



German Trade Fair Industry | Review 2008



German Trade Fair Industry | Review 2008

Publisher:

AUMA

Association of the German
Trade Fair Industry

Littenstrasse 9
10179 Berlin
Phone (030) 24 000-0
Fax (030) 24 000-330
info@auma.de
www.auma.de

Layout:

CCL, Berlin

Production:

Leonardo Marketing Ltd., Köln

Photos:

Cover photo:

Heidelberger Druckmaschinen AG,
drupa 2008 (Source: FAMAB)

We would like to thank the exhibition
companies for providing us with pictures
of trade fairs and exhibition centers.

Further photos: Giraf Picture GmbH,
Berlin

Printing:

Königsdruck – Printmedien und
digitale Dienste GmbH, Berlin

Printed in the
Federal Republic of Germany 2009

ISSN: 1430-8983



Inhalt

Outlook	5
Trade fairs in Germany	11
Overview	13
AUMA_MesseTrend 2009	18
Only moderate growth in exhibitor numbers from Asia	20
More visitors from abroad at German trade fairs	23
Hall capacities remain largely unchanged	24
Visitor registration and IT	25
Stand construction sector experienced substantial growth	26
AUMA members expect no decline in congress business	28
Regional and specialised events	29
Voluntary auditing of trade fair statistics	31
Lobbying and legal aspects	33
Product piracy and brand theft at trade fairs	35
New trade fair laws in China	36
Unofficial exhibitor directories	37
AUMA Round table Brussels	38
Institute of the German Trade Fair Industry	39
Vocational training and advanced training	41
Seminar Alliance of German Trade Fairs within AUMA	43
Research	44
German Trade Fair Library	45

Trade fairs abroad 47

The competitive situation around the world	49
Supporting German exhibitors abroad	53
Trade fairs abroad held by German organisers	56
World Exhibitions	58

Marketing, media and events 61

Marketing for German trade fairs	63
Marketing for trade fairs	65
AUMA online	66
Public relations work	67
AUMA_MesseTreff 2008 - meeting of trade fair representatives	68
Participation in international congresses	70
Overview of AUMA media	72
Organisation	74

Key indicators of the German trade fair industry 77



Outlook





Outlook

Overall, in view of the extent of the current financial and economic crisis, international trade fairs in Germany are still faring relatively well, in particular when compared with competitors, despite other developments at individual industrial trade fairs. It is difficult to predict whether the trade fair industry will suffer a delayed and greater backlash. Whatever the case, this is the right time to communicate the strengths of trade fairs in their role as marketing instruments.

Trade fairs create confidence ■ One of the terms defining the financial crisis when it began in 2008 was the word confidence. Business partners lost confidence in each other, initially on the financial markets, later on in the so-called real business world. One of the reasons was that, with customer relations becoming increasingly anonymous, one could no longer sufficiently judge a business partner's behaviour. What initially may appear to be a dialogue, conducted by letter or over the internet, is limited to establishing formal contact without the sender being able to extract in-depth information from his business partner. Taking part in and attending trade fairs in an effort to create and maintain confidence is becoming more and more important again.



Companies who actively maintain close customer relations are a step ahead not only as far as information is concerned, but also in terms of the confidence they have built up. The fact that many companies are standing by their decision to take part in trade fairs is proof that they appreciate being able to maintain close relations with their customers at such events, even if their concrete business expectations are necessarily reduced.

Trade fairs are rational and emotional ■ Fairs are a unique combination of rational and emotional elements, whereas the focus of most other marketing instruments is quite clearly on the one or the other, and often they only appear to embrace both. The effect that bulk mailing or e-mails has on the senses is somewhat limited. However, when addressing exhibitors and visitors, the question is whether it is possible to adequately put across the specific qualities of trade fairs.

Thus the stand design, supporting events at the stand and other factors are the prime emotional elements associated with taking part in an exhibition. The question is whether those responsible for rational elements such as the stand space and potential visitor attendance, i.e. the organisers, and those responsible for emotional elements such as stand design and special events, should not cooperate more closely in their efforts to attract exhibitors, ultimately benefiting everyone involved.

Among the emotional elements, the significance of

stand personnel should not be underestimated. The degree to which personal talks at a fair may culminate in medium or long-term business success depends on the quality of the staff on the stand. In this respect, providing training for exhibitors is becoming more and more important, in order to improve trade fair preparations and organising participation.





Since early 2009, for this reason, AUMA has given its support to the Seminar Alliance of German Trade Fairs. This organisation provides advanced training courses for exhibitors throughout Germany. In agreement with the trade fair organisers involved its title now is the Seminar Alliance of German Trade Fairs within AUMA.

Setting new standards for measuring trade fairs ■ The effects of the economic crisis on the trade fair industry have raised the question, at least in the case of those trade fairs affected relatively severely, as to how far the economic success of a trade fair can be measured primarily in terms of visitor attendance. As a rule this figure says relatively little about levels of successful business concluded by exhibitors. Recent developments in particular have shown that declining visitor attendance and relatively high levels of satisfaction do not contradict one another. Nor does judging the quality of a visitor at a fair seem to be an adequate additional yardstick, as it is a means which is often used only when visitor attendance is in decline, thus limiting its acceptability.



It is more likely that the search for new indicators should look at business success. Doubtless this is not easy to measure, even for exhibitors, and their willingness to provide information will most likely vary. Nonetheless, it should be worth the effort of organisers and exhibitors to jointly give the issue of indicators some thought. Differentiated reporting on the success of a trade fair will most likely make the decision a lot easier for many a company deliberating over whether to take part.



Trade fairs in Germany





Trade fairs in Germany

Overview

In 2008 international trade fairs in Germany again reported positive results, despite the international financial and economic crisis. However, the outlook for 2009 is considerably less bright, despite of considerable fluctuations, depending on the industry and type of fair.

2008 review ■ In 2008 the most outstanding figure recorded by the 153 international trade fairs which took place in Germany was, compared with previous events, the 4.2 % average growth rate in the amount of stand space rented out, close to the high growth figure of 4.6 % reached in 2007. This result pointedly demonstrates that in general, exhibitors do not react to overall economic changes with hasty or short-term decisions. Companies exhibiting at fairs took part in events as planned, despite the fact that in early 2008 an economic downturn was already in the offing.



Because according to the findings of a representative poll of German exhibitors entitled AUMA_MesseTrend, conducted in autumn 2007, the number of exhibitors attending domestic trade fairs and the overall increase in trade fair investment reflected a stable trend. Clearly this also had a positive impact on stand space. Once again, the amount of space occupied by international exhibitors increased, too.

What is remarkable is that, at an average of 3.5 %, the increase in visitor numbers reached a level unattained since the nineties. Even if the reason for this was a positive economic trend in certain sectors, the engineering industry for example, these results also generally indicate that trade fairs are broadly accepted as a means of obtaining information and preparing decisions.



2008 also clearly showed that the gap between growth rates for exhibitors from Germany and abroad is narrowing once again, after many years of disproportionately high growth rates for participants from abroad. With the overall growth rate for exhibitors registering at 1.9 %, domestic exhibitor participation rose by 2.1 % and that of foreign exhibitors by 1.8 %. Clearly, German exhibitors' confidence in the effectiveness of domestic trade fairs is stable and actually continues to increase, a good sign for 2009, which in business terms will be a difficult year.

However, it should be noted that the growth rates recorded for exhibitors from abroad are the lowest for many years. It seems that with the onset of economic decline in 2008 many foreign companies already became more cautious

in their plans. Thus the previously high growth rates for exhibitors from Eastern EU countries and from eastern parts of Europe have significantly tailed off.

With global trade contracting, it is in any case likely that foreign exhibitors will no longer be taken for granted as the driving forces of trade fairs in Germany for some time. As far as attracting exhibitors from abroad is concerned the issue in the future will no longer be about profiting from a larger market, but more than ever about competing for market shares. Increasingly, organisers in other countries are also aiming to secure foreign exhibitors for their domestic trade fairs, in part with public financial support.



With the outlook for growth abroad looking bleak, the focus must be more on tapping the remaining existing potential for exhibitor attendance at home.

This is an opportunity for trade fair organisers not only to win over new companies for trade fairs, but also to secure them as long-term customers of their own company. For this reason some organisers have had the good foresight to make an above-average effort to assist these new exhibitors. The first few trade fair attendances are crucial for an exhibitor in order to recognise the opportunities that taking part offers and how spending can be kept within limits, in particular with good advice from the organisers.

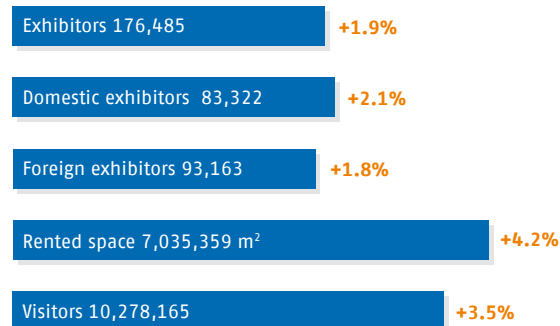
Among the various types of events, the gap between trade fairs for capital goods and events for consumer goods continues to widen. At the 87 trade fairs for capital goods which took place, stand space increased by an average of more than 9.3 %, due in particular to the continuing boom in 2008 of the engineering sector, and a number of exhibition grounds no longer suffering from capacity constraints which had previously been an obstacle to expansion at the respective locations.

At 5.3 %, the relatively low growth rate in exhibitor numbers shows that existing exhibitors are clearly occupying more stand space, and at 4.7 % the increase in German exhibitors is also a positive sign. Thus a potential for new exhibitors and greater attendance still exists. In line with exhibitor numbers, visitor attendance rose by 6.8 %.

Trade fairs representing the services sector reported stable stand space data, a marginal increase in exhibitor numbers, and a slight drop in visitor attendance. However, as they comprise only four events the relevance of these developments is rather limited. The figures for the category of international public fairs for consumer goods are quite stable, with a slight increase in stand space and a 1 % decline in visitor attendance. At an average of 2.3 %, the growth rate in visitor

Trade Fairs in Germany 2008

Development of the 153 international / national events in comparison to the respective previous events



Trade fairs for capital goods dominate trade fair business

numbers is worth noting. Providing they offer appealing topics and concepts, consumer-oriented trade fairs clearly remain an effective instrument for addressing the general public.

Trade Fairs in Germany 2008

Development of the 153 international / national events in comparison to the respective previous events

	Number of events	Total	Exhibitors Domestic	Foreign	Visitors Total	Rented space Total
Total	153	+1.9%	+2.1%	+1.8%	+3.5%	+4.2%
Investment goods trade fairs	87	+5.3%	+4.7%	+6.1%	+6.8%	+9.3%
Consumer goods fairs directed to trade visitors	44	-2.8%	-2.3%	-3.1%	-6.6%	-2.4%
Consumer goods fairs directed to the public	18	-0.8%	-1.5%	+0.2%	+2.3%	+1.7%
Trade fairs presenting services	4	+1.9%	+0.3%	+2.5%	-2.5%	-0.2%

By contrast, consumer goods events for trade visitors averaged negative results throughout. The reasons have less to do with the economic situation but rather more with changes to sales and buying structures in individual sectors. Overall in this category, exhibitor numbers declined by 2.8 %, stand area figures fell by 2.4 %, and visitor attendance was 6.6 % lower than at the previous events.

Undoubtedly, the latest developments at trade fairs for consumer goods are also a signal to the organisers to think about new concepts and to intensify dialogue with exhibitors on strategic issues. A greater focus on narrower ranges of products and services or on smaller target audiences is likely.

In general, when faced with individual trade fairs declining in significance organisers are now quicker to adjust their portfolio. It is certainly in the interest of exhibitors and visitors from industry when trade fairs which no longer satisfy current demands are withdrawn from the market. Trade fairs have life cycles in the same way that products do. Exhibitors and their associations can support this adjustment process by coming to clear decisions in favour of or against individual projects.

The 153 international trade fairs held in 2008 were attended by 176,485 exhibitors, of whom 83,322 came from Germany and 93,163 from abroad. These companies rented stand space covering 7,035,359 m². 10,278,165 visitors came in search of information at these events. Furthermore, the 174 regional events and highly specialised smaller



trade fairs for which AUMA keeps records reported a figure of 52,071 exhibitors who rented 1,489,975 m² of stand space. Visitor attendance here was 6,445,427 (see also p. 28). Thus, statistics for the 327 AUMA-registered events were as follows: 228,000 exhibitors, 16.75 million visitors and 8.5 million m² of rented space.

According to initial results, in 2008 German trade fair organisers achieved a turnover of approximately EUR 2.8 billion, a record figure (2007: EUR 2.7 billion; 2006: EUR 2.55 billion). Due to the relatively large number of trade fairs scheduled in 2008 revenues from stand area rentals as well as from visitor admission tickets and services were extremely high.

Many organisers are making an effort to register all visitors, where possible. However, the process of systematically using addresses is still in its infancy, be it for attracting visitors to the next trade fair, supplying regular information between events, or taking care of industry communities. Those familiar with the visitors attending an industry trade fair in principle also have an outstanding opportunity to support communication within that industry. In many cases the resulting possibilities that await have yet to be explored. If trade fair organisers regard themselves as communicators of an industry then examining these possibilities will be worthwhile.

Forecast for 2009 ■ Developments during the first half of 2009 showed that the situation for international trade fairs has remained relatively stable. Visitor attendance has indeed dropped by about 8 %, but a figure of this order has no significance in terms of the appeal of individual trade fairs and their ability to function. There are no signs of any crisis regarding levels of acceptance. This applies all the more to exhibitors, for which figures only dropped by 3 %.

What is also clear is that exhibitors have been forced to cut back, causing stand space rentals to drop by around 5 %. In each case these variations represent a balance of positive and negative developments. For example, during the first half of 2009 there were trade

*Overall results for 2008:
327 AUMA-registered events,
228,000 exhibitors,
16.75 million visitors,
8.5 million m² of rented space*



Messe Hannover



Messe Frankfurt

fairs experiencing respectable growth while others were making considerable losses. In 2009 there have been only a few cancellations affecting international trade fairs.

AUMA expects overall figures for the year to be slightly down on the results for the first quarter, whereby in individual cases severe downturns and surprisingly positive figures appear to be just as likely.

Due to the relatively small number of international trade fairs scheduled in 2009 (136) overall results for the year will be considerably down on previous years. The figures anticipated by AUMA are 156,000 exhibitors, 5.7 million m² of rented stand space and a visitor attendance figure of 9.3 million visitors.

AUMA_MesseTrend 2009

In 2009 and 2010, German companies in the business-to-business sector who exhibit at trade fairs are again aiming to invest around 40 % of their communications budget in trade fairs. These are the findings of a representative poll of 500 German exhibitors between 30 September and 20 October 2008.

