

Asia Pacific Abrasive Market Forecast to 2030 - Regional Analysis - by Material (Natural and Synthetic), Type [Bonded Abrasives (Discs, Wheels, and Others) and Coated Abrasives (Flap Discs, Fiber Discs, Hook & Loop Discs, Belts, Rolls, and Others)], Application (Automotive, Aerospace, Marine, Metal Fabrication, Woodworking, Electrical & Electronics, and Others), and Sales Channel (Direct and Indirect)

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Abstracts

The Asia Pacific abrasive market was valued at US\$ 21,280.50 million in 2022 and is expected to reach US\$ 31,642.71 million by 2030; it is estimated to register a CAGR of 5.1% from 2022 to 2030.

Rising Demand for Abrasives from Electrical and Electronics Industry Boosts Asia Pacific Abrasive Market

Abrasives are used in a variety of electronics and photonics applications such as mounting, precision grinding, polishing, production lapping, and wafer polishing. In the electronics industry, mounting devices require high precision to ensure their stability during testing and analysis. Aluminum oxide and silicon carbide are generally used in mounting processes due to their high hardness and dimensional stability. Boron carbide is also used for mounting sensitive components such as ceramics and semiconductor materials due to its low density, high hardness, and chemical resistance. The rising sales of electrical and electronic components due to the transition toward electric vehicles and growing demand for electronic consumer durables have fueled the demand for high-efficiency materials required for component production.

As per the Parker Hannifin Corporation report, the global market for computer numerically controlled (CNC) machine tools is projected to reach US\$ 129 billion by 2026. China is the largest manufacturing hub of electronics in the world. Factors such as low labor costs, availability of skilled labor, and prevalent supply chains are driving the growth of the electronics industry. The government of India is also showing an aggressive approach to promoting the country as an alternative market to China. According to Invest India, the global electronics manufacturing services market is anticipated to reach US\$ 1,145 billion by 2026, recording a CAGR of 5.4% during 2021-2026. The India Brand Equity Foundation states that the Indian electronics manufacturing industry is projected to reach US\$ 520 billion by 2025. According to the Japan Electronics and Information Technology Industries Association, the production by the global electronics and IT industries was projected to reach US\$ 3,526.6 billion in 2023.

Asia Pacific Abrasive Market Overview

The market in Asia Pacific is driven by accelerating automotive, marine, aerospace, and construction industries. Asia Pacific is a hub for automotive manufacturing with a large presence of international and domestic players operating in the region. According to a report published by the China Passenger Car Association, in 2022, Tesla Inc delivered 83,135 made-in-China electric vehicles, indicating growth in sales of electric vehicles compared to 2021. According to the Organisation Internationale des Constructeurs d'Automobiles (OICA), Asia-Oceania's vehicle production increased from 46.8 million in 2021 to 50 million in 2022. The automotive sector's growth, coupled with the demand for lightweight materials and electrical vehicles, further propels the utilization of specialized abrasives tailored to these evolving requirements.

Moreover, the construction boom in Asia Pacific is another major driver. Under the Sustainable Development Goals 2030, the Asian Development Bank has planned to build resilient infrastructure, promote inclusive and sustainable industrialization, and foster innovation in Asia Pacific. Infrastructure development has been a focal point for many governments across Asia Pacific. Investments in large-scale projects, such as transportation networks, energy facilities, and public amenities, have driven demand for construction materials. These projects are essential for improving connectivity, fostering economic growth, and enhancing the overall quality of life. As a result, abrasives are in high demand to support the planning and execution of these vital infrastructure initiatives. According to the report by the Department for Promotion of Industry and Internal Trade (DPIIT), the Government of India has planned to boost the infrastructure

and construction services through several policies such as open FDI norms, large budget allocation to the infrastructure sector, and smart cities mission. The report also stated that the real estate industry in India is projected to reach US\$ 1 trillion by 2030, along with an increased year-on-year infrastructure Capex by 34% to reach US\$ 6.7 million. With ongoing infrastructure development and urbanization projects, there is an increased requirement for abrasives in construction applications. From shaping and smoothing concrete surfaces to cutting and finishing metal structures, abrasives play a vital role in enhancing the quality and precision of construction projects. In addition, as the maritime trade and transportation sectors expand, there is an increasing need for ship construction and maintenance, stimulating the demand for abrasives in various applications. China, Japan, and South Korea are leading countries in the shipbuilding sector. According to the States Council of the People's Republic of China, the shipbuilding output of China was 9.61 million deadweight tons (dwt) in 2022, i.e., up by 2.8 percentage points year-on-year, accounting for 46.2% of the global total. Abrasives play a crucial role in smoothing and polishing the metal surfaces of ship components. This is essential not only for aesthetic purposes but also for preventing corrosion and ensuring the longevity of the vessels. The intricate and large-scale nature of ship construction requires abrasives that can handle diverse materials used in shipbuilding, including steel and various alloys. Furthermore, Asia Pacific's metalworking industry is another major force driving the demand for abrasives due to the diverse and expansive nature of metal-related manufacturing processes across the region. Abrasives are indispensable for precision machining, whether grinding down rough edges, cutting through thick metal sheets, or shaping intricate parts. This foundational role in metalworking operations contributes significantly to the consistent demand for abrasives in Asia Pacific.

