

White Cement Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (White Portland Cement, White Masonry Cement, and Others) By Pack Size (1Kg, 5Kg, 25Kg, 50Kg) By End User (Residential, Commercial, Industrial, Infrastructure), By Region, By Competition Forecast & Opportunities, 2018-2028F

<https://marketpublishers.com/r/WB82016404B1EN.html>

Date: November 2023

Pages: 190

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

ID: WB82016404B1EN

Abstracts

Global White Cement Market has valued at USD 4.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.19% through 2028

The white cement market is a specialized segment of the construction materials industry that deals exclusively with white cement products. White cement, unlike traditional gray cement, is distinguished by its pure white colour and is known for its aesthetic appeal and versatility in architectural and decorative applications. It is produced using raw materials with low iron and manganese content, resulting in a bright white finish when mixed with aggregates and additives. The white cement market encompasses the production, distribution, and utilization of white cement in various sectors, including construction, infrastructure development, residential, healthcare, arts and culture, and industrial applications. Key drivers of this market include demand in construction projects for visually appealing surfaces, growing interest in luxury and high-end residential properties, and requirements for sterile environments in healthcare and pharmaceutical industries. Government policies, environmental regulations, and trade factors also influence the dynamics of the white cement market.

Key Market Drivers

Increasing Demand in Construction and Infrastructure Projects

White cement is a specialized type of cement known for its aesthetic appeal and ability to create bright, colorful, and visually appealing surfaces. One of the primary drivers of the global white cement market is the increasing demand for white cement in construction and infrastructure projects worldwide. **Construction and Architectural Projects:** White cement is highly valued in architectural designs, decorative concrete, and interior and exterior finishes. It is used to create stunning facades, countertops, flooring, and intricate architectural details. Growing interest in modern and luxurious building designs, coupled with the expanding construction industry, is driving the demand for white cement. **Infrastructure Development:** The development of infrastructure, including bridges, highways, airports, and public spaces, often requires durable and aesthetically pleasing materials. White cement is used to produce concrete with high compressive strength and durability, making it a preferred choice for infrastructure projects.

Rising Demand in the Residential Construction Sector

The residential construction sector represents a significant driver of the global white cement market. There is a growing trend toward the use of white cement in residential projects for various applications:

Luxury Homes: White cement is often used in luxury homes and high-end residential properties to achieve a modern and elegant aesthetic. It is employed for flooring, walls, countertops, and decorative elements.

Outdoor Spaces: In residential landscaping, white cement is used to create attractive and durable outdoor surfaces, such as patios, pathways, and pool decks.

Interior Decor: Homeowners and interior designers use white cement for decorative features like fireplaces, sinks, and custom furniture, contributing to the market's growth.

Expanding Use in the Healthcare and Pharmaceutical Industries

The healthcare and pharmaceutical industries have a growing need for hygienic and easy-to-maintain facilities. White cement is preferred in these industries due to its cleanliness, resistance to stains, and ability to create sterile environments. Key applications include:

Hospital and Clinic Construction: White cement is used for flooring and wall surfaces in healthcare facilities to ensure a sterile and visually pleasing environment.

Pharmaceutical Manufacturing: The pharmaceutical industry relies on white cement for cleanroom construction and specialized facilities where hygiene and cleanliness are paramount.

Growing Popularity in the Arts and Culture Sector

White cement has gained popularity in the arts and culture sector due to its versatility and aesthetic appeal:

Sculptures and Art Installations: Artists use white cement to create sculptures, art installations, and intricate architectural designs, contributing to the demand for white cement in this sector.

Cultural Heritage Preservation: White cement is employed in the restoration and preservation of historical buildings, monuments, and cultural heritage sites.

Increasing Use in the Oil and Gas Industry

White cement is used in the oil and gas industry for specific applications such as:

Oil Well Cementing: White cement is employed in oil well cementing operations to secure the well casing and prevent gas or fluid migration.

Oilfield Services: The oil and gas industry uses white cement for various applications, including the sealing of wellbores and specialized construction within oilfield facilities.

