

# **Veterinary Vaccines Market – Global Industry Size, Share, Trends, Opportunity & Forecast, 2018-2028 Segmented By Vaccine Type (Livestock Vaccine, Companion Animal Vaccine), By Technology (Live Attenuated Vaccines, Inactivated Vaccines, Toxoid Vaccines, Recombinant Vaccines, Other), By Region, Competition**

<https://marketpublishers.com/r/V7BB616C6C34EN.html>

Date: October 2023

Pages: 178

Price: US\$ 4,900.00 (Single User License)

ID: V7BB616C6C34EN

## **Abstracts**

In 2022, the Global Veterinary Vaccines Market reached a valuation of USD 8.44 billion, and it is expected to demonstrate impressive growth in the forecasted period, achieving a Compound Annual Growth Rate (CAGR) of 7.28% through 2028. This market is an essential component within the broader veterinary healthcare industry, encompassing the research, production, and distribution of vaccines designed to prevent and manage diseases in animals, including both companion animals (pets) and livestock. Veterinary vaccines play a pivotal role in preserving animal health, ensuring food security, and mitigating the spread of zoonotic diseases, which can be transmitted between animals and humans.

The population of companion animals, including dogs, cats, and horses, is continually increasing on a global scale. Pet owners are increasingly willing to invest in healthcare for their animals, including vaccinations, to safeguard their well-being and extend their lifespan.

Key Market Drivers

Rising Incidence of Animal Diseases

The global veterinary vaccine market is significantly influenced by the increasing incidence of infectious diseases among animals. These diseases can affect various species, including livestock (cattle, poultry, swine) and companion animals (dogs, cats). Examples of such diseases include foot-and-mouth disease, avian influenza, bovine respiratory disease, and canine parvovirus. Animal diseases can have severe economic consequences. Outbreaks can lead to reduced livestock productivity, increased mortality rates, and trade restrictions. For farmers and livestock producers, this translates into substantial financial losses. To mitigate these impacts, vaccines are developed and administered to prevent the occurrence and spread of these diseases. The concept of One Health emphasizes the interconnectedness of human, animal, and environmental health. Preventing animal diseases is not only essential for the well-being of animals but also for public health. Diseases that can jump from animals to humans (zoonoses) highlight the importance of veterinary vaccines in safeguarding both animal and human populations.

### Growing Awareness of Animal Welfare

There is a notable shift in public attitudes toward animal welfare, driven by increased awareness and concern for the well-being of animals. Pet owners are more willing to invest in healthcare for their pets, including vaccinations, to ensure their health and longevity. In the livestock industry, there is a growing recognition that healthy and well-cared-for animals lead to higher productivity and food safety. Consumers are increasingly demanding ethically and sustainably sourced animal products, which incentivizes livestock producers to prioritize animal health and welfare. Regulatory bodies and animal welfare organizations have introduced guidelines and certification programs that encourage the humane treatment of animals. These guidelines often include recommendations for disease prevention through vaccination.

### Technological Advancements in Vaccine Development

Advances in biotechnology and genomics have revolutionized vaccine development. Researchers can now identify antigens more precisely and design vaccines tailored to specific pathogens. This has led to the development of subunit vaccines and recombinant vaccines with improved safety profiles. Technological innovations have also improved vaccine delivery methods. Traditional injectable vaccines are being supplemented with alternatives such as oral vaccines and intranasal vaccines, which can be administered more easily and with reduced stress for animals. Modern vaccine development techniques enable the creation of vaccines that are both highly efficacious and safe. This instills confidence in veterinarians, pet owners, and livestock producers,

encouraging greater vaccine adoption.

### Government Initiatives and Regulations:

Many governments around the world have implemented mandatory vaccination programs for specific diseases in animals. For example, bovine brucellosis vaccination is required in cattle in some regions to prevent the disease's spread. Vaccination of livestock is often tied to food safety and international trade regulations. Governments may require certain vaccinations to ensure the safety of animal-derived products for human consumption and to facilitate international trade. Governments and public health agencies often fund research and development efforts related to animal vaccines. This financial support can lead to the discovery and development of new and improved vaccines for various animal species.

### Key Market Challenges

#### Regulatory Hurdles and Approval Processes

**Complex Regulatory Landscape:** Developing and marketing veterinary vaccines involves navigating a complex regulatory landscape. Different countries and regions have their own regulatory agencies and requirements for vaccine approval. Complying with these regulations can be time-consuming and costly for vaccine manufacturers.

