

Global Influenza Market - Vaccines and Therapeutics

Market Report | 2025-04-08 | 387 pages | Industry Experts

AVAILABLE LICENSES:

- Single user licence (PDF) \$4500.00
- Enterprise Electronic (PDF) \$7200.00

Report description:

Influenza Market Trends and Outlook

Influenza, also known as the flu, is a contagious respiratory illness caused by influenza viruses, mainly impacting the nose, throat, and lungs. The usual symptoms are fever, cough, sore throat, muscle aches, and fatigue, with severe cases potentially resulting in pneumonia or other infections, especially in high-risk groups like children, elderly individuals, and those suffering from chronic medical conditions. Influenza viruses are categorized into types A, B, C, and D, with Influenza A being the most concerning because of its ability to cause pandemics. The primary method of preventing the flu is through annual vaccination in the form of trivalent or quadrivalent vaccines aimed at the most common virus strains each season. Flu vaccines are produced using three primary technologies: egg-based, cell-based, and recombinant DNA methods. The egg-based method is still the most common, and recombinant DNA technology is increasingly popular because it is faster and more versatile.

Global Influenza market is estimated at US\$9.6 billion in 2024 and expected to register a CAGR of 4.5% between 2024 and 2030 to reach US\$12.4 billion in 2030. The influenza market is driven by global health initiatives, seasonal outbreaks of flu, and the need for preventive healthcare, leading to a steady demand for vaccines and antiviral treatments. Government immunization programs, increasing awareness, and ongoing R&D investments in vaccine innovation and pandemic preparedness are major market growth factors.

Advancements in vaccine technology, such as recombinant and cell-based formulations, have improved the effectiveness and availability of vaccine agents. Public-private partnerships, strategic collaborations, and global surveillance systems, including WHO and CDC initiatives, support the widespread vaccination efforts. An aging population and a rising number of chronic diseases further drive the need for vaccines. The market also benefits from enhanced distribution networks, regulatory incentives for quicker vaccine approvals, and emerging universal vaccine developments that target multiple strains of the virus. The COVID-19 pandemic heightened public awareness of vaccination, reinforcing demand for flu vaccines as a preventive measure. Investments in antiviral drug development, such as next-generation treatments and novel mechanisms like baloxavir marboxil, expand treatment options. Quadrivalent and high-dose vaccines offer diverse demographic needs, while digital platforms aid vaccine monitoring and distribution. A robust government backing, ongoing research and development, and constantly evolving vaccine formulations contribute to long-term market expansion and resilience against influenza hazards.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Influenza Regional Market Analysis

North America holds a leading 44.5% share of the global influenza market in 2024, thanks to increased awareness, advanced healthcare systems, and robust government backing for vaccination initiatives. The region's growth is also driven by rapid vaccine development, digital platforms for tracking vaccinations, and strategic partnerships within the pharmaceutical industry. In contrast, the Asia-Pacific region is anticipated to be the fastest-growing market, projected to grow at a 6% CAGR from 2024 to 2030, fueled by increasing healthcare investments, rising flu cases, and expanded vaccination programs in countries like China, India, and Southeast Asia. Government policies, domestic vaccine manufacturing, and increased awareness are contributing to market growth. The region's large population and increased transmission rates drive demand, while technology transfer collaborations and innovative treatment options further enhance the market.

Influenza Market Analysis by Product

The influenza vaccines segment leads the market with an estimated 88.2% share in 2024 and is also the fastest-growing segment, anticipated to record a 4.7% CAGR from 2024 to 2030, driven by increasing immunization campaigns, governmental support, and endorsements from global health organizations such as WHO and CDC. The global vaccines volume market is estimated at 847.2 million doses in 2024, driven by the growth of immunization programs, increased flu awareness, improved access in developing regions, and government-led vaccination efforts. A rise in seasonal flu outbreaks, preparations for pandemics, and innovations in mRNA and recombinant vaccine sciences also enhance market demand. Furthermore, the growing elderly populations at higher risk contribute to market expansion. Conversely, the therapeutics segment grows slowly due to high vaccination rates, though advancements in antiviral drugs continue to address breakthrough infections.

