





German Trade Fair Industry Review 2011

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German Trade Fair Industry | Review 2011

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AUMA

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We would like to thank the exhibition companies for providing us with pictures of trade fairs and exhibition centers. Further photos: page 68

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Contents

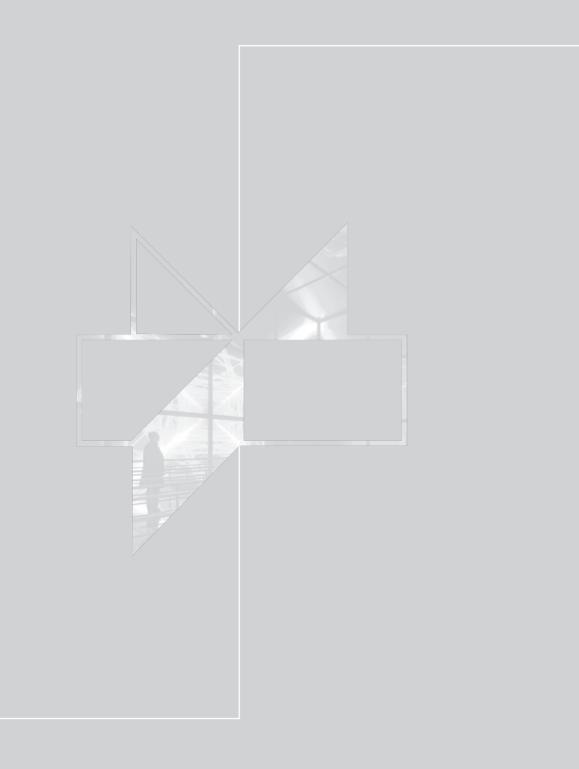
Outlook	5
Exhibitions in Germany	9
Overview AUMA_MesseTrend Sharp rise in foreign exhibitors from Central and Eastern Europe Regional events From 2012: Certification instead of auditing of trade fair statistics Upturn in AUMA members' congress business	11 14 16 18 18 20
Lobbying and legal aspects	21
Current developments regarding German VAT law Visas for trade fairs AUMA Round Table Brussels	23 24 25
Institute of the German trade fair industry	27
Vocational training and advanced training Research German Trade Fair Library	29 32 33

Exhibitions abroad	35
The competitive situation around the world	37
Supporting German exhibitors abroad	39
Trade fairs abroad held by German organisers	40
Germany at World Expositions	43
Marketing, media and events	45
Marketing German trade fairs	47
Promoting participation in trade fairs	49
Annual meeting of the trade fair industry in Berlin	49
Participation in international congresses	50
AUMA media for international customers	52
Organisation	55
Key indicators of the German exhibition industry	59

Regarding the choice of photos:

Meeting at trade fairs also means discussing the products and services on display. This is what communicating at trade fairs is about. For this reason, starting on page 11, we have put together images of typical products from the trade fair programmes of all the members of AUMA who hold at least one international trade fair a year, which also represent the wide range of products and services exhibited at trade fairs in Germany.





Outlook

The current economic situation shows that the real economy and the financial economy may not depend as strongly on one another as imagined only a few years ago. That is good news for trade fairs, which are "reallife" communication instruments.

Trade fairs are business critical • "At trade fairs, exhibitors have to keep their advertising promises" – this idea may not be new, but against a backdrop of financial market turbulence and a thriving German economy it takes on a new significance. Trade fairs are in many respects about the real world. They are about real products, the chance to examine and evaluate them, about personal meetings and subsequent commitments and in the end about real business, regardless of whether a deal is done on the spot or preparations are made.

The fact that trade fairs are business critical makes them different from other, supposedly similar "live communication" instruments. As a rule, marketing or sponsorship events influence business only very indirectly. This can also be said of the so-called MICE industry. Companies who organise meetings, incentive events, conferences or other events discover that the road to increasing their turnover is often a long one. Thus, in future the exhibition industry should have enough confidence to view itself as an independent sector, one where organisers and exhibiting companies combine to hold events influencing business.



The same applies to consumer exhibitions. Naturally, visitors like to be entertained at certain times, but ultimately they want to find out about products and services and buy them during or after a fair. Again, this makes exhibitions different from other events, be they sports events, concerts or street festivals, where this aspect hardly plays any part.

