

South & Central America 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 South & Central America abrasive market was valued at US\$ 2,941.12 million in 2022 and is expected to reach US\$ 3,983.57 million by 2030; it is estimated to register a CAGR of 3.9% from 2022 to 2030.

Development of Sustainable Abrasives Fuels South & Central America Abrasive Market

Governments of various countries have imposed a few regulations on using sustainable materials to manufacture products in processing industries, including chemicals & materials, to ensure better protection of human health and the environment. These regulations are set to reduce greenhouse emissions and have compelled manufacturing companies to increase investments in developing naturally derived raw materials. Rising awareness regarding greenhouse gas (GHG) emissions and environmental pollution is projected to surge the demand for bio-based and sustainable products. Governments of various countries are adopting several initiatives to increase the awareness and development of sustainable materials. Emerging trends in sustainability have spurred innovation in the abrasive market. Advancements in abrasive manufacturing techniques, such as precision engineering and surface modification, are leveraged to enhance

efficiency and reduce waste generation. Several manufacturers are also focused on minimizing energy consumption and emissions caused during the production and usage of abrasives. Therefore, the development of sustainable abrasives is expected to drive the abrasive market during the forecast period.

South & Central America Abrasive Market Overview

The abrasive market growth in South & Central America is attributed to the surging industrial activities across the region, ranging from manufacturing to mining. According to the International Organisation Internationale des Constructeurs d'Automobiles (OICA), the total number of vehicles manufactured in South & Central America grew from ~2.72 million in 2021 to ~2.96 million in 2022, registering an increase of 9%. In addition, rising car ownership due to increased spending power and higher living standards fuel the market for automotive refinishes. Moreover, major market players in the automotive sector have strategized development and expansion of their operational capacities in South & Central America to tap the lucrative automotive market. In 2022, Audi AG invested US\$ 19.2 million to restart production at its plant in Parana, Brazil, registering a capacity of 4,000 vehicles per year. The rise in passenger car production is the prime factor driving the abrasive market in the region. As South & Central America becomes an important hub for automobile manufacturing, a greater number of precision tools and abrasives will be required for shaping and finishing metal components in the production of vehicles. Abrasives play a pivotal role in achieving the necessary level of precision and quality, thereby supporting the region's automotive growth.

In South & Central America, "Jubarte Offshore Oil Field Development" and "Pre-Salt Submarine Fiber Optic Cable Network" are among the major ongoing infrastructure projects. Governments of various countries in this region focus on supporting the development of more infrastructure projects to catch up with the pace of urbanization. Thus, constant infrastructure development efforts have surged the demand for construction machinery and equipment, thereby positively favoring the abrasive market.

Brazil is one of the strongest markets for aircraft manufacturing across the globe. Brazilian-based Embraer is the fourth largest aircraft manufacturer in the world, after Airbus, Boeing, and Bombardier Aerospace. Furthermore, the rising number of air passengers in the region is supporting the aircraft manufacturing industry. According to the International Air Transport Association (IATA), passenger numbers recorded in 2019 are projected to surpass in 2023, i.e., Central America (102%), followed by South America in 2024 (103%), and the Caribbean in 2025 (101%). Furthermore, regional manufacturers are investing in strategic initiatives such as product development,

mergers, and acquisitions to gain a competitive position in the market. For instance, in September 2022, South American rotorcraft operator Ecocopter collaborated with Airbus on possible plans to launch urban air mobility (UAM) services with eVTOL aircraft in markets including Chile, Ecuador, and Peru. Under a memorandum of understanding signed in September 2021, the companies are working on possible use cases for air taxis and other eVTOL operations, including early-adopter markets in the three countries.

South & Central America Abrasive Market Revenue and Forecast to 2030 (US\$ Million)

South & Central America Abrasive Market Segmentation

The South & Central America abrasive market is categorized into material, type, application, sales channel, and country.

By material, the South & Central America abrasive market is bifurcated into natural and synthetic. The synthetic segment held a larger share of South & Central America abrasive market in 2022.

In terms of type, the South & Central America abrasive market is bifurcated into bonded abrasives and coated abrasives. The bonded abrasives segment held a larger share of South & Central America 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 South & Central America abrasive market is segmented into automotive, aerospace, marine, metal fabrication, woodworking, electrical & electronics, and others. The automotive segment held the largest share of South & Central America abrasive market in 2022.

