

North America Spinal Fusion Devices Market Forecast to 2030 – Regional Analysis – By Product Type (Thoracolumbar Devices, Cervical Fixation Devices, and Interbody Fusion Devices), Surgery Type (Open Spine Surgery and Minimally Invasive Spine Surgery), Disease Indications (Degenerative Disc, Trauma and Fractures, Complex Deformity, and Others), and End User (Hospitals, Specialty Clinics, and Others)

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Abstracts

The North America spinal fusion devices market was valued at US\$ 3,868.93 million in 2022 and is expected to reach US\$ 6,075.64 million by 2030; it is estimated to grow at a CAGR of 5.8% from 2022 to 2030.

Increasing Developments in Spinal Technology by Spine Device Companies Fuels the North America Spinal Fusion Devices Market

The spine device companies widely adopted innovation, spinoffs, and merger and acquisition developments or strategies. The strategies have helped mark an exponential growth of the North America spinal fusion devices market in 2022. Below are a few instances of developments made by the companies in 2022.

- In August 2022, Kleiner Device Labs announced the completion of its first successful surgery using its new KG2 Surge flow-thru interbody system. On July 19, 2022, the single level transforaminal lumbar interbody fusion (TLIF) surgery was performed at the Brooklyn Hospital Center, New York, US. Kleiner Device Labs claims that the new KG2 Surge flow-thru interbody system provided the amount of bone-grafting material three

times more than the traditional spinal surgery approaches. The company also claims that their KG2 Surge flow-thru interbody system is a single-patient-use bone graft delivery tool combined with a 3D-printed titanium I-Beam fusion implant. Further, the KG2 Surge flow-thru interbody system will reduce multi-step, multi-instrument pass practice to a single insertion process of current spinal fusion procedures.

- In March 2022, Zimmer Biomet Holdings, Inc. announced a complete spinoff of ZimVie. ZimVie will continue to focus on key growth strategies for the spine and dental markets. The company will develop products, including spinal fusion implants, surgical tools, bone grafts, implants, non-fusion alternatives, and digital care technologies. Due to the spinoff, ZimVie will operate as an independent entity registered on the Nasdaq with the symbol 'ZIMV.' Thus, it is expected that ZimVie will significantly enhance the market by holding a good market share.

- In October 2022, Spineart launched its new minimally invasive spine surgery (MISS) system, PERLA TL MIS. The company's MISS system is a thoracolumbar posterior fixation system available worldwide. The launch of PERLA TL MIS is anticipated to demonstrate the company's commitment to transforming spine surgery to benefit its end users: surgeons, patients, and hospitals. Such product launches are likely to drive market growth in the coming future.

The trend of developments in the spine industry has continued and witnessed strategic improvements that have fueled the growth of the North America spinal fusion devices market.

- In July 2023, Xtant Medical Holdings, Inc. announced that it won certain assets and liabilities of Surgalign Holdings, Inc. related to spinal fixation and domestic and international biologics. Xtant Medical Holdings, Inc. is dedicated to developing spinal implant systems that facilitate spinal fusion in complex spinal deformity degenerative processes. Thus, such developments in spinal technology by spine device companies are catalyzing the market growth.

North America Spinal Fusion Devices Market Overview

DePuy Synthes, Stryker, Aurora Spine, and Alevio Spine are among the major players operating in the North America spinal fusion devices market in the US. Product developments and launches driven by these players favor the market growth. Technologically advanced spinal fusion devices approved by the Food and Drug Administration (FDA) are widely adopted in the US. Following is the list of spinal fusion

devices recently approved by the FDA:

- In May 2023, CTL Amedica received FDA 510(k) clearance for the commercialization of the NITRO Interbody Fusion Cage System, which is exclusively made by the fusion of biomaterial silicon nitride. Silicon nitride material is compatible with all imaging modalities; it exhibits unique bacteriostatic properties and provides artifact-free imaging.
- In January 2023, Alevio Spine received 510 (K) clearance of additional indications for the SI-Cure SI Joint Fusion System. The expanded indication includes sacroiliac fusion for skeletally mature patients undergoing sacropelvic fixation as part of a lumbar or thoracolumbar fusion.
- In June 2022, the US FDA granted 510K clearance for Aurora Spine's DEXA SOLO-L anterior lumbar interbody fusion device (ALIF). Based on DEXA Technology Platform, a 3D printed standalone device was designed for anterior and lateral lumbar interbody fusion (ALIF & LLIF) procedures.

Age-related wear-and-tear triggers the prevalence of lower back pain (LBP) among the geriatric population in the US, in turn, fuels the demand for spinal fusion devices. According to National Health Services in 2022, lifetime incidence of LBP in the US is reported to be 60–90%, with annual incidence of 5%. The source also states that 14.3% of new patients visit physicians each year because of LBP, and ~13 million people visit physician due to chronic LBP.

North America Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Million)

North America Spinal Fusion Devices Market Segmentation

The North America spinal fusion devices market is segmented based on product type, surgery type, disease indications, end user, and country.

Based on product type, the North America spinal fusion devices market is segmented into thoracolumbar devices, cervical fixation devices, and interbody fusion devices. The thoracolumbar devices segment held the largest share in 2022.

By surgery type, the North America spinal fusion devices market is bifurcated into open spine surgery and minimally invasive spine surgery. The open spine surgery segment held the largest share in 2022.

By disease indications, the North America spinal fusion devices market is segmented into degenerative disc, trauma and fractures, complex deformity, and others. The degenerative disc segment held the largest share in 2022.

In terms of end users, the North America spinal fusion devices market is categorized into hospitals, specialty clinics, and others. The hospitals segment held the largest share in 2022.

Based on country, the North America spinal fusion devices market is segmented into the US, Canada, and Mexico. The US dominated the North America spinal fusion devices market in 2022.

ATEC Spine Inc, B. Braun SE, Centinel Spine LLC, DePuy Synthes Inc, Globus Medical Inc, Medtronic Plc, NuVasive Inc, Orthofix Medical Inc, Stryker Corp, and ZimVie Inc are some of the leading companies operating in the North America spinal fusion devices market.

Contents

1. INTRODUCTION

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

2. EXECUTIVE SUMMARY

- 2.1 Key Insights

3. RESEARCH METHODOLOGY

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

4. NORTH AMERICA SPINAL FUSION DEVICES MARKET LANDSCAPE

- 4.1 Overview
- 4.2 North America PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 List of Vendors in the Value Chain

5. NORTH AMERICA SPINAL FUSION DEVICES MARKET - KEY INDUSTRY DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Increasing Developments in Spinal Technology by Spine Device Companies
 - 5.1.2 Surging Number of Spinal Fusion Procedures
- 5.2 Market Restraints
 - 5.2.1 Stringent Regulations for Spinal Fusion Devices
- 5.3 Market Opportunities
 - 5.3.1 Low-Cost Surgery Under Medical Tourism
- 5.4 Market Trends
 - 5.4.1 3D Printing for Spinal Fusion Products for Spinal Surgery
- 5.5 Impact Analysis:

6. SPINAL FUSION DEVICES MARKET – NORTH AMERICA MARKET ANALYSIS

6.1 North America Spinal Fusion Devices Market Revenue (US\$ Mn), 2022 – 2030

7. NORTH AMERICA SPINAL FUSION DEVICES MARKET – REVENUE AND FORECAST TO 2030 – BY PRODUCT TYPE

7.1 Overview

7.2 North America Spinal Fusion Devices Market Revenue Share, by Product Type, 2022 & 2030 (%)

7.3 Thoracolumbar Devices

7.3.1 Overview

7.3.2 Thoracolumbar Devices: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

7.3.3 Anterior Lumbar Plates

7.3.3.1 Overview

7.3.3.2 Anterior Lumbar Plates: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

7.3.4 Pedicle Screw and Rods

7.3.4.1 Overview

7.3.4.2 Pedicle Screw and Rods: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

7.3.5 Others

7.3.5.1 Overview

7.3.5.2 Others: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

7.4 Cervical Fixation Devices

7.4.1 Overview

7.4.2 Cervical Fixation Devices: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

7.4.3 Anterior Cervical Plates

7.4.3.1 Overview

7.4.3.2 Anterior Cervical Plates: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

7.4.4 Hook Fixation Systems

7.4.4.1 Overview

7.4.4.2 Hook Fixation Systems: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

7.4.5 Others

7.4.5.1 Overview

7.4.5.2 Others: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

7.5 Interbody Fusion Devices

7.5.1 Overview

7.5.2 Interbody Fusion Devices: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

8. NORTH AMERICA SPINAL FUSION DEVICES MARKET – REVENUE AND FORECAST TO 2030 – BY SURGERY TYPE

8.1 Overview

8.2 North America Spinal Fusion Devices Market Revenue Share, by Surgery Type, 2022 & 2030 (%)

8.3 Open Spine Surgery

8.3.1 Overview

8.3.2 Open Spine Surgery: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

8.4 Minimally Invasive Spine Surgery

8.4.1 Overview

8.4.2 Minimally Invasive Spine Surgery: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

9. NORTH AMERICA SPINAL FUSION DEVICES MARKET – REVENUE AND FORECAST TO 2030 – BY DISEASE INDICATIONS

9.1 Overview

9.2 North America Spinal Fusion Devices Market Revenue Share, by Disease Indications 2022 & 2030 (%)

9.3 Degenerative Disc

9.3.1 Overview

9.3.2 Degenerative Disc: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

9.4 Trauma and Fractures

9.4.1 Overview

9.4.2 Trauma and Fractures: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

9.5 Complex Deformity

9.5.1 Overview

9.5.2 Complex Deformity: North America Spinal Fusion Devices Market – Revenue

and Forecast to 2030 (US\$ Million)

