

## **Europe Prefabricated Construction Market Intelligence and Future Growth Dynamics to 2029 - 100+ KPIs, Market Size & Forecast by End Markets, Precast Products, and Precast Materials**

Market Report | 2025-07-08 | 1560 pages | ConsTrack360

### **AVAILABLE LICENSES:**

- Single User Price \$4900.00
- Multi User Price \$5500.00
- Enterprise User Price \$6100.00

### **Report description:**

#### Report Description

This report provides a detailed data-centric analysis of the prefabricated construction sector in Europe, offering a comprehensive view of market opportunities across end-markets, materials, and products at the country level. With over 100+ KPIs covering growth dynamics in prefabricated construction, this databook provides a wealth of data-centric analysis with charts and tables.

ConsTrack360's research methodology is based on industry best practices. Its unbiased analysis leverages a proprietary analytics platform to offer a detailed view of emerging business and investment market opportunities.

This title from ConsTrack360 is a bundled offering, combining the following 13 reports:

- Country Report 1 - Austria Prefabricated Construction Industry Databook Series
- Country Report 2 - Belgium Prefabricated Construction Industry Databook Series
- Country Report 3 - Finland Prefabricated Construction Industry Databook Series
- Country Report 4 - France Prefabricated Construction Industry Databook Series
- Country Report 5 - Germany Prefabricated Construction Industry Databook Series
- Country Report 6 - Greece Prefabricated Construction Industry Databook Series
- Country Report 7 - Italy Prefabricated Construction Industry Databook Series
- Country Report 8 - Netherlands Prefabricated Construction Industry Databook Series
- Country Report 9 - Poland Prefabricated Construction Industry Databook Series

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Country Report 10 - Russia Prefabricated Construction Industry Databook Series  
Country Report 11 - Spain Prefabricated Construction Industry Databook Series  
Country Report 12 - Switzerland Prefabricated Construction Industry Databook Series  
Country Report 13 - United Kingdom Prefabricated Construction Industry Databook Series

## Key Insights

European prefabricated construction is advancing from component-level assembly to integrated, industrial-scale delivery spurred by labor shortages, cost pressures, sustainability mandates, and urban housing demands. While traditional penalization remains common, the trajectory favors volumetric modular buildings, especially in multi-family, social, and retrofit segments. Policy support from the EU's prefabricated construction Products Regulation to national tax incentives and streamlined permitting lowers barriers and unifies standards across markets.

Strategic partnerships from government industry alignment to start up funding and cross-border manufacturing networks are essential to scaling operations and optimizing supply chains. Meanwhile, investment in digitalization, BIM, robotics, and factory automation is professionalizing production, improving quality, and reducing timelines. Timber prefabricated construction is emerging as a low-carbon, high-rise alternative, and energy efficiency retrofit modules are being trialed as a pragmatic response to decarbonization goals. As we advance, Europe will benefit from harmonized regulations, specialized supply hubs in Eastern Europe, and broader integration of prefab into urban renewal and low-carbon policy agendas. Industry leaders must position prefab not just as a prefabricated construction technique but as a strategic enabler of resilience, sustainability, and productivity. By aligning investments in digital-fab infrastructure, regulatory engagement, and public-private collaboration, executives can convert prefab from a niche tactic into a foundational infrastructure strategy for Europe's built-environment transition.

## Frame Outlook for Europe's Prefabricated construction Industry

- Address labor and productivity constraints: With persistent labor shortages and pressures on productivity, prefabrication is increasingly viewed as a critical strategy. Major markets like the Netherlands are already using prefab in most projects; Germany, Italy, Belgium hovering around half; Europe wide prefab share sits above 40%.
- Meet sustainability and housing imperatives: Modular, panelized methods are solutions to affordable housing gaps and environmental goals across residential and non residential sectors. Navigate macro volatility and regulation alignment: While geopolitical and macroeconomic uncertainties have dampened new build activity, the EU's prefabricated construction Products Regulation harmonizes standards, easing prefab adoption.

