Grinding Machines - Global Strategic Business Report

Description: This report analyzes the worldwide markets for Grinding Machines in US$ by the following Product Segments: Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines. The US market is further analyzed by the following End-Use Sectors: Job Shops, Automotive, Aerospace & Defense, Heavy Industries, and Others. The report provides separate comprehensive analytics for the US, Canada, Japan Europe, Asia-Pacific, Middle East & Africa, and Latin America.

Annual estimates and forecasts are provided for the period 2015 through 2022. Also, a six-year historic analysis is provided for these markets. Market data and analytics are derived from primary and secondary research.

Company profiles are primarily based on public domain information including company URLs. The report profiles 279 companies including many key and niche players such as:

- Abwood Machine Tools
- Amada Co, Ltd.
- Amada Machine Tools America, Inc.
- ANCA Pty. Ltd.
- C & B Machinery

Contents:

I. INTRODUCTION, METHODOLOGY & PRODUCT DEFINITIONS

Study Reliability and Reporting Limitations
Disclaimers
Data Interpretation & Reporting Level
Quantitative Techniques & Analytics
Product Definitions and Scope of Study

II. EXECUTIVE SUMMARY

1. INDUSTRY OVERVIEW
Grinding Machines: Delivering Dimensional Accuracy and High Precision in Demanding Applications
Market Fortunes Intrinsically Linked to the Machine Tools Industry
Technology Refinements Boost Demand for Numerical Control (NC) Machine Tools
3D-Printing Machines Marks the Emergence of Next Generation Machine Tools
Smart Machines Spiral in Popularity
China: Leading Machine Tools Producing Nation in the World
Spending on Machine Tools in 2016
Table 1: Global Machines Tools Sales (US$ Million): 2015, 2017, and 2019 (includes corresponding Graph/Chart)
Global Market Outlook
Recovering Economic Fundamentals Presents Optimistic Outlook for Grinding Machines
Current Economic Scenario & Future Outlook
Table 2: Real GDP Growth Rates (%) in Major World Economies: 2014-2017E (includes corresponding Graph/Chart)
Despite Slowdown in Economic Growth, China Continues to Dominate Global Sales of Grinding Machines
Table 3: Global Manufacturing Output by Region (1990 & 2013): Percentage Breakdown for China, Europe, North America, Rest of Asia, and Rest of World (includes corresponding Graph/Chart)