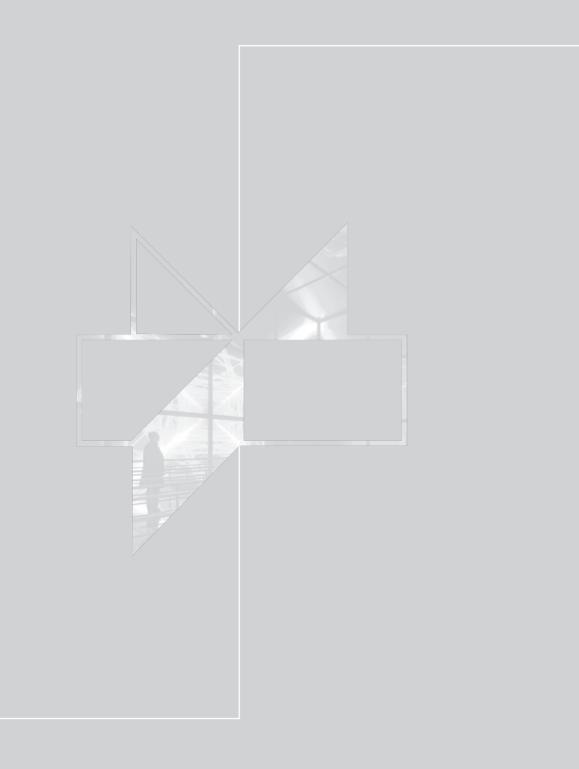


Making trade fair participation more effective Trade fairs, being relatively costly business instruments, must repeatedly prove their worth. Thus for organisers, the medium-term focus is on making trade fair participation more effective, for example by systematically setting up meetings between visitors and exhibitors. Improvements in visitor registration and the widespread use of other databases have gradually made it easier for organisers and exhibitors to address visitors in systematic ways, thereby increasing the number of substantial business meetings, or leads, on the trade fair stand. One reason organisers use digital media is to promote exhibitors and their products and services online. However, the long-term goal is for the internet to make taking part in a real-life trade fair more effective. One of the trade fair industry's biggest challenges is to make prearranged meetings between exhibitors and visitors the norm, thus maximising the use of limited time resources. In principle, trade fairs are the perfect one-to-one marketing instrument, a frequent characterisation nowadays of online media. However, exhibitors have little advance knowledge of who is either present or will be attending an exhibition. Data protection laws permitting, there is significant room for improvement here.

Thus there is now a greater, if perhaps not definite, probability of achieving success at trade fairs. For chance meetings will always be important in trade fair business, and the emotive effect of a surprise success is key to trade fairs being such an attractive instrument.

Success at a trade fair also has to do with how effective a visit is. The time spent at events is a factor that is at best constant and in many cases is in decline. That makes it all the more important for visitors to make the best of their available time for business contacts.

Exhibitions in Germany



Exhibitions in Germany

Overview

With the overall economic situation continuing to improve, the German exhibition industry grew significantly in 2011, following a slow recovery from the recession in 2010.

In the wake of 5 % plus growth in 2010, in 2011 the global economy expanded by a further 3.8 %. At 3.0 %, Germany's GDP growth showed little signs of slowing, having previously reached 3.6 % in 2010. Against this economic backdrop the domestic trade fair industry fared extremely

well. On the one hand, in terms of exhibitor and visitor attendance German trade fairs continue to enjoy a strong level of domestic participations. On the other, with foreign exhibitors accounting for more than 50 % and trade visitors from abroad for 30 %, they remain strongly reliant on international market developments. The above-average growth in foreign participation is an indicator of why leading German trade fairs are so attractive. Many non-European



2011 review After recovering only slowly in 2010 from the previous year's recession, in 2011 national and international trade fairs regained their old form. At 4.8 %, exhibitor stand space grew significantly, to a large degree making up for previous years' losses. On average,

visitor attendance rose by 4.1 %, another indicator of the continuing acceptance of trade fairs. Compared with corresponding events in previous years, exhibitor numbers at the 134 trade fairs which took place rose by 3.1 %. International participation was the driving force here. Exhibitors from abroad increased by 5 %, compared with +2.7 % the previous year. Any speculation that German trade fairs might be losing ground on

R+T, Stuttgart (Landesmesse Stuttgart GmbH)

companies who set foot on the European market for the first time go directly to German trade fairs. For exhibitors the chances of success here are clearly higher than at trade fairs in other large countries. Since the last recession this trend has become more evident. German consumers' spending power is one reason, the good shape of the German economy another, but also the quality of trade fairs as such. the international market is misplaced, certainly in the light of current developments.