Asia Pacific Abrasive Market Revenue and Forecast to 2030 (US\$ Million)

Asia Pacific Abrasive Market Segmentation

The Asia Pacific abrasive market is categorized into material, type, application, sales channel, and country.

By material, the Asia Pacific abrasive market is bifurcated into natural and synthetic. The synthetic segment held a larger share of Asia Pacific abrasive market in 2022.

In terms of type, the Asia Pacific abrasive market is bifurcated into bonded abrasives and coated abrasives. The bonded abrasives segment held a larger share of Asia Pacific abrasive market in 2022. Furthermore, the bonded abrasives segment is

subcategorized into discs, wheels, and others. Additionally, the coated abrasives segment is subcategorized into flap discs, fiber discs, hook a loop discs, belts, rolls, and others.

By application, the Asia Pacific abrasive market is segmented into automotive, aerospace, marine, metal fabrication, woodworking, electrical & electronics, and others. The automotive segment held the largest share of Asia Pacific abrasive market in 2022.

Based on sales channel, the Asia Pacific abrasive market is bifurcated into direct and indirect. The indirect segment held a larger share of Asia Pacific abrasive market in 2022.

By country, the Asia Pacific abrasive market is segmented into Australia, India, Malaysia, and the Rest of Asia Pacific. The Rest of Asia Pacific dominated the Asia Pacific abrasive market share in 2022.

Deerfos Co., Ltd; CUMI AWUKO Abrasives GmbH; Robert Bosch GmbH; Tyrolit Schleifmittelwerke Swarovski AG & Co KG; Sun Abrasives Co Ltd; Compagnie de Saint-Gobain S.A.; sia Abrasives Industries AG; RHODIUS Abrasives GmbH; 3M Co; and Ekamant AB are some of the leading companies operating in the Asia Pacific abrasive market.

Contents

1. INTRODUCTION

- 1.1 The Insight Partners Research Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

4. ABRASIVE MARKET LANDSCAPE

- 4.1 Overview
- 4.2 Porters Analysis
 - 4.2.1 Bargaining Power of Suppliers
 - 4.2.2 Bargaining Power of Buyers
 - 4.2.3 Threat of New Entrants
 - 4.2.4 Intensity of Competitive Rivalry
 - 4.2.5 Threat of Substitutes
- 4.3 Ecosystem Analysis
 - 4.3.1 Properties of Different Abrasive Media Types
 - 4.3.2 List of Vendors in the Value Chain

5. ASIA PACIFIC ABRASIVE MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Growing Automotive and Metal Fabrication Industry
 - 5.1.2 Rising Demand for Abrasives from Electrical and Electronics Industry
- 5.2 Market Restraints
 - 5.2.1 Fluctuations in Raw Material Prices
- 5.3 Market Opportunities

- 5.3.1 Adoption of Abrasives in Automation and Robotic Applications
- 5.4 Future Trends
 - 5.4.1 Development of Sustainable Abrasives
- 5.5 Impact of Drivers and Restraints:

6. ABRASIVE MARKET -ASIA PACIFIC ANALYSIS

- 6.1 Overview
- 6.2 Abrasive Market Revenue (US\$ Million), 2020-2030
- 6.3 Abrasive Market Forecast Analysis

7. ASIA PACIFIC ABRASIVE MARKET ANALYSIS - BY MATERIAL

- 7.1 Natural
 - 7.1.1 Overview
 - 7.1.2 Natural: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- 7.2 Synthetic
 - 7.2.1 Overview
 - 7.2.2 Synthetic: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

8. ASIA PACIFIC ABRASIVE MARKET ANALYSIS - BY TYPE

- 8.1 Bonded Abrasives
 - 8.1.1 Overview
 - 8.1.2 Bonded Abrasives: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
 - 8.1.3 Discs
 - 8.1.3.1 Overview
 - 8.1.3.2 Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
 - 8.1.4 Wheels
 - 8.1.4.1 Overview
 - 8.1.4.2 Wheels: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
 - 8.1.5 Others
 - 8.1.5.1 Overview
 - 8.1.5.2 Others: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- 8.2 Coated Abrasives
 - 8.2.1 Overview
 - 8.2.1.1 Coated Abrasives: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

