

Usage-Based Insurance Market Report by Type (Pay-As-You-Drive (PAYD), Pay-How-You-Drive (PHYD), Manage-How-You-Drive (MHYD), and Others), Technology (OBD II, Black Box, Smartphones, and Others), Vehicle Type (Light-Duty Vehicle (LDV), Heavy-Duty Vehicle (HDV)), Vehicle Age (New Vehicles, Used Vehicles), and Region 2024-2032

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Report description:

The global usage-based insurance market size reached US\$ 51.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 307.6 Billion by 2032, exhibiting a growth rate (CAGR) of 21.3% during 2024-2032. The market is primarily driven by the expanding insurance ecosystem, the rising number of autonomous vehicles, the elevating collaborations and partnerships between insurers and various tech companies for UBI solutions, and the growing popularity of personalized insurance services.

Usage-Based Insurance Market Analysis:

- Major Market Drivers: The increasing proliferation of telematics technology, such as accelerometers, GPS, and onboard diagnostics to allow the collection of detailed data regarding driving behavior is catalyzing the usage-based insurance market growth. Moreover, UBI aids insurers in assessing risks related to driving, including acceleration, cornering, braking, and speed, enabling more accurate pricing of insurance premiums, which is also stimulating the usage-based insurance market forecast.
- Key Market Trends: The growing popularity of machine learning and artificial intelligence (AI) algorithms among insurers for analyzing telematics data and predicting driver behavior to detect patterns and personalize offerings is acting as a significant growth-inducing factor. Furthermore, the rising number of strategic partnerships between insurers and automotive OEMs and telematics providers to access vehicle data and increase their UBI offerings is positively influencing the usage-based insurance market share globally.

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-[]Competitive Landscape: Some of the major market players in the usage-based insurance industry trends include Aioi Nissay Dowa Insurance UK Ltd., Allianz SE, Allstate Insurance Company, American International Group Inc., Assicurazioni Generali S.p.A., AXA, Liberty Mutual Insurance Company, Mapfre S.A., Progressive Casualty Insurance Company, State Farm Automobile Mutual Insurance Company, TomTom International BV., UnipolSai Assicurazioni S.p.A. (Unipol Gruppo S.p.A), among many others.

-[]Geographical Trends: North America accounted for the largest share in the usage-based insurance market analysis, owing to the development of technologically-advanced infrastructure and the increasing number of tech-savvy consumers across the region. Moreover, the rising urban population density and the elevating vehicle ownership rates are also propelling the usage-based insurance market outlook in North America.

-[]Challenges and Opportunities: One of the major challenges of the market includes collecting and analyzing the telematics data for UBI programs, as it raises privacy concerns among individuals. However, the rising engagement of insurers with customers through rewards, feedbacks, and incentives to encourage safer driving habits and improve individual satisfaction is presenting significant growth opportunities for the usage-based insurance market demand.

Usage-Based Insurance Market Trends:

Rising Demand for Remote Diagnostics to Monitor Consumer Driving Behavior

The extensive utilization of telematics technology by insurers to collect real-time data remotely from vehicles for monitoring consumer driving habits, such as acceleration, speed, and braking is primarily driving the usage-based insurance market statistics. Moreover, the widespread availability of remote diagnostics allows insurance providers to offer accurate premium calculations to consumers, which is also propelling the market growth. For instance, according to Ptolemus, a mobility-focused research and strategic consulting organization with headquarters in Brussels, about 20 million of the 875 million motor insurance plans in force last year were usage-based. Additionally, in August 2023, Citroen India, with the help of ICICI Lombard General Insurance, introduced Usage-Based Insurance for EC3 Customers to encourage safe driving among owners. Furthermore, in September 2023, Definity launched a new usage-based insurance (UBI) offering to provide drivers unprecedented control over their premiums while promoting safer driving practices.

