

**Pain Management Devices Market by Type (Neurostimulation, Infusion Pump, Ablation), Application (Neuropathic, Musculoskeletal, Cancer pain), Mode of Purchase (Prescription, OTC), By End user (Hospital, Physiotherapy, Home care) - Global Forecast to 2029**

Market Report | 2024-10-18 | 298 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The global pain management devices market is projected to reach USD 5,835.8 million by 2029 from USD 3,768.6 million in 2024, at a CAGR of 9.1% during the forecast period. The rapid growth in the geriatric population globally and the significant rise in the patients with chronic pain conditions are expected to boost the demand for pain management devices market. Moreover, gradual rise in utilization of pain management devices due to improved awareness among patients is likely to support the market growth. Advancements in pain management devices technology, new product launches, favourable reimbursement and government policies, investments in healthcare infrastructure, and initiatives to enhance the accessibility and affordability of pain management devices is anticipated to fuel the market growth.

"The Neurostimulation devices segment of pain management devices market to grow with the highest CAGR during the forecast period."

Based on the pain management devices market, the Neurostimulation devices pain management devices segment is anticipated to grow at significant rate during forecast period. The demand for neurostimulation devices in the pain management market is increasing due to their effectiveness in treating chronic pain, their minimally invasive nature, and advancements in technology that enhance their functionality and patient comfort. These factors are fostering the growth of neurostimulation devices at higher pace.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

"The neuropathic pain segment of application segment to capture the largest market share of pain management devices market." Based on application, the pain management devices market is segmented into neuropathic pain, musculoskeletal pain, cancer pain, facial & migraine, and other applications. The neuropathic segment is to capture the largest share and the higher CAGR during the forecast period. Owing to high prevalence of neuropathic pain across the globe, presence of substantial clinical evidence in the favor of high efficacy of pain management devices in neuropathic pain treatment, development of novel devices, the rising geriatric population is at high risk of neuropathic pain due to the increased incidence of neuropathic pain associated with many age-related diseases, side effects of drugs used to treat neuropathic pain, and availability of favorable reimbursement are boosting the adoption of pain management devices for neuropathic pain conditions.

"North America accounted for the largest share of the pain management devices market by region."

The global pain management devices market is segmented into five major regions, namely, North America, Europe, Asia Pacific, Latin America, and Middle East & Africa. North America is the largest regional market for pain management devices, whereas the Asia Pacific market is estimated to grow at the highest CAGR during the forecast period.

The largest share of North America is attributed to the high disease burden of chronic disease and pain conditions contributing to a larger pool of patients requiring pain management devices products. The presence of numerous potential market giants and favorable reimbursement policy in the region is likely to promote the growth of pain management devices market in North America.

A breakdown of the primary participants referred to for this report is provided below:

- By Company Type: Tier 1-60%, Tier 2-30%, and Tier 3- 10%
- By Designation: Directors-50%, Managers-30% and Others-20%
- By Region: North America-45%, Europe-15%, Asia Pacific-25% and RoW-15%

The major players operating in the pain management devices market are Medtronic (Ireland), Boston Scientific Corporation(US), Abbott Laboratories (US), Stryker (US), Nevro Corp. (US), Becton, Dickinson and Company (US), Baxter (US), B. Braun SE (Germany), Omron Corporation (Japan), Avanos Medical, Inc. (US), Teleflex Incorporated (US), ICU Medical, Inc. (US), Nipro (Japan), Moog Inc. (US), Atricure, Inc. (US), Micrel Medical Devices SA (Greece), Zynex, Inc.(US), and Enovis Corporation (US).

#### Research Coverage

This report studies the pain management devices market based on type, application, mode of purchase, end user and region. The report also studies factors (such as drivers, restraints, opportunities, and challenges) affecting market growth and provides details of the competitive landscape for market leaders. Furthermore, the report analyzes micro markets with respect to their individual growth trends and forecasts the revenue of the market segments with respect to five major regions (and the respective countries in these regions).

#### Reasons to Buy the Report

The report will enable established firms as well as entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them to garner a larger market share. Firms purchasing the report could use one or a combination of the below-mentioned strategies for strengthening their market presence.

This report provides insights on the following pointers:

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- Analysis of Key drivers (increasing prevalence of chronic pain conditions, rising demand of pain management devices in home care settings, , new product launches & approvals, favourable reimbursement scenario and government initiatives), restraints (high procedural cost, product recalls), Opportunities (emerging markets, expanding base of pain management clinics/centers ) , Challenge (stringent regulatory requirement, use of pain medication as first-line treatment for pain management)
- Market Penetration: Comprehensive information on the product portfolios offered by the top players in the pain management devices market
- Product Development/Innovation: Detailed insights on the upcoming trends, R&D activities, and product launches in the pain management devices market
- Market Development: Comprehensive information on lucrative emerging regions
- Market Diversification: Exhaustive information about new products, growing geographies, and recent developments in the pain management devices market
- Competitive Assessment: In-depth assessment of market segments, growth strategies, revenue analysis, and products of the leading market players.