Influenza Vaccines Market by Type

The quadrivalent segment dominated the influenza vaccine market in 2024, accounting for 79.3% of the share, and exhibited the fastest CAGR of 5.2% from 2024 to 2030, fueled by greater efficacy, broader protection against two strains each of influenza A and B, and a growing preference among healthcare providers. The growth is also supported by increasing product approvals, ambitious immunization goals, and growing adoption rates in developed and developing regions. Their presence in hospitals and clinics, cost-effective nature, and increasing public awareness have driven demand. Furthermore, the development of pipeline candidates and ongoing innovations contribute to their market growth. On the other hand, trivalent vaccines are growing slowly due to their restricted coverage as the industry progressively shifts toward quadrivalent formulations to adapt to the changing patterns of the influenza virus.

Influenza Therapeutics Market by Drug Type

In 2024, the oseltamivir phosphate segment led the market with a 47.4% share thanks to its strong effectiveness, broad activity against influenza A & B, and broad availability. As a neuraminidase inhibitor, it blocks viral replication, which reduces symptom severity and duration when taken early. The medication is primarily recommended for treatment and prevention, which enhances its market leadership. Continued research and development efforts focused on new formulations further drive this market growth. Conversely, baloxavir marboxil is the fastest-growing segment, projected to record a CAGR of 5% during the analysis period 2024-2030, attributed to its single-dose administration, enhanced patient compliance, and efficacy against drug-resistant influenza strains. Its capacity to inhibit viral replication early on makes it a compelling option compared to traditional multi-dose treatments.

Influenza Market Analysis by Age Group

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

In 2024, the adult segment is the largest in the influenza market by age group, with a 66.7% share, propelled by elevated vaccination rates among seniors and individuals with chronic illnesses. Government vaccination programs and large-scale procurement by PAHO, UNICEF, and GAVI have improved coverage, reducing influenza-related hospitalizations and fatalities. Prioritizing adult vaccination has become essential to safeguard high-risk groups. On the contrary, the pediatric segment is experiencing the fastest growth, with a projected 5% CAGR from 2024 to 2030, driven by boosted childhood immunization programs and the introduction of needle-free nasal spray vaccines. Increasing rates of influenza infections among children, population growth in emerging markets, and broadened vaccine age indications further fuel the expansion of the pediatric segment. Strategies by the WHO and CDC to ensure global vaccination for all children also play a significant role in this growth.

Influenza Market Analysis by Route of Administration

The injection segment is the largest market, holding an estimated share of 85.4% in the influenza market in 2024. Injectables are preferred in national immunization initiatives due to their robust immune response, consistent production standards, and extensive clinical efficacy and safety data. Their broad availability, comprehensive product range, and recent approvals contribute to the ongoing market expansion. Injectable vaccines generate stronger and longer-lasting antibody responses than nasal sprays, making them the preferred option for healthcare professionals and insurers. In contrast, the nasal spray segment is experiencing the fastest growth, with an anticipated CAGR of 6.9% until 2030, spurred by ease of administration, adaptability for personal use, and enhanced adherence, especially in children and those who fear needles. Continued research into intranasal vaccines, which have the potential to generate both systemic and mucosal immunity, further supports their increasing acceptance.

Influenza Market Analysis by Technology

The influenza market is primarily led by egg-based manufacturing, which commands a 62.5% market share in 2024, thanks to its established infrastructure and capacity for large-scale production. Even with hurdles such as extended production times and concerns regarding egg allergies, ongoing innovations are aimed at enhancing efficiency and output. On the other hand, recombinant DNA technology is experiencing the fastest growth, with a 7% CAGR over 2024-2030, as it removes the reliance on eggs, allowing for quicker vaccine development and responsiveness to new strains. Additionally, cell-based manufacturing is growing due to its ability to scale and lower the risk of antigenic drift, making it an appealing alternative to conventional methods.