## Illuminate Key Trends & Developments

- Shift to Industrialized Modular Delivery: Move is underway from basic elements to volumetric, factory assembled units; though only ~12% of prefab is currently volumetric, forecasts expect strong mid term growth. Drive Digital Integration via BIM & Automated Processes: BIM usage among architects exceeds 45%, though contractors lag; deeper digital fabrication is tied strongly to prefab adoption.
- Advance Eco Material & Timber Solutions: The Timber segment relatively common in Nordic nations is being embraced in France, Italy, and the Netherlands; tall timber towers in Norway and Austria highlight climate friendly innovations. Embed Energy Efficiency and Retrofit Readiness: Prefab modules are increasingly used in retrofit and renovation projects to raise energy performance particularly in Germany amid the energy efficiency push.

## Orchestrate Strategic Partnerships for Scale

- Align Government Incentives with Industry Scale Up : Grants, tax breaks, and streamlined approvals across countries like the UK, Germany, and France are helping prefab integrate into social housing and public projects. Encourage Manufacturer-Registry Cooperation: Producers in Germany, Sweden, and Poland collaborate to harmonize designs and reduce regulatory friction, leveraging EU standards alignment.

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- Support Start ups and Scale ups with Capital : Modular housing firms like Ecoworks and Ilke Homes received EUR7.7?million and ?100?million, respectively, fueling capacity expansion in retrofit and new build markets.

#### Identify Core Growth Drivers in Europe

- Labor and cost efficiency pressures: Prefab reduces build time by 20-50%, minimizes waste, and improves safety and quality, per BCG and industry analysis. Housing shortages and urbanization: Multi family prefab housing is expanding rapidly in Germany, France, Poland, Sweden and Italy, supported by affordability and speed priorities.

- Regulatory alignment and sustainability mandates: EU-wide policies, including the CPR and energy-performance rules, make prefab adoption smoother and more compelling. Technology led quality improvements: Automation, robotics, and BIM integration improve build precision and cost control, creating momentum for more industrialized methods.

#### Forecast Future Trends in Prefabricated prefabricated construction

- Scale Digital Automation Ecosystems: Expect robotics, AI driven quality control, and factory scale digital workflows to move from pilots into core operations. Expand Timber Clad and Tall Prefab Projects: High rise timber towers and timber panel homes will multiply following early successes in Austria and Norway.

- Accelerate Retrofit Prefab for Efficiency: Germany's retrofit modules will signal a broader European shift toward energy grade renewal of existing building stock. Consolidate Regional Supply Chains: Central and Eastern Europe will emerge as prefab component manufacturing hubs, feeding Western projects with cost effective modules.

- Shape Regulatory and Investment Frameworks: The EU will likely move to standardize prefab codes and establish financial mechanisms to support modular housing and energy transition projects.

#### Scope

This report provides a detailed data-centric analysis of the prefabricated construction industry at regional and country level. It covers market opportunity, and industry dynamics by prefabricated materials, methods, and products across various construction sectors at country level. In addition, it provides market size and forecast of the prefabricated industry covering end markets along with demand analysis. With over 100+ KPIs at the country level, this report provides comprehensive understanding of market dynamics at a more granular level.

#### Prefabricated Construction Market Size by Building Construction Sector

- Residential
  - Single-Family
  - Multi Family
- Commercial
  - Office
  - Retail
  - Hospitality
  - Other
- Institutional
- Industrial

#### Prefabricated Construction Market Size by Prefabrication Methods

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- Panelised construction
- Modular (Volumetric) construction
- Hybrid (Semi-volumetric) construction

#### Prefabricated Construction Market Size by Type of Material

- Aluminium
- Wood
- Iron & Steel
- Concrete
- Glass
- Other

#### Prefabricated Construction Market Size by Type of Product

- Building Superstructure
- Roof Construction
- Floor Construction
- Interior Room Modules
- Exterior Walls
- Columns & Beams
- Other