By contrast, domestic exhibitor participation remained the same. It is clearly becoming increasingly difficult to mobilise the potential that, in principle, in Germany still exists. In 2011, trade fairs results were positive across the entire board. That is not to say that even during the economic recovery some trade fairs did not lose ground due to structural or concept-related problems. Trade fairs with 'energy' as their key theme were notably successful and the automobile sector has now almost fully recovered from its losses in 2009. Also, agricultural machinery exhibitions reported yet another leap in growth.



Trends among individual exhibition categories Among the individual exhibition categories, consumer goods exhibitions for the general public once again registered substantial growth. Even in 2010, at a time when trade fair business was still very slow, their results stood out among the rest. In 2011, despite the 17 exhibitions reporting "only" a 2.0 % rise in exhibitors, stand space increased by 7.6 %, and visitor attendance by 4.8 %. As regards exhibitions for the general public, which by nature compete for visitors' time and attention, large events appear to have maintained their strong position.

The 41 consumer goods trade fairs attended by trade visitors reported only below-average growth even while trade fair business as a whole recovered, and compared with corresponding events in previous years reported 2.0 % more exhibitors and a 2.6 % rise in stand space. The 5.2 % rise in visitor attendance was outstanding. Despite this market segment displaying some weakness in recent years trade visitors clearly remain very confident in the benefits of consumer goods trade fairs.

Trade fairs for capital goods, many of which reported negative results in 2009 and 2010, have made an impressive comeback and are once again the driving force of German trade fair business. The 71 trade fairs which took place registered a 4.3 % rise in exhibitors and a 5.5 % increase in stand space. Compared with corresponding events in previous years visitor attendance grew by 3.2 %.

GDS, Duesseldorf (Messe Duesseldorf GmbH)

In 2011 trade fairs representing the services sector, of which there were only five, reported substantially below-average results. Overall, exhibitor numbers rose by only 1.8 % and stand space by 1.0 %. Visitor attendance actually declined by 1.7 %. In 2010 the figures for this market segment had fallen throughout. This category caters mainly exhibitions for the tourism, financial, marketing and software industries.

Small specialised trade fairs reported generally stable results as far as exhibitor numbers were concerned. However they registered a substantial increase in visitor attendance. These events cater for trade visitors, exhibit highly specialised products and attract visitors from all parts of Germany. Compared with corresponding events in previous years, the 20 trade fairs in this category reported a 0.3 % drop in exhibitors and a 2.2 % rise in stand space. Visitor attendance increased by 10.0 %, although only a few fairs reported significant gains. Visitor numbers remained stable at most of these events, of which 27 were scheduled for 2012.

Overall results for 2011 In total, AUMA statistics registered 308 domestic events attended by 214,000 exhibitors, 7.8 million m² of stand space and 15.4 million visitors. The 134 national and international trade fairs which took place were attended by 159,945 exhibitors, of whom 88,608 came from abroad. These companies occupied stand space covering 6,200,359 m². 9,526,246 visitors attended these events. AUMA also collected data on 154 regional exhibitions which reported 51,336 exhibitors, 1,530,768 m² of stand space and 5,862,815 visi-



tors. 20 specialised national trade fairs took place which registered 2,551 exhibitors, $36,837 \text{ m}^2$ of stand space and 92,728 visitors.

Despite individual trade fairs reporting significant growth compared to previous events, according to preliminary results German trade fair organisers' turnover fell to a figure in excess of 2.8 billion euros. In 2011 some larger capital goods trade fairs which take place every two or three years were absent from the trade fair calendar.

Eurobike Friedrichshafen (Messe Friedrichshafen GmbH)



Musikmesse, Frankfurt/M. (Messe Frankfurt GmbH) **Forecast for 2012** During the first half of 2011 there was a renewed upturn in business at international trade fairs in Germany. Neither the weak economic performance of individual sectors nor the uncertainty on the financial markets appear to have negatively affected trade fair business. At the same time German companies intend to increase rather than cut back on their trade fair spending. Accordingly, in 2012 AUMA expects exhibitor and visitor figures at international trade fairs to rise in the order of 2 % compared to respective previous events. By contrast, stand space is not expected to increase, due to caution on the part of many exhibitors.