**Stringent Safety and Efficacy Standards:** Regulatory agencies impose stringent safety and efficacy standards on veterinary vaccines to ensure the well-being of animals and prevent potential risks to human health. Meeting these standards often requires extensive preclinical and clinical testing, which can be expensive and time intensive.

**Vaccine Registration Delays:** Delays in the registration and approval of veterinary vaccines can significantly slow down market growth. Manufacturers must invest in research, development, and clinical trials, and any delays in the approval process can hinder their ability to bring vaccines to market in a timely manner.

#### Market Fragmentation and Competitive Challenges

The global veterinary vaccine market is fragmented, with many manufacturers, including both multinational pharmaceutical companies and smaller, specialized firms. This fragmentation can lead to intense competition and pricing pressures. Customers, such as farmers and pet owners, are often price-sensitive when it comes to veterinary

vaccines. This can make it challenging for vaccine manufacturers to maintain profitability, particularly when competing with lower-cost alternatives. Expanding into emerging markets can be difficult due to variations in regulatory requirements, distribution channels, and local preferences. Manufacturers must adapt their strategies to suit each market, which can be resource intensive.

### Emerging Diseases and Antigenic Variability

The emergence of new and unpredictable animal diseases can pose significant challenges to the veterinary vaccine market. Developing vaccines for these diseases often requires extensive research and development, and the timeline to market may not align with the urgency of addressing disease outbreaks. Some pathogens, like influenza viruses, exhibit antigenic variability, meaning they can mutate over time. This variability can render existing vaccines less effective, necessitating frequent updates and reformulations. This poses technical and logistical challenges for vaccine manufacturers to stay ahead of evolving pathogens. Some diseases, particularly zoonotic diseases that can be transmitted between animals and humans, may have reservoir hosts in wildlife. Controlling these diseases through vaccination can be challenging due to the difficulty of vaccinating wild animals.

### Key Market Trends

#### Increasing Focus on Preventive Healthcare:

One prominent trend in the global veterinary vaccine market is the increasing emphasis on preventive healthcare for animals. Pet owners and livestock producers are recognizing the importance of vaccination as a proactive measure to protect animals from infectious diseases. Preventive healthcare not only improves the overall well-being of animals but also reduces the economic burden associated with treating sick animals.

This trend is particularly evident in the companion animal sector, where pet owners are more willing to invest in routine vaccinations to ensure the health and longevity of their pets. In the livestock industry, preventive vaccination is becoming standard practice to maintain herd health and productivity.

#### Advancements in Vaccine Technology:

Advances in vaccine technology are driving innovation in the veterinary vaccine market. These advancements encompass various aspects of vaccine development, production,

and administration: Researchers are exploring new vaccine platforms, such as DNA vaccines, recombinant vaccines, and virus-like particle vaccines. These platforms offer improved safety, efficacy, and ease of production. Improved adjuvants and delivery systems are enhancing vaccine effectiveness and reducing the need for booster shots. These innovations are making vaccines more convenient for both pet owners and livestock producers. Advances in genomics and antigen discovery are enabling the development of targeted and customized vaccines that provide better protection against specific pathogens. This trend is particularly relevant for addressing emerging and evolving diseases.

#### Globalization and Market Expansion:

The global veterinary vaccine market is experiencing significant expansion, driven by globalization and increased trade in animal products. Several related trends contribute to this growth:

Emerging markets in Asia, Latin America, and Africa are witnessing a rise in demand for veterinary vaccines. As these regions undergo economic development and urbanization, the demand for animal protein and pet ownership is increasing, driving the need for vaccines. The international trade of animals and animal products necessitates compliance with international health and safety standards. This, in turn, boosts the demand for vaccines to ensure the health and safety of animals in transit. Vaccine manufacturers are forming collaborations and partnerships to expand their global presence and access new markets. This includes joint ventures, licensing agreements, and distribution partnerships.

#### Segmental Insights

##### Vaccine Type Insights

Based on the category of Vaccine Type, the livestock vaccine segment emerged as the dominant player in the global market for Veterinary Vaccines in 2022. The dominance of the livestock vaccine segment in the global veterinary vaccine market can be attributed to several factors related to the types of vaccines used in the livestock industry. Livestock vaccines are specifically designed to address the health and disease prevention needs of various farm animals, including cattle, swine, poultry, sheep, and goats.