#### Prefabricated Construction Market Size by Prefabricated Material X Product

- Aluminium (Building Superstructure, Roof Construction, Floor Construction, Interior Room Modules, Exterior Walls, Columns & Beams, Other)
- Wood (Building Superstructure, Roof Construction, Floor Construction, Interior Room Modules, Exterior Walls, Columns & Beams, Other)
- Iron & Steel (Building Superstructure, Roof Construction, Floor Construction, Interior Room Modules, Exterior Walls, Columns & Beams, Other)
- Concrete (Building Superstructure, Roof Construction, Floor Construction, Interior Room Modules, Exterior Walls, Columns & Beams, Other)
- Glass (Building Superstructure, Roof Construction, Floor Construction, Interior Room Modules, Exterior Walls, Columns & Beams, Other)
- Other (Building Superstructure, Roof Construction, Floor Construction, Interior Room Modules, Exterior Walls, Columns & Beams, Other)

#### Prefabricated Construction Market Size by Prefabrication Product X Construction Sector

- Residential (Building Superstructure, Roof Construction, Floor Construction, Interior Room Modules, Exterior Walls, Columns & Beams, Other)
- Commercial (Building Superstructure, Roof Construction, Floor Construction, Interior Room Modules, Exterior Walls, Columns & Beams, Other)
- Industrial (Building Superstructure, Roof Construction, Floor Construction, Interior Room Modules, Exterior Walls, Columns & Beams, Other)
- Institutional (Building Superstructure, Roof Construction, Floor Construction, Interior Room Modules, Exterior Walls, Columns & Beams, Other)

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Beams, Other)

#### Reasons to buy

- Comprehensive Market Value Forecasts (2020-2029): Access detailed, data-driven forecasts of the prefabricated construction market's value across a nine-year period, segmented by construction methods, products, materials, and sectors.
- Granular Product and Component-Level Analysis: Measure the market value of individual prefabricated components?including superstructures, roofs, floors, walls, room modules, and columns & beams?with breakdowns by material and end-use sector.
- Sector-Wise Breakdown of Prefabrication Demand: Track prefabricated construction adoption across residential, commercial, industrial, and institutional sectors, with further segmentation by construction type (e.g., single-family vs. multi-family, office, retail, hospitality).
- Cross-Segmentation for Deeper Clarity: Leverage detailed cross-tabulations such as Product ? Material and Product ? Sector to understand layered market structures and identify segment-specific demand patterns.

#### Table of Contents:

This title from ConsTrack360 is a bundled offering, combining the following 13 reports (1079 tables and 1300 charts):

Country Report 1 - Austria Prefabricated Construction Industry Databook Series  
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Country Report 5 - Germany Prefabricated Construction Industry Databook Series  
Country Report 6 - Greece Prefabricated Construction Industry Databook Series  
Country Report 7 - Italy Prefabricated Construction Industry Databook Series  
Country Report 8 - Netherlands Prefabricated Construction Industry Databook Series  
Country Report 9 - Poland Prefabricated Construction Industry Databook Series  
Country Report 10 - Russia Prefabricated Construction Industry Databook Series  
Country Report 11 - Spain Prefabricated Construction Industry Databook Series

All regional, and country reports mentioned above will have the following tables of contents:

1. About this Report
  - 1.1. Summary
  - 1.2. Methodology
  - 1.3. Definitions
  - 1.4. Disclaimer
2. Prefabricated Building Construction Industry Dynamics and Growth Prospects
  - 2.1. Prefabricated Construction Market Size and Forecast, 2020 - 2029
  - 2.2. Market Share of Prefabricated Construction, 2020 - 2029
3. Market Outlook by Prefabrication Methods