2. COMPETITION
Grinding Machines Marketplace: Extremely Consolidated
Competition: Noteworthy Trends
After Sales Customer Service, Training & Support: Important for Success in the Marketplace
Innovative Technologies: Need of the Hour
3. MARKET TRENDS, ISSUES & DRIVERS
Superior Attributes over Milling and Turning Drives Healthy Demand in Aerospace Engine and Components Manufacturing
Machining Platforms Evolve to Address Specific Needs of the Aerospace Industry
Custom Grinding and Dressing Solutions for Aerospace Parts
HVOF Grinding Approaches
Use of New and Different Materials in Aerospace Building Provide Opportunities
Rise in Aircraft Fleet Drive Long-term Opportunities
Table 4: Global Aircraft Deliveries Estimates and Forecasts (2014-2020) (in Units) (includes corresponding Graph/Chart)
Table 5: Demand for New Airplanes by Region (2015-2035) (includes corresponding Graph/Chart)
Table 6: Boeing Aircraft Gross Orders, Deliveries & Unfilled Orders (in Units): for the Years 2011 through 2015 (includes corresponding Graph/Chart)
Healthy Commercial Aviation Outlook Benefits Market Demand
Table 7: Commercial Aircraft Engines in Service (Thousands) Worldwide: 2015, 2020, 2025, 2030, and 2035 (includes corresponding Graph/Chart)
Table 8: Global Growth in Commercial Air Passenger Traffic (in Billion) for the Years 2012 through 2015 & Projections for 2034 (includes corresponding Graph/Chart)
Table 9: Rising Passenger Traffic as Measured by Revenue Passenger Kilometers (RPKs) in Billion for the Years 2011, 2013E, 2015P & 2030P (includes corresponding Graph/Chart)
Surging Popularity of Laser Machines in Handling Tough Tool Grinding Benefits Market Adoption
Medical Orthopedic Implants Opens Up New Avenues for Future Growth
CNC Tool Grinders Find Growing Use in Orthopedic Implants Grinding
Increasing Use in Electrical Appliances and Electronics Manufacturing Drive Demand for Die Grinders
Efficiency and Productivity Benefits Drives Demand in the Cement Manufacturing Industry
Increasing Proliferation of Advanced Technologies in Gear Grinding Lends Traction to Market Growth
Solutions to Reduce Noise
Accelerating Grinding Time
Enhanced Polish Grinding
Myriad Applications in the Semiconductor Industry Boosts Market Adoption
Opportunity Indicators
Table 10: World Electronic Components Market & Semiconductor CAPEX (US$): 2016 & 2018 (includes corresponding Graph/Chart)
Table 11: World Industrial Semiconductor Market (In US$ Billion) for the Years 2016, 2018 & 2020 (includes corresponding Graph/Chart)
Growing Demand for New Generation Automobiles Extends Opportunities for Grinding Machines
Table 12: World Production of Passenger Cars & Commercial Vehicles: Breakdown of Annual Production Figures in '000' Units for Years 2015 & 2020 (includes corresponding Graph/Chart)
Shortage of Skilled Labor is Driving Automation in Grinding Machinery
Implications of Increasing Robotic Automation for Grinding Machines
Growing Share of Renewables Spurs Demand for Grinding Machines in Wind Turbines Production
Table 13: Global Energy Production: Percentage Share Breakdown of Production Volume by Energy Source Oil, Gas, Coal, Nuclear, Hydroelectricity & Renewables for Years 1990, 2000, 2015 & 2035 (includes corresponding Graph/Chart)
Positive Outlook for the Global Construction Industry Benefits Market Prospects
Table 14: Growth in the Global Construction Market by Sector: 2013-2020 (includes corresponding Graph/Chart)
Table 15: Global Construction Market by Region (2015 & 2020P): Percentage Breakdown of Construction Spending for Asia, Western Europe, North America, Latin America, Eastern Europe, Africa, and Middle East (includes corresponding Graph/Chart)
Asia-Pacific Continues to Dominate the Global Market, Also Offers Significant Growth Opportunities
Table 16: Global Grinding Machines Market
Geographic Regions Ranked by CAGR (Value Sales) for 2015-2022: Asia-Pacific, Middle East & Africa, Latin America, Europe, Japan, Canada, and the US (includes corresponding Graph/Chart)
Outsourcing of Manufacturing Activity Boosts Demand for Grinding Machines in Developing Countries
Other Steadily Growing End-Use Markets for Grinding Machines
Job Shops Industry
Heavy Machinery Industry

4. GRINDING MACHINE INNOVATIONS & ADVANCEMENTS
Centerless Grinding Machines Innovations
Small Grinders
Diamond Roll Dressers
Optimizing Costs
Power Cost
Employees Cost
Consumable Costs
Precision Linear Guideways
Automatic Wheel Balancers
Redesigned Coolers and Flappers
Hybrid Grinding Machine
Innovations in High-Productivity Generating Grinding
Dry Grinding Process Transforming Gear Grinding
Holroyd Unveils CS700E for High Accuracy Grinding
Norton Century45 Wheels Offer Superior Centerless Grinding Process
Norton Offer Advanced Grinding Solutions
Developments in Abrasive Grain
Norton B45 Centerless Grinding Bond
Extended Wheel Centerless Grinding Bond
Superior Versatility
Enhanced Stock Removal Rate
Quieter Grind
Glebar's CAM.2 Opens New Vistas for Medical and Dental Industries
Glebar Develops Centerless Grinding Process for the Automotive Sector
Molecular Decomposition Process® Grinding Technology
EMAG’S PMD 2 Crankshaft Grinder Grinds down Costs
High Speed Grinding (HSG)
High-Speed Grinding Under the Spotlight
Continuous Path Controlled (CPC) Grinding
Other Noteworthy Innovations in Grinding Machines
FX Linear Grinders
U-Grind Universal CNC Grinder
Helitronic Vision 400 and Mini Automation
S141 Internal Grinding Machine
Chevalier Surface Grinding Machines