Increasing Need to Reduce Road Accidents and Promote Driver Safety

The escalating demand for UBI as a proactive solution to incentivize safer driving behaviors, owing to the increasing number of road accidents causing human and economic losses, is stimulating the usage-based insurance market growth. For instance, according to the WHO Global Status Report on Road Safety, there were 1.3 million deaths in road traffic and 20 to 50 million people were injured or impacted due to road incidents. More than 93% of road traffic accidents happen in low- and middle-income countries. Moreover, government bodies are launching various policies to ensure road safety and reduce the occurrence of road accidents. For example, New South Wales collaborated with partners, stakeholders, and members of the NSW community in establishing the 2026 Road Safety Action Plan. Their consultations were well-attended and eventually aided in developing several programs. The Engagement Summary for the 2026 Road Safety Action Plan gives a snapshot of the engagement activities and responses received throughout NSW during the consultation. Furthermore, the National Safety Council, part of the US federal government, has created the Road to the Zero project to eradicate highway fatalities by 2050.

The Rapid Adoption of Advanced Technologies

The rising adoption of advanced technologies, such as smartphone-based usage-based insurance (UBI) and hybrid-based insurance is positively influencing the market growth. In addition to this, the integration of advanced technologies into insurance practices to improve accuracy in personalized premium calculation, risk assessment, and real-time data analysis is catalyzing the usage-based insurance market demand. For instance, Citroen India partnered with ICICI Lombard General Insurance to provide greater everyday value and convenience where it matters most to consumers. Moreover, Mastercard's U.S. usage-based Insurance card products empower cardholders with access to over US\$ 60 Billion in meaningful rewards and benefits. Besides this, CerebrumX platform collaborated with Ford connected vehicle data to support its data-driven usage-based insurance (UBI)-as-a-Service model for Insurers. This model offers a quicker and more cost-effective implementation of UBI programs by using embedded telematics for eligible Ford and Lincoln connected vehicles. Furthermore, in September 2023, Floop and Otonomo Technologies Ltd partnered with Definity and Munich Re to bring a new, innovative, usage-based auto insurance product to Canada. Further, such strategies drive market growth.

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Usage-Based Insurance Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional and country levels for 2024-2032. Our report has categorized the market based on type, technology, vehicle type and vehicle age.

Breakup by Type:

- Pay-As-You-Drive (PAYD)
- Pay-How-You-Drive (PHYD)
- Manage-How-You-Drive (MHYD)
- Others

Pay-As-You-Drive (PAYD) dominates the market

The report has provided a detailed breakup and analysis of the market based on the type. This includes pay-as-you-drive (PAYD), pay-how-you-drive (PHYD), manage-how-you-drive (MHYD), and others. According to the report, Pay-As-You-Drive (PAYD) represented the largest segment.

The Pay-As-You-Drive (PAYD) insurance model is gaining immense popularity, as it allows policyholders to pay premiums based on the distance driven. This type of insurance is particularly appealing to individuals who drive frequently, environmentally-conscious consumers, and people seeking equitable insurance pricing. For instance, Edelweiss General Insurance introduced India's first telematics-based motor insurance called 'SWITCH.' This on-demand policy generates a real-time driving score and dynamically rates the premium. Moreover, it detects motion and automatically activates insurance when the vehicle is driven, making it convenient and hassle-free for users. Additionally, in February 2023, New India Assurance (NIA) launched a 'Pay as You Drive' (PAYD) policy, which offers a comprehensive motor insurance policy that charges a premium based on vehicle usage. The policy has two components- Third Party cover and own-damage cover.

Breakup by Technology:

- OBD II
- Black Box
- Smartphones
- Others

Black Box dominates the market

The report has provided a detailed breakup and analysis of the market based on the technology. This includes OBD II, black box, smartphones, and others. According to the report, the black box represented the largest segment.

Black box car insurance, also known as telematics car insurance, offers a more personalized approach, tailoring premiums to drivers based on real data about the way they drive. Besides this, the rising incorporation of the Internet of Things (IoT) into passenger and commercial vehicles is propelling the utilization of UBI along with cloud services in insurance telematics, which is also catalyzing the market growth in this segment. For instance, in Europe, the insurance telematics market is primarily dominated by hardwired aftermarket black boxes, while self-install OBD devices represent the vast majority of active policies in Europe. The Italian insurers UnipolSai and Generali together accounted for over 50 percent of the telematics-enabled policies in Europe. Similarly, Admiral Group and Direct Line have strong adoption rates in the UK.