Influenza Market Analysis by Distribution Channel

Hospital and retail pharmacies dominate the influenza market with a 51.8% share in 2024, acting as key access points for vaccines and treatments. Their leadership is supported by elevated hospitalization rates, increasing flu-related admissions, and the widespread availability of vaccines in smaller healthcare facilities. The growth of in-hospital pharmacies and the rising trend of over-the-counter drug use also contribute significantly to market expansion. In contrast, government suppliers represent the fastest-growing distribution channel, showing a 5.9% CAGR through 2030, driven by large-scale vaccine purchases for national immunization initiatives and pandemic readiness. Additionally, collaborations between public and private sectors, along with global health organizations, are enhancing the availability of affordable vaccines in underserved areas, further promoting the growth of this segment.

Influenza Market Report Scope

This global report on Influenza analyzes the market based on product, subtype, age group, route of administration, technology, and distribution channel for the period 2021-2030 with projections from 2024 to 2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 20+

Influenza Market by Geographic Region

- North America (The United States, Canada, and Mexico)
- Europe (Germany, France, United Kingdom, Italy, Spain, and Rest of Europe)
- Asia-Pacific (Japan, China, India, South Korea, and Rest of Asia-Pacific)
- South America (Brazil, Argentina, and Rest of South America)
- Rest of World

Influenza Market by Product

- Vaccines
 - Quadrivalent
 - Trivalent
- Therapeutics
 - Oseltamivir Phosphate
 - Zanamivir
 - Peramivir
 - Baloxavir Marboxil
 - Others (Including Amantadine, Rimantadine, and Emerging Drugs)

Influenza Market by Age Group

- Pediatrics
- Adults

Influenza Market by Route of Administration

- Injection
- Oral
- Nasal Spray

Influenza Market by Technology

- Egg-based Manufacturing
- Cell-based Manufacturing
- Recombinant DNA Technology

Influenza Market by Distribution Channel

- Hospital & Retail Pharmacies
- Government Suppliers
- Other Distribution Channels (Including Online Pharmacies, Private Clinics, Specialty Healthcare Centers, and others)

Table of Contents:

PART A: GLOBAL MARKET PERSPECTIVE

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

1. INTRODUCTION

- Product Outline
- Influenza Definition
- Influenza Products
 - o□Vaccines
 - Quadrivalent
 - Trivalent
 - o□Therapeutics
 - Oseltamivir Phosphate
 - Zanamivir
 - Peramivir
 - Baloxavir Marboxil
 - Others (Including Amantadine, Rimantadine, and Emerging Drugs)
- Influenza Age Groups
 - o□Pediatrics
 - o□Adults
- Influenza Route of Administration
 - o□Injection
 - o□Oral
 - o□Nasal Spray
- Influenza Technologies
 - o□Egg-based Manufacturing
 - o□Cell-based Manufacturing
 - o□Recombinant DNA Technology
- Influenza Distribution Channels
 - o□Hospital & Retail Pharmacies
 - o□Government Suppliers
 - o□Other Distribution Channels (Including Online Pharmacies, Private Clinics, Specialty Healthcare Centers, and others)

