India Automotive Brake Pads, Shoes, and Linings Market Forecast and Opportunities, 2020

Description: Automotive industry is one of the main pillars of industrial development in India. India is the seventh largest vehicle producer in the world, with an average annual production of more than 20 million vehicles in 2014. India is also the third largest automotive market in Asia, after Japan and China. At present, almost all major global automobile manufacturers are operating in India. Rising sales of passenger cars, two wheelers, commercial vehicles, three-wheelers and off-the road (OTR) vehicles in the country, have established the country as one of the leading brake friction markets as well. India offers great potential for growth in automotive and allied sectors as the country's motorization rate is still lower compared to developed economies, which is consequently creating opportunities for brake pads, shoes, and linings manufacturers and suppliers.

According to "India Brake Pads, Shoes, and Linings Market Forecast & Opportunities, 2020", the market for automotive brake pads, shoes, and linings in the country is forecast to grow at a CAGR of over 11% through 2020. Increase in automotive production and sales, expanding automobile fleet, and continuously rising aftermarket demand are the major market drivers. Two-wheeler automotive brake pads & shoes segment is anticipated to maintain dominance in the overall automotive brake friction market till 2020. India brake pads, shoes, and linings market is highly fragmented and dominated by the unorganized sector. The unorganized sector is substantially larger than other suppliers and primarily caters to the demand for replacement brake pads, shoes, and linings in the country. "India Brake Pads, Shoes, and Linings Market Forecast & Opportunities, 2020" discusses the following aspects:

- India Brake Pads, Shoes, and Linings Market Size, Share & Forecast
- Segmental Analysis – Passenger cars, Two-wheelers, Commercial Vehicles, Three-Wheelers & OTR Vehicles
- Policy & Regulatory Landscape
- Changing Market Trends & Emerging Opportunities
- Competitive Landscape & Strategic Recommendations

Why You Should Buy This Report?

- To gain an in-depth understanding of brake pads, shoes, and linings market in India
- To identify the on-going trends and segment wise anticipated growth in the next five years
- To help industry consultants, manufacturing companies and other stakeholders to align their market-centric strategies
- To obtain research based business decision and add weight to presentations and marketing material
- To gain competitive knowledge of leading market players
- To avail 10% customization in the report without any extra charges and get the research data or trends added in the report as per the buyer's specific needs

Report Methodology

The information contained in this report is based on both primary and secondary sources. Primary research included interviews with brake pads, shoes, and linings manufacturers, distributors and retailers. Secondary research included an exhaustive search of relevant publications like company annual reports, financial reports and proprietary databases.

Contents:

1. Research Methodology
2. Product Definition and Market Segmentation
3. Analyst View
4. India Automotive Components Industry Overview
5. India Automotive Brake Pads, Shoes, and Linings Market Outlook
5.1. Market Size & Forecast
5.1.1. By Value
5.1.2. By Volume
5.2. Market Share & Forecast
5.2.1. By Vehicle Type
5.2.2. By Company
5.2.3. By Demand Category (OEM & Replacement)
5.2.4. By Brake Type (Brake Pads, Brake Shoes, and Brake Linings)
5.2.5. By Region

6. India Automotive Brake Pads Market Outlook
6.1. Market Size & Forecast
6.1.1. By Value
6.1.2. By Volume
6.2. Market Share & Forecast
6.2.1. By Vehicle Type
6.2.2. By Demand Category (OEM & Replacement)

7. India Automotive Brake Shoes Market Outlook
7.1. Market Size & Forecast
7.1.1. By Value
7.1.2. By Volume
7.2. Market Share & Forecast
7.2.1. By Vehicle Type
7.2.2. By Demand Category (OEM & Replacement)

8. India Automotive Brake Linings Market Outlook
8.1. Market Size & Forecast
8.1.1. By Value
8.1.2. By Volume
8.2. Market Share & Forecast
8.2.1. By Vehicle Type
8.2.2. By Demand Category (OEM & Replacement)