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- 3.1. Market Share Trend by Prefabrication Method, 2020 - 2029
- 3.2. Panelized Prefabricated Construction Market Size and Forecast, 2020 - 2029
- 3.3. Modular (Volumetric) Prefabricated Construction Market Size and Forecast, 2020 - 2029
- 3.4. Component Prefabricated Construction Market Size and Forecast, 2020 - 2029
- 3.5. Hybrid Prefabricated Construction Market Size and Forecast, 2020 - 2029
  
- 4. Market Outlook by Prefabricated Product
  - 4.1. Market Share Analysis by Prefabricated Product, 2020 - 2029
  - 4.2. Prefabricated Building Superstructure Market Size and Forecast, 2020 - 2029
  - 4.3. Prefabricated Roof Market Size and Forecast, 2020 - 2029
  - 4.4. Prefabricated Floor Market Size and Forecast, 2020 - 2029
  - 4.5. Prefabricated Interior Room Modules Market Size and Forecast, 2020 - 2029
  - 4.6. Prefabricated Exterior Walls Market Size and Forecast, 2020 - 2029
  - 4.7. Prefabricated Columns & Beams Market Size and Forecast, 2020 - 2029
  - 4.8. Other Prefabricated Products Market Size and Forecast, 2020 - 2029
  
- 5. Market Outlook by Prefabricated Material
  - 5.1. Market Share Analysis by Prefabricated Material, 2020 - 2029
  - 5.2. Iron & Steel Usage in Prefabricated Construction - Market Size and Forecast, 2020 - 2029
  - 5.3. Concrete Usage in Prefabricated Construction - Market Size and Forecast, 2020 - 2029
  - 5.4. Wood Usage in Prefabricated Construction - Market Size and Forecast, 2020 - 2029
  - 5.5. Aluminum Usage in Prefabricated Construction - Market Size and Forecast, 2020 - 2029
  - 5.6. Glass Usage in Prefabricated Construction - Market Size and Forecast, 2020 - 2029
  - 5.7. Other Materials Usage in Prefabricated Construction - Market Size and Forecast, 2020 - 2029
  
- 6. Market Outlook by Construction Sector
  - 6.1. Market Share Analysis by Construction Sector, 2020 - 2029
  - 6.2. Residential Prefabricated Construction Market Size and Forecast, 2020 - 2029
  - 6.3. Commercial Prefabricated Construction Market Size and Forecast, 2020 - 2029
  - 6.4. Industrial Prefabricated Construction Market Size and Forecast, 2020 - 2029
  - 6.5. Institutional Prefabricated Construction Market Size and Forecast, 2020 - 2029
  
- 7. Residential Prefabricated Construction Market Outlook
  - 7.1. Market Share Analysis by Residential Construction Sector, 2020 - 2029
  - 7.2. Single-Family Residential Prefabricated Construction Market Size and Forecast, 2020 - 2029
  - 7.3. Multi-Family Residential Prefabricated Construction Market Size and Forecast, 2020 - 2029
- 8. Commercial Prefabricated Construction Market Outlook
  - 8.1. Market Share Analysis by Commercial Construction Sector, 2020 - 2029
  - 8.2. Office Prefabricated Construction Market Size and Forecast, 2020 - 2029
  - 8.3. Retail Prefabricated Construction Market Size and Forecast, 2020 - 2029
  - 8.4. Hospitality Prefabricated Construction Market Size and Forecast, 2020 - 2029
  - 8.5. Other Commercial Prefabricated Construction Market Size and Forecast, 2020 - 2029
  
- 9. Residential Construction Analysis and Outlook by Prefabricated Products
  - 9.1. Market Share by Prefabricated Product in Residential Sector, 2020 - 2029
  - 9.2. Prefabricated Building Superstructure Usage in Residential Construction - Market Size and Forecast, 2020 - 2029
  - 9.3. Prefabricated Roof Usage in Residential Construction - Market Size and Forecast, 2020 - 2029