9.6 Others

9.6.1 Overview

9.6.2 Others: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

10. NORTH AMERICA SPINAL FUSION DEVICES MARKET – REVENUE AND FORECAST TO 2030 – BY END USER

10.1 Overview

10.2 North America Spinal Fusion Devices Market Revenue Share, by End User 2022 & 2030 (%)

10.3 Hospitals

10.3.1 Overview

10.3.2 Hospitals: North America Spinal Fusion Devices Market– Revenue and Forecast to 2030 (US\$ Million)

10.4 Specialty Clinics

10.4.1 Overview

10.4.2 Specialty Clinics: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

10.5 Others

10.5.1 Overview

10.5.2 Others: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

11. NORTH AMERICA SPINAL FUSION DEVICES MARKET - COUNTRY ANALYSIS

11.1 Overview

11.1.1 North America North America Spinal Fusion Devices Market, by Country

11.1.1.1 US

11.1.1.1.1 Overview

11.1.1.1.2 US Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn)

11.1.1.1.3 US Spinal Fusion Devices Market, by Product Type

11.1.1.1.3.1 US Spinal Fusion Devices Market, by Thoracolumbar Devices

11.1.1.1.3.2 US Spinal Fusion Devices Market, by Cervical Fixation Devices

11.1.1.1.4 US Spinal Fusion Devices Market, by Disease Indication

11.1.1.1.5 US Spinal Fusion Devices Market, by Surgery Type

11.1.1.1.6 US Spinal Fusion Devices Market, by End User

11.1.1.2 Canada

11.1.1.2.1 Overview

11.1.1.2.2 Canada Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn)

11.1.1.2.3 Canada Spinal Fusion Devices Market, by Product Type

11.1.1.2.3.1 Canada Spinal Fusion Devices Market, by Thoracolumbar Devices

11.1.1.2.3.2 Canada Spinal Fusion Devices Market, by Cervical Fixation Devices

11.1.1.2.4 Canada Spinal Fusion Devices Market, by Disease Indication

11.1.1.2.5 Canada Spinal Fusion Devices Market, by Surgery Type

11.1.1.2.6 Canada Spinal Fusion Devices Market, by End User

11.1.1.3 Mexico

11.1.1.3.1 Overview

11.1.1.3.2 Mexico Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn)

11.1.1.3.3 Mexico Spinal Fusion Devices Market, by Product Type

11.1.1.3.3.1 Mexico Spinal Fusion Devices Market, by Thoracolumbar Devices

11.1.1.3.3.2 Mexico Spinal Fusion Devices Market, by Cervical Fixation Devices

11.1.1.3.4 Mexico Spinal Fusion Devices Market, by Disease Indication

11.1.1.3.5 Mexico Spinal Fusion Devices Market, by Surgery Type

11.1.1.3.6 Mexico Spinal Fusion Devices Market, by End User

12. NORTH AMERICA SPINAL FUSION DEVICES MARKET INDUSTRY LANDSCAPE

12.1 Overview

12.2 Growth Strategies in North America Spinal Fusion Devices Market

12.3 Organic Growth Strategies

12.3.1 Overview

12.4 Inorganic Growth Strategies

12.4.1 Overview

13. COMPANY PROFILES

13.1 DePuy Synthes Inc

13.1.1 Key Facts

13.1.2 Business Description

13.1.3 Products and Services

13.1.4 Financial Overview

13.1.5 SWOT Analysis

- 13.1.6 Key Developments
- 13.2 Stryker Corp
 - 13.2.1 Key Facts
 - 13.2.2 Business Description
 - 13.2.3 Products and Services
 - 13.2.4 Financial Overview
 - 13.2.5 SWOT Analysis
 - 13.2.6 Key Developments
- 13.3 B. Braun SE
 - 13.3.1 Key Facts
 - 13.3.2 Business Description
 - 13.3.3 Products and Services
 - 13.3.4 Financial Overview
 - 13.3.5 SWOT Analysis
 - 13.3.6 Key Developments
- 13.4 ATEC Spine Inc
 - 13.4.1 Key Facts
 - 13.4.2 Business Description
 - 13.4.3 Products and Services
 - 13.4.4 Financial Overview
 - 13.4.5 SWOT Analysis
 - 13.4.6 Key Developments
- 13.5 Globus Medical Inc
 - 13.5.1 Key Facts
 - 13.5.2 Business Description
 - 13.5.3 Products and Services
 - 13.5.4 Financial Overview
 - 13.5.5 SWOT Analysis
 - 13.5.6 Key Developments
- 13.6 NuVasive Inc
 - 13.6.1 Key Facts
 - 13.6.2 Business Description
 - 13.6.3 Products and Services
 - 13.6.4 Financial Overview
 - 13.6.5 SWOT Analysis
 - 13.6.6 Key Developments
- 13.7 ZimVie Inc
 - 13.7.1 Key Facts
 - 13.7.2 Business Description

- 13.7.3 Products and Services
- 13.7.4 Financial Overview
- 13.7.5 SWOT Analysis
- 13.7.6 Key Developments
- 13.8 Medtronic Plc
 - 13.8.1 Key Facts
 - 13.8.2 Business Description
 - 13.8.3 Products and Services
 - 13.8.4 Financial Overview
 - 13.8.5 SWOT Analysis
 - 13.8.6 Key Developments
- 13.9 Centinel Spine LLC
 - 13.9.1 Key Facts
 - 13.9.2 Business Description
 - 13.9.3 Products and Services
 - 13.9.4 Financial Overview
 - 13.9.5 SWOT Analysis
 - 13.9.6 Key Developments
- 13.10 Orthofix Medical Inc
 - 13.10.1 Key Facts
 - 13.10.2 Business Description
 - 13.10.3 Products and Services
 - 13.10.4 Financial Overview
 - 13.10.5 SWOT Analysis
 - 13.10.6 Key Developments