In recent years, in relation to several other available options, trade fairs have increased their market share as a means of communication. For companies exhibiting at trade fairs, advertising in trade fair publications and direct mailshots have become less important. Whereas 59 % of exhibitors considered advertising important or very important in 2004, only 49 % thought so in 2008. In the case of direct mailshots the respective figures were 62 % in 2004, and only 53 % in 2008.



Ratings for sales forces have remained steady, at around 75 %. 81 % of those polled currently consider trade fairs to be important or very important (in 2004 the figure was 76 %). In the B2B sector, genuine face-to-face talks are becoming increasingly important.

34 % of exhibitors from Germany aim to spend more on trade fairs, with only 19 % considering spending less. The reason frequently quoted is higher participation costs, due mainly to the rising cost of energy and raw materials.

In particular companies exhibiting capital goods aim to spend more on trade fairs. 39 % intend to increase their budget, and 20 % aim to spend less. Furthermore, larger companies intend to increase their trade fair budgets more so than small companies.

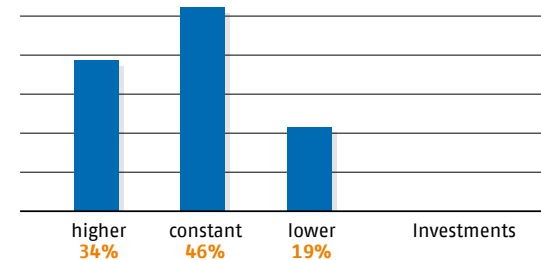
Overall, in 2009 and 2010, companies exhibiting at trade fairs plan to spend EUR 384,000 on taking part in fairs, close to 1 % more than during the last two years. In the future, as in the past, companies will be spending 80 % of these budgets on domestic trade fairs.

However, in relation to the number of participations there is a slight drop in attendance at domestic fairs. 16 % plan to take part in more trade fairs at home, 18 % in less events. Companies exhibiting consumer goods in particular aim to increase their involvement in trade fairs abroad. However, they still have much to do to catch up. To date, exhibitors of consumer goods have organised 80 % of their trade fair participations at home, compared with only 50 % of companies exhibiting capital goods.

AUMA_MesseTrend 2009

Investments in participations

Compared to 2007/2008, ...% of German exhibition companies* are planning worldwide in the period 2009/2010:



Trade fair budget	2007 + 2008:	383,700,- €	+ 0.7%
per company:	2009 + 2010:	386,400,- €	

* representative survey by TNS Emnid commissioned by AUMA among 500 companies, which exhibit at trade visitor-oriented fairs; October 2008; to 100 remaining percent: n.a.

Only moderate growth in exhibitor numbers from Asia

Compared with 2007, in 2008 the number of foreign exhibitors at international trade fairs in Germany rose by 3.6 %. Following a downturn caused by the low number of trade fairs scheduled for 2007, attendance by exhibitors from countries in Southern, Eastern and Central Asia rose to 25,000, an increase of over 6 %.



Participation figures for the People's Republic of China rose to close to 10,000, an increase of 8 %, following 2 % growth in 2007. However, the days of double-digit growth rates appear to be over. Only as recently as 2006 the figure for China was 30 %. Due to the number of trade fairs taking place, participation by exhibitors from Taiwan grew considerably, rising to nearly 4,400, an increase of 24 %, although these figures fell significantly short of the results for 2006. There were 2 % more exhibitors from India, and almost 8 % less from Korea. On the other hand there was a noteworthy 20 % increase in exhibitors from Japan. Aside from this figure, participation by exhibitors from Eastern Asia was inconsistent. There was a 6 % increase in exhibitors from Hong Kong, and by contrast a significant decline in numbers from Indonesia, Malaysia and Thailand.

Koelnmesse

Participation figures for the European Union rose to close to 48,000, an increase of over 3 %. Sweden reported a significant increase (+17 %), as did the UK (+10 %) and France (+8 %), while Italy (-6 %) and Spain (-3 %) reported negative developments. The growth rates for participation by exhibitors from eastern EU countries are clearly no longer as high as some have been in recent years. Thus there



were close to 6 % more exhibitors from Poland, 2 % more from the Czech Republic, and almost 3 % less from Hungary. Participation figures for the Baltic states are mostly stagnating too. However, Romania reported an increase of 17 %.

Among the larger non-EU states there were 7 % more exhibitors from Switzerland, 6 % more from Turkey, whereas numbers from Russia fell by 2 %. Attendance by exhibitors from Ukraine, previously very low, rose by 23 %.

At 1,400, exhibitor numbers from the Middle East remained more or less the same. With almost 350 more exhibitors, the United Arab Emirates again reported double-digit growth. However, at 600 the country with the highest number of exhibitors from the region is Israel (+17 %).

Participation figures for North America rose by 3 %. There were close to 5 % more exhibitors from the USA, but Canada reported slightly fewer numbers.

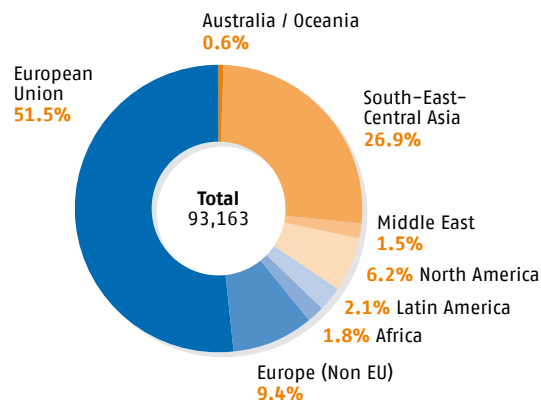
Participation figures for South America continue to depend strongly on ANUGA, the food exhibition which takes place in uneven years. Accordingly, from 2007 to 2008 numbers fell to nearly 2,000, a drop of 21 %. Other large countries from the region such as Brazil, Argentina and Mexico were affected too.

Participation figures for Africa fell too, but only by 5 %. Attendance levels here also depend on large food exhibitions taking place. Exhibitor numbers from some countries increased, from Kenya and Namibia for example. At around 360 companies, South Africa's presence at trade fairs remained largest. However, the number of participations from Egypt was highest, whose exhibitors attended 44 German trade fairs.

Trade Fairs in Germany 2008

Foreign exhibitors

AUMA category international and national events



Exhibitor numbers from Australia and Oceania fell by close to 15 %. Attendance here is also linked with food exhibitions. However, New Zealand's exhibitors bucked the trend. The number of exhibitors increased by 4 %, the companies took part in 41 trade fairs. Australia made up two-thirds of the total for participation from this region. Their exhibitors attended 74 trade fairs.

As in recent years, the country with the largest number of exhibitors at international trade fairs in Germany was Italy (11,125 companies), followed by the People's Republic of China (9,998), the UK (5,385), the Netherlands (5,217), France (5,211) and the USA (5,036) which, despite more American exhibitors attending, dropped two places due to an increase in numbers from Western Europe.

The following places among the top 12 nations were occupied by Taiwan (4,386), Spain (4,290), Austria (3,649), Switzerland (3,623), India (2,763) and Turkey (2,475).

The country which took part in more trade fairs than any other was Switzerland, which was represented at 151 out of 153 trade fairs, ahead of Austria (150), Italy (148), the Netherlands (147) and France (146).





More visitors from abroad at German trade fairs

Visitors totalling 2.55 million from around the world attended trade fairs in Germany in 2008.

Despite the onset of the international economic crisis, last year trade fairs in Germany reported a figure of 2.55 million visitors from abroad, following 2.5 million in 2007, which marked the previous record. At numerous German trade fairs, the number of foreign visitors rose once again in 2008.

According to AUMA, trade fairs in Germany demonstrated their worldwide appeal, even in a deteriorating overall situation. Altogether, in 2008 nearly 10.3 million visitors attended international trade fairs in Germany.

There were close to 200,000 visitors from southern, eastern and central regions of Asia, some 90,000 from North America, and the same figure from the Middle East, as well as 60,000 from South America and Africa respectively. Exactly two-thirds (1,700,000) of foreign visitors came from countries in the European Union, and more than 13 % (340,000) from other countries in Europe.

Outside Europe the USA (80,000) represented the country with the highest number of visitors, followed by India (65,000), China (45,000) and Japan (35,000). In Europe the Netherlands led the rankings with 220,000 visitors, ahead of Italy with 145,000, and Belgium, France and Austria (130,000 each). It should be noted that a significant part of visitors from neighbouring countries were members of the general public, whereas audiences from abroad consisted almost entirely of trade visitors.



Messe Düsseldorf

Hall capacities remain largely unchanged

In early 2009 there were 2,721,100 m² of hall space at German trade fair venues hosting fairs of at least national importance, 1.6 % less than on 1 January 2008.



Messe München

One reason in particular is that since 2009 one location has no longer been organising international trade fairs. Only very small amounts of additional hall space were completed in 2008.

Overall in 2008, more than EUR 220 million were invested in venues hosting national or international trade fairs, considerably less than the previous year, in which EUR 400 million were spent on expansion and modernisation. Thus the wave of investment of recent years has now come to an end. This would also seem to apply to the near future.

In 2009 hall space will grow by 48,500 m², an increase that will largely cancel out the decline of 1.6 % in 2008. Amounts totalling approximately EUR 450 million are due to be invested by 2012, in particular in the modernisation of existing hall space.

Currently, no decisions have been taken regarding expansion measures beyond 2009. Considering the lengthy timespan required for planning and building exhibition halls this means that the amount of hall space will remain unchanged at least until 2011.



Visitor registration and IT

At many trade fair venues the focus is currently on optimising IT hardware. Issues such as green IT also play a part, i.e. using IT systems in an environmentally friendly way while conserving resources. The main focus is on saving energy along with reducing costs.

Discussions on the further development of online ordering systems are currently taking place at all venues, and in particular on bringing in external contractors. We are seeing the traditional services folder gradually being phased out. At many venues a printed version is now only dispatched on request, sometimes only on a CD-ROM.

The degree to which electronic invoicing and electronic processing of incoming invoices is being implemented varies, and the same applies to document management and IT-supported processing of actions. Reasons favouring such a changeover are process optimisation and subsequent cost savings, although a minimum size is required for such considerations to be relevant.

At many venues the focus is also on the continued development and introduction of new visitor admission systems and visitor information systems. Issues regarding online registration and data protection are also important. Alternatively, some organisers are also focusing on mobile visitor admission systems at locations where no fixed systems are available.



*2008 ADAM award winners:
Eternit AG at
DACH + HOLZ, Stuttgart*

Stand construction sector experienced substantial growth

2008 was a good year for FAMAB. Not only were its members able to increase 2007 turnover by around 11 per cent, the association representing direct business communications also launched a quality offensive. As a pioneer of new ideas in the stand construction and event marketing sector it has risen to the task and undertaken various steps towards ensuring transparency, qualifications and sustainability in direct business communications. Its aim is to strengthen confidence in communication measures and the relevant providers of such services.



The individual measures at the heart of this quality offensive are manifold and will dominate the work of FAMAB in the coming years. At the same time they are a means of securing Germany's position as a venue for trade fairs. Among the most important elements of the quality offensive, the quality charters established by individual forums within the association should be mentioned. Their aim is to lay down rules of conduct and policies to ensure transparency with customers and contractors. The Marketing and Event Agencies Forum (FME) launched the initiative and compiled the quality charter with the support of its scientific advisory council. It was approved in summer 2008. The Trade Fair and Exhibition Forum (FMA) and the FLP Forum have also laid down a quality charter.

Messe Berlin

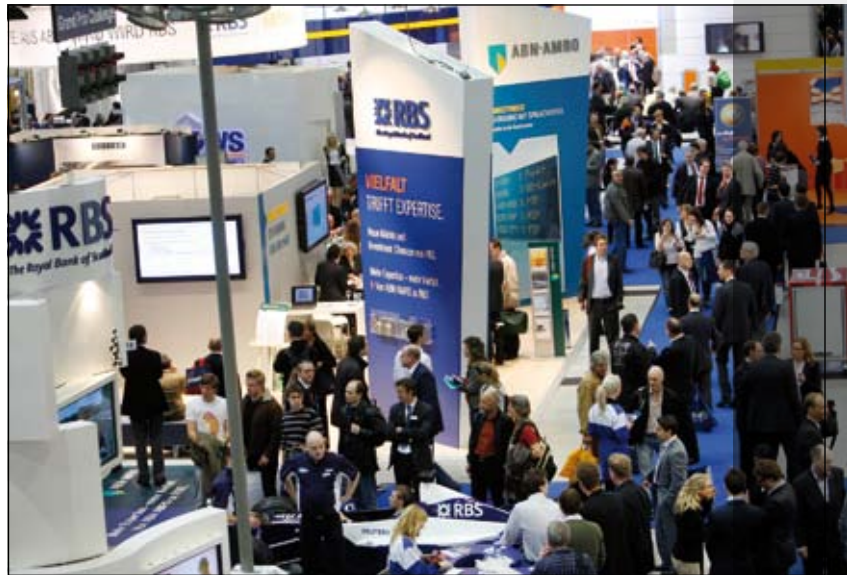
In the stand construction and events sector FAMAB is undertaking moves to ensure proper qualifications in a number of areas. Currently, a catalogue listing criteria for choosing suitable advanced training measures is being prepared. The aim is to provide trainees and persons in search of advanced training with a catalogue which allows them to select the right institutions offering training and to choose the right courses.



Sustainability is an important issue forming part of the quality offensive, as it is becoming an increasingly important factor in the business decision-making process. Sustainability in ecological terms is not the deciding factor. Economics and social responsibility are equally important. A handbook on how to compile a sustainability report provides the basis for further sustainable development in direct business communications.

In the wake of an economically very successful year in 2008, business expectations for 2009 in the stand construction sector are somewhat downbeat. These are the results of a poll among FMA's members, who number around 150.

After an 11 % increase in turnover last year, expectations for 2009 are clearly down. The reasons for double-digit growth last year were the positive situation in the economy, particularly in the first half of 2008, and an especially good year at trade fairs. In 2008 major events held in multiple-year cycles such as Drupa, EuroShop, Light + Building and Photokina took place, which characteristically feature large and elaborately designed stands.



The situation among stand construction companies in the first half of 2009 varied. Some companies were able to maintain the same turnover as in 2008, due to long-term contracts with customers, a favourable trade fair cycle in the building sector, or because they had diversified into other branches such as shopfitting. Other companies are now experiencing the full impact of the economic crisis, with a 15 to 20 % drop in turnover. On average, turnover in the first half of 2009 is expected to be down by 7 %.

AUMA members expect no decline in congress business

In 2008 business in events accompanying trade fairs was positive, organisers registered 600,000 visitors.