8.2.2 Flap Discs

8.2.2.1 Overview

8.2.2.2 Flap Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

8.2.3 Fiber Discs

8.2.3.1 Overview

8.2.3.2 Fiber Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

8.2.4 Hook and Loop Discs

8.2.4.1 Overview

8.2.4.2 Hook and Loop Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

8.2.5 Belts

8.2.5.1 Overview

8.2.5.2 Belts: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

8.2.6 Rolls

8.2.6.1 Overview

8.2.6.2 Rolls: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

8.2.7 Others

8.2.7.1 Overview

8.2.7.2 Others: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

9. ASIA PACIFIC ABRASIVE MARKET ANALYSIS - BY APPLICATION

9.1 Automotive

9.1.1 Overview

9.1.2 Automotive: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

9.2 Aerospace

9.2.1 Overview

9.2.2 Aerospace: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

9.3 Marine

9.3.1 Overview

9.3.2 Marine: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

9.4 Metal Fabrication

9.4.1 Overview

9.4.2 Metal Fabrication: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

9.5 Woodworking

9.5.1 Overview

9.5.2 Woodworking: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

9.6 Electrical and Electronics

9.6.1 Overview

9.6.2 Electrical and Electronics: Abrasive Market - Revenue and Forecast to 2030
(US\$ Million)

9.7 Others

9.7.1 Overview

9.7.2 Others: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

10. ASIA PACIFIC ABRASIVE MARKET ANALYSIS - BY SALES CHANNEL

10.1 Direct

10.1.1 Overview

10.1.2 Direct: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

10.2 Indirect

10.2.1 Overview

10.2.2 Indirect: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

11. ASIA PACIFIC ABRASIVE MARKET - COUNTRY ANALYSIS

11.1 Asia Pacific

11.1.1 Asia Pacific: Abrasive Market - Revenue and Forecast Analysis - by Country

11.1.1.1 Australia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

11.1.1.1.1 Australia: Abrasive Market Breakdown, by Material

11.1.1.1.2 Australia: Abrasive Market Breakdown, by Type

11.1.1.1.3 Australia: Abrasive Market Breakdown, by Application

11.1.1.1.4 Australia: Abrasive Market Breakdown, by Sales Channel

11.1.1.2 India: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

11.1.1.2.1 India: Abrasive Market Breakdown, by Material

11.1.1.2.2 India: Abrasive Market Breakdown, by Type

11.1.1.2.3 India: Abrasive Market Breakdown, by Application

11.1.1.2.4 India: Abrasive Market Breakdown, by Sales Channel

11.1.1.3 Malaysia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

11.1.1.3.1 Malaysia: Abrasive Market Breakdown, by Material

11.1.1.3.2 Malaysia: Abrasive Market Breakdown, by Type

11.1.1.3.3 Malaysia: Abrasive Market Breakdown, by Application

11.1.1.3.4 Malaysia: Abrasive Market Breakdown, by Sales Channel

11.1.1.4 Rest of Asia Pacific: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

11.1.1.4.1 Rest of Asia Pacific: Abrasive Market Breakdown, by Material

11.1.1.4.2 Rest of Asia Pacific: Abrasive Market Breakdown, by Type

11.1.1.4.3 Rest of Asia Pacific: Abrasive Market Breakdown, by Application

11.1.1.4.4 Rest of Asia Pacific: Abrasive Market Breakdown, by Sales Channel

12. COMPETITIVE LANDSCAPE

12.1 Heat Map Analysis by Key Players

12.2 Company Positioning & Concentration

13. INDUSTRY LANDSCAPE

13.1 Overview

13.2 Product launch

13.3 Mergers and Acquisitions

13.4 Expansion

13.5 Other Strategies and Developments

14. COMPANY PROFILES

14.1 Deerfos Co., Ltd.

14.1.1 Key Facts

14.1.2 Business Description

14.1.3 Products and Services

14.1.4 Financial Overview

14.1.5 SWOT Analysis

14.1.6 Key Developments

14.2 CUMI AWUKO Abrasives GmbH

14.2.1 Key Facts

14.2.2 Business Description

14.2.3 Products and Services

14.2.4 Financial Overview

14.2.5 SWOT Analysis

14.2.6 Key Developments

14.3 Robert Bosch GmbH

14.3.1 Key Facts

14.3.2 Business Description

14.3.3 Products and Services

14.3.4 Financial Overview

14.3.5 SWOT Analysis

14.3.6 Key Developments

14.4 Tyrolit Schleifmittelwerke Swarovski AG & Co KG

- 14.4.1 Key Facts
- 14.4.2 Business Description
- 14.4.3 Products and Services
- 14.4.4 Financial Overview
- 14.4.5 SWOT Analysis
- 14.4.6 Key Developments