AUMA_MesseTrend

Despite the growing uncertainty over future economic developments many German companies plan to increase their trade fair spending in 2012/2013. According to AUMA_MesseTrend, a representative survey by TNS Emnid, 30 % of German exhibitors aim to increase their trade fair spending, 55 % intend to spend the same, while only 15 % have planned cuts.

It is worth noting that larger companies in particular as well as those who often take part in trade fairs still intend to invest strongly. Among those exhibitors whose turnover exceeds 50 million euros, 38 % aim to increase their trade fair budgets, whereas for smaller-sized companies the figure is 27 %. Of those exhibitors who over a period of two years take part in more than 11 trade fairs 29 % plan to invest even more, while 55 % aim to spend the same. These are clear signs of the continuing ability of trade fairs to attract exhibitors, in particular companies who are experienced users of this marketing instrument.

The companies who aim to increase their trade fair budgets also want to invest in a high-quality, attractive stand. 42 % of them intend to have larger stands, 42 % also aim to invest more in stand construction and 21 % plan to spend more on staff at events. The companies who aim to cut back on trade fair costs are unlikely to spend less on the quality of their display. Thus stand construction and staff will be relatively unaffected by spending constraints. Rather, assuming cuts are to be made, it is the decision whether or not to take part in a trade fair. Thus, two-thirds of the companies who are planning cuts say there are individual trade fairs they will miss. Over the next two years there will most likely be a slight drop in participation by German exhibitors in domestic trade fairs. In 2012/2013 companies plan to take part in an average of 5.2 trade fairs, as compared with an average of 5.3 events in 2010/2011. Domestic trade fairs in particular are highly rated by German exhibitors. However, many companies are already represented at all the relevant trade fairs and the potential for more is only limited. And naturally there are always companies leaving the marketplace.

Trade fair share of the marketing budget remains stable

Over recent years the share of the company marketing budget earmarked for trade fairs has remained constant, at 40 %. However, it should be noted that among larger companies with a turnover in excess of 50 million euros this percentage has risen significantly in recent years. In 2012 the figure was 39 %, whereas five years ago it was only 31 %. Thus, what used to be a relatively wide gap between larger and smaller-sized companies has now narrowed as far as the trade fair share of the marketing budget is concerned.

Among the various marketing instruments, in recent years the role occupied by trade fairs has improved slightly again. 85 % of exhibitors regard taking part in trade fairs as important or very important. Five years ago this figure was 79 %. For companies exhibiting at trade fairs this is not something they do on the side. They are highly committed and their confidence in this marketing instrument has even increased. The last recession in 2009 and the vast increase in the number of online portals have clearly not undermined the importance of trade fairs. Field work, the second most important face-to-face medium, actually lost ground over the same period. Currently, 76 % regard it as important or very important, nearly 10 % less than the percentage favouring trade fairs.

For more information: Print ► AUMA_MesseTrend 2012 Online-Download ► www.auma.de / English / Downloads & Publications



CeBIT, Hanover (Deutsche Messe AG)

Sharp rise in foreign exhibitors from Central and Eastern Europe

In 2011 exhibitors from abroad were again the driving force behind trade fair business in Germany. In addition to China there was also a significant rise in the number of exhibitors from European countries.

Countries from outside the EU in particular are increasingly using German trade fair venues as an export platform, despite the weak economic performance of many EU countries. While a lot of foreign exhibitors have their sights set on the EU market their interest also lies in the many visitors from other parts of the world. Thus, compared with their participation at the same events prior to 2011, exhibitor numbers from Turkey and Russia rose by 13 % and 12 % respectively.



Even exhibitor numbers from Switzerland, which have been high for many years, grew by another 5 %. Exhibitor numbers from Croatia, a prospective member of the EU, rose by more than 30 %.

Participation by exhibitors from EU countries rose by an overall 3.8 %; obviously potential is still existing here. Countries experiencing particularly serious financial problems are focusing on exports by using German trade fairs as a platform. Thus, the number of representations from Portugal grew by 10 %, from Spain by 7.5 %, and from Greece by 6 %. Participation by Italy, the country with the largest number of exhibitors at German trade fairs from abroad, grew by over 2 %. There was a significant increase in representations from Central and Eastern European countries: 24 % more exhibitors from Romania, 18 % more from the Czech Republic and 11 % more from Slovenia. The Baltic States reported double-digit growth, whereas exhibitor numbers from Hungary fell by 16 %.

