

Vietnam Industrial Enzymes Market By Type (Amylases, Cellulases, Proteases, Lipases, Phytases, Others), By Source (Micro-Organisms, Plants, Animals), By Application (Food & Beverages, Cleaning Agents, Animal Feed, Others), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Report description:

Vietnam Industrial Enzymes Market was valued at USD 15.68 Million in 2024 and is expected to reach USD 22.34 Million by 2030 with a CAGR of 6.28% during the forecast period. Industrial Enzymes is anticipated to grow significantly. This evolving landscape presents substantial opportunities for market participants to innovate and expand their offerings. The Vietnam Industrial Enzymes Market is experiencing notable growth and evolution, propelled by several key factors including heightened industrialization, technological advancements, and evolving consumer preferences. Across diverse sectors such as food and beverage, textile, biofuel, pharmaceuticals, and agriculture, industrial enzymes are pivotal in catalyzing biochemical reactions and enhancing process efficiency.

This market is positioned for sustained expansion and innovation, buoyed by ongoing industrialization, continuous technological progress, and dynamic shifts in market dynamics. As industries increasingly prioritize objectives such as sustainability, operational efficiency, and product excellence, the demand for enzyme-driven solutions is anticipated to escalate significantly. This trend offers substantial opportunities for industry participants to leverage emerging market dynamics and spearhead market growth. Navigating through challenges such as cost constraints, regulatory complexities, and knowledge gaps will be imperative to fully unleash the market's growth potential. Overcoming these hurdles is essential for fostering sustainable development and maximizing opportunities across diverse industrial sectors in Vietnam.

Key Market Drivers

Increasing Industrialization

Increasing industrialization in Vietnam drives the growth of the Industrial Enzymes Market by fostering a greater demand for efficient manufacturing processes across various sectors. As industries expand and diversify, there's a heightened need for

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solutions that enhance productivity, reduce costs, and minimize environmental impact. Enzyme-enabled technologies emerge as crucial tools in meeting these requirements.

With industrialization comes the scaling up of production facilities and operations. From 2012 to 2022, Vietnam experienced a remarkable average annual growth rate of 12.0% in industrial production, surpassing the Asia-Pacific region's average of 4.1%. In 2022 specifically, Vietnam's industrial production achieved an impressive growth rate of 15.5%. Enzymes play a pivotal role in optimizing these processes, improving efficiency, and streamlining workflows. For instance, in the food and beverage sector, enzymes facilitate faster fermentation, increase product yields, and enhance flavor profiles. In textiles, enzymes aid in fabric processing, reducing water consumption, energy usage, and chemical waste. Similarly, in biofuel production, enzymes catalyze the conversion of biomass into biofuels, offering a sustainable alternative to fossil fuels. As industries modernize and adopt advanced technologies, there's a growing recognition of the environmental benefits of enzyme-enabled processes. Enzymes often replace harsh chemicals and reduce the need for energy-intensive processes, aligning with sustainability goals and regulatory requirements. This shift towards greener manufacturing practices further drives the adoption of industrial enzymes across industries.

Also, as Vietnam integrates into global supply chains and competes on the international stage, there's an increasing emphasis on enhancing product quality and competitiveness. Industrial enzymes contribute to this goal by enabling manufacturers to produce higher quality products with improved consistency and performance. Whether it's in the pharmaceutical sector for drug synthesis or agriculture for crop enhancement, enzymes play a vital role in elevating product standards and meeting market demands. Increasing industrialization in Vietnam drives the demand for industrial enzymes by necessitating more efficient, sustainable, and competitive manufacturing processes. Enzyme-enabled technologies emerge as indispensable tools in meeting these requirements, positioning the Industrial Enzymes Market for sustained growth and innovation in the evolving industrial landscape of Vietnam.