14. APPENDIX

- 14.1 About Us
- 14.2 Glossary of Terms

List Of Tables

LIST OF TABLES

Table 1. North America Spinal Fusion Devices Market Segmentation

Table 2. @LIST OF Vendors

Table 3. US Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Product Type

Table 4. US Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Thoracolumbar Devices

Table 5. US Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Cervical Fixation Devices

Table 6. US Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Disease Indication

Table 7. US Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Surgery Type

Table 8. US Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – End User

Table 9. Canada Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Product Type

Table 10. Canada Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Thoracolumbar Devices

Table 11. Canada Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Cervical Fixation Devices

Table 12. Canada Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Disease Indication

Table 13. Canada Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Surgery Type

Table 14. Canada Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – End User

Table 15. Mexico Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Product Type

Table 16. Mexico Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Thoracolumbar Devices

Table 17. Mexico Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Cervical Fixation Devices

Table 18. Mexico Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn) – Disease Indication

Table 19. Mexico Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$

Mn) – Surgery Type

Table 20. Mexico Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$

Mn) – End User

Table 21. Recent Organic Growth Strategies in North America Spinal Fusion Devices Market

Table 22. Recent Inorganic Growth Strategies in the North America Spinal Fusion Devices Market

Table 23. Glossary of Terms, spinal fusion devices market

List Of Figures

LIST OF FIGURES

Figure 1. North America Spinal Fusion Devices Market Segmentation, By Country

Figure 2. North America - PEST Analysis

Figure 3. North America Spinal Fusion Devices Market - Key Industry Dynamics

Figure 4. Impact Analysis of Drivers and Restraints

Figure 5. North America Spinal Fusion Devices Market Revenue (US\$ Mn), 2022 – 2030

Figure 6. North America Spinal Fusion Devices Market Revenue Share, by Product Type, 2022 & 2030 (%)

Figure 7. Thoracolumbar Devices: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 8. Anterior Lumbar Plates: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 9. Pedicle Screw and Rods: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 10. Others: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 11. Cervical Fixation Devices: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 12. Anterior Cervical Plates: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 13. Hook Fixation Systems: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 14. Others: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 15. Interbody Fusion Devices: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 16. North America Spinal Fusion Devices Market Revenue Share, by Surgery Type, 2022 & 2030 (%)

Figure 17. Open Spine Surgery: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 18. Minimally Invasive Spine Surgery: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 19. North America Spinal Fusion Devices Market Revenue Share, by Disease Indications 2022 & 2030 (%)

Figure 20. Degenerative Disc: North America Spinal Fusion Devices Market – Revenue

and Forecast to 2030 (US\$ Million)

Figure 21. Trauma and Fractures: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 22. Complex Deformity: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 23. Others: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 24. North America Spinal Fusion Devices Market Revenue Share, by End User 2022 & 2030 (%)

Figure 25. Hospitals: North America Spinal Fusion Devices Market– Revenue and Forecast to 2030 (US\$ Million)

Figure 26. Specialty Clinics: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 27. Others: North America Spinal Fusion Devices Market – Revenue and Forecast to 2030 (US\$ Million)

Figure 28. North America Spinal Fusion Devices Market by Key Country - Revenue (2022) (US\$ Million))

Figure 29. North America North America Spinal Fusion Devices Market, By Key Countries, 2022 And 2030 (%)

Figure 30. US Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn)

Figure 31. Canada Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn)

Figure 32. Mexico Spinal Fusion Devices Market Revenue and Forecast to 2030 (US\$ Mn)

Figure 33. Growth Strategies in North America Spinal Fusion Devices Market

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