

United States Oil and Gas Analytics Market By Component (Solution, Service), By Deployment Mode (On-premises, Cloud), By Application (Upstream {Exploration & Drilling, Field Surveillance & Monitoring, Production Planning & Forecasting, Equipment Maintenance Management, Asset Performance, Workforce Management}, Midstream {Pipeline SCADA, Fleet, Storage Optimization}, Downstream {Commodity Trading, Demand Forecasting, Pricing, Refining}), By Region, Competition, Forecast and Opportunities, 2019-2029F

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Abstracts

The United States Oil and Gas Analytics Market was valued at USD 1.89 Billion in 2023 and is expected to reach USD 7.21 Billion in 2029 with a CAGR of 24.82% during the forecast period.

The United States oil and gas analytics market is poised for significant growth, driven by the increasing complexity of operations, the need for enhanced decision-making capabilities, and the rising demand for operational efficiency across the sector. As oil and gas companies face mounting pressure to optimize production and reduce costs, the adoption of advanced analytics solutions has become imperative. These solutions leverage big data, machine learning, and artificial intelligence to provide actionable insights that enhance operational performance, improve asset management, and facilitate predictive maintenance. This transformation is critical as companies aim to maximize output while minimizing downtime and operational risks.

The market is experiencing heightened interest in data-driven decision-making as organizations seek to harness the vast amounts of data generated from drilling, exploration, and production activities. Advanced analytics tools enable companies to process and analyze this data in real time, offering insights into drilling performance, reservoir behavior, and equipment health. As a result, operators can make informed decisions that lead to improved drilling strategies, enhanced recovery rates, and more effective resource management. Furthermore, the integration of analytics into supply chain management and logistics allows companies to optimize their operations, ensuring timely delivery of materials and services while reducing costs.

Another significant driver of growth in the U.S. oil and gas analytics market is the increasing focus on regulatory compliance and environmental sustainability. Companies are utilizing analytics to monitor emissions, assess environmental impact, and ensure adherence to regulatory requirements. By leveraging analytics to streamline operations and enhance transparency, companies can better align with sustainability goals and stakeholder expectations.

Additionally, the rapid advancements in cloud computing and IoT technologies are revolutionizing how oil and gas companies manage their data. Cloud-based analytics solutions offer scalability, flexibility, and cost-effectiveness, enabling organizations to access powerful analytical tools without the need for extensive on-premises infrastructure. The convergence of IoT and analytics facilitates real-time monitoring of equipment and assets, leading to improved operational efficiency and reduced maintenance costs.

Despite these opportunities, the market faces challenges, including concerns related to data security and the need for skilled personnel to analyze complex datasets. However, as the oil and gas industry continues to embrace digital transformation, the outlook for the U.S. oil and gas analytics market remains positive. With ongoing investments in technology and innovation, companies are well-positioned to leverage analytics as a strategic asset, driving efficiency and growth in an increasingly competitive landscape.

Key Market Drivers

Increasing Volume of Data Generation

One of the primary drivers of the United States oil and gas analytics market is the exponential growth in the volume of data generated from various operations across the

sector. With advancements in drilling techniques, exploration methods, and production processes, companies are now able to collect vast amounts of data from numerous sources, including sensors, drilling equipment, and geological surveys. This data includes real-time information on drilling performance, reservoir characteristics, equipment health, and market trends. As companies recognize the value of this data, they are increasingly investing in analytics solutions to process and analyze it effectively. By leveraging advanced analytics tools, operators can gain actionable insights, optimize production processes, enhance decision-making, and ultimately improve operational efficiency. The ability to harness big data analytics allows organizations to identify patterns, forecast future trends, and mitigate risks, thereby driving the growth of the oil and gas analytics market.

Need for Enhanced Operational Efficiency

The demand for enhanced operational efficiency is a significant driver in the United States oil and gas analytics market. Companies are under continuous pressure to optimize their operations, reduce costs, and improve profitability in an increasingly competitive environment. Analytics solutions enable organizations to identify inefficiencies in their processes and develop strategies to address them. For instance, predictive maintenance analytics can help operators anticipate equipment failures before they occur, reducing downtime and maintenance costs. Furthermore, analytics can optimize drilling operations by providing insights into the most effective drilling techniques and parameters, thereby minimizing waste and maximizing resource extraction. As companies seek to streamline their operations and improve their bottom line, the adoption of analytics becomes essential, driving growth in the oil and gas analytics market.