9. India Passenger Car Brake Pads & Shoes Market Outlook
9.1. Market Size & Forecast
9.1.1. By Value
9.1.2. By Volume
9.2. Market Share & Forecast
9.2.1. By Demand Category (OEM & Replacement)
9.2.2. By Brake Type (Brake Pads & Brake Shoes)

10. India Commercial Vehicle Brake Pads, Shoes, & Linings Market Outlook
10.1. Market Size & Forecast
10.1.1. By Value
10.1.2. By Volume
10.2. Market Share & Forecast
10.2.1. By Brake Type (Brake Pads, Brake Shoes, & Brake Linings)
10.2.2. By Demand Category (OEM & Replacement)

11. India Two-Wheeler Brake Pads & Shoes Market Outlook
11.1. Market Size & Forecast
11.1.1. By Value
11.1.2. By Volume
11.2. Market Share & Forecast
11.2.1. By Demand Category (OEM & Replacement)
11.2.2. By Segment (Brake Pads & Brake Shoes)

12. India Three-Wheeler Brake Shoes Market Outlook
12.1. Market Size & Forecast
12.1.1. By Value
12.1.2. By Volume
12.2. Market Share & Forecast
12.2.1. By Demand Category (OEM & Replacement)

13. India Off-The-Road (OTR) Brake Linings Market Outlook
13.1. Market Size & Forecast
13.1.1. By Value
13.1.2. By Volume
13.2. Market Share & Forecast
13.2.1. By Demand Category (OEM & Replacement)

14. Market Dynamics
14.1. Growth Drivers
14.2. Challenges

15. Policy & Regulatory Landscape

16. Market Trends & Developments
16.1. Automobile Sales & Production Scenario
16.2. Counterfeit Brake Friction Products
16.3. Brake Pads Replacing Brake Shoes
16.4. Unorganized Sector
16.5. Highly Fragmented Market

17. India Economic Outlook

18. Competitive Landscape
18.1. Rane Brake Lining Limited
18.2. ASK Automotive (P) Limited
18.3. Sundaram Brake Lining Limited
18.4. Brakes India Pvt. Ltd.
18.5. Bosch Chassis System India Limited
18.6. Automotive Axles Limited
18.7. Hindustan Composites Limited
18.8. Allied-Nippon Limited
18.9. Allied-Nippon Limited
18.10. Makino Auto Industries Pvt. Ltd.
18.11. Federal-Mogul Goetze Limited
18.12. Ranbro Brakes India Limited