Technological Advancements

Technological advancements play a pivotal role in propelling the growth of the Vietnam Industrial Enzymes Market by driving innovation, expanding application possibilities, and enhancing the performance of enzyme-based solutions across various industries. The significant aspect of technological advancement is the continual evolution of enzyme engineering and biotechnology. Innovations in enzyme discovery, optimization, and production techniques enable the development of novel enzyme formulations with improved properties such as higher activity, stability, and specificity. These advancements allow enzyme manufacturers to tailor their products to meet specific industrial requirements, expanding the application scope of industrial enzymes across diverse sectors. By 2030, the country is targeting the fulfillment of 30-35% of its domestic animal feed demand. This ambitious goal is supported by the nation's strong advantages in microbial products, enzymes, herbs, natural compounds, macro-minerals, trace minerals, and other natural minerals. These strengths are set to be further leveraged as part of the broader national strategy outlined in Prime Minister Decision 1625/QĐ-TTg, which approves the long-term development of the animal feed processing industry. The Scheme emphasizes the use of new technologies to harness Vietnam's existing strengths, such as microbial enzymes, herbs, and trace minerals, to boost domestic production capacity. These technologies not only optimize feed efficiency but also contribute to better food safety, lower production costs, and reduced reliance on imported feed ingredients. The advancements in enzyme technology, for example, are enhancing feed digestibility and animal performance, which are critical factors in reducing the environmental impact of livestock farming. By integrating these technological solutions into the animal feed industry, Vietnam is positioning itself to meet its sustainability and food security goals, while fostering innovation and competitiveness in the market.

Also, advancements in fermentation technologies contribute to the scalability and efficiency of enzyme production processes. Improved fermentation methods, coupled with automation and process optimization, enable manufacturers to produce enzymes in larger quantities and at lower costs. This scalability enhances the availability and accessibility of industrial enzymes, making them more viable for widespread adoption across industries in Vietnam. Technological advancements facilitate the integration of enzymes into advanced manufacturing processes and systems. Enzyme-enabled technologies, such as enzyme immobilization, enzyme reactors, and enzyme-based sensors, enable precise control and optimization of biochemical reactions in industrial settings. These technologies enhance process efficiency, reduce production costs, and improve product quality, driving the demand for industrial enzymes in Vietnam.

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Also, advancements in bioprocessing and biocatalysis pave the way for the development of innovative enzyme-based solutions with enhanced performance characteristics. Enzymes are increasingly used as biocatalysts in synthetic chemistry, enabling the production of high-value chemicals, pharmaceuticals, and biofuels through sustainable and eco-friendly processes. These applications leverage the unique catalytic properties of enzymes to achieve complex chemical transformations with high efficiency and selectivity, opening up new opportunities for enzyme manufacturers and end-users in Vietnam. Technological advancements in enzyme engineering, fermentation, bioprocessing, and biocatalysis drive the growth of the Vietnam Industrial Enzymes Market by enabling the development of innovative products and applications that address evolving industrial needs. As industries continue to embrace advanced technologies and seek sustainable solutions, the demand for enzyme-enabled processes is expected to grow, further fueling market expansion and driving innovation in Vietnam's industrial landscape.

Shifting Consumer Preferences

Shifting consumer preferences in Vietnam are instrumental in driving the growth of the Industrial Enzymes Market as industries adapt to meet evolving demands for sustainable, high-quality products.

The significant aspect of changing consumer preferences is the increasing emphasis on sustainability and environmental responsibility. Consumers are increasingly conscious of the environmental impact of industrial processes and products, leading to a growing demand for eco-friendly alternatives. Industrial enzymes offer a sustainable solution by enabling manufacturers to reduce their reliance on harsh chemicals, minimize energy consumption, and decrease waste generation. This aligns with consumer preferences for greener, more sustainable products, driving the adoption of enzyme-enabled processes across various industries in Vietnam. Consumers are becoming more discerning about the quality and safety of products, particularly in sectors such as food and beverage, pharmaceuticals, and personal care. Enzymes play a crucial role in improving product quality by enhancing texture, flavor, and nutritional value, while also ensuring consistency and safety. As consumers seek higher quality products that meet their health and wellness needs, manufacturers are increasingly turning to enzyme-enabled processes to deliver superior products that meet consumer expectations. Changing consumer demographics and lifestyles are driving demand for convenience and functionality in products. Enzyme-enabled solutions allow manufacturers to develop products with improved performance characteristics, such as faster processing times, longer shelf life, and enhanced functionality. This enables companies to cater to the evolving needs of consumers for convenient, value-added products that fit seamlessly into their busy lifestyles.