The Livestock vaccines encompass a wide range of vaccine types tailored to different

livestock species and specific diseases. This diversity includes vaccines for diseases like foot-and-mouth disease, bovine respiratory disease, avian influenza, porcine circovirus-associated disease, and many others.

The livestock industry places a strong emphasis on preventive healthcare to maintain herd health and productivity. Vaccination is a cornerstone of this approach. Livestock vaccines are formulated to protect animals from diseases that can cause substantial economic losses through reduced production, increased mortality, and trade restrictions. The global livestock population is immense, with billions of animals raised for meat, milk, and other products. For example, there are over 1.5 billion cattle and nearly 25 billion chickens globally. Such large populations create a significant demand for vaccines to protect these animals from infectious diseases. Livestock farming is a vital component of the global agriculture industry, contributing to food security and economic stability in many countries. Consequently, the economic impact of disease outbreaks in livestock can be substantial, driving the need for vaccination. Livestock can be vulnerable to a range of infectious diseases, some of which are highly contagious and can spread rapidly within herds or flocks. Controlling and preventing these diseases often requires a multifaceted approach, with vaccination being a critical component. Some livestock diseases can have zoonotic potential, meaning they can be transmitted from animals to humans. Preventing these diseases through vaccination is not only essential for animal health but also for public health. These factors are expected to drive the growth of this segment.

### Technology Insights

The live attenuated vaccines segment is projected to experience rapid growth during the forecast period. Live attenuated vaccines are a category of vaccines that contain weakened or modified forms of the pathogen they target. Live attenuated vaccines often provide a stronger and more sustained immune response compared to other types of vaccines. This is because they closely mimic natural infections, stimulating both humoral (antibody) and cellular immunity.

In many cases, live attenuated vaccines require fewer doses to confer long-lasting immunity. This is particularly advantageous in veterinary settings where administering multiple doses can be challenging, especially for farm animals. Live attenuated vaccines have played a crucial role in eradicating or controlling several devastating animal diseases. For example, the use of live attenuated vaccines has been instrumental in controlling diseases like rinderpest in cattle and pseudorabies in pigs. In the event of disease outbreaks, live attenuated vaccines can be rapidly deployed to control the



spread of the disease and protect vulnerable populations of animals. Live attenuated vaccines often provide cross-protection against multiple strains or variants of a pathogen. This is particularly valuable when dealing with pathogens that exhibit antigenic variation. Live attenuated vaccines can be used to protect against a wide range of viral and bacterial diseases, making them versatile tools for veterinarians and livestock producers. These factors collectively contribute to the growth of this segment.

## Regional Insights

North America emerged as the dominant player in the global Veterinary Vaccines market in 2022, holding the largest market share in terms of value. The United States has a significant population of pets, including dogs, cats, and horses, leading to a substantial demand for companion animal vaccines. North America boasts a well-developed livestock industry, with high-quality beef and dairy production. This has led to a substantial need for livestock vaccines to maintain herd health and productivity. The region is home to leading veterinary research institutions and vaccine manufacturers, driving innovation and the development of new vaccine technologies.

The Asia-Pacific market is poised to be the fastest-growing market, offering lucrative growth opportunities for Veterinary Vaccines players during the forecast period. As APAC countries undergo rapid urbanization and economic development, there is an increasing demand for animal protein, leading to a growing livestock industry. Countries like China and India have rapidly expanding pet populations, with pet owners showing greater awareness of and willingness to invest in pet healthcare, including vaccinations. Some APAC countries face ongoing challenges with endemic diseases in livestock and poultry. Governments and farmers are increasingly turning to vaccines as a means of disease control to ensure food security. The region is witnessing increased investment in veterinary healthcare infrastructure, including vaccination programs and research and development of new vaccines. Some APAC governments are implementing policies to boost the production of animal-derived products, which includes promoting vaccination to improve livestock health.

## Key Market Players

Zoetis Inc.

Merck & Co. Inc.

Virbac SA

Hester Biosciences Limited

Elanco Animal Health

Boehringer Ingelheim International GmbH

Ceva Sante Animale

Phibro Animal Health Corporation

HIPRA

Report Scope:

In this report, the Global Veterinary Vaccines Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Veterinary Vaccines Market, By Vaccine Type:

Livestock Vaccine

Companion Animal Vaccine

Veterinary Vaccines Market, By Technology:

Live Attenuated Vaccines

Inactivated Vaccines

Toxoid Vaccines

Recombinant Vaccines

Other

Veterinary Vaccines Market, By Region:



North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Veterinary Vaccines Market.