Focus on Safety and Compliance

Safety and regulatory compliance are paramount in the oil and gas industry, driving the need for advanced analytics solutions. With increasing scrutiny from regulatory bodies and heightened public awareness of environmental issues, companies are prioritizing safety and compliance measures. Analytics tools enable organizations to monitor operations in real-time, ensuring adherence to safety standards and regulatory requirements. For example, predictive analytics can assess risk factors associated with drilling operations and environmental impact, allowing companies to implement preventive measures proactively. Additionally, analytics can help monitor emissions and waste management practices, ensuring compliance with environmental regulations. By utilizing analytics to enhance safety protocols and regulatory compliance, companies

not only protect their workforce and the environment but also mitigate potential legal and financial repercussions, further driving demand for analytics solutions in the oil and gas sector.

Integration of IoT and Cloud Computing

The integration of Internet of Things (IoT) technologies and cloud computing is a crucial driver of the United States oil and gas analytics market. IoT devices, including sensors and smart equipment, enable real-time data collection and monitoring of various operational parameters. This data can be transmitted to cloud-based analytics platforms for processing and analysis, providing organizations with immediate insights into their operations. Cloud computing offers scalability, flexibility, and cost-effectiveness, allowing companies to access powerful analytical tools without the need for extensive on-premises infrastructure. The combination of IoT and cloud analytics enables operators to optimize production, enhance asset management, and streamline decision-making processes. As companies increasingly adopt IoT solutions and cloud-based analytics, the growth of the oil and gas analytics market is expected to accelerate, enabling organizations to leverage technology to improve efficiency and competitiveness.

Key Market Challenges

Data Security and Privacy Concerns

One of the primary challenges facing the United States oil and gas analytics market is the increasing concern regarding data security and privacy. The sector generates vast amounts of sensitive data, including proprietary operational details, financial information, and customer data. As companies adopt advanced analytics solutions, they become more vulnerable to cyber threats, which can lead to data breaches, loss of intellectual property, and significant financial repercussions. The need to safeguard data against cyberattacks requires robust security measures and continuous monitoring, which can be costly and resource-intensive. Additionally, regulatory frameworks surrounding data protection are evolving, necessitating compliance with stringent standards such as the General Data Protection Regulation (GDPR) and other industry-specific regulations. Companies must navigate these complexities while ensuring the integrity and confidentiality of their data. The challenge is compounded by the fact that many organizations may lack the necessary expertise and resources to implement comprehensive cybersecurity strategies. As the market becomes increasingly digital and interconnected, addressing data security and privacy concerns is crucial for

fostering trust and encouraging the widespread adoption of analytics solutions.

Skill Shortages and Talent Acquisition

Another significant challenge in the United States oil and gas analytics market is the shortage of skilled professionals equipped to analyze complex datasets and derive actionable insights. The integration of advanced analytics into oil and gas operations requires a unique blend of expertise in data science, engineering, and industry knowledge. However, the rapid evolution of technology has outpaced the availability of qualified personnel, resulting in a talent gap that hampers innovation and efficiency. Companies often struggle to attract and retain individuals with the necessary skills in machine learning, artificial intelligence, and big data analytics. This shortage can lead to overburdened existing staff, delays in project implementation, and a slower pace of digital transformation. Additionally, the competitive nature of the job market means that companies may have to offer higher salaries and incentives to attract top talent, which can strain budgets. To address this challenge, the industry must invest in training and development programs, fostering partnerships with educational institutions, and promoting STEM initiatives to build a skilled workforce capable of driving analytics initiatives in the oil and gas sector.

Integration with Legacy Systems

The integration of advanced analytics solutions with existing legacy systems presents a significant challenge for the United States oil and gas analytics market. Many companies in the sector rely on traditional systems that have been in place for years, which can be inflexible and incompatible with modern analytics tools. This disparity often results in data silos, where valuable information is isolated within different departments or systems, hindering comprehensive analysis. Transitioning to new analytics platforms requires not only significant financial investment but also careful planning and execution to ensure a seamless integration process. Furthermore, the resistance to change among employees accustomed to legacy systems can impede the adoption of new technologies. Organizations must navigate these complexities while ensuring that critical operations remain uninterrupted during the transition. Failure to effectively integrate analytics solutions can lead to missed opportunities for optimizing performance, improving decision-making, and enhancing overall competitiveness. Therefore, companies must develop strategic approaches to modernize their IT infrastructure while minimizing disruptions and maximizing the value derived from analytics.