Technological Advancements and Product Innovation

Technological advancements and ongoing product innovation in the manufacturing of white cement contribute to the market's growth:

Improved Formulations: Manufacturers are continually developing advanced formulations to enhance the performance characteristics of white cement, making it more durable and versatile.

Sustainable Production: With an increasing focus on sustainability, white cement

manufacturers are adopting eco-friendly production methods and incorporating recycled materials into their products.

In conclusion, the global white cement market is driven by increasing demand in construction and infrastructure projects, the residential construction sector, healthcare and pharmaceutical industries, the arts and culture sector, the oil and gas industry, and ongoing technological advancements and product innovation. These drivers collectively contribute to the growth and diversification of the white cement market.

Government Policies are Likely to Propel the Market

Building Codes and Standards for Construction Materials

Government authorities worldwide establish building codes and standards that dictate the use of construction materials, including white cement. These regulations stipulate quality, safety, and performance criteria for materials used in construction and infrastructure projects.

Purpose: Building codes and standards aim to ensure the safety and durability of structures, protect public health, and promote environmentally sustainable construction practices.

Impact on the White Cement Market: Stringent building codes that prioritize the use of high-quality construction materials, including white cement, drive demand for premium cement products. Compliance with these standards is often a prerequisite for construction projects, boosting the market for white cement.

Environmental Regulations and Sustainability Initiatives

Government bodies worldwide implement environmental regulations and sustainability initiatives that influence the production and use of white cement. These policies address emissions, resource utilization, and environmental impact.

Purpose: Environmental regulations and sustainability initiatives aim to reduce the carbon footprint of construction materials, promote resource conservation, and mitigate environmental degradation associated with cement production.

Impact on the White Cement Market: Governments may encourage or mandate the adoption of eco-friendly manufacturing processes, such as carbon capture and

utilization, and promote the use of white cement with lower environmental impact, leading to market growth.

Trade Tariffs and Import/Export Regulations

Trade policies, including tariffs and import/export regulations, significantly affect the global white cement market. Governments use trade policies to control the flow of cement products across borders, influencing market dynamics.

Purpose: Trade policies are implemented to protect domestic industries, ensure fair competition, and regulate imports and exports of cement products.

Impact on the White Cement Market: Tariffs and trade restrictions can impact the cost of white cement products, affect market competition, and influence sourcing decisions for construction projects. Changes in trade policies may lead to shifts in market dynamics.

Infrastructure Investment and Public Projects

Government investment in infrastructure and public projects has a direct impact on the demand for white cement. Infrastructure development policies, funding allocation, and project prioritization influence market growth.

Purpose: Governments invest in infrastructure to stimulate economic growth, enhance transportation networks, and improve public services, such as healthcare and education.

Impact on the White Cement Market: Increased infrastructure spending leads to higher demand for white cement for use in construction, including bridges, highways, airports, and public facilities.

Taxation and Incentive Programs

Taxation policies and incentive programs can affect the production and use of white cement. Governments may implement tax incentives, subsidies, or deductions to encourage specific industry practices or investments.

Purpose: Taxation policies and incentives aim to promote economic growth, innovation, and sustainable practices within the cement industry.

Impact on the White Cement Market: Tax benefits or incentives for sustainable production processes, energy efficiency, or the use of recycled materials can drive innovation and influence purchasing decisions, impacting the white cement market.

Quality and Safety Regulations for Construction

Governments establish and enforce regulations related to the quality and safety of construction materials. These regulations set standards for the performance and characteristics of white cement used in construction.

Purpose: Quality and safety regulations are designed to protect public safety, ensure structural integrity, and minimize construction-related accidents and failures.

Impact on the White Cement Market: Compliance with quality and safety regulations is essential for construction projects. White cement manufacturers must meet these standards to supply products for construction, driving demand for compliant products.