5. PRODUCT OVERVIEW
Grinding
Classification of Machine Tools
Grinding Machines Definition
Floor Mounted & Bench Type Grinding Machines
Types of Grinding Machines
Surface Grinding Machines
Characteristics of Horizontal Spindle Reciprocating Table Machines
Characteristics of Vertical Spindle Reciprocating Table Machines
Characteristics of Horizontal Spindle Rotary Table Machines
Characteristics of Vertical Spindle Rotary Table Machines
Cylindrical Grinding Machines
Centerless Grinding Machines
Other Grinding Machines
Utility Grinding Machines
Bench-mounted Utility Grinding Machines
Bench-type Drill Grinding Machine
Bench-type Utility Grinding and Buffing Machine
Belt Grinder
Bench Grinder
Tool and Cutter Grinders
Bench Type Tool and Cutter Grinder
Jig Grinder
6. PRODUCT INTRODUCTIONS & INNOVATIONS

HTC Unveils New Floor Grinders
Fives to Launch Landis-Bryant Grinder
Fives Introduces Landis Twin Turret Grinder
Gleason Launches Threaded Wheel Grinding Machines
Saint-Gobain Introduces Lightweight Vitrified cBN Wheels for OD Grinding
SUHNER Launches New Compact Pneumatic Grinding Machines
Star SU Introduces Tool Cutting Advancements
Forkardt Unveils HWC Hydraulic Actuating Cylinder
Osborn Launches New Range of Abrasive Products
HAAS Multigrind Launches New Line Grinding Machines
JUNKER Unveils New Grinding Machines
Saint-Gobain Introduces Range of Centerless Grinding Wheels
SHIGIYA Launches CNC Cylindrical Grinders
SHIGIYA Unveils GPS-30B Cylindrical Grinder
United Grinding Unveils Advanced Profile and Surface Grinding Systems
Samputensili Launches SG 160 Sky Grind Grinding Machine
Curtis Introduces Dual-spindle Grinder
Jones and Shipman Launches Cylindrical Grinding Machines
STUDER Launches Cylindrical Grinding Machine
Bosch Unveils Small Angle Grinder
Vollmer Unveils New Range of Grinding Centres
Wendt India Launches Precision Grinding Machinery
HMT Unveils Heavy Duty Cylindrical Grinder
Schütte Launches 5-axis CNC Grinder
Okuma Updates GPW/GAW Grinder Line
Shigeyoshi Launches Upgraded Version of its Vertical CNC Grinders
Husqvarna Launches New Line of Grinding Machines
Danobat Unveils Centreless Grinding Machine
Mitsui Seiki Unveils Novel Thread Grinding Technology
Dorman Machine Tools to Launch New Range of Grinding and Deburring Machines
Peterson Pacific Unveils 5710D Grinder
Makita Launches GS5000 Straight Grinder
Walter Maschinenbau to Launch Microtool Grinder
UNITED GRINDING Launches Cylindrical Grinding Machine
ANCA Launches CNC Tool Grinders

7. RECENT INDUSTRY ACTIVITY

SST Inks Agreement with JUNKER Group
Fives Secures Order for Landis LT2e Orbital Crankshaft Grinders
Georg Takes Over Capco Machinery Systems
Wendt (India) to Acquire Diamond Dressing Tools
Star SU Forms JV with Neher Group to Divest its PCD Tooling
Junker Group Takes Over Majority Stake in ZEMA
United Grinding North America Inks Distribution Agreement with Methods Machine Tools
Hardinge Plans to Take Over Voumard