2. Key Market Trends

3. Key Global Players

- Abbott Laboratories, Inc.
- AstraZeneca plc
- BioCryst Pharmaceuticals, Inc.
- CSL Seqirus
- Daiichi Sankyo Company, Limited
- Emergent BioSolutions Inc.
- F. Hoffmann-La Roche AG
- GSK plc
- Hualan Biological Vaccine Inc
- Instituto Butantan
- Mitsubishi Tanabe Pharma Corporation
- NATCO Pharma Limited.
- Novavax, Inc.
- Pfizer Inc.
- Sanofi S.A.
- Shanghai Institute of Biological Products Co., Ltd.
- Shionogi & Co., Ltd.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- [] Sinovac Biotech Ltd.
- [] Teva Pharmaceutical Industries Ltd.
- [] Viatrix Inc.
- 4. Key Business & Product Trends
- 5. Global Market Overview
- [] Global Influenza Market Overview by Product
 - o [] Influenza Product Market Overview by Global Region
- [] Vaccines
 - [] Global Influenza Vaccines Volume Market Overview by Global Region
 - [] Global Influenza Vaccines Market Overview by Type
 - [] Influenza Vaccines Type Market Overview by Global Region
 - [] Quadrivalent
 - [] Trivalent
 - [] Therapeutics
 - [] Global Influenza Therapeutics Market Overview by Drug Type
 - [] Influenza Therapeutics Drug Type Market Overview by Global Region
 - [] Oseltamivir Phosphate
 - [] Zanamivir
 - [] Peramivir
 - [] Baloxavir Marboxil
 - [] Others
 - [] Global Influenza Market Overview by Age Group
 - o [] Influenza Age Group Market Overview by Global Region
 - [] Pediatrics
 - [] Adults
 - [] Global Influenza Market Overview by Route of Administration
 - o [] Influenza Route of Administration Market Overview by Global Region
 - [] Injection
 - [] Oral
 - [] Nasal Spray
 - [] Global Influenza Market Overview by Technology
 - o [] Influenza Technology Market Overview by Global Region
 - [] Egg-based Manufacturing
 - [] Cell-based Manufacturing
 - [] Recombinant DNA Technology
 - [] Global Influenza Market Overview by Distribution Channel
 - o [] Influenza Distribution Channel Market Overview by Global Region
 - [] Hospital & Retail Pharmacies
 - [] Government Suppliers
 - [] Other Distribution Channels

PART B: REGIONAL MARKET PERSPECTIVE

- [] Global Influenza Market Overview by Geographic Region

REGIONAL MARKET OVERVIEW

6. North America

- [] North American Influenza Market Overview by Geographic Region
- [] North American Influenza Market Overview by Product
- [] North American Influenza Vaccines Market Overview by Type

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- North American Influenza Therapeutics Market Overview by Drug Type
- North American Influenza Market Overview by Age Group
- North American Influenza Market Overview by Route of Administration
- North American Influenza Market Overview by Technology
- North American Influenza Market Overview by Distribution Channel
- Country-wise Analysis of North American Influenza Market
 - o□The United States
 - United States Influenza Market Overview by Product
 - United States Influenza Vaccines Market Overview by Type
 - United States Influenza Therapeutics Market Overview by Drug Type
 - United States Influenza Market Overview by Age Group
 - United States Influenza Market Overview by Route of Administration
 - United States Influenza Market Overview by Technology
 - United States Influenza Market Overview by Distribution Channel
 - o□Canada
 - Canadian Influenza Market Overview by Product
 - Canadian Influenza Vaccines Market Overview by Type
 - Canadian Influenza Therapeutics Market Overview by Drug Type
 - Canadian Influenza Market Overview by Age Group
 - Canadian Influenza Market Overview by Route of Administration
 - Canadian Influenza Market Overview by Technology
 - Canadian Influenza Market Overview by Distribution Channel
 - o□Mexico
 - Mexican Influenza Market Overview by Product
 - Mexican Influenza Vaccines Market Overview by Type
 - Mexican Influenza Therapeutics Market Overview by Drug Type
 - Mexican Influenza Market Overview by Age Group
 - Mexican Influenza Market Overview by Route of Administration
 - Mexican Influenza Market Overview by Technology
 - Mexican Influenza Market Overview by Distribution Channel
- 7. Europe
 - European Influenza Market Overview by Geographic Region
 - European Influenza Market Overview by Product
 - European Influenza Vaccines Market Overview by Type
 - European Influenza Therapeutics Market Overview by Drug Type
 - European Influenza Market Overview by Age Group
 - European Influenza Market Overview by Route of Administration
 - European Influenza Market Overview by Technology
 - European Influenza Market Overview by Distribution Channel
 - Country-wise Analysis of European Influenza Market
 - o□Germany
 - German Influenza Market Overview by Product
 - German Influenza Vaccines Market Overview by Type
 - German Influenza Therapeutics Market Overview by Drug Type
 - German Influenza Market Overview by Age Group
 - German Influenza Market Overview by Route of Administration
 - German Influenza Market Overview by Technology