In conclusion, government policies and regulations in areas such as building codes, environmental sustainability, trade, infrastructure investment, taxation, and quality standards significantly influence the global white cement market. Manufacturers and stakeholders in the white cement industry closely monitor and adapt to these policies to ensure compliance and capitalize on market opportunities.

Key Market Challenges

Fluctuating Raw Material Prices and Availability

One of the key challenges facing the global white cement market is the fluctuation in raw material prices and availability. The primary raw materials for white cement production are limestone and kaolin clay, which must meet stringent purity and quality requirements to produce high-quality white cement. The challenges related to raw materials include:

Price Volatility: The prices of raw materials for white cement production can be highly volatile due to factors such as mining regulations, supply-demand dynamics, and geopolitical issues. Any significant increase in raw material prices can have a direct impact on the production cost of white cement.

Dependence on Limited Sources: High-quality limestone and kaolin clay suitable for

white cement production are not readily available in all regions. This leads to a heavy dependence on specific mining sources, and any disruptions in the supply chain can affect production.

Environmental Regulations: Mining activities for these raw materials are subject to environmental regulations, which can result in increased production costs due to compliance requirements and the need for sustainable mining practices.

Mitigation Strategies:

Diversification of Raw Material Sources: White cement manufacturers are exploring new sources and suppliers of raw materials to reduce dependence on limited sources. This includes international sourcing and partnerships with mining companies.

Recycling and Waste Utilization: Some manufacturers are investigating recycling and waste utilization methods to reduce the reliance on traditional raw materials. For example, by using waste materials or byproducts from other industries in the production process.

Advanced Mining and Extraction Technologies: Investments in advanced mining and extraction technologies can help optimize the utilization of existing raw material sources and improve efficiency.

Intense Competition and Price Sensitivity

The global white cement market is characterized by intense competition among manufacturers. Price sensitivity among buyers, particularly in the construction sector, poses a significant challenge. Key aspects of this challenge include:

Competitive Market: The white cement market is highly competitive, with numerous manufacturers operating globally. This competition puts pressure on pricing strategies and profit margins.

Price Sensitivity: In many construction projects, cost considerations are paramount. As a result, buyers, including construction companies and contractors, often seek cost-effective alternatives to white cement, which can impact demand.

Market Entry Barriers: The cost of establishing a white cement production facility is high, leading to limited market entry by new players. Existing manufacturers, therefore, have

substantial market control and influence over prices.

Mitigation Strategies:

Product Differentiation: White cement manufacturers are investing in product differentiation by offering specialized white cement products with unique properties and performance characteristics. This can justify higher prices based on value-added features.

Market Expansion: Expanding into new geographic markets and diversifying the customer base can help reduce dependence on specific regions or customer segments, potentially mitigating the impact of price sensitivity in any one area.

Customer Education: Educating buyers about the benefits and applications of white cement, including its aesthetic and performance advantages, can help justify its cost and reduce the emphasis on price alone.

Efficiency Improvements: Manufacturers are continually seeking ways to improve production efficiency and reduce costs without compromising product quality. This can help maintain competitiveness in a price-sensitive market.

In conclusion, the global white cement market faces challenges related to fluctuating raw material prices and availability, as well as intense competition and price sensitivity. Manufacturers are adopting various strategies to address these challenges, including diversifying raw material sources, exploring alternative materials, investing in differentiation, and expanding their market presence. Overcoming these challenges requires a combination of innovation, efficiency, and strategic positioning in the market.

Segmental Insights

Residential Insights

The residential segment had the largest market share in 2022 & expected to maintain in the forecast period. The residential construction sector often leads in adopting architectural trends. White cement is favored for its ability to create aesthetically pleasing surfaces, including facades, walls, and flooring. Its versatility makes it suitable for a wide range of design styles, from contemporary to traditional. High-end residential properties, including luxury homes and upscale apartments, frequently use white cement for its premium appearance. White surfaces are associated with luxury and

elegance, making them a popular choice in this segment. White cement is used extensively in interior design for residential spaces. It can create stunning countertops, fireplace surrounds, and decorative elements. Homeowners and interior designers value white cement for its clean and modern look. In residential landscaping, white cement is employed to create attractive and durable outdoor surfaces, such as patios, pathways, and pool decks. Its ability to withstand outdoor conditions adds to its appeal in the residential sector. In renovation projects, especially in historic or heritage home restoration, white cement is used to replicate traditional finishes. Its use in restoration contributes to its presence in the residential market. Some homeowners undertake do-it-yourself (DIY) projects that involve white cement. These projects can range from crafting decorative items to small-scale home improvements, increasing residential demand.