8. FOCUS ON SELECT GLOBAL PLAYERS

Abwood Machine Tools (UK)
Amada Co, Ltd. (Japan)
Amada Machine Tools America, Inc. (USA)
ANCA Pty. Ltd. (Australia)
C & B Machinery (USA)
Campbell Grinder Co. (USA)
CT Machine Tools Limited (UK)
Danobat Group (Spain)
ELB-SCHLFF Werkzeugmaschinen GmbH (Germany)
Aba Grinding Technologies GmbH, Aschaffenburg (Germany)
EMAG GmbH & Co. KG (Germany)
Erwin Junker Maschinenfabrik GmbH (Germany)
Falcon Machine Tools Co., Ltd. (Taiwan)
Chevalier Machinery, Inc. (USA)
Fives Cinetic SA (France)
Gleason Corporation (US)
Glebar Co. (USA)
Hardinge, Inc. (USA)
Jones & Shipman Hardinge Ltd. (UK)
Heinz Berger Maschinenfabrik GmbH & Co. KG (Germany)
HTC Sweden AB (Sweden)
IMT SpA-Stabilimento MORARA
DE.CI.MA (Italy)
ITM
International Tool Machines (USA)
Jtekt Corporation (Japan)
JTEKT Toyoda Americas Corporation (USA)
Junker Group (Germany)
Kent Industrial Co., Ltd. (Taiwan)
KMT Precision Grinding AB (Sweden)
Körber AG (Germany)
Schleifring Group (Germany)
Koyo Machinery USA, Inc. (USA)
Kunshan Huachen Heavy Machinery Co., Ltd. (China)
L. Kellenberger & Co. AG (Switzerland)
Jones & Shipman Hardinge Limited (UK)
Matrix Machine Tool (Coventry) Limited (UK)
Mitsubishi Machine Tools, Inc. (USA)
Moore Tool Company, Inc. (USA)
Oberg Industries (USA)
Okamoto Corporation (USA)
Okuma Corporation (Japan)
Pietro Carnaghi S.p.A. (Italy)
Qinchuan Machine Tool & Tool Group Co., Ltd. (China)
Royal Master Grinders, Inc. (USA)
Shanghai Machine Tool Works Ltd. (China)
Sumitomo Heavy Industries Ltd. (Japan)
Shigiyu (USA) Ltd.
Taiyo Koki Co., Ltd. (Japan)
Toshiba Machine Co., Ltd. (Japan)
United Grinding Technologies (USA)
WMW Machinery Company (USA)

9. GLOBAL MARKET PERSPECTIVE

Table 17: World Recent Past, Current & Future Analysis for Grinding Machines by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets Independently
Analyzed with Annual Sales in US$ Million for Years 2015 through 2022 (includes corresponding
Graph/Chart)

Table 18: World Historic Review for Grinding Machines by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets Independently
Analyzed with Annual Sales in US$ Million for Years 2009 through 2014 (includes corresponding
Graph/Chart)

Table 19: World 14-Year Perspective for Grinding Machines by Geographic Region
Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and
Latin America Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

Table 20: World Recent Past, Current & Future Analysis for Surface Grinding Machines by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets Independently
Analyzed with Annual Sales in US$ Million for Years 2015 through 2022 (includes corresponding
Graph/Chart)

Table 21: World Historic Review for Surface Grinding Machines by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets Independently
Analyzed with Annual Sales in US$ Million for Years 2009 through 2014 (includes corresponding
Graph/Chart)

Table 22: World 14-Year Perspective for Surface Grinding Machines by Geographic Region
Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and
Latin America Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