Close to 7,000 business-to-business events accompanying trade fairs took place, 5 % more than in 2007. Growth in participant numbers at these events was even higher, reaching 600,000, 30 % more than in 2007. However, both visitor attendance and visitor frequency at non-trade fair related B2B events fell by 5 to 10 %. It appears that due to the large number of trade fairs occurring in 2008 there were a substantial number of accompanying events, resulting in limited space availability for other uses.

In 2009 the congress divisions at trade fair venues expect business in B2B events to remain either steady or to marginally increase. Some congress centres at smaller trade fair venues even expect a marked improvement in business. No-one expects a significant decline in B2B business in 2009.

However, to a large extent congress hall space at trade fair venues is also used for other purposes, such as cultural, society, political and sports events. Their number dropped slightly to around 1,500. At around 4 million, participant numbers remained the same.

Most congress companies at the trade fair venues do not confine their business operations to renting out space. Almost all of them also provide special events, technical services and catering, half of them offer a registration service for participants, which is becoming increasingly important for maintaining customer relations.



Regional and specialised events

Events which attract visitors from local regions or which focus on highly specialised products and services averaged less positive results throughout, although these varied considerably depending on the type of fair. As a rule one can say that the more specialised the topics are both for exhibitors and visitors, the better the results.

A total of 174 regional and specialised trade fairs and exhibitions took place in 2008, which reported 2.4 % less visitors compared with the previous events (2007: -1.1 %). The number of exhibitors fell by 2.3 % (2007: +2.1 %), and the amount of space rented out was 1.6 % less (2007: +1.2 %).

Thus there was no continuation of the positive exhibitor trend witnessed in 2007. In 2008, a total of 52,071 exhibitors occupied stand space totalling 1,489,975 m². The organisers reported 6,445,427 visitors. The statistics included trade fairs and exhibitions listed by AUMA in the regional and specialised event category, which were held by members of AUMA. This category may also include other events which have been audited at least once by FKM and whose trade fair standards comply with industry requirements.

Among the various types of trade fair the 57 regional events for trade visitors and specialised fairs reported a 3.7 % rise in visitor attendance. At -0.2 %, exhibitor numbers remained relatively stable, the amount of stand space grew marginally by 1.3 %. Clearly, these trade fairs are appreciated by industry as augmenting leading international events.



Developments in the category for specialist regional exhibitions for consumers were somewhat weaker. Visitor attendance fell slightly by 1 %, exhibitor numbers by 1.5 %, while the amount of space rented out grew by 0.4 %. However, the 80 events of various kinds which took place in the leisure and hobbies category generally represent stable elements in the B2C category.



NürnbergMesse

By contrast, the 37 general consumer goods events which took place averaged less positive results throughout. Exhibitor numbers fell by 5.6 %, the amount of rented space by 6.2 %, and on average there were 5.8 % less visitors than at the previous events. Despite various innovations the trend of recent years could not be halted. The reasons are manifold.

They include greater competition from other events or shopping centres, changes in the way consumers obtain information, reduced consumer spending power in local regions and shortfalls in the concepts of the events in question.

AUMA plans to make these developments the topic of a specialist business to consumer exhibition forum in autumn 2009. The format will also include brand producers who will be invited to outline the conditions under which they might intensify their involvement in B2C trade fairs. AUMA will be collaborating closely with FAMA and IDFA, whose members organise numerous B2C fairs.



Voluntary auditing of trade fair statistics

Following a weak year due to the low number of trade fairs scheduled, the number of trade fairs audited by FKM increased significantly again in 2008. German organisers requested auditing of exhibitor, space and visitor statistics at 280 trade fairs and exhibitions.

Currently, a total of 67 German trade fair organisers are members of the Society for Voluntary Control of Fair and Exhibition Statistics (FKM). One organiser operating in a regional market withdrew at the end of 2008.

The number of foreign trade fairs audited by FKM remains unchanged. Altogether, the three guest members from abroad, the Verona Trade Fair Company, the Hong Kong Trade Development Council and the Moscow Trade Fair Company MVK, had 29 trade fairs audited. Two German members also applied for one foreign trade fair respectively to be audited in 2008.

Essentially, every FKM audit takes basic data on exhibitors, rented stand space and visitor numbers into account, in each case differentiating data according to domestic and foreign origin.

More so than the basic data, FKM's evaluations of visitor patterns have become even more important to businesses exhibiting at trade fairs, as they make it possible to pinpoint the groups they can specifically target at these events. Standard visitor analyses for trade visitors and the general public are available for around three-quarters of the events audited. These provide information on visitors' regional origins, branches of industry, levels of decision-making and the duration of their attendance.



FKM's annual report contains audited exhibitor, stand space and visitor statistics as well as visitor patterns, and is published annually in August



For businesses exhibiting at trade fairs these visitor profiles are an important instrument aiding preparations, and a means of monitoring success. Statistics on visitor patterns also provide criteria for selecting trade fairs over other marketing instruments.

The FKM online service includes information on the services provided by FKM, tips on the correct use of FKM data, the most important definitions, and links to individual members.

AUMA's online database linked with the FKM website provides FKM-audited trade fair statistics and visitor analyses. AUMA is responsible for the management of FKM.

Trade fair transparency at international level ■ In collaboration with other auditing organisations in Europe, FKM has published the 20th edition of the brochure entitled Euro Fair Statistics, which contains audited statistics on almost 1,900 events. The following 20 countries took part: Austria, Croatia, the Czech Republic, Denmark, Finland, France, Germany, Hungary, Italy, Moldova, Norway, Poland, Portugal, Romania, Russia, the Slovak Republic, Slovenia, Spain, Sweden and Ukraine.

More information: ► "Euro Fair Statistics 2008", a PDF file in English is available for download at www.fkm.de/Publikationen.



Lobbying and legal aspects





Lobbying and legal aspects

Product piracy and brand theft at trade fairs

In 2008 German trade fair companies intensified their efforts in the fight against product piracy and brand theft at trade fairs and exhibitions. More and more awareness being propagated among exhibitors can be seen at all trade fair venues in Germany. Trade fair companies also actively support resolving disputes quickly and amicably. At certain events there is also evidence of customs confiscating significantly less items.

Last year's sustained positive trend was only overshadowed by a complaint by foreign exhibitors and their ministry of trade, addressing the German Federal Ministry of Economics, which criticised German customs measures as being too harsh. In the disputed cases the issue was not product piracy and brand theft but unresolved licensing agreements. Trade fairs were being exploited by third parties as a means to forcibly obtain expensive high-visibility licensing agreements. German trade fair companies, the ministry, customs authorities and AUMA acted as mediators.

On 20 November a Chinese delegation headed by Mr. Li Chenggang, Deputy Director General of the Treaty and Law Department of the Economics Ministry of China, visited AUMA in Berlin to find out about product piracy and brand theft at trade fairs.

The event was part of an educational trip undertaken by the Chinese delegation in Germany, France and Italy, aimed at studying IPR protection at trade fairs. It was organised by the EU China Project on the protection of intellectual property rights (www.ipr2.org), which was recently launched by the EU Commission.



Messe Essen

Besides representatives of the Economics Ministry of China, members of the delegation included the chief judge of China's supreme court, the director of the China Foreign Trade Centre, the deputy director of the State Intellectual Property Office, and representatives of the China Council for the Promotion of International Trade. Other participants in the event included members of the EU China Project and lawyers from Italian and German law offices specialising in intellectual property rights.

New trade fair laws in China

Early in 2008 AUMA learned that the Chinese government intends to pass new laws on classification, description, certification and protection of trade fair subjects.

In agreement with the circle of members who organise trade fairs abroad AUMA subsequently released a detailed statement which was issued to Benedikt Madl, the EU Commission's coordinator on trade with China, the Chinese Embassy in Berlin, the German Embassy in Beijing, and representatives of MOFCOM, the Chinese Ministry of Economics. Some months previously, AUMA had issued a statement on these provisions during the ongoing legislative procedure, and had passed on a number of queries.

Messe Stuttgart

In principle AUMA welcomes this initiative, providing it contributes to more transparency in trade fair markets. However, the granting of licences must continue to be based solely on rational arguments and there must be a freedom to exploit globally established trade fair brands. This was the position advanced by AUMA at the annual meeting of the Chinese trade fair industry (CEFCO) in Nanjing in mid-January 2009.



At the conference AUMA learned from meetings with representatives of MOFCOM that the laws were to be passed in mid-2009 and that AUMA's position would be taken into account.

Unofficial exhibitor directories

Distributors of unofficial exhibitor directories are still a cause for concern. They continue to target registered exhibitors with offers of directory entries in advance of a fair, in an effort to create the impression of a free offer by the trade fair organiser.

However, the small print stipulates that an entry in the online directory entails high costs and an obligation to enter into a long-term contract.

In particular a company from Mexico, Commercial Online Manuals, has made a considerable effort since 2008 to obtain exhibitors' names for an online directory called Expo Guide. In the small print on the form with the offer there is a condition stipulating that an entry for a 3-year period will result in an annual fee of EUR 1,181.

Numerous exhibitors who are affected have contacted AUMA to ask what further steps they can take. AUMA generally advises not to pay any invoices from such companies and to challenge any mistakenly given declaration to have names listed.



Leipziger Messe

AUMA Round table Brussels

The Round Table Brussels last took place on the exhibition grounds in Luxembourg in January 2009. The sessions provide an opportunity for German trade fair companies' representatives who are responsible for EU matters to exchange their experiences. Representatives of EU Commissions are usually also invited to discuss EU politics relating to trade fair issues.



The first speaker at the Round Table was Renate Nikolay, a member of the cabinet of EU Trade Commissioner Baroness Catherine Ashton, who gave those attending an overview of the latest topics under discussion at the General Directorate for Trade. Besides describing the General Directorate's reaction to the financial crisis Ms. Nikolay reported on the current state of talks on a free trade agreement with South Korea. She also stressed the necessity to integrate small and medium-sized enterprises in worldwide trade. One of the measures being set up in this context is a trade defence help desk, a hotline available to all companies in Europe.

Another of the speakers was Kirsten Hungermann, head of the Brussels offices of Germany Trade and Invest GmbH, who was a guest at the event. She gave an overview of opportunities for EU support. The EU's programmes supporting participation in trade fairs represent regional sub-programmes which are part of programmes supporting cooperation with developing countries. As a rule applicants may not be profit-oriented, so that trade fair organisers may not themselves apply for EU support.

Other topics included the Block Exemption Regulation, which states that subsidies are automatically approved for SMEs taking part in a particular trade fair for the first time, as well as China's prospective laws for certifying trade fairs, trade fair visas, and the effects of the financial crisis on the German trade fair industry.



Institute of the
German Trade
Fair Industry





Institute of the German Trade Fair Industry

With this institute AUMA has established trade fairs as a subject in science and has created a platform for knowledge transfer and a network of expertise. It has been a business division of AUMA since early 2008. The institute's main aims are to combine theory with practical knowledge, and to make research findings available to those working in the trade fair industry. The institute combines trade fair research and teaching, trade fair training and advanced training and the German Trade Fair Library.

Vocational training and advanced training

A new events specialist training course began in late 2008. AUMA co-authored the new directive and the curriculum for this advanced training course and included subject matter relevant to the trade fair industry.

New concept for the training course for “examined events specialists (IHK)” ■ This advanced job training course comprises 650 teaching units and concludes with an examination by the Chamber of Industry and Commerce. In order to take part applicants as a rule must have completed commercial training and have appropriate experience from working in the events industry.

AUMA supports ongoing development of job descriptions

The new advanced training course is divided into two parts: the first part offers basic business qualifications in economics and business administration, law and taxation, business management and accounting. In the second part applicants acquire industry-relevant knowledge, including market evaluation, conceptualisation, preparation, execution, subsequent analysis of events and customer-oriented marketing. Leadership and teamwork are subjects also included in the curriculum.

AUMA organises advanced job training for vocational school teachers ■

The 7th advanced job training course for vocational school teachers of the events industry from all parts of Germany took place on 13 and 14 November 2008, attended by 42 teachers. The focus of the event was on practical measures. They included presentations of examples of best practice, workshops, and an exchange of outstanding teaching units on planning, execution and subsequent analysis of events.

Papers on specialist subjects by experts from the trade fair and events industry and excursions to selected event locations rounded off this meeting. For vocational teachers of event management this platform provided by AUMA is unique and the foremost in its field in Germany. The next event is scheduled to take place in autumn 2009.

Studies relating to trade fairs at universities ■

Research by AUMA shows that currently at least 60 universities and technical colleges in Germany teach trade fair related subjects during job training. These universities are also listed on the AUMA website, where lecturers can also find courses, statistics and presentation material. Papers and seminars held last year by representatives of AUMA at universities and various institutions providing advanced training also gave students practical insights into the trade fair industry.



Messe Friedrichshafen



Seminar Alliance of German Trade Fairs within AUMA

Companies exhibiting at trade fairs must know and be able to utilise the marketing and communication opportunities which trade fairs offer in order to fully exploit the possibilities of taking part in trade fairs. Content-wise this knowledge must be put across effectively and in a short time. To date not enough exhibitors are making use of trade fair courses.

Consequently, in 2008 the trade fair companies in Essen, Düsseldorf, Frankfurt, Hamburg, Karlsruhe, Cologne, Nuremberg and Munich launched the Seminar Alliance. AUMA supports this initiative set up by its members, which under the title of the Seminar Alliance of German Trade Fairs within AUMA has been operating since early 2009.

14 partners at one table

In the meantime the number of partners cooperating in the project has risen to fourteen. Additional members now include Messe Berlin, Leipziger Messe, Reed Exhibitions Messe Wien (Vienna) and MCH Group (Switzerland). The industry publishing house m + a is the media partner of this initiative.

The members of this alliance offer courses which provide basic knowledge for exhibitors on taking part in trade fairs. The contents of the courses are the same, regardless of where they are taught. Exhibitors attend courses at the trade fair locations nearest to where they are based.

The programme of the Seminar Alliance targets all companies who exhibit at trade fairs, long-standing regular exhibitors, as well as those who have no experience at all. Akademie Messe Frankfurt coordinates running of the seminars. Last year 15 seminars provided training for a total of 123 exhibitors.

Research

In 2009, in addition to its annual edition of AUMA_MesseTrend, AUMA will be carrying out two new research projects.

The 1997 survey examining the overall economic impact of trade fairs is being updated

With the first project, the IFO Institute in Munich will collect information on the overall economic impact of trade fairs. The number of jobs created and assured by trade fairs, the production effects and resulting tax revenues are all important indicators. In order to accomplish this, data will be compiled on all the trade fairs held in Germany. Spending by companies who exhibit at trade fairs and by visitors, combined in a so-called economic integration model, will provide the basis for calculations. IFO will be making use of information from several thousand interviews from current surveys of numerous trade fair locations examining the local economic impact.