## **Table of Contents:**

1□INTRODUCTION□	27
1.1□STUDY OBJECTIVES□	27
1.2□MARKET DEFINITION□	27
1.2.1□INCLUSIONS AND EXCLUSIONS□	28
1.3□STUDY SCOPE□	29
1.3.1□MARKETS COVERED□	29
1.3.2□YEARS CONSIDERED□	30
1.3.3□CURRENCY CONSIDERED□	30
1.4□STAKEHOLDERS□	31
1.5□SUMMARY OF CHANGES□	31
2□RESEARCH METHODOLOGY□	32
2.1□RESEARCH DATA□	32
2.1.1□SECONDARY DATA□	33
2.1.1.1□Key data from secondary sources□	34
2.1.2□PRIMARY DATA□	35
2.1.2.1□Key data from primary sources□	35
2.1.2.2□Insights from industry experts□	36
2.1.2.3□Breakdown of primary interviews□	36
2.1.2.4□Supply-side and demand-side participants□	37
2.2□MARKET SIZE ESTIMATION□	37
2.2.1□BOTTOM-UP APPROACH□	37
2.2.2□TOP-DOWN APPROACH□	40
2.3□DATA TRIANGULATION□	41
2.4□RESEARCH ASSUMPTIONS□	42
2.5□RESEARCH LIMITATIONS□	42
2.6□RISK ASSESSMENT□	42
3□EXECUTIVE SUMMARY□	43
4□PREMIUM INSIGHTS□	48
4.1□ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN PAIN MANAGEMENT DEVICES MARKET□	48
4.2□ASIA PACIFIC PAIN MANAGEMENT DEVICES MARKET, BY APPLICATION AND COUNTRY□	49
4.3□PAIN MANAGEMENT DEVICES MARKET, BY COUNTRY□	50
?	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5	MARKET OVERVIEW	51
5.1	INTRODUCTION	51
5.2	MARKET DYNAMICS	51
5.2.1	DRIVERS	52
5.2.1.1	Surge in demand for at-home pain management devices	52
5.2.1.2	Increase in surgical procedures	52
5.2.1.3	Prevalence of chronic pain conditions	53
5.2.1.4	Favorable reimbursement policies for spinal cord stimulation devices	53
5.2.1.5	Growing launches and regulatory approvals for advanced pain management devices	54
5.2.2	RESTRAINTS	54
5.2.2.1	Rise in product recalls	54
5.2.2.2	High procedural and purchase cost of pain management devices	55
5.2.3	OPPORTUNITIES	55
5.2.3.1	Untapped growth potential in emerging economies	55
5.2.3.2	Expansion of pain management clinics	56
5.2.4	CHALLENGES	56
5.2.4.1	Use of pain medication as first line of treatment	56
5.2.4.2	Stringent regulatory norms for FDA approval	56
5.3	TECHNOLOGY ANALYSIS	57
5.3.1	KEY TECHNOLOGIES	57
5.3.1.1	Wearable devices	57
5.3.1.2	Implantable pumps	57
5.3.2	COMPLEMENTARY TECHNOLOGIES	58
5.3.2.1	Virtual reality	58
5.3.2.2	Digital therapeutics	58
5.3.3	ADJACENT TECHNOLOGIES	58
5.3.3.1	Robotics	58
5.4	INDUSTRY TRENDS	58
5.4.1	ELECTROTHERAPY DEVICES	58
5.4.2	RECHARGEABLE SPINAL CORD STIMULATORS	59
5.5	SUPPLY CHAIN ANALYSIS	59
5.6	TRADE ANALYSIS	61
5.7	PORTER'S FIVE FORCES ANALYSIS	62
5.7.1	THREAT FROM NEW ENTRANTS	63
5.7.2	THREAT FROM SUBSTITUTES	64
5.7.3	BARGAINING POWER OF SUPPLIERS	64
5.7.4	BARGAINING POWER OF BUYERS	64
5.7.5	INTENSITY OF COMPETITIVE RIVALRY	65
?		
5.8	REGULATORY LANDSCAPE	65
5.8.1	NORTH AMERICA	66
5.8.1.1	US	66
5.8.1.2	Canada	67
5.8.2	EUROPE	68
5.8.3	ASIA PACIFIC	71
5.8.3.1	Japan	71