19. Strategic Recommendations

List of Figures

Figure 1: Automotive Components Industry - Product Segment Chart
Figure 2: India Automotive Components Market Size, By Value, 2009–2013 (USD Billion)
Figure 3: India Automotive Market, By Product Segment Share, By Value, 2014
Figure 4: India Automotive Brake Pads, Shoes, and Linings Market Size, By Value, 2010–2014 (USD Million)
Figure 5: India Automotive Brake Pads, Shoes, and Linings Market Size, By Value, 2015E–2020F (USD Million)
Figure 6: India Automotive Brake Pads, Shoes, and Linings Market Size, By Value, 2015E–2020F (Million Units)
Figure 7: India Automotive Brake Pads, Shoes, and Linings Market Size, By Volume, 2015E–2020F (Million Units)
Figure 8: India Automotive Brake Pads, Shoes, and Linings Market Share, By Vehicle Type, By Value, 2014
Figure 9: India Automotive Brake Pads, Shoes, and Linings Market Share, By Vehicle Type, By Value, 2020F
Figure 10: India Automotive Brake Pads, Shoes, and Linings Market Share, By Vehicle Type, By Value, 2020F
Figure 11: India Automotive Brake Pads & Shoes Market Share, By Vehicle Type, By Value, 2020F
Figure 12: India Automotive Brake Pads, Shoes, and Linings Market Share, By Company, By Value, 2014
Figure 13: India Automotive Brake Pads, Shoes, and Linings Market Share, By Company, By Value, 2020F
Figure 14: India Automotive Brake Pads, Shoes, and Linings Market Share, By Demand Category, By Value, 2014
Figure 15: India Automotive Brake Pads, Shoes, and Linings Market Share, By Demand Category, By Value, 2020F
Figure 16: India Automotive Brake Pads, Shoes, and Linings Market Share, By Demand Category, By Value, 2020F
Figure 17: India Automotive Brake Pads, Shoes, and Linings Market Share, By Demand Category, By Value, 2020F
Figure 18: India Brake Pads, Shoes, and Linings Market Share, By Region, By Volume, 2014 & 2020F
Figure 19: India Automotive Brake Pads Market Size, By Value, 2010–2014 (USD Million)
Figure 20: India Automotive Brake Pads Market Size, By Value, 2015E–2020F (USD Million)
Figure 21: India Automotive Brake Pads Market Size, By Volume, 2010–2014 (Million Units)
Figure 22: India Automotive Brake Pads Market Size, By Volume, 2015E–2020F (Million Units)
Figure 23: India Automotive Brake Pads Market Share, By Vehicle Type, By Value, 2014
Figure 24: India Automotive Brake Pads Market Share, By Vehicle Type, By Value, 2020F
Figure 25: India Automotive Brake Pads Market Share, By Vehicle Type, By Volume, 2014
Figure 26: India Automotive Brake Pads Market Share, By Vehicle Type, By Volume, 2020F
Figure 27: India Automotive Brake Pads Market Share, By Demand Category, By Value, 2014
Figure 28: India Automotive Brake Pads Market Share, By Demand Category, By Value, 2020F
Figure 29: India Automotive Brake Pads Market Share, By Demand Category, By Volume, 2014
Figure 30: India Automotive Brake Pads Market Share, By Demand Category, By Volume, 2020F
Figure 31: India Automotive Brake Shoes Market Size, By Value, 2010–2014 (USD Million)
Figure 32: India Automotive Brake Shoes Market Size, By Value, 2015E–2020F (USD Million)
Figure 33: India Automotive Brake Shoes Market Size, By Volume, 2010–2014 (Million Units)
Figure 34: India Automotive Brake Shoes Market Size, By Volume, 2015E–2020F (Million Units)
Figure 35: India Automotive Brake Shoes Market Share, By Vehicle Type, By Value, 2014
Figure 36: India Automotive Brake Shoes Market Share, By Vehicle Type, By Value, 2020F
Figure 37: India Automotive Brake Shoes Market Share, By Vehicle Type, By Volume, 2014
Figure 38: India Automotive Brake Shoes Market Share, By Vehicle Type, By Volume, 2020F
Figure 39: India Automotive Brake Linings Market Size, By Value, 2010–2014 (USD Million)
Figure 40: India Automotive Brake Linings Market Size, By Value, 2015E–2020F (USD Million)
Figure 41: India Automotive Brake Linings Market Size, By Volume, 2010–2014 (Million Units)
Figure 42: India Automotive Brake Linings Market Size, By Volume, 2015E–2020F (Million Units)
Figure 43: India Automotive Brake Linings Market Share, By Vehicle Type, By Value, 2014
Figure 44: India Automotive Brake Linings Market Share, By Vehicle Type, By Value, 2020F
Figure 45: India Automotive Brake Linings Market Share, By Vehicle Type, By Volume, 2014
Figure 46: India Automotive Brake Linings Market Share, By Vehicle Type, By Volume, 2020F
Figure 47: India Passenger Car Brake Pads & Shoes Market Size, By Value, 2010–2014 (USD Million)
Figure 48: India Passenger Car Brake Pads & Shoes Market Size, By Value, 2015E–2020F (USD Million)
Figure 49: India Passenger Car Brake Pads & Shoes Market Size, By Volume, 2010–2014 (Million Units)
Figure 50: India Passenger Car Brake Pads & Shoes Market Size, By Volume, 2015E–2020F (Million Units)
Figure 51: India Passenger Car Brake Pads & Shoes Market Share, By Demand Category, By Value, 2014
Figure 52: India Passenger Car Brake Pads & Shoes Market Share, By Demand Category, By Value, 2020F
Figure 53: India Passenger Car Brake Pads & Shoes Market Share, By Demand Category, By Volume, 2014