Westfalenhallen Dortmund

The second project will look at the amounts which exhibitors spend on taking part in trade fairs. It is well known that stand rental charges are relatively minor compared with the overall costs of participation. The aim is to find out the exact size of this share, how costs are divided up, and what differences there are with regard to different types of fair.

The AUMA Trade Fair Transparency Working Group is actively engaged in both projects. The working group consists of representatives from the market research divisions of organisers and of trade fair experts from industry. This ensures that the issues raised by trade fair organisers and by exhibitors both receive attention.



German Trade Fair Library

As a public institution the German Trade Fair Library in Berlin offers services for everyone looking for information on trade fair related topics. Students, teaching staff and those directly involved with trade fairs receive help in their search for relevant publications and for answers to questions concerning trade fairs.

The German Trade Fair Library, which since 2008 has become part of the Institute of the German Trade Fair Industry, now has more than 6,900 titles in stock. In 2008 its principal users were students, undergraduates, researchers undertaking PhDs, and lecturers whose focus is on trade fairs and congresses. Consultants, journalists and employees with event organisers and trade fair service providers also visited the library and made research inquiries. In 2008 there were more than 240 visitors to the library and around 600 research requests, which compared with 2007 represented a further increase in the library's use.

The items stocked in the German Trade Fair Library comprise rare or out-of-print publications, including numerous treasures from bygone trade fair days, and a large collection of more recent trade fair literature, such as books, surveys and presentations, which is growing all the time. Frequent use is made of the newspaper archive, with a subject index for articles, and of the collection of scientific works. The library also has a selection of general literature on marketing, advertising, sales and foreign trade. Users have access to all current and past publications by AUMA and FKM. These include surveys, documentations and statements as well as data material from earlier years. The library also has a video collection and a large stock of trade fair catalogues. It has two copying machines and three internet workplaces which visitors may use free of charge.

Close to 6,900 titles in stock for visitors interested in trade fairs



Messe Karlsruhe

More information: ► [www.auma.de/Trade Fair Library](http://www.auma.de/Trade%20Fair%20Library)



Trade fairs
abroad





Trade fairs abroad

The competitive situation around the world

The global decline in economic growth and international trade means that trade fair companies are facing new challenges at international level as well. Business models by organisers who have short-term expansion in mind may falter, and many widescale expansion measures at exhibition grounds abroad may prove to be a burden in the long run. For German exhibitors and organisers the important thing is to remain visible, particularly in those markets affected by the recession, in order to be perfectly positioned to face competitors when the economies recover.

AUMA conducts a particularly in-depth analysis of those trade fairs abroad which compete with international events in Germany. More than 400 competing trade fairs have been identified worldwide.

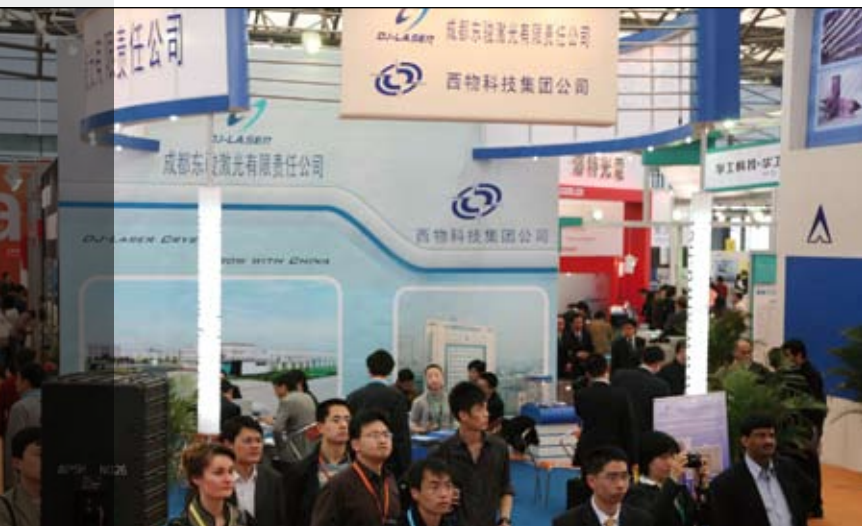
Among global competitors, international trade fairs in Germany have retained their leading international position. In 2007, an average trade fair abroad competing with an average international trade fair in Germany reported 69 % of the net space, 79 % of exhibitors and 64 % of visitor attendance of its German counterpart.

In 2007, compared with the previous events, the relevant trade fairs abroad reported around 1.4 % more exhibitors and a 1.5 % increase in net space. In Germany exhibitor numbers at international trade fairs grew by 3.8 %, and by 4.6 % in relation to the net space. International trade fairs in Germany also witnessed a 2.0 % increase in visitor attendance, whereas their competitors abroad reported a drop in visitor numbers.



In developed markets, trade fairs regarded as strong competitors of German trade fairs are in the USA (82 trade fairs), Italy (77) and France (64), followed by the UK (35) and Spain (27). With 25 trade fairs, China, which is becoming increasingly important as a trade fair venue, is ranked sixth among the countries competing with German events.

The trade fairs abroad which German trade fairs frequently name as competitors are events for building engineering and building machinery, for vehicle construction, food and packaging machines as well as for metal treatment and processing.



Trade fair industry in the USA in decline ■

In 2008 the trade fair industry in the USA, Germany's leading competitor, went into decline, as shown by figures released by the Index of the Center for Exhibition Industry Research (CEIR). For the first time since 2002 the results affected all areas.

The net space fell by 2 %, exhibitor numbers by 2.6 %, visitor attendance by 4 %, and organisers' turnover figures by 3.5 %. The overall index, which includes all four categories, dropped by 3.1 %. Trade fairs for the building industry, which declined by 9.8 %, were affected particularly badly.

Italy increases trade fair business abroad ■ To date Italy's trade fair organisers have held only a small number of their trade fairs abroad. Last year Fiera Milano took a big step towards improving its position abroad. Together with Deutsche Messe AG a joint holding company was founded to conduct business with China and India.

The long-term aim is for broader cooperation to include Russia and Brazil. Since the end of last year Italy's trade fair association AEFI has supported Italian trade fair companies in their efforts to establish



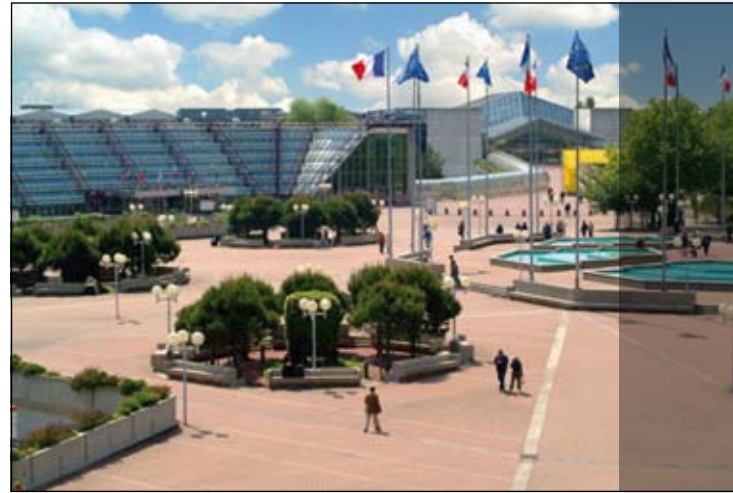
themselves abroad. With a turnover of EUR 302.5 million abroad in 2007 (2006: EUR 375 million), Fiera Milano is by far Italy's largest trade fair company, followed by BolognaFiere with EUR 128.5 million and EUR 119 million (2006) respectively. Verona remains third, which in 2008 reported a turnover of EUR 88 million (2007: EUR 72 million).

Mergers in France ■ In 2008 the main news in France was the Paris Chamber of Industry and Commerce (CCIP) merging with the real estate group Unibail-Rodamco for joint trade fair activities. Two 50/50 joint ventures were set up. The ten trade fair and congress venues operated by both parties, including Porte de Versailles, Paris Nord Villepinte and Le Bourget, now form part of VIPARIS (venues in Paris). In 2008 joint annual turnover was EUR 300.4 million.

The French Ministry of Economics regards VIPARIS as the dominant market force in the Paris region. Taking into account all the relevant statistics the market share is at least 90 %.

Forming another joint venture, the former trade fair organisers Comexpo and Expositum combined their operations to become Comexposium. Six of France's ten largest trade fairs belong to this company, which as the country's biggest trade fair organiser recorded an annual turnover of EUR 226 million in 2008.

With a turnover of EUR 605.7 million in 2008, France's largest company in the trade fair and events business is GL Events. Its business activities include trade fairs and congress centres, organising trade fairs and congresses, stand construction, other trade fair and marketing services and organising sports events.



Paris Nord Villepinte

*ADNEC from Abu Dhabi buys
UK exhibition grounds*

Last year the UK's trade fair industry again experienced several takeovers, ownership changes, and portfolio restructuring. London's ExCel exhibition grounds were taken over by the Abu Dhabi National Exhibition Center (ADNEC). Based in the United Arab Emirates, the company sees ExCel as the first step towards establishing a global trade fair venue portfolio, envisaged as part of Abu Dhabi's economic diversification strategy.



Financial investors now hold a majority interest in the trade fair organisers Clarion Events and Emap. Reed Exhibitions, the NEC Group and dmg world media have sold off joint venture interests and parts of the trade fair business. As a result of trade fair acquisitions, Reed Exhibitions, the ITE Group and Tarsus Group have strengthened their market position in Russia and China. As the world's largest trade fair organiser Reed Exhibitions' 2008 turnover was EUR 891 million (2007: EUR 842 million). Other companies among the world's largest include informa (2008: EUR 330.5 million) and United Business Media (2008: EUR 324.6 million).

ExCEL in London

China continues to invest heavily in building new exhibition grounds and expanding existing facilities, although there are slightly fewer new projects than in previous years. According to reports in the Annual Report on the China Exhibition Industry in 2008, published by CCPIT, new building projects are aimed at developing western parts of China, including Yichang, Yinchuan, Xinjiang and Shijiazhuang. In Guangzhou, the final part of the exhibition grounds has been completed in the district of Pazhou.

*China now has the third largest
exhibition centre in the world*

With an overall display area of 340,000 m², the exhibition grounds at the China Import & Export Fair Complex are ranked the third largest in the world, behind Hanover and Milan. The old exhibition grounds on Liuhua Road are no longer used for trade fairs.



In Beijing the number of trade fair halls now available has also increased. The overall display area at the New China International Exhibition Center is currently more than 100,000 m², with plans under way for a further 100,000 m².

Supporting German exhibitors abroad

The 2008 foreign trade fair programme of the Federal Ministry of Economics and Technology supported 246 German joint representations worldwide. The budget was EUR 37 million.

Summary of the 2008 foreign trade fair programme ■

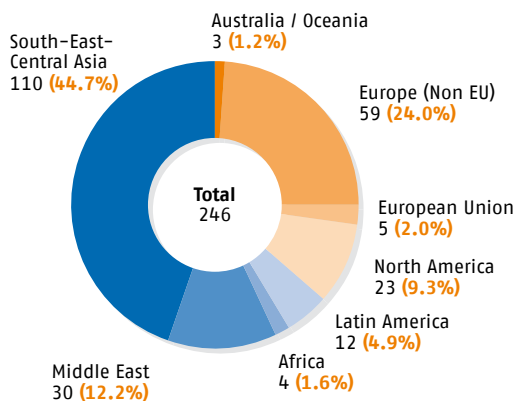
A total of 7,641 exhibitors were represented at joint stands in 2008, over 100 more (+1.4 %) than in 2007 (a record year), although the increase lagged considerably behind the figures for 2008. However, on average exhibitors occupied slightly larger stands, with average stand space at 20 m², an increase of 2 m². Thus the area occupied by German Pavilions rose to 167,000 m², a substantial increase of 18,000 m² (11.9 %).

The programme targets small and medium-sized enterprises in Germany. Its main regional focus included the People's Republic of China (except Hong Kong), whose participation figures reached 51, as well as Russia (44) and the United Arab Emirates (UAE), where there were 25 joint presentations from Germany. In China, Shanghai was the venue with the highest participation figures (32), followed by Beijing (13) and a few participations in Canton, Suzhou, Nanjing and Fuzhou.

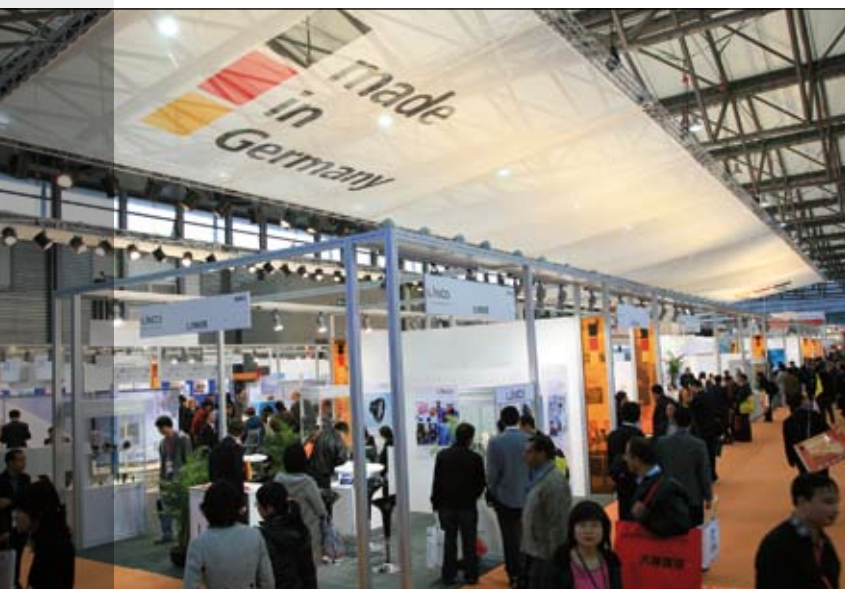
As in previous years, Moscow was the Russian venue with the highest participation by German exhibitors (40), there were 23 representations in Dubai (UAE). On 35 trade fairs worldwide, joint presentations from Germany were organised for the first time.

German Foreign Trade Fair Programme 2008

Participations by the Federal Ministry of Economics and Technology



There was outstanding participation by exhibitors representing the 2008 overseas trade fair programme at the special event at the Laser World of Photonics China in Shanghai, which took place from 18 to 20 March. Taking the “German World of Laser & Photonics” as their theme heading more than 50 German companies and institutions displayed their products and services at the Shanghai New International Exhibition Centre, in an area covering 1,500 m².



Last year Germany's largest joint presentation, measured by the highest number of companies taking part, was organised in Dubai. Taking “made in Germany” as their statement of quality and their logo, 360 companies were represented at the Big 5 show. In 2008 15 participations in India, three more than the previous year, reflected German industry's growing interest in the Indian market.