High Implementation Costs

The high costs associated with implementing advanced analytics solutions pose a considerable challenge in the United States oil and gas analytics market. While these technologies offer significant potential for improving operational efficiency and decision-making, the initial investment can be substantial. Companies must consider various expenses, including software licenses, hardware infrastructure, data storage solutions, and ongoing maintenance and support. Additionally, organizations often need to invest in training programs to equip employees with the skills necessary to utilize these advanced tools effectively. For smaller companies or those operating with tight budgets, these costs can be prohibitive, leading to hesitancy in adopting analytics solutions. Furthermore, the return on investment (ROI) for analytics initiatives may not be immediately apparent, creating additional barriers to adoption. Companies may struggle to justify the upfront expenditure without clear evidence of potential benefits. To overcome this challenge, organizations must carefully assess their analytics needs, explore scalable solutions, and consider phased implementation strategies that allow for gradual investment while demonstrating value over time.

Rapid Technological Advancements

The fast-paced nature of technological advancements in the analytics landscape presents a challenge for the United States oil and gas analytics market. As new tools, platforms, and methodologies emerge, companies must continually adapt to remain competitive and leverage the latest innovations. This rapid evolution can create uncertainty and complicate decision-making processes, as organizations must evaluate which technologies are best suited for their specific needs. Additionally, the constant influx of new solutions can overwhelm companies, leading to analysis paralysis or misguided investments in tools that may not deliver the desired outcomes. Moreover, staying abreast of industry trends and advancements requires ongoing investment in research and development, further straining budgets. Companies also face the risk of obsolescence if they do not keep pace with technological changes, potentially losing their competitive edge. To navigate this challenge, organizations must establish a culture of continuous learning, foster partnerships with technology providers, and remain agile in their approach to adopting new analytics solutions that align with their strategic objectives. This proactive stance will enable them to harness the power of emerging technologies while mitigating the risks associated with rapid change.

Key Market Trends

Integration of Artificial Intelligence and Machine Learning

The integration of artificial intelligence (AI) and machine learning (ML) is a prominent trend in the United States oil and gas analytics market. As companies strive to enhance operational efficiency and decision-making, AI and ML technologies are being increasingly employed to analyze vast datasets generated from exploration, production, and supply chain activities. These technologies enable predictive analytics, allowing companies to anticipate equipment failures, optimize drilling performance, and enhance reservoir management. For example, AI algorithms can process historical production data and identify patterns that inform future drilling strategies. Furthermore, machine learning models can improve the accuracy of forecasting by learning from new data inputs, enabling companies to make real-time adjustments to their operations. The ability to leverage AI and ML not only enhances operational efficiency but also reduces costs and minimizes downtime, making them essential tools for companies looking to maintain a competitive edge in a rapidly evolving market. As the technology matures, its adoption will likely expand, leading to more sophisticated analytics solutions that drive innovation across the industry.

Growing Importance of Real-time Data Analytics

The demand for real-time data analytics is transforming the oil and gas sector, with companies increasingly recognizing the value of immediate insights for decision-making. Real-time analytics allow operators to monitor drilling operations, production levels, and equipment performance as they occur, enabling quicker responses to changing conditions. This capability is crucial for minimizing operational risks and optimizing resource allocation. For instance, by analyzing data from sensors embedded in drilling equipment, companies can detect anomalies and address potential issues before they escalate, thereby preventing costly downtime. The proliferation of IoT devices further facilitates real-time data collection and analysis, offering comprehensive visibility into operational metrics. As the industry seeks to improve efficiency and reduce costs, the reliance on real-time analytics is expected to grow. Companies that successfully implement these systems can enhance their operational agility, leading to improved safety and productivity. Consequently, the trend towards real-time data analytics is reshaping the landscape of the U.S. oil and gas analytics market, positioning data-driven decision-making as a critical component of modern operations.

Focus on Sustainability and Environmental Compliance

The increasing emphasis on sustainability and environmental compliance is significantly

influencing the U.S. oil and gas analytics market. As regulatory pressures intensify and public scrutiny of environmental practices grows, companies are leveraging analytics to monitor their environmental impact and ensure compliance with regulations. Advanced analytics solutions enable operators to assess emissions, track waste management, and optimize resource utilization, contributing to more sustainable practices. By utilizing analytics to analyze environmental data, companies can identify areas for improvement, implement best practices, and minimize their carbon footprint. Moreover, the integration of sustainability metrics into business operations not only helps companies meet regulatory requirements but also enhances their reputation with stakeholders and investors. This trend is further supported by technological advancements that enable better monitoring and reporting of environmental data. As the industry continues to adapt to changing expectations regarding sustainability, the role of analytics in driving environmentally responsible practices will become increasingly vital, shaping the future of the U.S. oil and gas sector.