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- [] German Influenza Market Overview by Distribution Channel
- o [] France
 - [] French Influenza Market Overview by Product
 - [] French Influenza Vaccines Market Overview by Type
 - [] French Influenza Therapeutics Market Overview by Drug Type
 - [] French Influenza Market Overview by Age Group
 - [] French Influenza Market Overview by Route of Administration
 - [] French Influenza Market Overview by Technology
 - [] French Influenza Market Overview by Distribution Channel
- o [] The United Kingdom
 - [] United Kingdom Influenza Market Overview by Product
 - [] United Kingdom Influenza Vaccines Market Overview by Type
 - [] United Kingdom Influenza Therapeutics Market Overview by Drug Type
 - [] United Kingdom Influenza Market Overview by Age Group
 - [] United Kingdom Influenza Market Overview by Route of Administration
 - [] United Kingdom Influenza Market Overview by Technology
 - [] United Kingdom Influenza Market Overview by Distribution Channel
- o [] Italy
 - [] Italian Influenza Market Overview by Product
 - [] Italian Influenza Vaccines Market Overview by Type
 - [] Italian Influenza Therapeutics Market Overview by Drug Type
 - [] Italian Influenza Market Overview by Age Group
 - [] Italian Influenza Market Overview by Route of Administration
 - [] Italian Influenza Market Overview by Technology
 - [] Italian Influenza Market Overview by Distribution Channel
- o [] Spain
 - [] Spanish Influenza Market Overview by Product
 - [] Spanish Influenza Vaccines Market Overview by Type
 - [] Spanish Influenza Therapeutics Market Overview by Drug Type
 - [] Spanish Influenza Market Overview by Age Group
 - [] Spanish Influenza Market Overview by Route of Administration
 - [] Spanish Influenza Market Overview by Technology
 - [] Spanish Influenza Market Overview by Distribution Channel
- o [] Rest of Europe
 - [] Rest of Europe Influenza Market Overview by Product
 - [] Rest of Europe Influenza Vaccines Market Overview by Type
 - [] Rest of Europe Influenza Therapeutics Market Overview by Drug Type
 - [] Rest of Europe Influenza Market Overview by Age Group
 - [] Rest of Europe Influenza Market Overview by Route of Administration
 - [] Rest of Europe Influenza Market Overview by Technology
 - [] Rest of Europe Influenza Market Overview by Distribution Channel
- 8. Asia-Pacific
 - [] Asia-Pacific Influenza Market Overview by Geographic Region
 - [] Asia-Pacific Influenza Market Overview by Product
 - [] Asia-Pacific Influenza Vaccines Market Overview by Type
 - [] Asia-Pacific Influenza Therapeutics Market Overview by Drug Type
 - [] Asia-Pacific Influenza Market Overview by Age Group

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- Asia-Pacific Influenza Market Overview by Route of Administration
- Asia-Pacific Influenza Market Overview by Technology
- Asia-Pacific Influenza Market Overview by Distribution Channel
- Country-wise Analysis of Asia-Pacific Influenza Market

o□Japan

- Japanese Influenza Market Overview by Product
- Japanese Influenza Vaccines Market Overview by Type
- Japanese Influenza Therapeutics Market Overview by Drug Type
- Japanese Influenza Market Overview by Age Group
- Japanese Influenza Market Overview by Route of Administration
- Japanese Influenza Market Overview by Technology
- Japanese Influenza Market Overview by Distribution Channel

o□China

- Chinese Influenza Market Overview by Product
- Chinese Influenza Vaccines Market Overview by Type
- Chinese Influenza Therapeutics Market Overview by Drug Type
- Chinese Influenza Market Overview by Age Group
- Chinese Influenza Market Overview by Route of Administration
- Chinese Influenza Market Overview by Technology
- Chinese Influenza Market Overview by Distribution Channel