Table 23: World Recent Past, Current & Future Analysis for Cylindrical Grinding Machines by Geographic
Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets Independently Analyzed with Annual Sales in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 24: World Historic Review for Cylindrical Grinding Machines by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets Independently Analyzed with Annual Sales in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 25: World 14-Year Perspective for Cylindrical Grinding Machines by Geographic Region
Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)
Table 26: World Recent Past, Current & Future Analysis for Center-Less Grinding Machines by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets Independently Analyzed with Annual Sales in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 27: World Historic Review for Center-Less Grinding Machines by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets Independently Analyzed with Annual Sales in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 28: World 14-Year Perspective for Center-Less Grinding Machines by Geographic Region
Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)
Table 29: World Recent Past, Current & Future Analysis for Other Grinding Machines by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets Independently Analyzed with Annual Sales in US$ Million for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 30: World Historic Review for Other Grinding Machines by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets Independently Analyzed with Annual Sales in US$ Million for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 31: World 14-Year Perspective for Other Grinding Machines by Geographic Region
Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Middle East & Africa and Latin America Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

III. MARKET

1. THE UNITED STATES
A. Market Analysis
Despite Sluggish Economic Recovery, Healthy Growth Projected for the US Market
Shale Gas Revolution Promises to Trigger Manufacturing Renaissance in the US
Proposed US-EU Trade Pact Boosts Prospects for Cross Atlantic Trade
Product Launches
Strategic Corporate Developments
Select Key Players
B. Market Analytics
Analytics by Product Segment
Table 32: US Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 33: US Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 34: US 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)
Analytics by End-Use Sector
Table 35: US Recent Past, Current & Future Analysis for Grinding Machines by End-Use Segment
Job Shops, Automotive, Aerospace & Defense, Heavy Industries and Others Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
2. CANADA
A. Market Analysis
Recovering Manufacturing Sector Drive Market Growth
High-Speed Machining Gains Prominence in the Market
Growing Activity in the Aerospace Sector Bodes Well For the Market

B. Market Analytics
Table 38: Canadian Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 39: Canadian Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 40: Canadian 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

3. JAPAN
A. Market Analysis
Japan: A Major Industrialized Nation Continue to Sustain Market Growth
Disaster Recovery Efforts Drive Replacement Demand
Japanese Companies Adopt New Initiatives to Stay in Competition

B. Market Analytics
Table 41: Japanese Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 42: Japanese Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 43: Japanese 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

4. EUROPE
A. Market Analysis
Growing Demand from Diverse Industry Segments Benefit Market Growth

B. Market Analytics
Table 44: European Recent Past, Current & Future Analysis for Grinding Machines by Geographic Region/Country
France, Germany, Italy, UK, Spain, Russia and Rest of Europe Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 45: European Historic Review for Grinding Machines by Geographic Region/Country
France, Germany, Italy, UK, Spain, Russia and Rest of Europe Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 46: European 14-Year Perspective for Grinding Machines by Geographic Region/Country
Percentage Breakdown of Dollar Sales for France, Germany, Italy, UK, Spain, Russia and Rest of Europe Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)
Table 47: European Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 48: European Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 49: European 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

4a. FRANCE
A. Market Analysis
Product Launches
Fives Cinetic SA
A Major France-Based Company
B. Market Analytics

Table 50: French Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 51: French Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 52: French 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

4b. GERMANY
A. Market Analysis
Post-Recession Recovery in Manufacturing Activity Drive Market Demand
Price Wars from Developing Economies: A Cause of Concern for German Makers of Machine Tools
Manufacturers Adopt Newer Technologies, Value-Added Services and Integrated Solutions to Stay Competitive
Product Launches
Strategic Corporate Development
Select Key Players
B. Market Analytics

Table 53: German Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 54: German Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 55: German 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

4c. ITALY
A. Market Analysis
Machine Tools Market Overview
Product Launch
Select Key Players
B. Market Analytics

Table 56: Italian Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 57: Italian Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 58: Italian 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

4d. THE UNITED KINGDOM
A. Market Analysis
Continued Innovations Benefit Market Demand
Product Launches
Strategic Corporate Development
Select Key Players
B. Market Analytics
Table 59: United Kingdom Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 60: United Kingdom Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 61: United Kingdom 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

4e. SPAIN
A. Market Analysis
Characteristic Features of the Spanish Market
Product Launch
Danobat Group
A Major Spain-Based Company
B. Market Analytics
Table 62: Spanish Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 63: Spanish Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 64: Spanish 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