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.8.3.2	China	71
5.8.3.3	India	72
5.8.4	LATIN AMERICA	73
5.8.4.1	Brazil	73
5.8.4.2	Mexico	75
5.8.5	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	77
5.9	PATENT ANALYSIS	80
5.10	PRICING ANALYSIS	82
5.11	KEY CONFERENCES AND EVENTS, 2024-2025	83
5.12	KEY STAKEHOLDERS AND BUYING CRITERIA	84
5.12.1	KEY STAKEHOLDERS IN BUYING PROCESS	84
5.12.2	BUYING CRITERIA	85
5.13	ECOSYSTEM ANALYSIS	86
5.14	CASE STUDY ANALYSIS	88
5.15	REIMBURSEMENT ANALYSIS	89
5.16	UNMET NEEDS IN PAIN MANAGEMENT DEVICES MARKET	90
5.17	VALUE CHAIN ANALYSIS	91
5.18	END USER EXPECTATIONS IN PAIN MANAGEMENT DEVICES MARKET	92
5.19	IMPACT OF AI/GEN AI IN PAIN MANAGEMENT DEVICES MARKET	93
5.20	TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES	93
5.21	INVESTMENT AND FUNDING SCENARIO	94
6	PAIN MANAGEMENT DEVICES MARKET, BY TYPE	95
6.1	INTRODUCTION	96
6.2	NEUROSTIMULATION DEVICES	96
6.2.1	TRANSCUTANEOUS ELECTRICAL NERVE STIMULATORS	99
6.2.1.1	Surge in demand for non-invasive therapy to drive market	99
6.2.2	SPINAL CORD STIMULATORS	101
6.2.2.1	Extensive use of SCS for pain treatment to drive market	101
6.2.3	OTHERS	103
6.3	INFUSION PUMPS	105
6.3.1	INTRATHECAL INFUSION PUMPS	107
6.3.1.1	Increasing incidences of chronic pain to drive market	107
6.3.2	EXTERNAL INFUSION PUMPS	109
6.3.2.1	Availability of reimbursement to drive market	109
6.4	ABLATION DEVICES	111
6.4.1	RADIOFREQUENCY ABLATION DEVICES	113
6.4.1.1	Low cost of RF ablation procedures to drive market	113
6.4.2	CRYOABLATION ABLATION DEVICES	115
6.4.2.1	Successful clinical trials to drive market	115
6.4.3	ULTRASOUND ABLATION DEVICES	116
6.4.3.1	Efficacy in targeted pain management to drive market	116
6.4.4	OTHERS	118
7	PAIN MANAGEMENT DEVICES MARKET, BY APPLICATION	119
7.1	INTRODUCTION	120
7.2	NEUROPATHIC PAIN	120

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

7.2.1	HIGH EFFICACY OF PAIN MANAGEMENT DEVICES IN NEUROPATHIC PAIN TREATMENT TO DRIVE MARKET	120
7.3	MUSCULOSKELETAL PAIN	122
7.3.1	SURGE IN AGING POPULATION TO DRIVE MARKET	122
7.4	CANCER PAIN	124
7.4.1	PREVALENCE OF CANCER TO DRIVE MARKET	124
7.5	FACIAL PAIN & MIGRAINE	126
7.5.1	INTRODUCTION OF NOVEL PAIN MANAGEMENT DEVICES TO DRIVE MARKET	126
7.6	OTHER APPLICATIONS	127
8	PAIN MANAGEMENT DEVICES MARKET, BY MODE OF PURCHASE	129
8.1	INTRODUCTION	130
8.2	PRESCRIPTION-BASED	130
8.2.1	INCREASING INCIDENCES OF MEDICAL DISORDERS TO DRIVE MARKET	130
8.3	OVER-THE-COUNTER	132
8.3.1	ACCESSIBILITY OF OTC PAIN MANAGEMENT DEVICES TO DRIVE MARKET	132
9	PAIN MANAGEMENT DEVICES MARKET, BY END USER	134
9.1	INTRODUCTION	135
9.2	HOSPITALS & CLINICS	135
9.3	PHYSIOTHERAPY CENTERS	137
9.3.1	RISE OF SPORTS INJURIES AND MUSCULOSKELETAL DISORDERS TO DRIVE MARKET	137
9.4	HOME CARE SETTINGS	139
9.4.1	HIGH COST OF HOSPITALIZATION TO DRIVE MARKET	139
9.5	OTHER END USERS	141
	?	
10	PAIN MANAGEMENT DEVICES MARKET, BY REGION	142
10.1	INTRODUCTION	143
10.2	NORTH AMERICA	143
10.2.1	MACROECONOMIC OUTLOOK	147
10.2.2	US	148
10.2.2.1	Favorable reimbursement policies to drive market	148
10.2.3	CANADA	151
10.2.3.1	Increasing incidences of chronic pain to drive market	151
10.3	EUROPE	154
10.3.1	MACROECONOMIC OUTLOOK	157
10.3.2	GERMANY	158
10.3.2.1	Robust healthcare infrastructure to drive market	158
10.3.3	FRANCE	161
10.3.3.1	Government initiatives for lowering healthcare costs to drive market	161
10.3.4	UK	164
10.3.4.1	Shift toward home care settings to drive market	164
10.3.5	ITALY	167
10.3.5.1	Growing healthcare investments to drive market	167
10.3.6	SPAIN	169
10.3.6.1	Surge in new cancer cases to drive market	169
10.3.7	REST OF EUROPE	172
10.4	ASIA PACIFIC	175