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

By country, the South & Central America abrasive market is segmented into Brazil, Argentina, Chile, Colombia, and the Rest of South & Central America. Brazil dominated the South & Central America 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 South & Central America 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

5. SOUTH & CENTRAL AMERICA 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 -SOUTH & CENTRAL AMERICA ANALYSIS

6.1 Overview

6.2 Abrasive Market Revenue (US\$ Million), 2020-2030

6.3 Abrasive Market Forecast Analysis

7. SOUTH & CENTRAL AMERICA 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. SOUTH & CENTRAL AMERICA 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. SOUTH & CENTRAL AMERICA 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. SOUTH & CENTRAL AMERICA 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. SOUTH & CENTRAL AMERICA ABRASIVE MARKET - COUNTRY ANALYSIS

11.1 South & Central America

11.1.1 South & Central America: Abrasive Market - Revenue and Forecast Analysis - by Country

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

11.1.1.1.1 Brazil: Abrasive Market Breakdown, by Material

11.1.1.1.2 Brazil: Abrasive Market Breakdown, by Type

11.1.1.1.3 Brazil: Abrasive Market Breakdown, by Application

11.1.1.1.4 Brazil: Abrasive Market Breakdown, by Sales Channel

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

11.1.1.2.1 Argentina: Abrasive Market Breakdown, by Material

11.1.1.2.2 Argentina: Abrasive Market Breakdown, by Type

11.1.1.2.3 Argentina: Abrasive Market Breakdown, by Application

11.1.1.2.4 Argentina: Abrasive Market Breakdown, by Sales Channel

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

11.1.1.3.1 Chile: Abrasive Market Breakdown, by Material

11.1.1.3.2 Chile: Abrasive Market Breakdown, by Type

11.1.1.3.3 Chile: Abrasive Market Breakdown, by Application

11.1.1.3.4 Chile: Abrasive Market Breakdown, by Sales Channel

11.1.1.4 Colombia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

11.1.1.4.1 Colombia: Abrasive Market Breakdown, by Material

- 11.1.1.4.2 Colombia: Abrasive Market Breakdown, by Type
- 11.1.1.4.3 Colombia: Abrasive Market Breakdown, by Application
- 11.1.1.4.4 Colombia: Abrasive Market Breakdown, by Sales Channel
- 11.1.1.5 Rest of South & Central America: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
 - 11.1.1.5.1 Rest of South & Central America: Abrasive Market Breakdown, by Material
 - 11.1.1.5.2 Rest of South & Central America: Abrasive Market Breakdown, by Type
 - 11.1.1.5.3 Rest of South & Central America: Abrasive Market Breakdown, by Application
 - 11.1.1.5.4 Rest of South & Central America: 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. South & Central America Abrasive Market Segmentation
- Table 2. Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Table 3. Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material
- Table 4. Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Type
- Table 5. Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application
- Table 6. Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel
- Table 7. Brazil: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material
- Table 8. Brazil: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Type
- Table 9. Brazil: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application
- Table 10. Brazil: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel
- Table 11. Argentina: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material
- Table 12. Argentina: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Type
- Table 13. Argentina: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application
- Table 14. Argentina: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel
- Table 15. Chile: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material
- Table 16. Chile: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Type
- Table 17. Chile: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application
- Table 18. Chile: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel
- Table 19. Colombia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material
- Table 20. Colombia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Type

Table 21. Colombia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application

Table 22. Colombia: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel

Table 23. Rest of South & Central America: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Material

Table 24. Rest of South & Central America: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Type

Table 25. Rest of South & Central America: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Application

Table 26. Rest of South & Central America: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million) - by Sales Channel

List Of Figures

LIST OF FIGURES

- Figure 1. South & Central America 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. Production Value by the Global Electronics and IT Industries (2015-2023)
- Figure 9. Impact Analysis of Drivers and Restraints
- Figure 10. Abrasive Market Revenue (US\$ Million), 2020-2030
- Figure 11. Abrasive Market Share (%) - by Material (2022 and 2030)
- Figure 12. Natural: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 13. Synthetic: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 14. Abrasive Market Share (%) - by Type (2022 and 2030)
- Figure 15. Bonded Abrasives: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 16. Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 17. Wheels: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 18. Others: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 19. Coated Abrasives: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 20. Flap Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 21. Fiber Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 22. Hook and Loop Discs: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 23. Belts: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 24. Rolls: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 25. Others: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 26. Abrasive Market Share (%) - by Application (2022 and 2030)
- Figure 27. Automotive: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 28. Aerospace: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 29. Marine: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 30. Metal Fabrication: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)
- Figure 31. Woodworking: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

Million)

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

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

Figure 34. Abrasive Market Share (%) - by Sales Channel (2022 and 2030)

Figure 35. Direct: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

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

Figure 37. South & Central America: Abrasive Market, By Key Country - Revenue 2022 (US\$ Million)

Figure 38. South & Central America: Abrasive Market Breakdown, by Key Countries, 2022 and 2030 (%)

Figure 39. Brazil: Abrasive Market - Revenue and Forecast to 2030 (US\$ Million)

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

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

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

Figure 43. Rest of South & Central America: 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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