White Portland Cement Insights

The White Portland Cement segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. White Portland Cement is incredibly versatile and can be used in a wide range of construction applications. It can serve as a direct substitute for gray cement in most concrete and mortar mixes, making it suitable for virtually any construction project. White Portland Cement is renowned for its ability to create bright, clean, and visually appealing finishes. This makes it a preferred choice for architectural and decorative applications where aesthetics are crucial, such as facades, flooring, countertops, and sculptures. White Portland Cement can be easily tinted or colored using pigments, allowing for a wide spectrum of design possibilities. Architects, designers, and builders appreciate the ability to customize the color and texture of the final product to meet their specific project requirements. White Portland Cement is manufactured to meet stringent quality standards. It offers consistent performance and durability, which is crucial in construction projects where structural integrity is essential. White Portland Cement is widely produced and readily available from cement manufacturers worldwide. This accessibility ensures a stable supply for construction projects in different regions. White Portland Cement is a well-established product with recognized industry standards and specifications. Architects and builders often specify it by name in construction plans and contracts. White Portland Cement has a long history of successful use in a wide range of applications. Its performance and durability are well-documented, providing confidence to engineers, architects, and contractors. In many regions, there is a tradition of using White Portland Cement for prestigious construction projects. This tradition, combined with the preference for bright white finishes, contributes to its dominance in the market.

Regional Insights

The Asia-Pacific region had the leading market for white cement in the global market in 2022. The growth of the white cement market in Asia-Pacific is being driven by the growth of the construction industry in the region. China is the largest market for white cement in Asia-Pacific, followed by India and Indonesia.

Europe had the second-largest market for white cement in the global market in 2022. The growth of the white cement market in Europe is being driven by the increasing demand for white cement in decorative and architectural applications. Germany is the largest market for white cement in Europe, followed by Italy and France.

North America had the third-largest market for white cement in the global market in 2022. The growth of the white cement market in North America is being driven by the increasing demand for white cement in the construction industry. The United States is the largest market for white cement in North America, followed by Canada and Mexico.

Key Market Players

Holcim Group

Italcementi S.p.A

HeidelbergCement

CEMEX S.A.B. de C.V

Votorantim Cimentos Group

UltraTech Cement Limited

Anhui Conch Cement Co., Ltd.

Cimsa

Sika AG

Report Scope:

White Cement Market – Global Industry Size, Share, Trends, Opportunity, and ForecastSegmented By Type (White P...

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

White Cement Market, By Type:

White Portland Cement

White Masonry Cement

Others

White Cement Market, By Pack Size:

1Kg

5Kg

25Kg

50Kg

White Cement Market, By End User:

Residential

Commercial

Industrial

Infrastructure

White Cement 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 White Cement Market.

Available Customizations:

Global White Cement 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

2. RESEARCH METHODOLOGY

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL WHITE CEMENT MARKET OUTLOOK