4f. RUSSIA
A. Market Analysis
Need to Refurbish Heavy Engineering Production Facilities Drives Demand
Large Oil & Gas Reserves Drive the Need for Fabrication Using Grinders
B. Market Analytics
Table 65: Russian Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 66: Russian Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009
4g. REST OF EUROPE
A. Market Analysis
Product Launches
Select Key Players
B. Market Analytics
Table 68: Rest of Europe Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015
through 2022 (includes corresponding Graph/Chart)
Table 69: Rest of Europe Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009
through 2014 (includes corresponding Graph/Chart)
Table 70: Rest of Europe 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-
less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes
corresponding Graph/Chart)

5. ASIA-PACIFIC
A. Market Analysis
Asia-Pacific: The Largest and the Fastest Growing Grinding Machines Market Worldwide
Table 71: Global Grinding Machines Market
Geographic Regions Ranked by CAGR (Value Sales) for 2015-2022: Asia-Pacific, Middle East & Africa, Latin
America, Europe, Japan, Canada, and the US (includes corresponding Graph/Chart)
Outsourcing of Manufacturing Activity to Asia Boosts Demand for Grinding Machines
B. Market Analytics
Table 72: Asia-Pacific Recent Past, Current & Future Analysis for Grinding Machines by Geographic
Region/Country
China, India, South Korea, Taiwan and Rest of Asia-Pacific Markets Independently Analyzed with Annual Sales
in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 73: Asia-Pacific Historic Review for Grinding Machines by Geographic Region/Country
China, India, South Korea, Taiwan and Rest of Asia-Pacific Markets Independently Analyzed with Annual Sales
in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 74: Asia-Pacific 14-Year Perspective for Grinding Machines by Geographic Region/Country
Percentage Breakdown of Dollar Sales for China, India, South Korea, Taiwan and Rest of Asia-Pacific Markets
for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)
Table 75: Asia-Pacific Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015
through 2022 (includes corresponding Graph/Chart)
Table 76: Asia-Pacific Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009
through 2014 (includes corresponding Graph/Chart)
Table 77: Asia-Pacific 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-
less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes
corresponding Graph/Chart)

5a. CHINA
A. Market Analysis
Steadily Growing End-Use Sectors Drive Strong Demand for Grinding Machines
Increasing Activity in Chinese Automotive Market Benefits Growth Prospects
Despite Slowdown in Economic Growth, China Continues to Dominate Global Sales of Grinding Machines
Table 78: Global Manufacturing Output by Region (1990 & 2013): Percentage Breakdown for China, Europe,
North America, Rest of Asia, and Rest of World (includes corresponding Graph/Chart)
China: Largest Machine Tools Producing Nation in the World
CNC Machine Tools Rise in Popularity
The Road Ahead
Select Key Players
B. Market Analytics
Table 79: Chinese Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 80: Chinese Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 81: Chinese 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

5b. INDIA
A. Market Analysis
Advancements in Technology and Booming Demand Drive Market Growth
Key Issues & Challenges
Factors Affecting Market Fortunes
Rampant Restructuring of Public & Private Enterprises Paints Greener Avenues
Product Launches
Strategic Corporate Development
B. Market Analytics
Table 82: Indian Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 83: Indian Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 84: Indian 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

5c. SOUTH KOREA
A. Market Analysis
South Korea's Machine Tools Market Overview
B. Market Analytics
Table 85: South Korean Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 86: South Korean Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 87: South Korean 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

5d. TAIWAN
A. Market Analysis
Market Primer
Select Key Players
B. Market Analytics
Table 88: Taiwanese Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other
Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)

Table 89: Taiwanese Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)

Table 90: Taiwanese 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

5e. REST OF ASIA-PACIFIC
A. Market Analysis
ANCA Pty. Ltd.
A Major Australia-Based Company
B. Market Analytics
Table 91: Rest of Asia-Pacific Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 92: Rest of Asia-Pacific Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 93: Rest of Asia-Pacific 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