Breakup by Vehicle Type:

- Light-duty Vehicle (LDV)
- Heavy-duty Vehicle (HDV)

Light-duty vehicle (LDV) dominates the market

The report has provided a detailed breakup and analysis of the market based on the vehicle type. This includes light-duty vehicle (LDV) and heavy-duty vehicle (HDV). According to the report, light-duty vehicle (LDV) represented the largest segment.

Light-duty vehicles (LDV) include cars and small trucks. UBI offerings are tailored specifically to the driving behavior of LDV owners, providing cost-effective and fair insurance premiums. For instance, in November 2023, Oyster launched a new rental insurance product. This offers the first usage-based rental insurance program in the U.S., providing rental shops and marketplaces

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with theft and damage coverage for their rental bikes, e-bikes, kayaks, and paddleboards through Oyster's modern platform.

Breakup by Vehicle Age:

- New Vehicles
- Used Vehicles

New vehicles dominate the market

The report has provided a detailed breakup and analysis of the market based on the vehicle age. This includes new vehicles and used vehicles. According to the report, new vehicles accounted for the largest market share.

New vehicles extensively utilize advanced telematics technology that integrates seamlessly with usage-based insurance systems. Besides this, the incorporation of UBI with new vehicles allows for safety awareness, personalized coverage, and enhanced data integration. For instance, India's passenger vehicle market, valued at Rs 4.5 lakh crore, has been outpacing volume growth. It has just passed a milestone as annual volumes of cars, sedans and utility vehicles breached the four million mark for the first time in 2023. As per industry estimates, about 4.1 million passenger vehicles were sold in the local market in the last calendar year, an increase of around 8.2% compared with sales of 3.79 million units. Moreover, the European Automobile Manufacturers' Association (ACEA) had reported that, despite a slight fall in December, the European Union's car market grew 13.9% in 2023, reaching a full-year volume of 10.5 million units.

Breakup by Region:

- North America
 - o United States
 - o Canada
- Asia-Pacific
 - o China
 - o Japan
 - o India
 - o South Korea
 - o Australia
 - o Indonesia
 - o Others
- Europe
 - o Germany
 - o France
 - o United Kingdom
 - o Italy
 - o Spain
 - o Russia
 - o Others
- Latin America
 - o Brazil
 - o Mexico
 - o Others
- Middle East and Africa

North America exhibits a clear dominance, accounting for the largest usage-based insurance market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa.

According to the report, North America accounted for the largest market share, owing to the rising number of tech-savvy

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individuals and the development of technologically advanced infrastructure.

Besides this, the implementation of stringent regulations by the government bodies emphasizing road safety is also propelling the growth of the usage-based insurance market in this region. For instance, according to the Insurance Institute for Highway Safety, it is anticipated that there will be around 3.5 million self-driving vehicles on US roads by 2025 and 4.5 million by 2030. Moreover, in October 2023, Sun Life Financial Inc. acquired Dialogue Health Technologies Inc to provide service to companies in Canada and internationally. Nearly 2.8 million members across 50,000 organizations have access to Dialogue's healthcare team. Additionally, Connected Analytic Services, LLC (CAS), an affiliate of Toyota Insurance Management Solutions USA, expanded its partnership with Toyota Motor North America to add new product offerings to enhance the ownership experience for owners of enrolled Toyota vehicles. For Toyota customers who wish to use their driving data to obtain potential insurance savings, CAS represents Toyota's exclusive data aggregation service, providing telematics and vehicle build data to insurance companies.

Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Competitive analysis such as market structure, key player positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major companies have been provided. Some of the major market players in the Usage-Based Insurance industry include:

- Aioi Nissay Dowa Insurance UK Ltd
- Allianz SE
- Allstate Insurance Company
- American International Group Inc.
- Assicurazioni Generali S.p.A.
- AXA
- Liberty Mutual Insurance Company
- Mapfre S.A.
- Progressive Casualty Insurance Company
- State Farm Automobile Mutual Insurance Company
- TomTom International BV.
- UnipolSai Assicurazioni S.p.A. (Unipol Gruppo S.p.A)

Usage-Based Insurance Market News:

- November 2022: OPES, a digital-only insurance firm, joined with IMS to offer app-based telematics insurance solutions called O-Car in Vietnam. OCar leverages the IMS One App SDK and IMS Wedge, a patented technology, to identify the insured's vehicle. With this app-based solution, OPES aims to target the country's 3 million car drivers.
- August 2023: Citroen India has introduced a unique and innovative Usage Based Insurance (UBI) in collaboration with ICICI Lombard General Insurance for eC3 customers. This initiative encourages customers to adopt safe driving practices and reward them with lower insurance premium.
- November 2023: Oyster, a modern insurance platform for commerce, announced that it has launched a new rental insurance product. This offers the first usage-based rental insurance program in the U.S., providing rental shops and marketplaces with theft and damage coverage for their rental bikes, ebikes, kayaks, and paddleboards through Oyster's modern platform.