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

10.4.1	MACROECONOMIC OUTLOOK	179
10.4.2	JAPAN	181
10.4.2.1	Large geriatric population to drive market	181
10.4.3	CHINA	183
10.4.3.1	Growing investments in healthcare infrastructure development to drive market	183
10.4.4	INDIA	186
10.4.4.1	High prevalence of lifestyle diseases to drive market	186
10.4.5	AUSTRALIA	189
10.4.5.1	Initiatives promoting development of novel pain management devices to drive market	189
10.4.6	SOUTH KOREA	192
10.4.6.1	Growing demand for effective treatment options to drive market	192
10.4.7	REST OF ASIA PACIFIC	194
10.5	LATIN AMERICA	197
10.5.1	MACROECONOMIC OUTLOOK	200
10.5.2	BRAZIL	201
10.5.2.1	Private and government sector awareness programs to drive market	201
10.5.3	MEXICO	204
10.5.3.1	Domestic health coverage schemes to drive market	204
10.5.4	REST OF LATIN AMERICA	206
10.6	MIDDLE EAST & AFRICA	209
10.6.1	MACROECONOMIC OUTLOOK	212
10.6.2	GCC COUNTRIES	213
10.6.2.1	High healthcare spending capacity to drive market	213
10.6.3	REST OF MIDDLE EAST & AFRICA	216
11	COMPETITIVE LANDSCAPE	219
11.1	INTRODUCTION	219
11.2	KEY PLAYER STRATEGIES/RIGHT TO WIN, 2021-2024	219
11.3	REVENUE ANALYSIS, 2021-2023	220
11.4	MARKET SHARE ANALYSIS, 2023	221
11.5	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023	222
11.5.1	STARS	223
11.5.2	EMERGING LEADERS	223
11.5.3	PERVASIVE PLAYERS	223
11.5.4	PARTICIPANTS	223
11.5.5	COMPANY FOOTPRINT	224
11.5.5.1	Company footprint	225
11.5.5.2	Type footprint	226
11.5.5.3	Region footprint	227
11.6	COMPANY EVALUATION MATRIX: START-UPS/SMES, 2023	228
11.6.1	PROGRESSIVE COMPANIES	228
11.6.2	RESPONSIVE COMPANIES	228
11.6.3	DYNAMIC COMPANIES	228
11.6.4	STARTING BLOCKS	228
11.6.5	COMPETITIVE BENCHMARKING	230
11.7	BRAND/PRODUCT COMPARISON	231
11.8	R&D ASSESSMENT	232
11.9	COMPANY VALUATION AND FINANCIAL METRICS	232