6. MIDDLE EAST/AFRICA
Market Analysis
Table 94: Middle East and Africa Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 95: Middle East and Africa Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 96: Middle East and Africa 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

7. LATIN AMERICA
Market Analysis
Table 97: Latin American Recent Past, Current & Future Analysis for Grinding Machines by Geographic Region/Country
Brazil and Rest of Latin America Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 98: Latin American Historic Review for Grinding Machines by Geographic Region/Country
Brazil and Rest of Latin America Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 99: Latin American 14-Year Perspective for Grinding Machines by Geographic Region/Country
Percentage Breakdown of Dollar Sales for Brazil and Rest of Latin America Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)
Table 100: Latin American Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 101: Latin American Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 102: Latin American 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

7a. BRAZIL
A. Market Analysis
Corporate Development
B. Market Analytics
Table 103: Brazilian Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 104: Brazilian Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 105: Brazilian 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

7b. REST OF LATIN AMERICA
Market Analysis
Table 106: Rest of Latin America Recent Past, Current & Future Analysis for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2015 through 2022 (includes corresponding Graph/Chart)
Table 107: Rest of Latin America Historic Review for Grinding Machines by Product Segment
Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets Independently Analyzed with Annual Sales in US$ Thousands for Years 2009 through 2014 (includes corresponding Graph/Chart)
Table 108: Rest of Latin America 14-Year Perspective for Grinding Machines by Product Segment
Percentage Breakdown of Dollar Sales for Surface Grinding Machines, Cylindrical Grinding Machines, Center-less Grinding Machines, and Other Grinding Machines Markets for Years 2009, 2016 & 2022 (includes corresponding Graph/Chart)

IV. COMPETITIVE LANDSCAPE
Total Companies Profiled: 279 (including Divisions/Subsidiaries 300)
The United States (41)
Japan (27)
Europe (157)
- France (2)
- Germany (73)
- The United Kingdom (15)
- Italy (20)
- Spain (3)
- Rest of Europe (44)
Asia-Pacific (Excluding Japan) (75)

Ordering:
Order Online - http://www.researchandmarkets.com/reports/1206784/
Order by Fax - using the form below
Order by Post - print the order form below and send to
Research and Markets,
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.

<table>
<thead>
<tr>
<th>Product Name:</th>
<th>Grinding Machines - Global Strategic Business Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Address:</td>
<td><a href="http://www.researchandmarkets.com/reports/1206784/">http://www.researchandmarkets.com/reports/1206784/</a></td>
</tr>
<tr>
<td>Office Code:</td>
<td>SC</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF)</td>
<td></td>
</tr>
<tr>
<td>Single User:</td>
<td>USD 4950</td>
</tr>
<tr>
<td>1 - 5 Users:</td>
<td>USD 6930</td>
</tr>
<tr>
<td>1 - 10 Users:</td>
<td>USD 9405</td>
</tr>
<tr>
<td>1 - 15 Users:</td>
<td>USD 11880</td>
</tr>
</tbody>
</table>

* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

Contact Information
Please enter all the information below in BLOCK CAPITALS

<table>
<thead>
<tr>
<th>Title:</th>
<th>Mr ☐ Mrs ☐ Dr ☐ Miss ☐ Ms ☐ Prof ☐</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td></td>
</tr>
<tr>
<td>Email Address: *</td>
<td></td>
</tr>
<tr>
<td>Job Title:</td>
<td></td>
</tr>
<tr>
<td>Organisation:</td>
<td></td>
</tr>
<tr>
<td>Address:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
</tr>
<tr>
<td>Postal / Zip Code:</td>
<td></td>
</tr>
<tr>
<td>Country:</td>
<td></td>
</tr>
<tr>
<td>Phone Number:</td>
<td></td>
</tr>
<tr>
<td>Fax Number:</td>
<td></td>
</tr>
</tbody>
</table>

* 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: Bank details will be provided on the invoice which you will receive after you place your order with us.

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