Segmental Insights

Deployment Mode Insights

On-premises segment dominates in the United States Oil and Gas Analytics market in 2023, due to several key factors that resonate with industry needs and operational preferences. One of the primary reasons for this dominance is the enhanced control that on-premises solutions provide. Many oil and gas companies handle sensitive data, including proprietary information about reserves, production techniques, and financial data. By utilizing on-premises systems, organizations can maintain strict control over their data security protocols, ensuring that sensitive information remains within their own IT infrastructure. This level of control is particularly critical in an industry where confidentiality and regulatory compliance are paramount.

Furthermore, on-premises analytics solutions often allow for greater customization compared to cloud-based alternatives. Oil and gas companies frequently operate under unique conditions and require tailored analytics solutions to meet specific operational demands. On-premises systems can be configured to align with the specific workflows, data types, and analytics needs of a company, enabling more effective data management and reporting.

Another factor contributing to the on-premises segment's dominance is the existing investments in IT infrastructure within many oil and gas companies. Many organizations have significant legacy systems in place that integrate with their operational processes.

Transitioning to cloud-based solutions can involve substantial costs and complexities, including data migration and system integration challenges. As a result, companies are more inclined to continue leveraging their current on-premises systems, especially if they have proven effective in managing analytics. Additionally, concerns surrounding data security, particularly with the increasing frequency of cyber threats, have prompted some organizations to prefer on-premises solutions over cloud-based options. On-premises systems allow for enhanced cybersecurity measures to be implemented directly by the organization, addressing specific vulnerabilities and regulatory requirements.

Regional Insights

Northeast dominates the United States Oil and Gas Analytics market in 2023, primarily due to its rich natural gas reserves, particularly from the Marcellus Shale formation. This area has become a hub for natural gas production, driving significant investments in analytics solutions to enhance operational efficiency, reduce costs, and improve decision-making processes. As companies in this region face increasing pressure to optimize production and manage resources effectively, the demand for advanced analytics tools has surged.

Furthermore, the Northeast has a well-established infrastructure that supports the oil and gas industry, including pipelines, processing facilities, and distribution networks. This robust infrastructure facilitates data collection and analysis, enabling operators to leverage real-time insights for better operational management. The availability of large datasets from drilling activities, production processes, and supply chain operations enhances the effectiveness of analytics solutions, making it easier for companies to monitor performance and identify areas for improvement. Another contributing factor is the growing focus on sustainability and environmental compliance within the region. Companies are increasingly utilizing analytics to monitor emissions, optimize resource usage, and adhere to regulatory requirements. By leveraging analytics, operators can minimize their environmental impact while ensuring compliance with stringent regulations, making them more competitive in a market that increasingly values sustainability.

Moreover, the Northeast is home to numerous technology firms and research institutions that foster innovation in analytics solutions. Collaborations between industry players and technology providers have led to the development of cutting-edge analytics tools tailored to the specific needs of oil and gas operators. This synergy enhances the region's capacity to adopt advanced analytics technologies rapidly.

Key Market Players

Halliburton Company

IBM Corporation

Siemens AG

Viridian Therapeutics, Inc.

Honeywell International Inc.

SAP SE

Oracle Corporation

Pioneer Natural Resources Company

Schlumberger Limited

Baker Hughes Holdings LLC

Report Scope:

In this report, the United States Oil and Gas Analytics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

United States Oil and Gas Analytics Market, By Component:

Solution

Service

United States Oil and Gas Analytics Market, By Deployment Mode:

On-premises

Cloud

United States Oil and Gas Analytics Market, By Application:

Upstream

Exploration & Drilling

Field Surveillance & Monitoring

Production Planning & Forecasting

Equipment Maintenance Management

Asset Performance

Workforce Management

Midstream

Pipeline SCADA

Fleet

Storage Optimization

Downstream

Commodity Trading

Demand Forecasting

Pricing

Refining

United States Oil and Gas Analytics Market, By Region:

Northeast

Southwest

West

Southeast

Midwest

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United States Oil and Gas Analytics Market.

Available Customizations:

United States Oil and Gas Analytics 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).