Later in the year the German Ministry of Economics withdrew the German Pavilions in Iran from the overseas trade fair programme for the time being. The reason was the federal government's policy of restraint in dealings with Iran.

German Pavilions online ■ The internet portal www.german-pavilion.com, which links to the individual pages of joint presentations, in particular makes it easier to get in touch with the companies involved with the German Pavilion. In 2008, exhibitors and visitors from industry embraced this measure supporting the overseas trade fair programme on an even greater scale, and by the end of the year there were more than 18.5 million page views.



Special supporting programme “Renewable energies and energy efficiency” ■ Since 2003, as part of its “Renewable energies” supporting programme the Federal Ministry of Economics and Technology has supported small and medium-sized enterprises at selected trade fairs abroad. “Energy efficiency” was added in 2008. Every year the programmes cover 15 to 20 trade fairs worldwide.

Renewable energies and energy efficiency must feature significantly in the products listed in the classification of the trade fairs in question. 17 participations were organised at trade fairs in 2008, with 20 planned for 2009.

2009 foreign trade fair programme ■ In 2009 the foreign trade fair programme plans more than 250 trade fair representations. 48 joint presentations are to be organised in Russia, which for the first time will overtake China (minus Hong Kong), where 40 participations are planned.

17 stands are planned for India, reflecting a further shift towards this country and confirming an upward trend since 2005 of increasing numbers of joint German stands in India. In 2005 there were 6 participations. 38 trade fairs have worldwide been included in the programme for the first time.



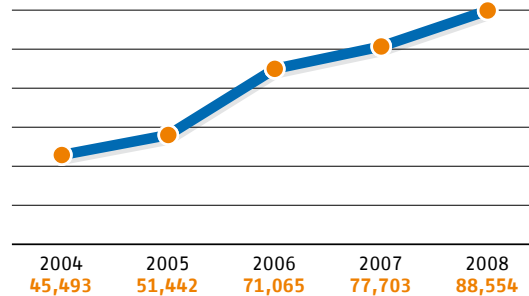
Trade fairs abroad held by German organisers

German trade fair organisers who are members of AUMA offer their expertise in organisational matters and their industry knowledge to international exhibitors around the world.

The concepts for these events are based on the standards of leading international trade fairs in Germany. This makes it possible for exhibitors to achieve above-average success.

Trade Fairs Abroad by German Organisers*

Number of exhibitors



* AUMA members

2008 was the first time that German trade fair organisers rented out more than 2.0 million m² (2007: 1.9 million m²) at the 220 trade fairs which they held abroad (2007: 216). Exhibitor numbers rose to 88,500 (2007: 77,700), an increase of 14 %. Following a slight drop in visitor attendance in 2007 (4.4 million), numbers in 2008 rose to 4.9 million, a record figure.

Approximately half of the 2.0 million m² of space was rented by German companies exhibiting in China. Exhibitor numbers at the 77 trade fairs exceeded 38,000 and visitor attendance was more than 2.6 million, making 2008 the most successful year for German trade fair companies to date. In addition to Shanghai (41 trade fairs), Beijing (12), Guangzhou (7) and Hong Kong (7) were the focus of German trade fair companies' activities in China.

In Russia the statistics for rented space and exhibitor attendance also reflected a positive trend. Around 15,500 companies, more than at any other previous time, were represented in an area totalling 450,000 m². However, visitor attendance fell. Whereas in 2007 the figure was 560,000, only 490,000 attended trade fairs in 2008. 80 % of the trade fairs held by German organisers in Russia took place in Moscow.



The largest increase in 2008 was in India. Developments in the last few years were slow, but the number of trade fairs held by German organisers has now risen to 22, from 13 in 2007. In a year in which the largest trade fair (Plastindia) did not take place records were achieved in all three categories, with space rented out in excess of 40,000 m² and exhibitor numbers at 3,200. The reason for this growth was an increase in the number of trade fairs. In India there were events in Mumbai (7 events), Bangalore (7) and New Delhi (6).

Last year, in the United Arab Emirates, there were more exhibitors per trade fair than ever before, who also rented larger areas than in previous years. At the 15 trade fairs which they attended a total of 5,100 companies rented more than 92,000 m². Visitor numbers fell marginally to 113,000.

In 2009, 17 members of AUMA intend to hold 227 trade fairs around the world.

The countries primarily targeted by German trade fair organisers are China (69 trade fairs) and Russia (32). Once again, there has been an increase in trade fairs held in India (26, previously 22). The United Arab Emirates also offer interesting prospects (19, previously 15). Organisers intend to hold 13 trade fairs in Turkey and 12 in Japan. In terms of cities, Shanghai (32 trade fairs), Moscow (23) and Dubai (17) head the list.

In order to emphasise the quality of German trade fairs abroad, in consultation with the discussion group set up for its members working abroad, AUMA has created a seal of approval denoting “German Trade Fair Quality Abroad (GTQ)”. This discussion group allows event organisers to exchange experiences and opinions on a regular basis.

Every autumn AUMA publishes the information brochure entitled “German Trade Fair Quality Abroad” which contains trade fair dates and the contact details of organisers. Furthermore, the AUMA internet database provides a special list of trade fairs with the GTQ seal of approval, which is directly available at www.gtg.de.



World Exhibitions

EXPO 2008 in Saragossa ■ Under the theme heading of “water and sustainable development”, the world exhibition ran for three months in Saragossa, Spain, ending on 14 September 2008. Some 5.5 million people visited this exhibition with its focus on water issues, where 105 countries showed their innovations and more than 200 non-governmental organisations drew attention to declining water resources.

Without doubt the German Pavilion was among the main attractions. Under the slogan of “Wunderbar” the Federal Republic of Germany’s technological and scientific expertise in water issues was on show in an area covering 750 m².

Germany is a world leader in research and development where water treatment is concerned, and this was demonstrated to the 540,000 visitors with a water course. The highlight was a seven-minute adventure tour on futuristic rafts, which traced the path water takes from groundwater to domestic households, and using artistic images followed the course which rivers take.

At the end of EXPO the German Pavilion received the so-called Golden Award for the best achievement in expressing this EXPO topic. The German Federal Ministry of Economics and Technology was responsible for running the German Pavilion, the general commissioner was Dietmar Schmitz, head of the Ministry of Economics’ Department of Trade Fair Policy and Representations at EXPO. The organisers were Hamburg Messe and Congress GmbH.

AUMA organised a trip by a delegation to visit EXPO from 18 to 21 June 2008, in which 13 representatives of trade fair companies, organisers, associations and ministries took part. During this period EXPO’s “German Day” also took place on 19 June.



*EXPO Saragossa:
an adventure tour of the
German Pavilion*



EXPO 2010 in Shanghai ■ Under the theme heading of “better city, better life” the next “big” EXPO will be taking place in Shanghai in 2010. From 1 May to 31 October 2010 the exhibition will focus on the urban problems of the twenty-first century. The organisers expect representations from 200 countries and more than 70 million visitors. The Federal Republic of Germany will be at EXPO with its own pavilion. With its presentation of typical urban areas and facilities “balancity” will show life in Germany and offer solutions.

Koelnmesse International GmbH is responsible for the technical and organisational aspects of the German participation under the patronage of the Federal Ministry of Economics and Technology.

Construction of the German Pavilion began in November 2008. Shrouded in silvery, shining membranes, four large display units cover the ground floor, similar to a three-dimensional, walk-in sculpture. The official logo of the German Pavilion was presented for the first time in Shanghai. It shows the polygonal shape of the buildings, with interlinked units supporting one other, giving the overall impression of a many-faceted, futuristic city. Thus the logo directly references the idea at the heart of “balancity”, that of maintaining and balancing the various aspects that make up a city.



*EXPO 2010:
the German Pavilion*

The German Pavilion in its current form is the result of a process that began in March 2008. A selection committee consisting of representatives of ministries and associations, including AUMA, decided to realise the “balancity” concept in Shanghai.



Marketing,
media and
events





Marketing, media and events

Marketing for German trade fairs

In a move accompanying the international marketing efforts of German trade fair organisers AUMA promotes international trade fairs in Germany with the slogan “trade fairs made in Germany”.

Promoting Germany as a venue for trade fairs with advertising and poster motifs ■ The posters entitled “Trade Fairs Made in Germany – marketplaces of the world” are widely used by the joint participations of German companies as part of the foreign trade fair programme of the Federal Ministry of Economics, as well as by information agencies serving German trade fairs abroad and German diplomatic representations. This advertising and poster motif is available in German, English, Chinese, and Spanish.

Brochure entitled “Trade Fairs Made in Germany 2009/2010” ■ This directory provides information on dates, the main services offered and statistics on national and international German trade fairs. This is augmented by basic information on Germany as a venue for trade fairs, emphasising advantages such as its international appeal, the organisers’ professional approach, and the outstanding infrastructure.

115,000 issues of the brochure are circulated in German, English, Spanish and French. Furthermore, in collaboration with chambers of commerce abroad and other partners, more than 40,000 copies are printed in Arabic, Chinese, Greek, Korean, Portuguese (for Brazil), and in Russian.

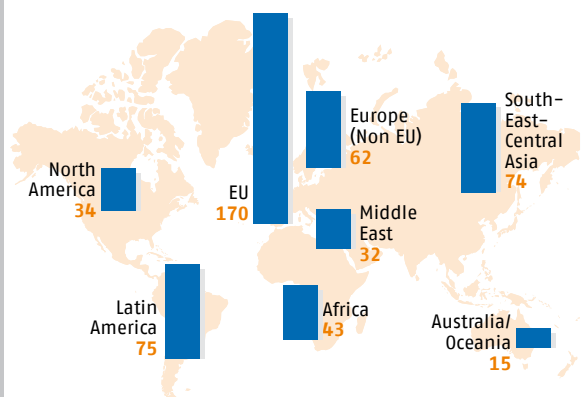


*Poster for information stands,
part of the federal government's
foreign trade fair programme*

There is also a Japanese version, an online database at www.fairs-germany.jp, and an additional information flyer is also available. The total circulation of the 2009/2010 brochure is 155,000 copies.

Trade Fairs in Germany 2008

Information offices abroad



Close to 500 opinion-formers in more than 130 countries, including German embassies and chambers of commerce abroad as well as representatives of German trade fair companies make use of these brochures to inform interested audiences, for instance on upcoming events.

Furthermore, anyone interested may obtain the brochure at any of around 250 information stands representing the federal government's foreign trade fair programme.

Promotional film – “Trade Fairs Made in Germany” ■

A promotional film highlights the strengths of trade fairs as a communication instrument and the specific quality and efficiency which German trade fairs have to offer. Germany is shown as an international venue for business and trade fairs with a focus on innovation and professional organisation.

First shown in November 2004, the clip entitled “Trade Fairs made in Germany” was updated in 2008. A DVD is available in nine languages, in German, English, French, Spanish, Russian, Chinese, Japanese and Portuguese (in versions for Europe and Brazil). Each film is 2 minutes and 30 seconds long.

The film is available mainly from information agencies for German trade fairs abroad, and is also used at presentations in Germany.



Promoting German Trade Fair Quality Abroad – GTQ ■ Since 2003 AUMA has published the dates of the trade fairs which its members hold abroad in a separate brochure. 2008 was the first year that AUMA released a series of advertisements to accompany the publication of the calendar entitled “German Trade Fair Quality Abroad”.

The focus was on placing advertisements and providing the calendar as a supplement for selected magazines addressing German companies interested in exporting to Eastern Europe and Asia. This was accompanied by banner advertising on the internet which targeted German companies seeking to export their products.

Marketing for trade fairs

In 2008 AUMA continued its current promotional campaign proclaiming “Your success is only fair” which was launched in spring 2007.

In particular it targets small and medium-sized companies, with the aim of motivating those who do not exhibit at trade fairs to take part in them. The key message of the campaign is that trade fairs lead to success, because one can present innovations to an expert international audience, meet people directly, and because most visitors to fairs are decision-makers.

In 2008 the campaign consisted mainly of advertisements in national dailies, in business magazines and their corresponding internet portals, of news tickers on TV, short messages ahead of the news and videotext broadcast by a news channel. The campaign explains key terms such as contacts, turnover, expansion, impulses, and decisions in the context of trade fairs.

There are neither photos nor other images among the motifs being used, which attract attention solely using phonetics as a stylistic device. An accompanying website, www.erfolgmessen.de, provides information on calculating the benefits of a trade fair and basic information on taking part.



Advertisement for the calendar entitled „German Trade Fair Quality Abroad“

AUMA online

New services at www.auma.de enhance the user-friendliness of the trade fair information portal for industry in Germany and abroad. They offer comprehensive data on the trade fair industry, tips for exhibitors and industry information.



Eight million page views annually are proof that the AUMA website is a major information portal used daily by everyone around the world interested in trade fairs. Since September 2008 new functions have been added to AUMA's online trade fair database. Researched trade fair data can now be combined and reduced to essential information. This innovation makes it easier to compare individual trade fair data and provides a focus on specific information, enhancing user friendliness. The new functions added to the trade fair database are in response to tips and requests offered by AUMA members.

AUMA's trade fair data can be researched in four languages, in English, Spanish and French as well as German. The database contains information on almost 5,000 events. It provides basic data on the last three editions of every trade fair in Germany and on many events abroad. Statistics showing the breakdown of the total visitor attendance are also available for most trade fairs in Germany. More than 50 % of the website's users access the trade fair database.

AUMA's trade fair database also contains 5,000 addresses of organisers, service providers, public authorities, trade fair organisations and auditing companies in Germany and abroad.



In addition to the information in the trade fair database exhibitors also receive tips on how to prepare for taking part in a trade fair in Germany or abroad. Checklists for managing day-to-day activities at the fair and AUMA's Trade Fair Benefit Check, i.e. software for planning and evaluating trade fairs, can also be downloaded here.

The website also lists statistics on the trade fair industry in Germany as well as information on 33 trade fair markets abroad.

Public relations work

Particularly in view of the current debate on the amounts spent on marketing and communications, AUMA considers it to be an important task to make expert audiences more aware of the specific qualities of trade fairs. Consequently, AUMA makes use of its links with daily newspapers and trade publications.

Twice a month AUMA publishes information on current industry topics and news about trade fairs in Germany and abroad via AUMA_Compact, AUMA's information service for the trade fair industry. In 2008 23 issues were e-mailed to around 2,600 recipients. This newsletter provides information for AUMA members, other associations, organisers, institutions interested in trade fairs, major companies who exhibit at trade fairs, service providers and the media.

AUMA publishes research findings and the results of conferences in the AUMA_Edition series, which targets members and expert audiences.