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- 9.4. Prefabricated Floor Usage in Residential Construction - Market Size and Forecast, 2020 - 2029
- 9.5. Prefabricated Interior Room Modules Usage in Residential Construction - Market Size and Forecast, 2020 - 2029
- 9.6. Prefabricated Exterior Walls Usage in Residential Construction - Market Size and Forecast, 2020 - 2029
- 9.7. Prefabricated Columns & Beams Usage in Residential Construction - Market Size and Forecast, 2020 - 2029
  
- 10. Commercial Construction Usage Analysis and Outlook by Prefabricated Products
  - 10.1. Commercial Construction Market Share Analysis by Prefabricated Products, 2020 - 2029
  - 10.2. Prefabricated Building Superstructure Usage in Commercial Construction - Market Size and Forecast, 2020 - 2029
  - 10.3. Prefabricated Roof Usage in Commercial Construction - Market Size and Forecast, 2020 - 2029
  - 10.4. Prefabricated Floor Usage in Commercial Construction - Market Size and Forecast, 2020 - 2029
  - 10.5. Prefabricated Interior Room Modules Usage in Commercial Construction - Market Size and Forecast, 2020 - 2029
  - 10.6. Prefabricated Exterior Walls Usage in Commercial Construction - Market Size and Forecast, 2020 - 2029
  - 10.7. Prefabricated Columns & Beams Usage in Commercial Construction - Market Size and Forecast, 2020 - 2029
  
- 11. Industrial Construction Usage Analysis and Outlook by Prefabricated Products
  - 11.1. Industrial Construction Market Share Analysis by Prefabricated Products, 2020 - 2029
  - 11.2. Prefabricated Building Superstructure Usage in Industrial Construction - Market Size and Forecast, 2020 - 2029
  - 11.3. Prefabricated Roof Usage in Industrial Construction - Market Size and Forecast, 2020 - 2029
  - 11.4. Prefabricated Floor Usage in Industrial Construction - Market Size and Forecast, 2020 - 2029
  - 11.5. Prefabricated Interior Room Modules Usage in Industrial Construction - Market Size and Forecast, 2020 - 2029
  - 11.6. Prefabricated Exterior Walls Usage in Industrial Construction - Market Size and Forecast, 2020 - 2029
  - 11.7. Prefabricated Columns & Beams Usage in Industrial Construction - Market Size and Forecast, 2020 - 2029
  
- 12. Institutional Construction Usage Analysis and Outlook by Prefabricated Products
  - 12.1. Prefabricated Institutional Construction Market Share Analysis by Prefabricated Products, 2020 - 2029
  - 12.2. Prefabricated Building Superstructure Usage in Institutional Construction - Market Size and Forecast, 2020 - 2029
  - 12.3. Prefabricated Roof Usage in Institutional Construction - Market Size and Forecast, 2020 - 2029
  - 12.4. Prefabricated Floor Usage in Institutional Construction - Market Size and Forecast, 2020 - 2029
  - 12.5. Prefabricated Interior Room Modules Usage in Institutional Construction - Market Size and Forecast, 2020 - 2029
  - 12.6. Prefabricated Exterior Walls Usage in Institutional Construction - Market Size and Forecast, 2020 - 2029
  - 12.7. Prefabricated Columns & Beams Usage in Institutional Construction - Market Size and Forecast, 2020 - 2029
  
- 13. Prefabricated Building Superstructure Analysis by Material
  - 13.1. Prefabricated Building Superstructure Market Share Analysis by Material, 2020 - 2029
  - 13.2. Iron & Steel Usage in Prefabricated Superstructures - Market Size and Forecast, 2020 - 2029
  - 13.3. Concrete Usage in Prefabricated Superstructures - Market Size and Forecast, 2020 - 2029
  - 13.4. Wood Usage in Prefabricated Superstructures - Market Size and Forecast, 2020 - 2029
  - 13.5. Aluminum Usage in Prefabricated Superstructures - Market Size and Forecast, 2020 - 2029
  - 13.6. Other Materials Usage in Prefabricated Superstructures - Market Size and Forecast, 2020 - 2029
  