Figure 54: India Passenger Car Brake Pads & Shoes Market Share, By Demand Category, By Volume, 2020F
Figure 55: India Passenger Car Brake Linings Market Share, By Demand Category, By Value, 2014
Figure 56: India Passenger Car Brake Linings Market Share, By Demand Category, By Value, 2020F
Figure 57: India Passenger Car Brake Linings Market Share, By Demand Category, By Volume, 2014
Figure 58: India Passenger Car Brake Linings Market Share, By Demand Category, By Volume, 2020F
Figure 59: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Size, By Value, 2010–2014 (USD Million)
Figure 60: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Size, By Value, 2015E–2020F (USD Million)
Figure 61: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Size, By Volume, 2010–2014 (Million Units)
Figure 62: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Size, By Volume, 2015E–2020F (Million Units)
Figure 63: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Brake Type, By Value, 2014
Figure 64: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Brake Type, By Value, 2020F
Figure 65: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Brake Type, By Volume, 2014
Figure 66: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Brake Type, By Volume, 2020F
Figure 67: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Demand Category, By Value, 2014
Figure 68: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Demand Category, By Value, 2020F
Figure 69: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Demand Category, By Volume, 2014
Figure 70: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Demand Category, By Volume, 2020F
Figure 71: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Demand Category, By Volume, 2014
Figure 72: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Demand Category, By Volume, 2020F
Figure 73: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Demand Category, By Volume, 2014
Figure 74: India Commercial Vehicle Brake Pads, Shoes, & Linings Market Share, By Demand Category, By Volume,
2020F
Figure 75: India CV Brake Pads, Shoes & Linings Market Share, By Demand Category, By Value, 2014
Figure 76: India CV Brake Pads, Shoes & Linings Market Share, By Demand Category, By Value, 2020F
Figure 77: India CV Brake Pads, Shoes & Linings Market Share, By Demand Category, By Volume, 2014
Figure 78: India CV Brake Pads, Shoes & Linings Market Share, By Demand Category, By Volume, 2020F
Figure 79: India Two-Wheeler Brake Pads & Shoes Market Size, By Value, 2010–2014 (USD Million)
Figure 80: India Two-Wheeler Brake Pads & Shoes Market Size, By Value, 2015E–2020F (USD Million)
Figure 81: India Two-Wheeler Brake Pads & Shoes Market Size, By Volume, 2010–2014 (Million Units)
Figure 82: India Two-Wheeler Brake Pads & Shoes Market Size, By Volume, 2015E–2020F (Million Units)
Figure 83: India Two-Wheeler Brake Pads & Shoes Market Share, By Demand Category, By Value, 2014
Figure 84: India Two-Wheeler Brake Pads & Shoes Market Share, By Demand Category, By Value, 2020F
Figure 85: India Two-Wheeler Brake Pads & Shoes Market Share, By Demand Category, By Volume, 2014
Figure 86: India Two-Wheeler Brake Pads & Shoes Market Share, By Demand Category, By Volume, 2020F
Figure 87: India Three-Wheeler Brake Pads & Shoes Market Share, By Brake Type, By Value, 2014
Figure 88: India Three-Wheeler Brake Pads & Shoes Market Share, By Brake Type, By Value, 2020F
Figure 89: India Three-Wheeler Brake Pads & Shoes Market Share, By Brake Type, By Volume, 2014
Figure 90: India Three-Wheeler Brake Pads & Shoes Market Share, By Brake Type, By Volume, 2020F
Figure 91: India Three-Wheeler Brake Shoes Market Size, By Value, 2010–2014 (USD Million)
Figure 92: India Three-Wheeler Brake Shoes Market Size, By Value, 2015E–2020F (USD Million)
Figure 93: India Three-Wheeler Brake Shoes Market Size, By Volume, 2010–2014 (Million Units)
Figure 94: India Three-Wheeler Brake Shoes Market Size, By Volume, 2015E–2020F (Million Units)
Figure 95: India Three-Wheeler Brake Shoes Market Share, By Demand Category, By Value, 2014
Figure 96: India Three-Wheeler Brake Shoes Market Share, By Demand Category, By Value, 2020F
Figure 97: India Three-Wheeler Brake Shoes Market Share, By Demand Category, By Volume, 2014
Figure 98: India Three-Wheeler Brake Shoes Market Share, By Demand Category, By Volume, 2020F
Figure 99: India OTR Brake Linings Market Size, By Value, 2010–2014 (USD Million)
Figure 100: India OTR Brake Linings Market Size, By Value, 2015E–2020F (USD Million)
Figure 101: India OTR Brake Linings Market Size, By Volume, 2010–2014 (Million Units)
Figure 102: India OTR Brake Linings Market Size, By Volume, 2015E–2020F (Million Units)
Figure 103: India OTR Brake Linings Market Share, By Demand Category, By Value, 2014
Figure 104: India OTR Brake Linings Market Share, By Demand Category, By Value, 2020F
Figure 105: India OTR Brake Linings Market Share, By Demand Category, By Volume, 2014
Figure 106: India OTR Brake Linings Market Share, By Demand Category, By Volume, 2020F
Figure 107: India Vehicle Sales, By Vehicle Type, By Volume, 2010–2014 (Million Units)