Also, as consumers become more informed and educated about the benefits of enzyme-enabled processes, there is a growing acceptance and preference for these technologies in the market. Manufacturers are responding to consumer demand by investing in enzyme-based solutions to differentiate their products, gain a competitive edge, and capture market share. Shifting consumer preferences towards sustainability, quality, convenience, and functionality are driving the growth of the Industrial Enzymes Market in Vietnam. As industries strive to meet these evolving demands, the adoption of enzyme-enabled processes is expected to continue to grow, presenting opportunities for market expansion and innovation in the dynamic consumer landscape of Vietnam.

Key Market Challenges

Regulatory Hurdles

Navigating regulatory frameworks and obtaining necessary approvals for enzyme products can pose a significant challenge for manufacturers. Regulatory agencies may have stringent requirements for the use of enzymes in industrial processes, including safety assessments, labeling regulations, and approval procedures. Meeting these regulatory standards requires substantial resources and expertise, particularly for novel enzyme formulations or applications. Delays in obtaining regulatory approvals can impede market entry and expansion, hindering the growth of the industrial enzymes market in Vietnam.

Cost Constraints

The cost of enzyme production, purification, and formulation can be prohibitive, especially for small and medium-sized enterprises (SMEs) in Vietnam. Enzyme manufacturing often involves complex biotechnological processes, requiring specialized equipment, raw materials, and skilled labor. Additionally, research and development expenses for optimizing enzyme performance and stability further add to production costs. As a result, high production costs may limit the affordability and accessibility of enzyme-enabled solutions for industries, constraining market growth.

Limited Awareness and Technical Expertise

Despite the benefits of enzyme-enabled processes, there may be a lack of awareness and technical expertise among industries in

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Vietnam. Some manufacturers may be unfamiliar with the potential applications and advantages of industrial enzymes or lack the knowledge and resources to implement enzyme-based solutions effectively. Moreover, the complexity of enzyme technology and the need for specialized skills in enzyme engineering and bioprocessing may present barriers to adoption. Addressing these knowledge gaps and building technical capacity within industries is crucial for overcoming resistance to enzyme adoption and unlocking the growth potential of the market.

Key Market Trends

Increasing Demand for Health-Enhancing Enzyme Solutions

A notable trend shaping the future of the Vietnam Industrial Enzymes Market is the rising demand for health-enhancing enzyme solutions. With growing awareness of health and wellness among consumers, there is a heightened interest in dairy products that offer functional benefits beyond basic nutrition. Enzyme-modified dairy products, such as lactose-free milk, probiotic yogurt, and enzyme-fortified cheese, are gaining popularity due to their digestive health benefits and improved nutrient absorption. As consumers prioritize health-conscious choices, dairy producers are likely to invest in enzyme technologies that enable the development of products tailored to meet these evolving demands, thus driving market growth.

Adoption of Advanced Enzyme Formulations for Product Differentiation

Another key trend driving the future growth of the Vietnam Industrial Enzymes Market is the adoption of advanced enzyme formulations for product differentiation. In an increasingly competitive market landscape, dairy producers are seeking innovative ways to distinguish their offerings and capture consumer attention. Advanced enzyme technologies allow for the development of unique dairy products with superior sensory attributes, extended shelf life, and enhanced nutritional profiles. From enzyme-assisted cheese aging to flavor modulation in yogurt, these specialized formulations enable product differentiation and premiumization, thereby fueling market expansion as consumers seek novel and high-value dairy experiences.