Key Questions Answered in This Report

1. What was the size of the global usage-based insurance market in 2023?
2. What is the expected growth rate of the global usage-based insurance market during 2024-2032?
3. What are the key factors driving the global usage-based insurance market?
4. What has been the impact of COVID-19 on the global usage-based insurance market?
5. What is the breakup of the global usage-based insurance market based on the type?
6. What is the breakup of the global usage-based insurance market based on the technology?
7. What is the breakup of the global usage-based insurance market based on the vehicle type?

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8. What is the breakup of the global usage-based insurance market based on the vehicle age?
9. What are the key regions in the global usage-based insurance market?
10. Who are the key players/companies in the global usage-based insurance market?

Table of Contents:

- 1 Preface
- 2 Scope and Methodology
 - 2.1 Objectives of the Study
 - 2.2 Stakeholders
 - 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
 - 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
 - 2.5 Forecasting Methodology
- 3 Executive Summary
- 4 Introduction
 - 4.1 Overview
 - 4.2 Key Industry Trends
- 5 Global Usage-Based Insurance Market
 - 5.1 Market Overview
 - 5.2 Market Performance
 - 5.3 Impact of COVID-19
 - 5.4 Market Forecast
- 6 Market Breakup by Type
 - 6.1 Pay-As-You-Drive (PAYD)
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
 - 6.2 Pay-How-You-Drive (PHYD)
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
 - 6.3 Manage-How-You-Drive (MHYD)
 - 6.3.1 Market Trends
 - 6.3.2 Market Forecast
 - 6.4 Others
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast
- 7 Market Breakup by Technology
 - 7.1 OBD II
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
 - 7.2 Black Box
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
 - 7.3 Smartphones

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- 7.3.1 Market Trends
- 7.3.2 Market Forecast
- 7.4 Others
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast
- 8 Market Breakup by Vehicle Type
 - 8.1 Light-duty Vehicle (LDV)
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
 - 8.2 Heavy-duty Vehicle (HDV)
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 9 Market Breakup by Vehicle Age
 - 9.1 New Vehicles
 - 9.1.1 Market Trends
 - 9.1.2 Market Forecast
 - 9.2 Used Vehicles
 - 9.2.1 Market Trends
 - 9.2.2 Market Forecast
- 10 Market Breakup by Region
 - 10.1 North America
 - 10.1.1 United States
 - 10.1.1.1 Market Trends
 - 10.1.1.2 Market Forecast
 - 10.1.2 Canada
 - 10.1.2.1 Market Trends
 - 10.1.2.2 Market Forecast
 - 10.2 Asia-Pacific
 - 10.2.1 China
 - 10.2.1.1 Market Trends
 - 10.2.1.2 Market Forecast
 - 10.2.2 Japan
 - 10.2.2.1 Market Trends
 - 10.2.2.2 Market Forecast
 - 10.2.3 India
 - 10.2.3.1 Market Trends
 - 10.2.3.2 Market Forecast
 - 10.2.4 South Korea
 - 10.2.4.1 Market Trends
 - 10.2.4.2 Market Forecast
 - 10.2.5 Australia
 - 10.2.5.1 Market Trends
 - 10.2.5.2 Market Forecast
 - 10.2.6 Indonesia
 - 10.2.6.1 Market Trends
 - 10.2.6.2 Market Forecast
 - 10.2.7 Others