5.1. Market Size & Forecast

5.1.1. By Value

5.2. Market Share & Forecast

5.2.1. By Type (White Portland Cement, White Masonry Cement, and Others)

5.2.2. By Pack Size (1Kg, 5Kg, 25Kg, 50Kg)

5.2.3. By End Use (Residential, Commercial, Industrial, Infrastructure)

5.2.4. By Region

5.2.5. By Company (2022)

5.3. Market Map

6. NORTH AMERICA WHITE CEMENT MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Type

6.2.2. By Pack Size

6.2.3. By End User

6.2.4. By Country

6.3. North America: Country Analysis

6.3.1. United States White Cement Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Type

6.3.1.2.2. By Pack Size

6.3.1.2.3. By End User

6.3.2. Canada White Cement Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Type

6.3.2.2.2. By Pack Size

6.3.2.2.3. By End User

6.3.3. Mexico White Cement Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Type

6.3.3.2.2. By Pack Size

6.3.3.2.3. By End User

7. EUROPE WHITE CEMENT MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Type

7.2.2. By Pack Size

7.2.3. By End User

7.2.4. By Country

7.3. Europe: Country Analysis

7.3.1. Germany White Cement 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 Type

7.3.1.2.2. By Pack Size

7.3.1.2.3. By End User

7.3.2. United Kingdom White Cement 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 Type

7.3.2.2.2. By Pack Size

7.3.2.2.3. By End User

7.3.3. Italy White Cement 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 Type

7.3.3.2.2. By Pack Size

7.3.3.2.3. By End User

7.3.4. France White Cement Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Type

7.3.4.2.2. By Pack Size

7.3.4.2.3. By End User

7.3.5. Spain White Cement Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Type

7.3.5.2.2. By Pack Size

7.3.5.2.3. By End User

8. ASIA-PACIFIC WHITE CEMENT MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Type

8.2.2. By Pack Size

8.2.3. By End User

8.2.4. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China White Cement 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 Type

8.3.1.2.2. By Pack Size

8.3.1.2.3. By End User

8.3.2. India White Cement 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 Type

8.3.2.2.2. By Pack Size

8.3.2.2.3. By End User

8.3.3. Japan White Cement 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 Type

8.3.3.2.2. By Pack Size

8.3.3.2.3. By End User

8.3.4. South Korea White Cement 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 Type

8.3.4.2.2. By Pack Size

8.3.4.2.3. By End User

8.3.5. Australia White Cement 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 Type

8.3.5.2.2. By Pack Size

8.3.5.2.3. By End User

9. SOUTH AMERICA WHITE CEMENT MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Type

9.2.2. By Pack Size

9.2.3. By End User

9.2.4. By Country

9.3. South America: Country Analysis

9.3.1. Brazil White Cement 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 Type

9.3.1.2.2. By Pack Size

9.3.1.2.3. By End User

9.3.2. Argentina White Cement 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 Type

9.3.2.2.2. By Pack Size

9.3.2.2.3. By End User

9.3.3. Colombia White Cement 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 Type

9.3.3.2.2. By Pack Size

9.3.3.2.3. By End User

10. MIDDLE EAST AND AFRICA WHITE CEMENT MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Type

10.2.2. By Pack Size

10.2.3. By End User

10.2.4. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa White Cement 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 Type

10.3.1.2.2. By Pack Size

10.3.1.2.3. By End User

10.3.2. Saudi Arabia White Cement 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 Type

10.3.2.2.2. By Pack Size

10.3.2.2.3. By End User

10.3.3. UAE White Cement 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 Type

10.3.3.2.2. By Pack Size

10.3.3.2.3. By End User

11. MARKET DYNAMICS

12. MARKET TRENDS & DEVELOPMENTS

13. COMPANY PROFILES

13.1. Holcim Group

13.2. Italcementi S.p.A

13.3. HeidelbergCement

13.4. CEMEX S.A.B. de C.V

13.5. Votorantim Cimentos Group

13.6. UltraTech Cement Limited

13.7. Anhui Conch Cement Co., Ltd.

13.8. Cimsa

13.9. Sika AG

14. STRATEGIC RECOMMENDATIONS

15. ABOUT US & DISCLAIMER

I would like to order

Product name: White Cement Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (White Portland Cement, White Masonry Cement, and Others) By Pack Size (1Kg, 5Kg, 25Kg, 50Kg) By End User (Residential, Commercial, Industrial, Infrastructure), By Region, By Competition Forecast & Opportunities, 2018-2028F

Product link: <https://marketpublishers.com/r/WB82016404B1EN.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

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/WB82016404B1EN.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