o□India

- Indian Influenza Market Overview by Product
- Indian Influenza Vaccines Market Overview by Type
- Indian Influenza Therapeutics Market Overview by Drug Type
- Indian Influenza Market Overview by Age Group
- Indian Influenza Market Overview by Route of Administration
- Indian Influenza Market Overview by Technology
- Indian Influenza Market Overview by Distribution Channel

o□South Korea

- South Korean Influenza Market Overview by Product
- South Korean Influenza Vaccines Market Overview by Type
- South Korean Influenza Therapeutics Market Overview by Drug Type
- South Korean Influenza Market Overview by Age Group
- South Korean Influenza Market Overview by Route of Administration
- South Korean Influenza Market Overview by Technology
- South Korean Influenza Market Overview by Distribution Channel

o□Rest of Asia-Pacific

- Rest of Asia-Pacific Influenza Market Overview by Product
- Rest of Asia-Pacific Influenza Vaccines Market Overview by Type
- Rest of Asia-Pacific Influenza Therapeutics Market Overview by Drug Type
- Rest of Asia-Pacific Influenza Market Overview by Age Group
- Rest of Asia-Pacific Influenza Market Overview by Route of Administration
- Rest of Asia-Pacific Influenza Market Overview by Technology
- Rest of Asia-Pacific Influenza Market Overview by Distribution Channel

9. South America

- South American Influenza Market Overview by Geographic Region
- South American Influenza Market Overview by Product

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- South American Influenza Vaccines Market Overview by Type
- South American Influenza Therapeutics Market Overview by Drug Type
- South American Influenza Market Overview by Age Group
- South American Influenza Market Overview by Route of Administration
- South American Influenza Market Overview by Technology
- South American Influenza Market Overview by Distribution Channel
- Country-wise Analysis of South American Influenza Market
 - o□Brazil
 - Brazilian Influenza Market Overview by Product
 - Brazilian Influenza Vaccines Market Overview by Type
 - Brazilian Influenza Therapeutics Market Overview by Drug Type
 - Brazilian Influenza Market Overview by Age Group
 - Brazilian Influenza Market Overview by Route of Administration
 - Brazilian Influenza Market Overview by Technology
 - Brazilian Influenza Market Overview by Distribution Channel
 - o□Argentina
 - Argentine Influenza Market Overview by Product
 - Argentine Influenza Vaccines Market Overview by Type
 - Argentine Influenza Therapeutics Market Overview by Drug Type
 - Argentine Influenza Market Overview by Age Group
 - Argentine Influenza Market Overview by Route of Administration
 - Argentine Influenza Market Overview by Technology
 - Argentine Influenza Market Overview by Distribution Channel
 - o□Rest of South America
 - Rest of South American Influenza Market Overview by Product
 - Rest of South American Influenza Vaccines Market Overview by Type
 - Rest of South American Influenza Therapeutics Market Overview by Drug Type
 - Rest of South American Influenza Market Overview by Age Group
 - Rest of South American Influenza Market Overview by Route of Administration
 - Rest of South American Influenza Market Overview by Technology
 - Rest of South American Influenza Market Overview by Distribution Channel

10. Rest of World

- Rest of World Influenza Market Overview by Product
- Rest of World Influenza Vaccines Market Overview by Type
- Rest of World Influenza Therapeutics Market Overview by Drug Type
- Rest of World Influenza Market Overview by Age Group
- Rest of World Influenza Market Overview by Route of Administration
- Rest of World Influenza Market Overview by Technology
- Rest of World Influenza Market Overview by Distribution Channel

PART C: GUIDE TO THE INDUSTRY

PART D: ANNEXURE

1. RESEARCH METHODOLOGY
2. FEEDBACK

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Global Influenza Market - Vaccines and Therapeutics

Market Report | 2025-04-08 | 387 pages | Industry Experts

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 licence (PDF)	\$4500.00
	Enterprise Electronic (PDF)	\$7200.00
		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"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-22"/>
		Signature	<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