Emphasis on Sustainable and Eco-Friendly Enzyme Production

A significant trend shaping the future trajectory of the Vietnam Industrial Enzymes Market is the emphasis on sustainable and eco-friendly enzyme production practices. With growing environmental concerns and regulatory scrutiny, there is a heightened focus on reducing the environmental footprint of dairy processing operations. Enzyme manufacturers are increasingly adopting sustainable production methods, such as utilizing renewable energy sources, optimizing water usage, and implementing green chemistry principles. Vietnam's National Strategy on Green Growth for the period 2021-2030, with a Vision to 2050, was approved by the Prime Minister in 2021 through Decision 1658/QĐ-TTg. This strategy outlines a framework for transforming Vietnam's growth model to promote economic development while ensuring environmental sustainability and social equity. Shifting consumer preferences, increasingly focused on sustainability and environmental impact, are driving demand for greener solutions, including in the industrial enzymes market. As consumers demand more eco-friendly products, there is a growing need for industries to adopt sustainable practices, such as the use of biological enzymes in production processes. This trend aligns with the objectives of the National Strategy, encouraging innovation and the development of environmentally responsible technologies that support both economic growth and social well-being. Additionally, advancements in enzyme engineering and fermentation technologies enable the development of eco-friendly enzyme formulations with reduced resource consumption and waste generation. As sustainability becomes a key driver of consumer purchasing decisions, dairy producers are likely to prioritize enzyme suppliers that offer environmentally responsible solutions, driving market growth for sustainable enzyme technologies.

Segmental Insights

Type Insights

Based on Type, the Proteases emerged as the fastest growing segment in the Vietnam Industrial Enzymes market during the forecast period. Proteases, alternatively known as proteolytic enzymes or proteinases, represent a class of enzymes pivotal in catalyzing the hydrolysis of peptide bonds within proteins. This enzymatic capability renders proteases exceptionally versatile, rendering them indispensable across a wide array of industrial processes.

In the food and beverage sector, proteases find extensive application across multiple functions, including meat tenderization, dairy processing, baking, brewing, and flavor enhancement. Notably, in meat processing, proteases serve to tenderize tough muscle fibers, thereby enhancing texture and flavor profiles. Likewise, within dairy processing, proteases contribute to cheese production by facilitating milk coagulation and expediting ripening processes. Moreover, proteases play a crucial role in brewing, where they enhance beer clarity and stability by breaking down haze-causing proteins. This breadth of applications underscores

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the integral role of proteases within the food and beverage industry, further cementing their dominance in the Vietnam Industrial Enzymes Market.

Beyond the realm of food and beverage, proteases wield significant influence within the textile industry, particularly in fabric finishing and garment processing. Through enzymatic treatments, proteases facilitate processes such as bio-scouring, desizing, and softening of textiles. These treatments result in tangible enhancements to fabric quality, color brightness, and overall hand feel. By effectively removing impurities, sizing agents, and natural waxes from fabrics, proteases prepare textiles for subsequent dyeing, printing, or finishing processes. The targeted action of proteases against protein-based contaminants makes them indispensable in textile processing, thereby fueling demand for protease-based enzyme formulations within the Vietnam Industrial Enzymes Market. The widespread utilization of proteases across diverse industries underscores their paramount importance within the Vietnam Industrial Enzymes Market. From enhancing product quality and flavor in the food and beverage sector to optimizing fabric quality and texture in textiles, proteases play a multifaceted role in driving efficiency and innovation across industrial processes in Vietnam.

Application Insights

Based on application, Food & Beverages emerged as the dominating segment in the Vietnam Industrial Enzymes market in 2024. As awareness of health and wellness continues to rise, consumers are increasingly seeking healthier, cleaner, and more natural food options. Enzymes play a key role in food processing by enhancing nutritional value, improving flavor, and extending shelf life, all while reducing the need for artificial additives, making them particularly appealing in this market. In 2022, Vietnam's consumer foodservice market reached USD 22.8 billion, with food purchases accounting for approximately 55.7% and drink sales making up 44.3%. The bulk of sales came from standalone foodservice outlets (90.8%), followed by retail (4%), travel (2.2%), lodging (2%), and leisure (1%) sectors.