In the course of 2008 20 press releases informed the media on the latest developments in the trade fair industry and about new publications by AUMA. Numerous trade publications and daily newspapers also published reports and interviews with representatives of AUMA on the latest topics concerning the trade fair industry.



*Trade fairs are a regular topic
in national dailies*

In the first six months of 2008 the newspapers WELT and Süddeutsche Zeitung conducted interviews with Hans-Joachim Boekstegers, the new chairman of AUMA. Various national dailies regularly publish a monthly feature on trade fairs which takes up topics concerning the overall industry.

The 2007 annual review of the trade fair industry was presented at the annual press conference on 11 June 2008. At the autumn press conference on 18 November 2008 AUMA released the preliminary results of trade fair business during that year and a poll of German exhibitors conducted in autumn entitled "AUMA_MesseTrend 2009".

A newsletter entitled "AUMA report from Brussels", distributed by e-mail to the members and published every quarter, reports on topics concerning the German trade fair industry at European level.

AUMA_MesseTreff 2008 – meeting of trade fair representatives

As part of a fund-raising for the "Jugend forscht" competition (young people doing research) at AUMA's meeting of trade fair representatives in 2008 the artist Christof Breidenich created a picture with trade fair motifs. Other highlights included a paper held by the marketing expert Hermann Scherer which appealed for a more passionate approach.

"Jugend forscht" was one of the topics on the agenda at AUMA_MesseTreff, the meeting of trade fair representatives, on 10 June 2008 in Berlin. At the fund-raiser the artist Christof Breidenich created a picture on an 8 by 3 metre canvas, which was cut into pixel-sized fragments and distributed to around 400 guests present. Attending this industry meeting were representatives of trade fair companies, the trade fair service, exhibitors and visitors from industry, and members of politics and the media.



*AUMA Chairman
Hans-Joachim Boekstegers
welcomes guests at
AUMA_MesseTreff 2008*



The funds raised at this meeting will enable the trust to provide additional support for the young people involved, for instance for presenting their projects at trade fairs.

Another highlight of the evening in Berlin was a paper delivered by the marketing expert Hermann Scherer.

His message regarding the “rules for being a major player in the (trade fair) markets of tomorrow” was an appeal for more a passionate approach. Scherer demonstrated how people’s daily perceptions of things were automated and geared towards efficiency, and that surprises, emotions and passion were necessary to unlock the memory compartments of a customer’s mind, where one could install products and brands. According to Scherer it takes the unorthodox to achieve the impossible.

2008 was the first year that AUMA held the MesseTreff as an annual meeting of the industry in Berlin. This meeting replaces the events previously known as Deutsches MesseForum and HauptstadtTreff. It addresses important issues concerning industry and society and as a get-together provides an opportunity for communication.

AUMA supports “Jugend forscht” for three years

■ The TerraTec 2009 in Leipzig was the first international trade fair where, with support from AUMA, the winners of the science competition for young people organised by the “Jugend forscht” trust presented their scientific findings. AUMA is one of the official sponsors supporting “Jugend forscht”. Every year, at eight competitions in federal states, AUMA offers a trade fair presentation or visit to a trade fair in Germany as a reward to a team comprising one to three researchers.



*Marketing expert
Herrmann Scherer
at AUMA_MesseTreff 2008*



*Fund-raising for the
“Jugend forscht” science
competition for young people.
The artist Christof Breidenich
creates a picture on canvas*

Together with “Jugend forscht” AUMA selects suitable trade fairs for presenting projects and arranges meetings with the trade fair organisers. Thus AUMA not only combines the topics of science and industry, but also offers young talented people an opportunity to find out about trade fairs and to gain a first experience of corporate marketing strategies at trade fairs.

Participation in international congresses



UFI Congress in Istanbul ■ From 12 to 15 November, under the theme heading of “promising business models in the trade fair industry”, the Global Association of the Exhibition Industry (UFI) held its annual congress in Istanbul. As host, Bekir Cakici, head of the Turkish trade fair organiser Trade Fairs Fuarcilik, opened the congress and talked about the overall situation and prospects for Turkey’s trade fair market.

At the European Chapter former UFI president Jochen Witt, now of jwc Cologne, presented a survey on developments in the European trade fair market. Dr. Andreas Gruchow, of Deutsche Messe AG in Hanover, talked about mergers and joint ventures in the trade fair business. Other papers dwelt on the effects of the financial crisis and of the downturn taking hold in the trade fair business. Managing director Dr. Peter Neven and division heads Marco Springer and Harald Kötter represented AUMA at the congress.

John Shaw, president of the organiser Comexposium in Paris, is the newly elected president of UFI. Manfred Wutzlhofer, CEO of Messe München GmbH, was voted next president in Istanbul and will take over the office at the end of 2009.

The Zagreb Trade Fair Company will host the next UFI Congress in the Croatian capital from 28 to 31 October 2009.



CEFCO in Nanjing ■ The 5th China Expo Forum for International Cooperation (CEFCO) took place from 14 to 16 January 2009 in Nanjing, with the global economic and financial crisis its dominant theme. Around 470 participants attended. The China Council for the Promotion of International Trade (CCPIT) organised this national trade fair congress in collaboration with UFI and the US exhibition associations IAEE and SISO.

As in previous years AUMA attended the congress as a partner. On this occasion papers were held by Marco Spinger, the head of Global Markets, and Natalja Wings, manager in the Global Markets division. Other papers and workshops focused on sustainability at trade fairs, the impact of crises on trade fair business, and greater transparency in Chinese trade fair markets. The next CEFCO Forum will take place in mid-January 2010 in Xi'an. AUMA has again announced its support.

*Participation in the
Chinese Trade Fair Forum*

International trade fair seminar in Graz ■ Taking as its slogan "Attention, please" the 40th trade fair seminar held by the organisers' associations AMA, IDFA and VMS took place from 24 to 27 May 2008 in Graz. Some 120 trade fair experts from Austria, Switzerland and Germany took part. Managing Director Dr. Peter Neven and the head of the Global markets division Marco Spinger represented AUMA.

*Links with
Austria and Switzerland*

Annual conference of the French trade fair association FSCF ■ From 19 to 20 June 2008, under the slogan "Strategy and competition", the annual conference of the French trade fair association Foires, Salons & Congrès (FSCF) took place in Ajaccio in Corsica. Heike Schöttle, manager in the Global markets division, represented AUMA. Topics included new marketing instruments as a result of new technologies, calculating trade fair benefits, measures against product piracy at trade fairs, and communication trends among the younger generation in particular with regard to trade fairs and congresses. Later on, members of the management of AUMA met with their French counterparts to exchange experiences on 21 October 2008 in Paris.

Overview of AUMA media

German Trade Fair Industry – Review 2008 ■ An overview of trade fair involvement by German businesses and of the work carried out by AUMA as the association of the German trade fair industry. Published annually in German (in May) and English (in September).

Portrait: AUMA – Serving the trade fair industry ■ Information on AUMA's responsibilities, its organisation and members. Published in German and English.

Statement: The Trade Fair Industry ■ Facts, functions, perspectives. 3rd revised edition, June 2007.

AUMA Online ■ All the information available from AUMA on the internet: a global trade fair database in four languages, information on planning trade fairs, on assistance programmes, industry statistics, vocational training and advanced training, on the German Trade Fair Library and for the press. Available at www.auma.de

AUMA_Messe Guide Deutschland ■ International, national, specialised and regional trade fairs and exhibitions in Germany. Dates, products and services by category, exhibitor and visitor attendance, space statistics. Published annually in German in October.

Messen made in Germany 2009/2010 ■ An abridged version of the AUMA_Messe Guide Deutschland for readers from abroad. International trade fairs in Germany, with dates, the main products and services offered, statistics and a subject index, as well as information on the special features of German trade fairs amid global competition. Published annually in spring in Arabic, Chinese, German, English, French, Greek, Korean, Portuguese, Russian and Spanish.

Messe fit. Ready for Trade Fairs ■ The CD-ROM introduces all the aspects of trade fair participation and offers exhibitors important planning aids for achieving success at trade fairs. Version 3.1, in German and English, released in December 2008.

**AUMA-Praxis: Successful Participation in Trade Fairs: Basics ■**

Detailed information for exhibitors, ranging from selecting trade fairs to monitoring success, a richly illustrated brochure. Published in German and English. April 2008, (internet only: available for download at www.auma.de).

Presentation “Successful Participation in Trade Fairs” ■

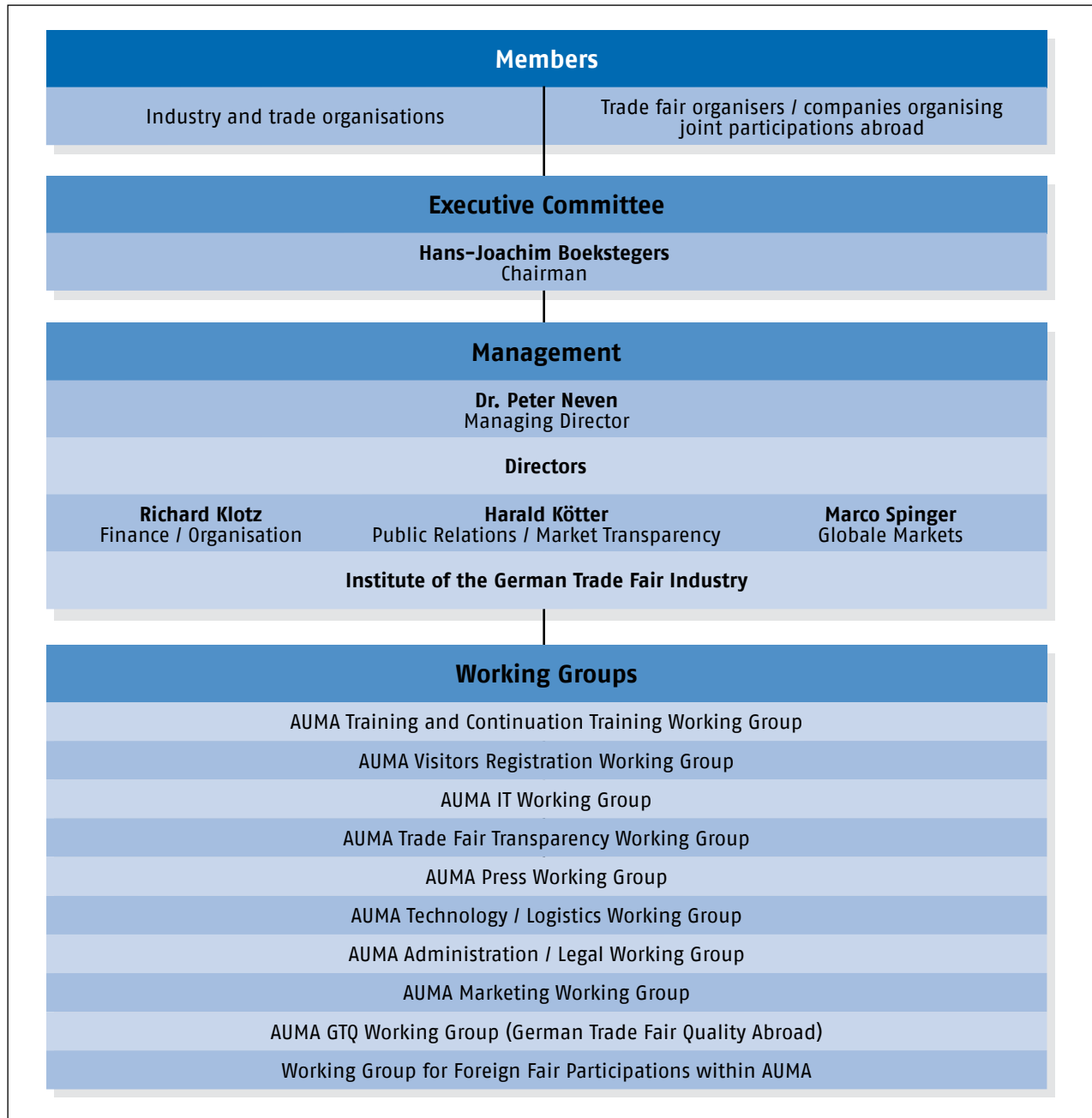
A presentation with charts of the brochure “Successful Participation in Trade Fairs Made in Germany” with colour graphics. Published in German and English. (Internet only: available for download at www.auma.de).

Promotional film “Trade Fairs Made in Germany” ■

The film highlights the strong aspects of trade fairs as a medium and the specific quality and efficiency which German trade fairs have to offer. The DVD is 2 minutes and 30 seconds in length and offers a choice of languages: Chinese, English, French, German, Japanese, Russian, Spanish, as well as European and Brazilian versions of Portuguese.

German Trade Fair Quality Abroad 2009 ■

A list of trade fairs abroad run by German organisers. The names, dates and organisers of 220 trade fairs around the world. Published annually in November, in German and English.