14.5 Sun Abrasives Co Ltd

- 14.5.1 Key Facts
- 14.5.2 Business Description
- 14.5.3 Products and Services
- 14.5.4 Financial Overview
- 14.5.5 SWOT Analysis
- 14.5.6 Key Developments

14.6 Compagnie de Saint-Gobain S.A.

- 14.6.1 Key Facts
- 14.6.2 Business Description
- 14.6.3 Products and Services
- 14.6.4 Financial Overview
- 14.6.5 SWOT Analysis
- 14.6.6 Key Developments

14.7 sia Abrasives Industries AG

- 14.7.1 Key Facts
- 14.7.2 Business Description
- 14.7.3 Products and Services
- 14.7.4 Financial Overview
- 14.7.5 SWOT Analysis
- 14.7.6 Key Developments

14.8 RHODIUS Abrasives GmbH

- 14.8.1 Key Facts
- 14.8.2 Business Description
- 14.8.3 Products and Services
- 14.8.4 Financial Overview
- 14.8.5 SWOT Analysis
- 14.8.6 Key Developments

14.9 3M Co

- 14.9.1 Key Facts
- 14.9.2 Business Description
- 14.9.3 Products and Services

- 14.9.4 Financial Overview
- 14.9.5 SWOT Analysis
- 14.9.6 Key Developments
- 14.10 Ekamant AB
 - 14.10.1 Key Facts
 - 14.10.2 Business Description
 - 14.10.3 Products and Services
 - 14.10.4 Financial Overview
 - 14.10.5 SWOT Analysis
 - 14.10.6 Key Developments

15. APPENDIX

- 15.1 About the Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Asia Pacific Abrasive Market Segmentation

Table 2. List of Vendors

Table 3. Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Table 4. Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material

Table 5. Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Type

Table 6. Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application

Table 7. Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel

Table 8. Australia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material

Table 9. Australia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Type

Table 10. Australia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application

Table 11. Australia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel

Table 12. India: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material

Table 13. India: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Type

Table 14. India: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application

Table 15. India: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel

Table 16. Malaysia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material

Table 17. Malaysia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Type

Table 18. Malaysia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application

Table 19. Malaysia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel

Table 20. Rest of Asia Pacific: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material

Table 21. Rest of Asia Pacific: Abrasive Market - Revenue and Forecast to 2030 (US\$

Million) - by Type

Table 22. Rest of Asia Pacific: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application

Table 23. Rest of Asia Pacific: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel

List Of Figures

LIST OF FIGURES

- Figure 1. Asia Pacific Abrasive Market Segmentation, by Country
- Figure 2. Abrasive Market - Porter's Analysis
- Figure 3. Ecosystem: Abrasive Market
- Figure 4. Abrasive Grain Processing
- Figure 5. Bonded Abrasive Product Manufacturing Process
- Figure 6. Coated Abrasive Product Manufacturing Process
- Figure 7. Abrasive Market - Key Market Dynamics
- Figure 8. Motor Vehicle Production, By Region (2019-2022)
- Figure 9. Production Value by the Global Electronics and IT Industries (2015-2023)
- Figure 10. Impact Analysis of Drivers and Restraints
- Figure 11. Abrasive Market Revenue (US\$ Million), 2020-2030
- Figure 12. Abrasive Market Share (%) - by Material (2022 and 2030)
- Figure 13. Natural: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 14. Synthetic: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 15. Abrasive Market Share (%) - by Type (2022 and 2030)
- Figure 16. Bonded Abrasives: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 17. Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 18. Wheels: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 19. Others: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 20. Coated Abrasives: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 21. Flap Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 22. Fiber Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 23. Hook and Loop Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 24. Belts: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 25. Rolls: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 26. Others: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 27. Abrasive Market Share (%) - by Application (2022 and 2030)
- Figure 28. Automotive: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 29. Aerospace: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 30. Marine: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 31. Metal Fabrication: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 32. Woodworking: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 33. Electrical and Electronics: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 34. Others: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 35. Abrasive Market Share (%) - by Sales Channel (2022 and 2030)

Figure 36. Direct: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 37. Indirect: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 38. Asia Pacific: Abrasive Market, By Key Country - Revenue 2022 (US\$ Million)

Figure 39. Asia Pacific: Abrasive Market Breakdown, by Key Countries, 2022 and 2030 (%)

Figure 40. Australia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 41. India: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 42. Malaysia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 43. Rest of Asia Pacific: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Figure 44. Heat Map Analysis by Key Players

Figure 45. Company Positioning & Concentration

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