Available Customizations:

Global Veterinary Vaccines market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

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

## Contents

### **1. PRODUCT 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. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### **3. EXECUTIVE SUMMARY**

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries

### **4. OVERVIEW OF MARKET DRIVERS, CHALLENGES, TRENDS**

### **5. VOICE OF CUSTOMER**

### **6. GLOBAL VETERINARY VACCINES MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Vaccine Type (Livestock Vaccine, Companion Animal Vaccine)
  - 6.2.2. By Technology (Live Attenuated Vaccines, Inactivated Vaccines, Toxoid Vaccines, Recombinant Vaccines, Other)

- 6.2.3. By Region
- 6.2.4. By Company (2022)
- 6.3. Market Map

## **7. NORTH AMERICA VETERINARY VACCINES MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By Vaccine Type
  - 7.2.2. By Technology
  - 7.2.3. By Country
- 7.3. North America: Country Analysis
  - 7.3.1. United States Veterinary Vaccines Market Outlook
    - 7.3.1.1. Market Size & Forecast
      - 7.3.1.1.1. By Value
    - 7.3.1.2. Market Share & Forecast
      - 7.3.1.2.1. By Vaccine Type
      - 7.3.1.2.2. By Technology
  - 7.3.2. Canada Veterinary Vaccines Market Outlook
    - 7.3.2.1. Market Size & Forecast
      - 7.3.2.1.1. By Value
    - 7.3.2.2. Market Share & Forecast
      - 7.3.2.2.1. By Vaccine Type
      - 7.3.2.2.2. By Technology
  - 7.3.3. Mexico Veterinary Vaccines Market Outlook
    - 7.3.3.1. Market Size & Forecast
      - 7.3.3.1.1. By Value
    - 7.3.3.2. Market Share & Forecast
      - 7.3.3.2.1. By Vaccine Type
      - 7.3.3.2.2. By Technology

## **8. EUROPE VETERINARY VACCINES MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast
  - 8.2.1. By Vaccine Type
  - 8.2.2. By Technology

### 8.3. Europe: Country Analysis

#### 8.3.1. Germany Veterinary Vaccines Market Outlook

##### 8.3.1.1. Market Size & Forecast

###### 8.3.1.1.1. By Value

##### 8.3.1.2. Market Share & Forecast

###### 8.3.1.2.1. By Vaccine Type

###### 8.3.1.2.2. By Technology

#### 8.3.2. United Kingdom Veterinary Vaccines Market Outlook

##### 8.3.2.1. Market Size & Forecast

###### 8.3.2.1.1. By Value

##### 8.3.2.2. Market Share & Forecast

###### 8.3.2.2.1. By Vaccine Type

###### 8.3.2.2.2. By Technology

#### 8.3.3. Italy Veterinary Vaccines Market Outlook

##### 8.3.3.1. Market Size & Forecast

###### 8.3.3.1.1. By Value

##### 8.3.3.2. Market Share & Forecast

###### 8.3.3.2.1. By Vaccine Type

###### 8.3.3.2.2. By Technology

#### 8.3.4. France Veterinary Vaccines Market Outlook

##### 8.3.4.1. Market Size & Forecast

###### 8.3.4.1.1. By Value

##### 8.3.4.2. Market Share & Forecast

###### 8.3.4.2.1. By Vaccine Type

###### 8.3.4.2.2. By Technology

#### 8.3.5. Spain Veterinary Vaccines Market Outlook

##### 8.3.5.1. Market Size & Forecast

###### 8.3.5.1.1. By Value

##### 8.3.5.2. Market Share & Forecast

###### 8.3.5.2.1. By Vaccine Type

###### 8.3.5.2.2. By Technology

## 9. ASIA-PACIFIC VETERINARY VACCINES MARKET OUTLOOK

### 9.1. Market Size & Forecast

#### 9.1.1. By Value

### 9.2. Market Share & Forecast

#### 9.2.1. By Vaccine Type

#### 9.2.2. By Technology

- 9.3. Asia-Pacific: Country Analysis
  - 9.3.1. China Veterinary Vaccines Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Vaccine Type
      - 9.3.1.2.2. By Technology
  - 9.3.2. India Veterinary Vaccines Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Vaccine Type
      - 9.3.2.2.2. By Technology
  - 9.3.3. Japan Veterinary Vaccines Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Vaccine Type
      - 9.3.3.2.2. By Technology
  - 9.3.4. South Korea Veterinary Vaccines Market Outlook
    - 9.3.4.1. Market Size & Forecast
      - 9.3.4.1.1. By Value
    - 9.3.4.2. Market Share & Forecast
      - 9.3.4.2.1. By Vaccine Type
      - 9.3.4.2.2. By Technology
  - 9.3.5. Australia Veterinary Vaccines Market Outlook
    - 9.3.5.1. Market Size & Forecast
      - 9.3.5.1.1. By Value
    - 9.3.5.2. Market Share & Forecast
      - 9.3.5.2.1. By Vaccine Type
      - 9.3.5.2.2. By Technology