Members

Industry and trade organisations

- Association for Direct Business Communication (FAMAB), Rheda-Wiedenbrueck
- Association of German Chambers of Industry and Commerce (DIHK), Berlin
- Association of German Dental Manufacturers (VDDI), Cologne
- Association of International Motor Vehicle Manufacturers (VDIK), Bad Homburg
- Association of the German Tool Manufacturers, Remscheid
- Association of the Steel and Metal Processing Industry (WSM), Duesseldorf
- Central Committee for German Agriculture, Berlin
- Confederation of the German Textile and Fashion Industry, Berlin
- Didacta Verband – Education Commerce Lobby, Darmstadt
- European Association of Event Centres (EWC), Bad Homburg
- Federal Association of German Galleries and Editions (BVDG), Cologne
- Federation of German Food and Drink Industries (BVE), Berlin
- Federation of German Heating Industry (BDH), Cologne
- Federation of German Industries (BDI), Berlin
- Federation of German Wholesale and Foreign Trade (BGA), Berlin
- Federation of the Manufacturers of High-grade Consumer Goods (IVSH), Solingen
- Foreign Trade Association of the German Retail Trade (AVE), Cologne
- General Association of the German Locks and Fitting Industry (FVSB), Velbert
- German Aerospace Industries Association (BDL), Berlin
- German Airport Technology & Equipment e.V. (GATE), Taunusstein
- German Association for Information Technology, Telecommunications and New Media (BITKOM), Berlin
- German Association for Water, Wastewater and Waste (DWA), Hennef
- German Boat and Shipbuilders Association (DBSV), Hamburg
- German Caravanning Industry Association (CIVD), Frankfurt / Main
- German Chemical Industry Association (VCI), Frankfurt / Main
- German Confederation of Skilled Crafts (ZDH), Berlin
- German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW), Frankfurt / Main
- German Electrical and Electronics Manufacturers Association (ZVEI), Frankfurt/Main
- German Engineering Federation (VDMA), Frankfurt / Main
- German Federation of the Wood and Plastics Processing Industries (HDH), Bad Honnef
- German Hotels and Restaurants Association (DEHOGA), Berlin
- German Industry Association for Coin-operated Amusement and Vending Machines (VDAl), Berlin
- German Industry Association for Optical, Medical and Mechatronical Technologies (SPECTARIS), Berlin
- German Machine Tool Builders' Association (VDW), Frankfurt / Main
- German Retail Trade Association (HDE), Berlin
- German Shipbuilding and Ocean Industries Association (VSM), Hamburg
- German Sweets e.V., Bonn
- German Winegrowers' Association (DWW), Bonn
- ICCA – International Congress and Convention Association – German Committee, Stuttgart
- IELA – International Exhibition Logistics Association – German Chapter, Braunschweig
- National Association of German Commercial Agencies and Distribution (CDH), Berlin
- Steel Information Centre, Duesseldorf

Trade fair organisers / companies organising joint participations abroad

- asfc atelier scherer fair consulting GmbH, Fuerth
- Balland Messe-Service GmbH, Cologne
- DEGA-EXPOTeam GmbH & Co. KG, Obersoehching
- Deutsche Messe AG, Hanover
- expotec GmbH – Agency for Marketing & Communications, Berlin
- FAMA – Special Association for Fairs and Exhibitions, Erfurt
- Frankfurt Book Fair, Frankfurt / Main
- GDG – Association of Major German Exhibition Organisers, Frankfurt/M.
- GHM – Gesellschaft fuer Handwerksmessen mbH, Munich
- Hamburg Messe und Congress GmbH, Hamburg
- Hannover-Messe International GmbH, Hanover
- IDFA – Pool of German Trade Fair Organisations and Exhibition Cities, Leipzig
- IFWexpo Heidelberg GmbH, Heidelberg
- IGEDO Company GmbH & Co. KG, Duesseldorf
- IMAG – Internationaler Messe- und Ausstellungsdienst GmbH, Munich
- INTER EXPO CONSULT GmbH, Berlin
- Karlsruher Messe- und Kongress-GmbH, Karlsruhe
- Koelnmesse GmbH, Cologne
- Koelnmesse International GmbH, Cologne
- Landesmesse Stuttgart GmbH, Stuttgart
- Leipziger Messe GmbH, Leipzig
- Leipziger Messe International GmbH, Leipzig
- Mack Brooks Exhibitions Ltd., St. Albans Herts (UK)
- MCO – Marketing Communication Organisation GmbH, Duesseldorf
- Mesago Messe Frankfurt GmbH, Stuttgart
- Messe Berlin GmbH, Berlin
- Messe Duesseldorf GmbH, Duesseldorf
- Messe Essen GmbH, Essen
- Messe Frankfurt GmbH, Frankfurt / Main
- Messe Friedrichshafen GmbH, Friedrichshafen
- Messe Muenchen GmbH, Munich
- Messe Offenbach GmbH, Offenbach
- Messe- und Veranstaltungsgesellschaft Pirmasens mbH, Pirmasens
- Messe Westfalenhallen Dortmund GmbH, Dortmund
- Nuernberg Global Fairs GmbH, Nuernberg
- NuernbergMesse GmbH, Nuernberg
- Reed Exhibitions Deutschland GmbH, Duesseldorf
- Saarmesse GmbH, Saarbruecken
- Spielwarenmesse – International Toy Fair, Nuernberg
- the fair agency gmbh, Munich

Status: 31st August 2009



Key indicators of the trade fair industry





Macro-economic significance

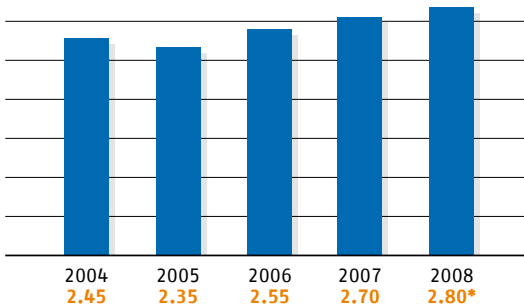
Four of the world's top ten trade fair companies in terms of turnover have their headquarters in Germany. Each year, exhibitors and visitors spend around 10 billion Euros on their trade fair involvement in Germany. The total production effect for the national economy amounts to about 23 billion Euros; around 250,000 jobs are thus secured. The trade fair industry is one of the leading service sectors in the German economy.

For the German exhibitors, trade fair participations are the most important instrument in business-to-business communication, as is confirmed by the AUMA_Messe Trend 2009.

Trade Fairs in Germany

Turnover of trade fair organisers (€ bn)

Companies organising international and regional events
(Turnover incl. trade fairs abroad, congress and services)



* preliminary

Turnover of Trade Fair Organisers worldwide (more than Euro 100 million)

(€ m)

	2008	2007	2006
Reed Exhibitions (GB)	891,0	842,0	767,0
GL Events (F)	605,7	633,5	495,7
Messe Düsseldorf (D)	496,0	354,2	304,0
Messe Frankfurt (D)	440,2	423,6	406,1
Informa (GB)	330,5	318,7	351,9
United Business Media (GB)	324,6	245,9	252,1
Fiera Milano (I)	306,5	302,5	375,0
VIPARIS (F)	300,4	founded in 2008	
Messe München (D)	243,3	299,4	212,4
Deutsche Messe (D)	241,8	286,0	235,0
dmg world media (GB)	226,2	229,6	241,5
Comexposium (F)	226,0	founded in 2008	
MCH Group (CH)	222,2	216,5	135,5
NEC Birmingham (GB)	n.a.	201,0	188,5
Messe Berlin (D)	199,6	144,4	168,2
Koelnmesse (D)	191,7	200,6	216,0
IFEMA Madrid (E)	186,6	170,6	170,9
EMAP Communications (GB)	n.a.	173,6	157,3
Nürnberg Messe (D)	153,2	125,0	125,7
Jaarbeurs Utrecht (NL)	145,7	108,5	103,1
BolognaFiere (I)	134,0	128,5	119,0
ITE Group (GB)	123,3	138,9	122,8
Fira Barcelona (E)	121,2	129,6	103,0
RAI Amsterdam (NL)	119,9	133,3	115,7
Expocentre (RU)	118,6	n.a.	n.a.
Messe Stuttgart (D)	118,0	63,3	61,4
Advanstar Communications (USA)	n.a.	n.a.	107,9

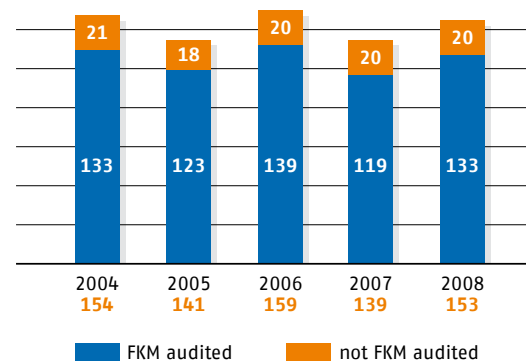
International / national trade fairs

In the organisation of international trade fairs, Germany is No. 1 worldwide. Of the globally leading trade fairs in the individual sectors, around two-thirds are held in Germany. Around 150 international trade fairs and exhibitions are conducted per year, with 160,000 to 180,000 exhibitors occupying stand space of 6 to 7 million m² and with 9.5 to 10.5 million visitors.

Trade Fairs in Germany

Number of events

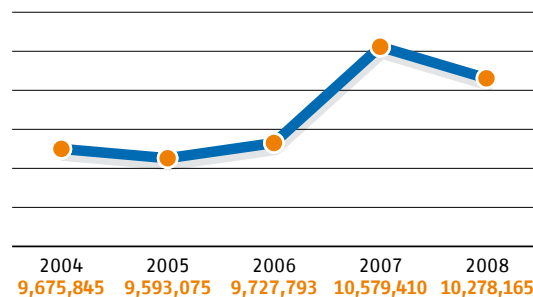
AUMA category international and national events



Trade Fairs in Germany

Number of visitors

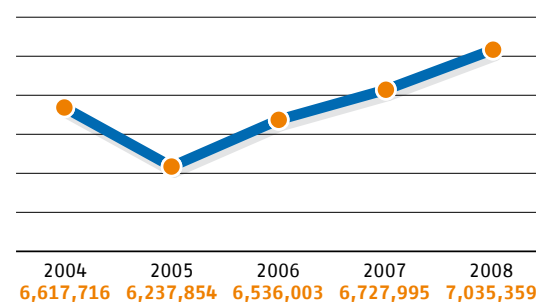
AUMA category international and national events



Trade Fairs in Germany

Rented space in m²

AUMA category international and national events



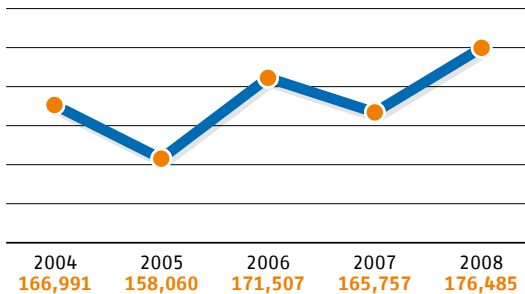


The internationality is the most important positive feature of the German trade fairs in the worldwide competition. In 2008 around 53 % of the exhibitors came from abroad, of whom one-third came from countries outside Europe. In particular, the number of exhibitors from Asia as well as Central and Eastern Europe has risen in recent years.

Trade Fairs in Germany

Number of exhibitors

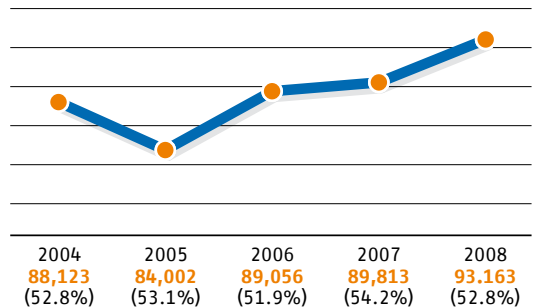
AUMA category international and national events



Trade Fairs in Germany

Number of foreign exhibitors

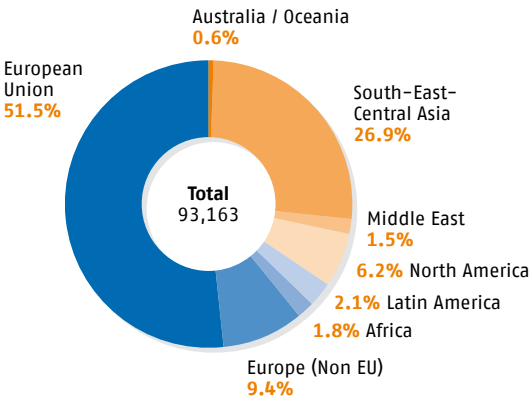
AUMA category international and national events



Trade Fairs in Germany 2008

Foreign exhibitors

AUMA category international and national events



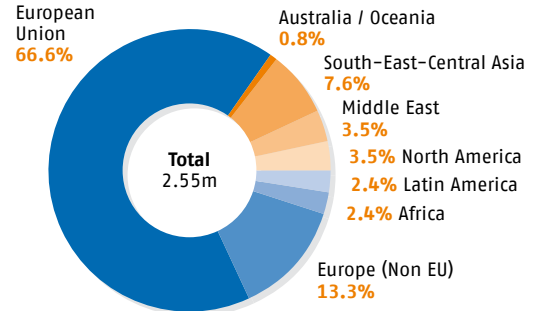
Of the visitors at international trade fairs, a quarter travelled from abroad, of whom over 20 % came from overseas.

Among the trade visitors the foreign share was more than 30 %.

Trade Fairs in Germany 2008

Foreign visitors

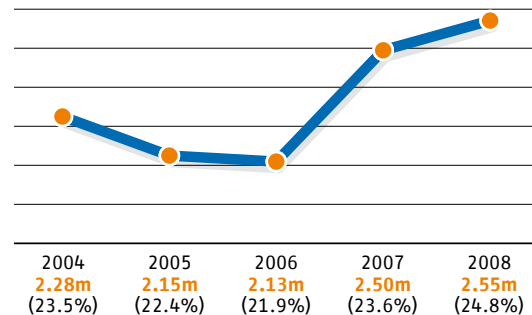
AUMA category international and national events



Trade Fairs in Germany

Number of foreign visitors

AUMA category international and national events

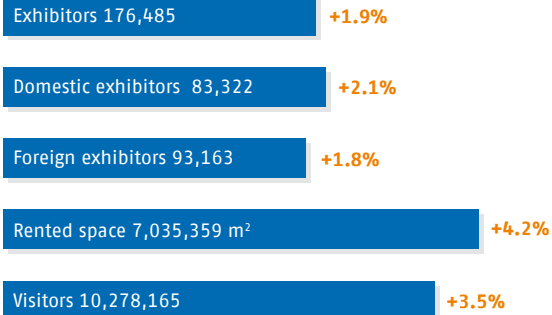




In 2008, international and national trade fairs once again registered clearly positive results. What was particularly remarkable was the relatively sharp rise in rented space and numbers of visitors.

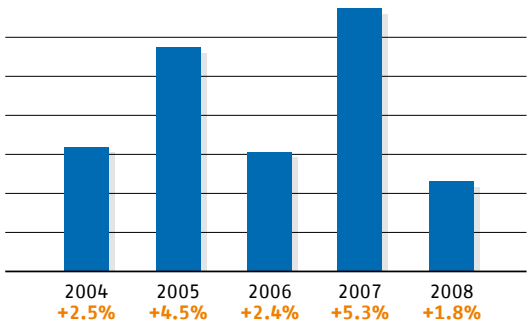
Trade Fairs in Germany 2008

The 153 international / national events in comparison to the respective previous events



Trade Fairs in Germany

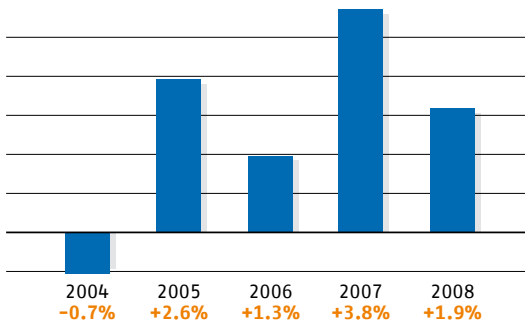
Number of foreign exhibitors
AUMA category international and national events



Development of one year's trade fairs
in comparison to the respective previous events

Trade Fairs in Germany

Numbers of exhibitors
AUMA category international and national events



Development of one year's trade fairs
in comparison to the respective previous events

Trade Fairs in Germany 2008

The 153 international / national events in comparison to the respective previous events

	Number of events	Total	Exhibitors Domestic	Foreign	Visitors Total	Rented space Total
Total	153	+1.9%	+2.1%	+1.8%	+3.5%	+4.2%
Investment goods trade fairs	87	+5.3%	+4.7%	+6.1%	+6.8%	+9.3%
Consumer goods fairs directed to trade visitors	44	-2.8%	-2.3%	-3.1%	-6.6%	-2.4%
Consumer goods fairs directed to the public	18	-0.8%	-1.5%	+0.2%	+2.3%	+1.7%
Trade fairs presenting services	4	+1.9%	+0.3%	+2.5%	-2.5%	-0.2%

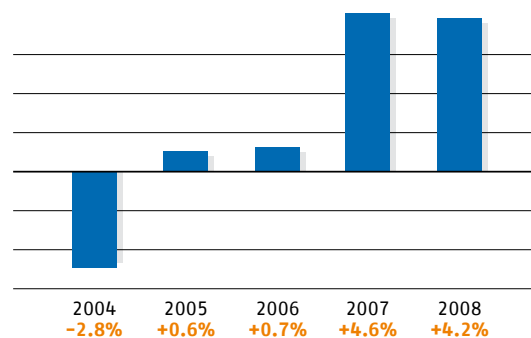
Among the various types of events, trade fairs for capital goods once again proved to be a driving force behind growth.