- 14. Prefabricated Roof Analysis by Material
  - 14.1. Prefabricated Roof Market Share Analysis by Material, 2020 - 2029
  - 14.2. Iron & Steel Usage in Prefabricated Roofs - Market Size and Forecast, 2020 - 2029
  - 14.3. Concrete Usage in Prefabricated Roofs - Market Size and Forecast, 2020 - 2029
  - 14.4. Wood Usage in Prefabricated Roofs - Market Size and Forecast, 2020 - 2029
  - 14.5. Aluminum Usage in Prefabricated Roofs - Market Size and Forecast, 2020 - 2029
  - 14.6. Glass Usage in Prefabricated Roofs - Market Size and Forecast, 2020 - 2029

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#### 14.7. Other Materials Usage in Prefabricated Roofs - Market Size and Forecast, 2020 - 2029

#### 15. Prefabricated Floor Analysis by Material

##### 15.1. Prefabricated Floor Demand Market Share Analysis by Material, 2020 - 2029

##### 15.2. Iron & Steel Usage in Prefabricated Floors - Market Size and Forecast, 2020 - 2029

##### 15.3. Concrete Usage in Prefabricated Floors - Market Size and Forecast, 2020 - 2029

##### 15.4. Glass Usage in Prefabricated Floors - Market Size and Forecast, 2020 - 2029

#### 16. Prefabricated Interior Room Modules Analysis by Material

##### 16.1. Prefabricated Interior Room Modules Market Share Analysis by Material, 2020 - 2029

##### 16.2. Iron & Steel Usage in Prefabricated Interior Room Modules - Market Size and Forecast, 2020 - 2029

##### 16.3. Concrete Usage in Prefabricated Interior Room Modules - Market Size and Forecast, 2020 - 2029

##### 16.4. Wood Usage in Prefabricated Interior Room Modules - Market Size and Forecast, 2020 - 2029

##### 16.5. Aluminum Usage in Prefabricated Interior Room Modules - Market Size and Forecast, 2020 - 2029

##### 16.6. Glass Usage in Prefabricated Interior Room Modules - Market Size and Forecast, 2020 - 2029

##### 16.7. Other Materials Usage in Prefabricated Interior Room Modules - Market Size and Forecast, 2020 - 2029

#### 17. Prefabricated Exterior Walls Analysis by Material

##### 17.1. Prefabricated Exterior Walls Market Share Analysis by Material, 2020 - 2029

##### 17.2. Iron & Steel Usage in Prefabricated Exterior Walls - Market Size and Forecast, 2020 - 2029

##### 17.3. Concrete Usage in Prefabricated Exterior Walls - Market Size and Forecast, 2020 - 2029

##### 17.4. Wood Usage in Prefabricated Exterior Walls - Market Size and Forecast, 2020 - 2029

##### 17.5. Aluminum Usage in Prefabricated Exterior Walls - Market Size and Forecast, 2020 - 2029

##### 17.6. Glass Usage in Prefabricated Exterior Walls - Market Size and Forecast, 2020 - 2029

##### 17.7. Other Materials Usage in Prefabricated Exterior Walls - Market Size and Forecast, 2020 - 2029

#### 18. Prefabricated Columns and Beams Analysis by Material

##### 18.1. Prefabricated Columns and Beams Market Share Analysis by Material, 2020 - 2029

##### 18.2. Iron & Steel Usage in Prefabricated Columns & Beams - Market Size and Forecast, 2020 - 2029

##### 18.3. Concrete Usage in Prefabricated Columns & Beams - Market Size and Forecast, 2020 - 2029

##### 18.4. Wood Usage in Prefabricated Columns & Beams - Market Size and Forecast, 2020 - 2029

##### 18.5. Aluminum Usage in Prefabricated Columns & Beams - Market Size and Forecast, 2020 - 2029

#### 19. Further Reading

##### 19.1. About ConsTrack360

##### 19.2. Related Research

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		Date	<input type="text" value="2026-02-20"/>

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