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

11.10	COMPETITIVE SCENARIO	233
11.10.1	PRODUCT APPROVALS/LAUNCHES	233
11.10.2	DEALS	234
11.10.3	EXPANSIONS	235
11.10.4	OTHERS	235
12	COMPANY PROFILES	236
12.1	KEY PLAYERS	236
12.1.1	MEDTRONIC	236
12.1.1.1	Business overview	236
12.1.1.1.2	Products offered	237
12.1.1.1.3	Recent developments	238
12.1.1.1.3.1	Product approvals/launches	238
12.1.1.1.4	MnM view	239
12.1.1.1.4.1	Key strengths	239
12.1.1.1.4.2	Strategic choices	239
12.1.1.1.4.3	Weaknesses and competitive threats	239
12.1.2	BOSTON SCIENTIFIC CORPORATION	240
12.1.2.1	Business overview	240
12.1.2.2	Products offered	241
12.1.2.3	Recent developments	242
12.1.2.3.1	Deals	242
12.1.2.4	MnM view	242
12.1.2.4.1	Key strengths	242
12.1.2.4.2	Strategic choices	242
12.1.2.4.3	Weaknesses and competitive threats	242
12.1.3	ABBOTT LABORATORIES	243
12.1.3.1	Business overview	243
12.1.3.2	Product offered	244
12.1.3.3	Recent developments	245
12.1.3.3.1	Product approvals/launches	245
12.1.3.4	MnM view	245
12.1.3.4.1	Key strengths	245
12.1.3.4.2	Strategic choices	245
12.1.3.4.3	Weaknesses and competitive threats	246
12.1.4	NEVRO CORP.	247
12.1.4.1	Business overview	247
12.1.4.2	Products offered	248
12.1.4.3	Recent developments	248
12.1.4.3.1	Product approvals/launches	248
12.1.4.3.2	Deals	248
12.1.4.4	MnM view	249
12.1.4.4.1	Key strengths	249
12.1.4.4.2	Strategic choices	249
12.1.4.4.3	Weaknesses and competitive threats	249
12.1.5	BECTON, DICKINSON AND COMPANY	250
12.1.5.1	Business overview	250
12.1.5.2	Products offered	251



12.1.5.3	Recent developments	252
12.1.5.3.1	Others	252
12.1.5.4	MnM view	252
12.1.5.4.1	Right to win	252
12.1.5.4.2	Strategic choices	252
12.1.5.4.3	Weaknesses and competitive threats	252
12.1.6	STRYKER	253
12.1.6.1	Business overview	253
12.1.6.2	Products offered	254
12.1.6.3	Recent developments	255
12.1.6.3.1	Expansions	255
12.1.7	B. BRAUN SE	256
12.1.7.1	Business overview	256
12.1.7.2	Products offered	257
12.1.7.3	Recent developments	259
12.1.7.3.1	Deals	259
12.1.7.3.2	Others	259
12.1.8	BAXTER	260
12.1.8.1	Business overview	260
12.1.8.2	Products offered	262
12.1.9	OMRON CORPORATION	263
12.1.9.1	Business overview	263
12.1.9.2	Products offered	264
12.1.10	AVANOS MEDICAL, INC.	265
12.1.10.1	Business overview	265
12.1.10.2	Products offered	266
12.1.10.2.1	Deals	266
12.1.11	TELEFLEX INCORPORATED	267
12.1.11.1	Business overview	267
12.1.11.2	Products offered	268
12.1.12	ICU MEDICAL, INC.	269
12.1.12.1	Business overview	269
12.1.12.2	Products offered	270
12.1.12.3	Recent developments	271
12.1.12.3.1	Deals	271
12.1.13	NIPRO	272
12.1.13.1	Business overview	272
12.1.13.2	Products offered	274
12.1.13.3	Recent developments	274
12.1.13.3.1	Expansions	274
12.1.14	MOOG INC.	275
12.1.14.1	Business overview	275
12.1.14.2	Products offered	277
12.1.15	ATRICURE, INC.	278
12.1.15.1	Business overview	278
12.1.15.2	Products offered	279
12.1.15.3	Recent developments	279

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.1.15.3.1	Product approvals/launches	279
12.1.16	MICREL MEDICAL DEVICES SA	280
12.1.16.1	Business overview	280
12.1.16.2	Products offered	281
12.1.17	ZYNEX, INC.	282
12.1.17.1	Business overview	282
12.1.17.2	Products offered	283
12.1.18	ENOVIS CORPORATION	284
12.1.18.1	Business overview	284
12.1.18.2	Products offered	285
12.2	OTHER PLAYERS	286
12.2.1	EPIC MEDICAL	286
12.2.2	SOTERIX MEDICAL INC.	286
12.2.3	GIMER MEDICAL	287
12.2.4	NEURONANO AB	287
12.2.5	ICECURE MEDICAL	288
12.2.6	BIOWAVE	288
12.2.7	THERANICA BIO-ELECTRONICS LTD.	289
13	APPENDIX	290
13.1	DISCUSSION GUIDE	290
13.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	294
13.3	CUSTOMIZATION OPTIONS	296
13.4	RELATED REPORTS	296
13.5	AUTHOR DETAILS	297

**Pain Management Devices Market by Type (Neurostimulation, Infusion Pump, Ablation), Application (Neuropathic, Musculoskeletal, Cancer pain), Mode of Purchase (Prescription, OTC), By End user (Hospital, Physiotherapy, Home care) - Global Forecast to 2029**

Market Report | 2024-10-18 | 298 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code\*

Country\*

Date

Signature