On average, trade fairs for consumer goods registered results below the previous level.

Trade Fairs in Germany

Rented space in m²

AUMA category international and national events

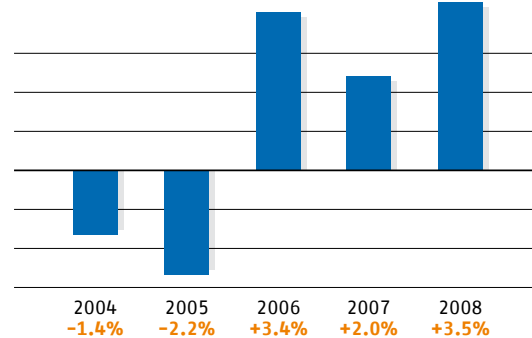


Development of one year's trade fairs in comparison to the respective previous events

Trade Fairs in Germany

Number of visitors

AUMA category international and national events



Development of one year's trade fairs in comparison to the respective previous events

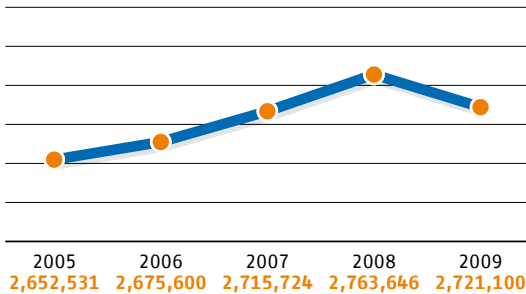


At 22 exhibition centres around Germany available hall space covers 2.72 million m², which is used for international and national trade fairs and exhibitions. Ten exhibition centres have hall space in excess of 100,000 m², at six others it exceeds 50,000 m².

Compared to 2008 the total capacity has decreased because at one venue international trade fairs take no longer place. Until the beginning of 2010 the level of 2008 will be reached again. In the years to come increase in hall capacity will be only marginal.

Trade Fairs in Germany

Hall capacities in m²
(each 1st January)



Trade fair centres with at least one event
according to AUMA category international and national events

Trade Fairs in Germany 2009

Exhibition capacities*
gross in m²

Location	Halls	Outdoor
Hanover	495 265	58 070
Frankfurt/M.	321 754	96 078
Cologne	284 000	100 000
Düsseldorf	263 888	43 000
Munich (New Exh. Center)	180 000	360 000
Berlin	160 000	100 000
Nuremberg	160 000	
Essen	110 000	20 000
Stuttgart	105 200	40 000
Leipzig	101 200	69 998
Hamburg	86 574	10 000
Friedrichshafen	69 700	11 800
Bad Salzungen	65 195	4 000
Dortmund	59 235	
Karlsruhe (New Exh. Center)	52 000	10 000
Augsburg	51 000	10 000
Bremen	39 000	100 000
Munich (M, O, C.)	30 000	
Saarbrücken	24 519	27 400
Freiburg	21 500	80 000
Offenburg	22 570	37 877
Offenbach	18 500	400

Status: 1.1.2009

* Locations with at least one event
according to AUMA category international and national events



Regional and specialized events

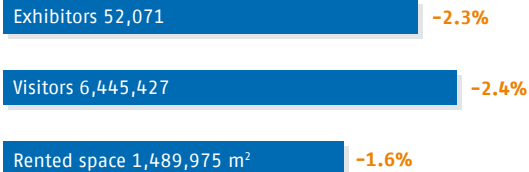
The international trade fairs were supplemented by a dense network of regional trade and public exhibitions. At these events, annually more than 50,000 exhibitors are brought together with 6.5 million visitors.

In comparison with their preceding events, the events with a regional catchment area or specialized offer registered nearly stable results on average.

Regional and Specialized Trade Fairs and Exhibitions 2008

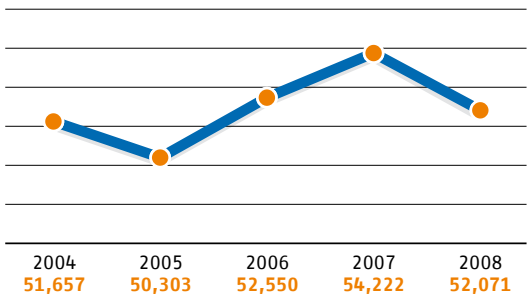
Development of the 174 events in comparison to the respective previous events

AUMA category regional / special



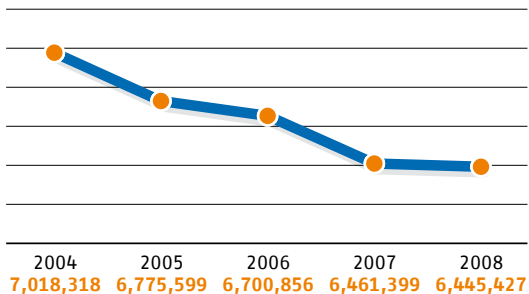
Regional and Specialized Trade Fairs and Exhibitions

Number of exhibitors
AUMA category regional / special



Regional and Specialized Trade Fairs and Exhibitions

Number of visitors
AUMA category regional / special



International activities

Supplementary to its trade fair participations in Germany, German industry makes considerable use of foreign trade fairs for its export marketing. At the trade fairs with participations of the Federal Ministry for Economics and Technology alone, in the meantime over 7,500 companies are present.

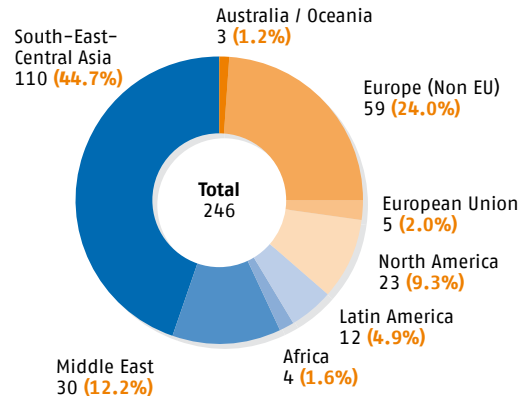
Participations in Asia have become considerably more important in recent years. Federal participations in the European Union are restricted to a few special trade fairs, as participations within the EU are not supported on principle.

The annual total of nearly 250 export platforms supported by the federal government are organised by special companies who have many years of experience in the respective sectors and the countries.

The Federal Ministry for Economics and Technology made around 37 million Euro available in 2008. Around 60 % of these participations are organised in Asia.

German Foreign Trade Fair Programme 2008

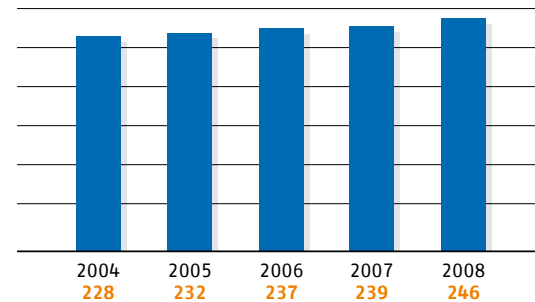
Participations by the Federal Ministry of Economics and Technology



German Foreign Trade Fair Programme

Number of events

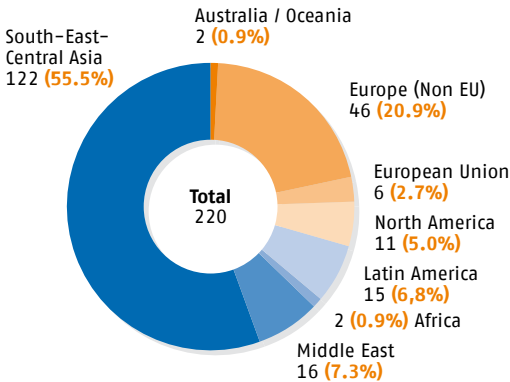
Participations by the Federal Ministry of Economics and Technology





The German trade fair companies grouped together in AUMA annually organise over 200 own events in important foreign growth regions – in particular, in Asia, North and South America as well as Eastern Europe. In this connection, predominantly pilot trade fair concepts which have proved their worth in Germany are transferred to selected foreign markets.

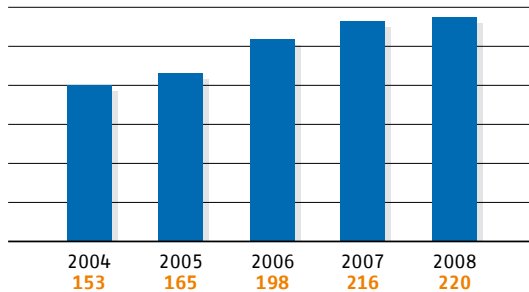
Trade Fairs Abroad by German Organisers* 2008



* AUMA members

Trade Fairs Abroad by German Organisers*

Number of events

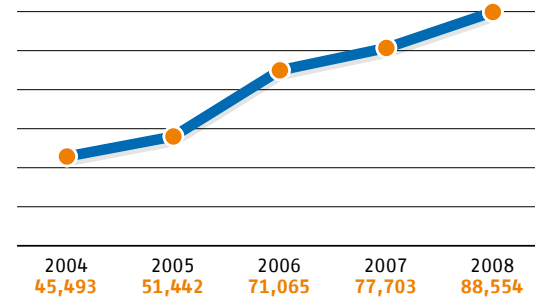


* AUMA members

The number of trade fairs abroad run by German organisers has risen by nearly 50 % since 2004, the same applies to visitor attendance at these fairs. The number of exhibitors has risen by three quarters.

Trade Fairs Abroad by German Organisers*

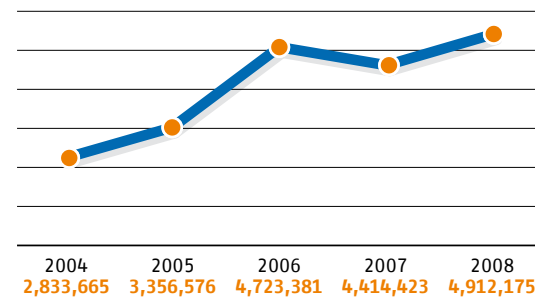
Number of exhibitors



* AUMA members

Trade Fairs Abroad by German Organisers*

Number of visitors



* AUMA members

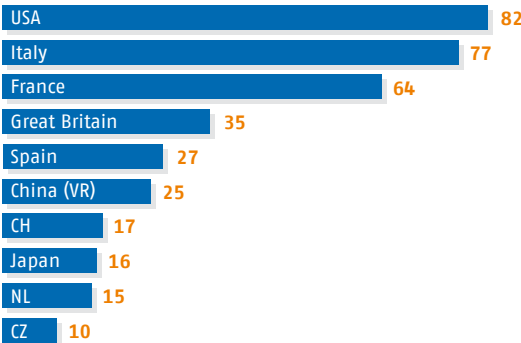


Of the five largest exhibition centres in the world, three are located in Germany. Worldwide there are 48 exhibition centres with more than 100,000 m² of hall space, of which eleven are outside Europe, and three already in China. Of the 36 European centres with over 100,000 m², 32 are in Western Europe and four in Central and Eastern Europe.

The most important competitors to German trade fairs are located in the USA and Western Europe. But on average, these fairs continue to be smaller than international trade fairs in Germany.

Foreign Trade Fairs

Number of competitors to international trade fairs in Germany*



* Survey among German organisers;
a maximum of three competing events could be specified per trade fair in Germany

Exhibition Centres Worldwide 2009

Exhibition capacities*
gross in m²

Location	Halls
Hanover Exhibition grounds	495 265
Fiera Milano	345 000
China Import & Export Fair Complex Guangzhou	340 000
Frankfurt/Main Messegelände	321 754
Cologne Exhibition grounds	284 000
Düsseldorf Exhibition grounds	263 888
McCormick Place Chicago	248 141
Feria Valencia	230 837
Paris Expo Porte de Versailles	227 380
Crocus Expo IEC Moskau	216 320
Paris-Nord Villepinte	206 000
NEC Birmingham	201 634
BolognaFiere	200 000
Fira Barcelona Gran Vía	200 000
IFEMA Feria de Madrid, Parque Ferial Juan Carlos I	200 000
Orange County Convention Center Orlando	190 875
Las Vegas Convention Center	184 456
Munich (New Exhibition Center)	180 000
Messezentrum Basel	162 000
Berlin Exhibition grounds	160 000
Nuremberg Exhibition grounds	160 000
IMPACT Bangkok	140 000
Georgia World Congress Center Atlanta	130 112
SNIEC Shanghai	126 500
Veronafiere	122 000
Fiera del Levante Bari	120 000
Reliant Park Houston	118 680
Fiera Roma	118 300
Fira Barcelona Montjuic	115 211
Fiera Milano City	115 000
Brussels Expo	114 445
BVV Brno	113 544
MTP Poznan	113 100
Essen Exhibition grounds	110 000
Nanjing International Expo Center	110 000
Eurexpo Lyon	109 000
Rimini Fiera	109 000
Bilbao Exhibition Centre	108 000
VVC Moskau	108 000
New China International Exhibition Center Beijing	106 800
New Stuttgart Trade Fair Center	105 200
SZCEC Shenzhen Convention & Exhibition Center	105 000
Geneva Palexpo	102 470
Ernest N. Morial Convention Center New Orleans	102 230
Leipzig Exhibition grounds	101 200
Fiere di Parma	100 000
Singapore Expo	100 000
Jaarbeurs Utrecht	100 000

Status: 1.1.2009

**Association of the German
Trade Fair Industry**

Littenstraße 9

10179 Berlin

Phone: +49 (0)30 24 000 - 0

Fax: +49 (0)30 24 000 - 330