## **10. SOUTH AMERICA VETERINARY VACCINES MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Vaccine Type
  - 10.2.2. By Technology

- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Veterinary Vaccines Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Vaccine Type
      - 10.3.1.2.2. By Technology
  - 10.3.2. Argentina Veterinary Vaccines Market Outlook
    - 10.3.2.1. Market Size & Forecast
      - 10.3.2.1.1. By Value
    - 10.3.2.2. Market Share & Forecast
      - 10.3.2.2.1. By Vaccine Type
      - 10.3.2.2.2. By Technology
  - 10.3.3. Colombia Veterinary Vaccines Market Outlook
    - 10.3.3.1. Market Size & Forecast
      - 10.3.3.1.1. By Value
    - 10.3.3.2. Market Share & Forecast
      - 10.3.3.2.1. By Vaccine Type
      - 10.3.3.2.2. By Technology

## **11. MIDDLE EAST AND AFRICA VETERINARY VACCINES MARKET OUTLOOK**

- 11.1. Market Size & Forecast
  - 11.1.1. By Value
- 11.2. Market Share & Forecast
  - 11.2.1. By Vaccine Type
  - 11.2.2. By Technology
- 11.3. MEA: Country Analysis
  - 11.3.1. South Africa Veterinary Vaccines Market Outlook
    - 11.3.1.1. Market Size & Forecast
      - 11.3.1.1.1. By Value
    - 11.3.1.2. Market Share & Forecast
      - 11.3.1.2.1. By Vaccine Type
      - 11.3.1.2.2. By Technology
  - 11.3.2. Saudi Arabia Veterinary Vaccines Market Outlook
    - 11.3.2.1. Market Size & Forecast
      - 11.3.2.1.1. By Value
    - 11.3.2.2. Market Share & Forecast
      - 11.3.2.2.1. By Vaccine Type



- 11.3.2.2.2. By Technology
- 11.3.3. UAE Veterinary Vaccines Market Outlook
  - 11.3.3.1. Market Size & Forecast
    - 11.3.3.1.1. By Value
  - 11.3.3.2. Market Share & Forecast
    - 11.3.3.2.1. By Vaccine Type
    - 11.3.3.2.2. By Technology

## **12. MARKET DYNAMICS**

- 12.1. Drivers & Challenges

## **13. MARKET TRENDS & DEVELOPMENTS**

- 13.1. Recent Developments
- 13.2. Product Launches
- 13.3. Mergers & Acquisitions

## **14. GLOBAL VETERINARY VACCINES MARKET: SWOT ANALYSIS**

## **15. COMPETITIVE LANDSCAPE**

- 15.1. Business Overview
- 15.2. Technology Offerings
- 15.3. Recent Developments
- 15.4. Key Personnel
- 15.5. SWOT Analysis
  - 15.5.1. Zoetis Inc.
  - 15.5.2. Merck & Co. Inc.
  - 15.5.3. Virbac
  - 15.5.4. Hester Biosciences Limited
  - 15.5.5. Elanco Animal Health
  - 15.5.6. Boehringer Ingelheim International GmbH
  - 15.5.7. Ceva Sante Animale
  - 15.5.8. Phibro Animal Health Corporation
  - 15.5.9. HIPRA

## **16. STRATEGIC RECOMMENDATIONS**

## 17. ABOUT US & DISCLAIMER

## I would like to order

Product name: Veterinary Vaccines Market – Global Industry Size, Share, Trends, Opportunity & Forecast, 2018-2028 Segmented By Vaccine Type (Livestock Vaccine, Companion Animal Vaccine), By Technology (Live Attenuated Vaccines, Inactivated Vaccines, Toxoid Vaccines, Recombinant Vaccines, Other), By Region, Competition

Product link: <https://marketpublishers.com/r/V7BB616C6C34EN.html>

Price: US\$ 4,900.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/V7BB616C6C34EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below  
and fax the completed form to +44 20 7900 3970