Enzymes are integral to modern food production, especially in processes like fermentation, brewing, and baking. They are particularly vital in the dairy, bakery, beverage, and processed food industries. As Vietnam's food sector continues to evolve, the demand for enzyme solutions to streamline production processes is growing. The Vietnamese Government is actively fostering urbanization, with goals outlined in Resolution 6 by the Politburo and Resolution No. 148/NQ CP, targeting an urbanization rate of at least 45% by 2025 and over 50% by 2030. By 2025, urban areas are expected to contribute approximately 75% of the national GDP, rising to about 85% by 2030. As Vietnam's middle class and urban population expand, there is an increasing demand for processed and packaged foods. Enzymes improve production efficiency and reduce costs, making them an essential tool for food manufacturers striving to meet the growing need for high-quality, affordable products. Additionally, the food and beverage sector is embracing enzyme-based solutions as part of a broader focus on environmental sustainability, aiming to optimize raw material usage, minimize waste, and reduce energy consumption in production processes. This shift is driving the growing adoption of enzymes across the sector.

Regional Insights

Based on Region, Southern Vietnam emerged as the dominating region in the Vietnam Industrial Enzymes market in 2024. South Vietnam possesses a robust infrastructure network, encompassing transportation systems, ports, and industrial zones, facilitating the establishment and operation of manufacturing facilities. This region hosts numerous industrial parks and clusters, housing a diverse array of industries spanning food processing, textiles, chemicals, and pharmaceuticals. This clustering of industrial activity generates a significant demand for industrial enzymes to optimize production processes, elevate product quality, and spur innovation. South Vietnam is experiencing rapid urbanization and economic expansion, with major cities like Ho Chi Minh City, Bien Hoa, and Can Tho emerging as pivotal economic hubs and commercial epicenters. Urbanization propels heightened consumer demand for a wide spectrum of goods, including processed foods and industrial products, thus fueling the necessity for enzyme-enabled solutions in manufacturing processes. As urban populations burgeon and consumer preferences evolve, industries in South Vietnam are compelled to embrace advanced technologies, including industrial enzymes, to remain competitive and meet evolving market demands. Also, Southern Vietnam harbors key industries that serve as substantial consumers of industrial enzymes, notably within food and beverage processing, textiles, and chemicals. The food and beverage sector, in particular, emerges as a primary driver of industrial enzyme demand, with extensive applications spanning meat processing, dairy production, brewing, and bakery operations. Similarly, the textile industry heavily relies on enzymes for fabric treatment, dyeing, and garment finishing processes. Additionally, enzymes play a pivotal role in various chemical processes,

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ranging from wastewater treatment to biofuel manufacturing. The concentration of these industries in South Vietnam underscores the region's dominance in the industrial enzymes market.

Key Market Players

- BASF SE
- DSM Nutritional Products Vietnam Ltd.
- DuPont de Nemours, Inc.
- Novozymes A/S (Novonesis Group)
- Advanced Enzyme Technologies
- ADISSEO VIETNAM
- Chr. Hansen A/S (Novonesis Group)
- Amano Enzyme Asia Pacific Co., Ltd.

Report Scope:

In this report, the Vietnam Industrial Enzymes Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□ Vietnam Industrial Enzymes Market, By Type:

- o Amylases
- o Cellulases
- o Proteases
- o Lipases
- o Phytases
- o Others

□□ Vietnam Industrial Enzymes Market, By Application:

- o Food & Beverages
- o Cleaning Agents
- o Animal Feed
- o Others

□□ Vietnam Industrial Enzymes Market, By Source:

- o Micro-Organisms
- o Plants
- o Animals

□□ Vietnam Industrial Enzymes Market, By Region:

- o Southern Vietnam
- o Northern Vietnam
- o Central Vietnam

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Vietnam Industrial Enzymes Market.

Available Customizations:

Vietnam Industrial Enzymes market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

- Detailed analysis and profiling of additional market players (up to five).

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