List of Tables

Table 1: Prominent Players in India Automotive Components Industry, By Product Segment
Table 2: India Automotive Vehicle Fleet, By Segment, 2010-2014 (Million Units)
Table 3: India Automotive Vehicle Production, By Volume, 2010–2014 (Million Units)
Table 4: India Automotive Vehicle Sales, By Volume, 2010–2014 (Million Units)
Table 5: India Automotive Brake Pads ASP in Replacement Market, By Vehicle Type, 2010 & 2014 (USD)
Table 6: India Automotive Brake Pads ASP in Replacement Market, By Vehicle Type, 2015E & 2020F (USD)
Table 7: India Automotive Brake Shoes ASP in Replacement Market, By Vehicle Type, 2010 & 2014, 2015 & 2020 (USD)
Table 8: India Automotive Brake Pads Market Size, By Value & Volume, 2010 & 2014 (USD)
Table 9: India Automotive Brake Shoes Market Size, By Value & Volume, 2010 & 2014 (USD)
Table 10: India Passenger Car Brake Pads & Shoes ASP, By Replacement Market, 2010 & 2014 (USD)
Table 11: India Passenger Car Brake Pads & Shoes ASP in Replacement Market, 2015E & 2020F (USD)
Table 12: Upcoming Greenfield and Brownfield Projects in Passenger Car Segment, 2014–2020
Table 13: India Passenger Car Production and Sales, By Volume, 2010-2014 (Million Units)
Table 14: India Passenger Car Brake Pads Market Size, By Value & Volume, 2014 & 2020F
Table 15: India Passenger Car Brake Shoes Market Size, By Value & Volume, 2014 & 2020F
Table 16: India Commercial Vehicle Brake Pads, Shoes & Linings ASP in Replacement Market, 2010 & 2014 (USD)
Table 17: India Commercial Vehicle Brake Pads, Shoes & Linings ASP in Replacement Market, 2015E & 2020F (USD)
Table 18: Upcoming Greenfield and Brownfield Projects in Commercial Vehicle Segment, 2014–2020
Table 19: India Commercial Vehicle Brake Pads Market Size, By Value & Volume, 2014 & 2020F
Table 20: India Commercial Vehicle Brake Shoes Market Size, By Value & Volume, 2014 & 2020F
Table 21: India Commercial Vehicle Brake Linings Market Size, By Value & Volume, 2014 & 2020F
Table 22: India Commercial Vehicle Production, By Segments, By Volume, 2010-2014 (Million Units)
Table 23: India Commercial Vehicle Sales, By Segments, By Volume, 2010-2014 (Million Units)
Table 24: India Two-Wheeler Brake Pads & Shoes ASP in Replacement Market, 2010 & 2014 (USD)
Table 25: India Two-Wheeler Brake Pads & Shoes ASP in Replacement Market, 2015E & 2020F (USD)
Table 26: Upcoming Greenfield and Brownfield Projects in Two Wheelers Segment, 2014 - 2020
Table 27: India Two-Wheeler Production, By Volume, 2010-2014 (Million Units)
Table 28: India Two-Wheeler Sales, By Segments, By Volume, 2010-2014 (Million Units)
Table 29: India Two-wheeler Brake Pads Market Size, By Value & Volume, 2014 & 2020F
Table 30: India Two-wheeler Brake Pads Market Size, By Value & Volume, 2014 & 2020F
Table 31: India Three-Wheeler Brake Pads & Shoes ASP in Replacement Market, 2015E & 2020F (USD)
Table 32: India Three-Wheeler Production and Sales Statistics, By Volume, 2010-2014 (Million Units)
Table 33: India OTR Brake Linings ASP in Replacement Market, 2015E & 2020F (USD)
Table 34: India Off-The-Road (OTR) Production and Sales Statistics, By Volume, 2010-2014 (Million Units)
Table 35: Standards for Brake Friction laid down by the Bureau of Indian standards
Table 36: Rane Brake Linings Limited Financials, 2010-2011 to 2013-2014 (USD Million)
Table 37: Sundaram Brake Linings Limited Financials, 2012-2013 & 2013-2014 (USD Million)
Table 38: Brakes India Private Limited Financials, 2012-13 & 2013-14 (USD Million)
Table 39: Automotive Axles Limited Financials, 2009-2010 to 2013-2014 (USD Million)
Table 40: Hindustan Composite Limited Financials, 2012-2013 & 2013-2014 (USD Million)
Table 41: Allied Nippon Limited Financials, 2012-2013 & 2013-2014 (USD Million)
Table 42: Makino Auto Industries Pvt. Ltd. Financials, 2012-13 & 2013-14 (USD Million)
Table 43: Federal-Mogul Goetze (India) Limited Financials, 2013 (USD Million)
Table 44: Brakewel Automotive Components (I) Pvt. Limited Financials, 2012-13 & 2013-14 (USD Million)

