term sustainability of the refined petroleum products market.

While Saudi Arabia has launched initiatives to diversify its economy and invest in renewable energy through its Vision 2030 plan, the transition to a lower-carbon world remains a significant challenge. The Kingdom's ability to adapt to these global energy shifts will be crucial for the future of its refined petroleum products market.

Key Market Trends

Increasing Focus on Petrochemical Integration

One of the key trends in the Saudi Arabia refined petroleum products market is the increasing integration of refining and petrochemical operations. As part of the country's Vision 2030 initiative to diversify its economy, Saudi Arabia is expanding its petrochemical sector, which relies heavily on refined petroleum products as feedstock. Integrating refineries with petrochemical plants allows for greater efficiency, value addition, and the ability to produce higher-value products from crude oil, such as plastics, chemicals, and fertilizers.

This trend is evident in several large-scale projects like the Saudi Aramco Total Refining and Petrochemical Company (SATORP) in Jubail, which integrates refining with petrochemical production. By co-locating refining and petrochemical operations, companies can better utilize by-products from the refining process, such as naphtha and ethane, to produce petrochemicals. This not only maximizes the value derived from each barrel of crude oil but also enhances the competitiveness of Saudi products in global markets. Furthermore, as global demand for traditional fuels like gasoline and diesel is expected to decline in the long run due to the energy transition, the petrochemical industry offers a strategic growth area. The demand for petrochemical products continues to rise, driven by sectors such as packaging, construction, automotive, and healthcare. Saudi Arabia's push toward petrochemical integration positions the country to capitalize on this growing demand, ensuring the long-term sustainability of its refining sector.

This trend toward petrochemical integration is also supported by significant investments in research and development (R&D) to improve production processes and develop more efficient ways of converting crude oil into valuable chemicals. By focusing on innovation, Saudi Arabia aims to become a global leader in the petrochemical industry, further boosting the role of refined petroleum products in supporting downstream industrial growth.

Shift Toward Cleaner and Higher-Quality Fuels

Another important trend shaping the Saudi Arabia refined petroleum products market is the shift toward cleaner and higher-quality fuels. With increasing global environmental regulations and growing awareness of the need to reduce carbon emissions, there is rising demand for fuels that produce fewer pollutants and comply with stricter environmental standards. This shift is particularly evident in regions like Europe and North America, where governments have implemented stringent regulations

to reduce sulfur content and other harmful emissions from transportation fuels.

To remain competitive in these markets, Saudi Arabia's refineries are increasingly upgrading their facilities to produce cleaner fuels. This involves investing in advanced refining technologies, such as hydrocracking, catalytic reforming, and desulfurization, which enable the production of fuels with lower sulfur content and higher efficiency. For instance, Saudi Aramco has been actively working on producing cleaner diesel and gasoline that meet Euro 5 standards, which have a low sulfur content and significantly reduce harmful emissions.

This trend is not only driven by regulatory requirements but also by growing consumer demand for cleaner fuels, particularly in major cities where air quality is a concern. In addition to transportation fuels, there is also a focus on producing cleaner industrial fuels such as low-sulfur fuel oil, which is used for power generation and shipping. Saudi Arabia's strategic investment in producing cleaner fuels ensures that its refined products remain in demand in both domestic and international markets.

As the global maritime industry shifts toward using cleaner fuels under the International Maritime Organization's (IMO) 2020 regulations, which cap sulfur content in marine fuels, Saudi Arabia has been increasing its production of compliant low-sulfur marine fuel. This trend not only strengthens Saudi Arabia's position as a reliable supplier of refined products but also helps the country align with global efforts to reduce environmental impact.

Segmental Insights

Product Type Insights

The Diesel held the largest market share in 2023. Diesel dominated the Saudi Arabia Refined Petroleum Products market primarily due to its extensive use in key sectors such as transportation, industrial operations, and power generation. Diesel is a highly efficient fuel for heavy-duty vehicles, trucks, and machinery, making it essential for the logistics and transportation sectors. Given Saudi Arabia's vast geographical size and reliance on freight transportation to move goods across the country and neighboring regions, diesel remains the backbone of these operations. The industrial sector also heavily relies on diesel for powering machinery and equipment, particularly in construction, mining, and manufacturing, which are integral to the country's ongoing economic diversification efforts under Vision 2030.

In addition to its dominance in transportation and industrial activities, diesel plays a crucial role in the country's power generation. While Saudi Arabia has been increasingly shifting toward natural gas and renewable energy sources for electricity, diesel is still used for backup power generation, especially in remote areas or during peak demand periods.

Another factor driving diesel's dominance is its role in international trade. Saudi Arabia is one of the largest exporters of diesel, particularly to emerging markets in Asia and Africa, where demand for transportation fuels remains strong. Saudi Aramco's vast refining capacity allows the country to meet both domestic and export demand for diesel, further strengthening its dominance in the product mix.

Global demand for cleaner diesel fuels has increased, with stricter environmental regulations driving refiners to produce higher-quality, low-sulfur diesel. Saudi Arabia's advanced refining infrastructure allows it to produce such fuels, positioning the country as a reliable supplier in international markets. Given these factors, diesel continues to dominate the Saudi Arabia Refined Petroleum Products market.

Regional Insights

Riyadh held the largest market share in 2023. Riyadh, as the capital and largest city of Saudi Arabia, is the center of government operations, commerce, and industrial development. The city's rapid urbanization and infrastructure projects have driven a significant demand for refined petroleum products. Industries such as construction, manufacturing, transportation, and power generation rely heavily on refined petroleum for operations. Riyadh's strategic location at the crossroads of major trade routes also enhances its importance as a distribution hub for refined petroleum products.

With a population of over 7 million, Riyadh has the highest population density in the country, leading to increased consumption of refined petroleum products for transportation, household energy needs, and commercial activities. The high demand for gasoline, diesel, and jet fuel is driven by the growing number of vehicles, expanding road networks, and the increased mobility of residents and goods. The Saudi government's Vision 2030 initiative, aimed at diversifying the economy, has further propelled Riyadh's growth. Massive infrastructure projects such as the Riyadh Metro and new residential and commercial developments have intensified the need for refined petroleum products. The city's pivotal role in national and international projects has positioned it as a key consumer of fuels and other refined petroleum products.

Riyadh's sophisticated logistics network and proximity to major oil refineries enable efficient distribution of petroleum products throughout the city and surrounding regions. This ensures a steady supply of refined petroleum products, making it a leading market for the sector.

Key Market Players

ExxonMobil Corporation

Shell plc

Chevron Corporation

TotalEnergies SE

Saudi Arabian Oil Company

ConocoPhillips

Eni S.p.A.

Marathon Petroleum Corporation

Report Scope:

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

Saudi Arabia Refined Petroleum Products Market, By Product Type:

Diesel

Gasoline

Fuel Oils

Kerosene

Others

Saudi Arabia Refined Petroleum Products Market, By Application:

Fuel

Chemical

Others

Saudi Arabia Refined Petroleum Products Market, By Fraction:

Light Distillates

Middle Distillates

Heavy Oils

Saudi Arabia Refined Petroleum Products Market, By Region:

Riyadh

Makkah

Madinah

Eastern Province

Dammam

Rest of Saudi Arabia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Refined Petroleum Products Market.

Saudi Arabia Refined Petroleum Products Market, By Product Type (Diesel, Gasoline, Fuel Oils, Kerosene, Others...

Available Customizations:

Saudi Arabia Refined Petroleum Products 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:

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

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