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- 10.2.7.1 Market Trends
- 10.2.7.2 Market Forecast
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.1.1 Market Trends
 - 10.3.1.2 Market Forecast
 - 10.3.2 France
 - 10.3.2.1 Market Trends
 - 10.3.2.2 Market Forecast
 - 10.3.3 United Kingdom
 - 10.3.3.1 Market Trends
 - 10.3.3.2 Market Forecast
 - 10.3.4 Italy
 - 10.3.4.1 Market Trends
 - 10.3.4.2 Market Forecast
 - 10.3.5 Spain
 - 10.3.5.1 Market Trends
 - 10.3.5.2 Market Forecast
 - 10.3.6 Russia
 - 10.3.6.1 Market Trends
 - 10.3.6.2 Market Forecast
 - 10.3.7 Others
 - 10.3.7.1 Market Trends
 - 10.3.7.2 Market Forecast
- 10.4 Latin America
 - 10.4.1 Brazil
 - 10.4.1.1 Market Trends
 - 10.4.1.2 Market Forecast
 - 10.4.2 Mexico
 - 10.4.2.1 Market Trends
 - 10.4.2.2 Market Forecast
 - 10.4.3 Others
 - 10.4.3.1 Market Trends
 - 10.4.3.2 Market Forecast
- 10.5 Middle East and Africa
 - 10.5.1 Market Trends
 - 10.5.2 Market Breakup by Country
 - 10.5.3 Market Forecast
- 11 SWOT Analysis
 - 11.1 Overview
 - 11.2 Strengths
 - 11.3 Weaknesses
 - 11.4 Opportunities
 - 11.5 Threats
- 12 Value Chain Analysis
- 13 Porters Five Forces Analysis
 - 13.1 Overview

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- 13.2 Bargaining Power of Buyers
- 13.3 Bargaining Power of Suppliers
- 13.4 Degree of Competition
- 13.5 Threat of New Entrants
- 13.6 Threat of Substitutes
- 14 Price Analysis
- 15 Competitive Landscape
 - 15.1 Market Structure
 - 15.2 Key Players
 - 15.3 Profiles of Key Players
 - 15.3.1 Aioi Nissay Dowa Insurance UK Ltd
 - 15.3.1.1 Company Overview
 - 15.3.1.2 Product Portfolio
 - 15.3.2 Allianz SE
 - 15.3.2.1 Company Overview
 - 15.3.2.2 Product Portfolio
 - 15.3.2.3 Financials
 - 15.3.2.4 SWOT Analysis
 - 15.3.3 Allstate Insurance Company
 - 15.3.3.1 Company Overview
 - 15.3.3.2 Product Portfolio
 - 15.3.3.3 Financials
 - 15.3.3.4 SWOT Analysis
 - 15.3.4 American International Group Inc.
 - 15.3.4.1 Company Overview
 - 15.3.4.2 Product Portfolio
 - 15.3.4.3 Financials
 - 15.3.4.4 SWOT Analysis
 - 15.3.5 Assicurazioni Generali S.p.A.
 - 15.3.5.1 Company Overview
 - 15.3.5.2 Product Portfolio
 - 15.3.5.3 Financials
 - 15.3.5.4 SWOT Analysis
 - 15.3.6 AXA
 - 15.3.6.1 Company Overview
 - 15.3.6.2 Product Portfolio
 - 15.3.6.3 Financials
 - 15.3.6.4 SWOT Analysis
 - 15.3.7 Liberty Mutual Insurance Company
 - 15.3.7.1 Company Overview
 - 15.3.7.2 Product Portfolio
 - 15.3.8 Mapfre S.A.
 - 15.3.8.1 Company Overview
 - 15.3.8.2 Product Portfolio
 - 15.3.9 Progressive Casualty Insurance Company
 - 15.3.9.1 Company Overview
 - 15.3.9.2 Product Portfolio

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- 15.3.9.3 Financials
- 15.3.9.4 SWOT Analysis
- 15.3.10 State Farm Automobile Mutual Insurance Company
 - 15.3.10.1 Company Overview
 - 15.3.10.2 Product Portfolio
 - 15.3.10.3 SWOT Analysis
- 15.3.11 TomTom International BV.
 - 15.3.11.1 Company Overview
 - 15.3.11.2 Product Portfolio
 - 15.3.11.3 Financials
 - 15.3.11.4 SWOT Analysis
- 15.3.12 UnipolSai Assicurazioni S.p.A. (Unipol Gruppo S.p.A)
 - 15.3.12.1 Company Overview
 - 15.3.12.2 Product Portfolio
 - 15.3.12.3 Financials

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