Contents

1. SERVICE OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Baseline Methodology
- 2.2. Key Industry Partners
- 2.3. Major Association and Secondary Sources
- 2.4. Forecasting Methodology
- 2.5. Data Triangulation & Validation
- 2.6. Assumptions and Limitations

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. UNITED STATES OIL AND GAS ANALYTICS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Component (Solution, Service)
 - 5.2.2. By Deployment Mode (On-premises, Cloud)
 - 5.2.3. By Application
 - 5.2.3.1. Upstream {Exploration & Drilling, Field Surveillance & Monitoring, Production Planning & Forecasting, Equipment Maintenance Management, Asset Performance, Workforce Management}
 - 5.2.3.2. Midstream {Pipeline SCADA, Fleet, Storage Optimization}
 - 5.2.3.3. Downstream {Commodity Trading, Demand Forecasting, Pricing, Refining}
 - 5.2.4. By Region (Northeast, Southwest, West, Southeast, Midwest)
- 5.3. By Company (2023)
- 5.4. Market Map

6. NORTHEAST UNITED STATES OIL AND GAS ANALYTICS MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Component

6.2.2. By Deployment Mode

6.2.3. By Application

6.2.3.1. Upstream

6.2.3.2. Midstream

6.2.3.3. Downstream

7. SOUTHWEST UNITED STATES OIL AND GAS ANALYTICS MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Component

7.2.2. By Deployment Mode

7.2.3. By Application

7.2.3.1. Upstream

7.2.3.2. Midstream

7.2.3.3. Downstream

8. WEST UNITED STATES OIL AND GAS ANALYTICS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Component

8.2.2. By Deployment Mode

8.2.3. By Application

8.2.3.1. Upstream

8.2.3.2. Midstream

8.2.3.3. Downstream

9. SOUTHEAST UNITED STATES OIL AND GAS ANALYTICS MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Component

9.2.2. By Deployment Mode

9.2.3. By Application

9.2.3.1. Upstream

9.2.3.2. Midstream

9.2.3.3. Downstream

10. MIDWEST UNITED STATES OIL AND GAS ANALYTICS MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Component

10.2.2. By Deployment Mode

10.2.3. By Application

10.2.3.1. Upstream

10.2.3.2. Midstream

10.2.3.3. Downstream

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS AND DEVELOPMENTS

13. UNITED STATES ECONOMIC PROFILE

14. COMPANY PROFILES

14.1. Halliburton Company

14.1.1. Business Overview

14.1.2. Key Revenue and Financials

14.1.3. Recent Developments

14.1.4. Key Personnel

14.1.5. Key Product/Services Offered

14.2.IBM Corporation

- 14.2.1. Business Overview
- 14.2.2. Key Revenue and Financials
- 14.2.3. Recent Developments
- 14.2.4. Key Personnel
- 14.2.5. Key Product/Services Offered

14.3.Siemens AG

- 14.3.1. Business Overview
- 14.3.2. Key Revenue and Financials
- 14.3.3. Recent Developments
- 14.3.4. Key Personnel
- 14.3.5. Key Product/Services Offered

14.4.Viridian Therapeutics, Inc.

- 14.4.1. Business Overview
- 14.4.2. Key Revenue and Financials
- 14.4.3. Recent Developments
- 14.4.4. Key Personnel
- 14.4.5. Key Product/Services Offered

14.5.Honeywell International Inc.

- 14.5.1. Business Overview
- 14.5.2. Key Revenue and Financials
- 14.5.3. Recent Developments
- 14.5.4. Key Personnel
- 14.5.5. Key Product/Services Offered

14.6.SAP SE

- 14.6.1. Business Overview
- 14.6.2. Key Revenue and Financials
- 14.6.3. Recent Developments
- 14.6.4. Key Personnel
- 14.6.5. Key Product/Services Offered

14.7.Oracle Corporation

- 14.7.1. Business Overview
- 14.7.2. Key Revenue and Financials
- 14.7.3. Recent Developments
- 14.7.4. Key Personnel
- 14.7.5. Key Product/Services Offered

14.8.Pioneer Natural Resources Company

- 14.8.1. Business Overview
- 14.8.2. Key Revenue and Financials

14.8.3. Recent Developments

14.8.4. Key Personnel

14.8.5. Key Product/Services Offered

14.9.Schlumberger Limited

14.9.1. Business Overview

14.9.2. Key Revenue and Financials

14.9.3. Recent Developments

14.9.4. Key Personnel

14.9.5. Key Product/Services Offered

14.10.Baker Hughes Holdings LLC

14.10.1. Business Overview

14.10.2. Key Revenue and Financials

14.10.3. Recent Developments

14.10.4. Key Personnel

14.10.5. Key Product/Services Offered

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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