Ordering:
Order Online - http://www.researchandmarkets.com/reports/3163230/

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: India Automotive Brake Pads, Shoes, and Linings Market Forecast and Opportunities, 2020
Web Address: http://www.researchandmarkets.com/reports/3163230/
Office Code: SCH3WERO

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Format</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User</td>
<td>USD 2000</td>
</tr>
<tr>
<td>CD-ROM</td>
<td>USD 2600 + USD 58 Shipping/Handling</td>
</tr>
<tr>
<td>Hard Copy</td>
<td>USD 3000 + USD 58 Shipping/Handling</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide</td>
<td>USD 4500</td>
</tr>
</tbody>
</table>

* Shipping/Handling is only charged once per order.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [Mr] [Mrs] [Dr] [Miss] [Ms] [Prof]
First Name: ___________________________ Last Name: ___________________________
Email Address: * ______________________________
Job Title: _______________________________
Organisation: ___________________________
Address: _______________________________
City: _________________________________
Postal / Zip Code: _______________________
Country: _______________________________
Phone Number: __________________________
Fax Number: ___________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

<table>
<thead>
<tr>
<th>Account number</th>
<th>833 130 83</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort code</td>
<td>98-53-30</td>
</tr>
<tr>
<td>Swift code</td>
<td>ULSBIE2D</td>
</tr>
<tr>
<td>IBAN number</td>
<td>IE78ULSB98533083313083</td>
</tr>
<tr>
<td>Bank Address</td>
<td>Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland.</td>
</tr>
</tbody>
</table>

If you have a Marketing Code please enter it below:

Marketing Code: ____________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World