Continuing increase in exhibitors from Eastern Asia Looking beyond Europe, the region most represented at German trade fairs is Southern, Eastern and Central Asia, and the gap is growing as well. On average, exhibitor numbers rose by more than 6 %, and there were double-digit increases from those countries most represented: a 10 % rise from the People's Republic of China, 9 % from Taiwan, 11 % from Korea and a 14 % rise from Japan. In some cases exhibitor numbers from smaller countries were below average. Compared with corresponding events in previous years, there were 8 %

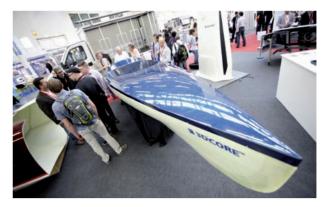
Frankfurt Book Fair less exhibitors from Thailand, 6 % less from Vietnam and 17 % less from the Philippines. At 2,800, the number of exhibitors from India, the region's second largest country, remained the same.

The increase in the number of exhibitors from the Middle East attending German trade fairs was close to 10 %. Lebanon, represented by well over 100 companies, reported strong gains (+25 %), as did Jordan (+21 %), the United Arab Emirates (+14 %) and Israel (over 10 %).

Following stagnation in recent years in 2011 exhibitor numbers from North America rose by 3.6 %. Clearly, this also reflected an export drive in the face of a weak domestic economy. At +2 %, Canada reported a belowaverage increase in exhibitors.

Exhibitor numbers from South America fell by 4 %. Of the three countries most represented only Mexico gained slight ground, while numbers from Brazil and Argentina fell by 14 % and 5 % respectively. The only positive exception was Colombia, which reported 8 % growth.

As regards participation from Africa there were large variations in growth, which on average was 13 %. The political upheavals in North Africa appear to have already affected these countries' exports and their ability to do business abroad. Participation from Libya, whose numbers were previously low, doubled at German trade fairs. Countries which were already well represented also reported growth, for example Morocco (15 %) and Tunisia



Composites Europe, Essen (Reed Exhibitions Deutschland GmbH)

(29 %). There were 5 % less exhibitors from Egypt and participation from Algeria fell by 20 %. Tanzania and Kenya sent out positive signals, posting 34 % and 26 % growth respectively.

Exhibitor numbers from Australia and Oceania rose by only 3 %, a below-average result.

As in recent years, the country with the largest number of exhibitors at international trade fairs in Germany was Italy (11,348), ahead of China (9,482). Next were France (5,261), the Netherlands (4,660), the USA (4,651), the UK (4,576) and Spain ((4,107). They were followed by Austria (3,510), Switzerland (3,203) and tenth-placed Taiwan (2,864), which was marginally ahead of India (2,832).

The countries which took part in more trade fairs than any other were Austria and Switzerland, which were each represented at 130 international trade fairs, ahead of Italy (125).

Regional events

In developments similar to those at international trade fairs, events attracting visitors from local regions reported a significant rise in figures, but not in attendance.



A total of 154 regional events took place in 2011 which, compared with corresponding events in previous years, reported 2.9 % more exhibitors, similar to the growth rate in 2010 (3.7 %). A year earlier, numbers had been down by 2.6 %. Evidently there was a renewed acceptance of regional trade fairs as sales and marketing instruments, which in previous years had also

EMV, Duesseldorf (Mesago Messe Frankfurt GmbH) been fighting exhibitor decline. At +7.9 %, stand space figures actually increased. However, there was a lot of catching up to do, as in 2010 stand space figures had stagnated and in 2009 had even fallen by more than 4 %. Clearly, many companies belatedly decided to increase their display area. At -0.8 %, visitor attendances marginally held their ground, although there were significant variations depending on the type of trade fair and venue.

Altogether, 51,336 exhibitors took part in 154 regional trade fairs, occupying stand space covering 1,530,768 m². Visitor attendance was 5,862,815. The statistics included trade fairs and exhibitions held in 2011 by organisers registered with AUMA and which were listed by AUMA as regional events.

From 2012: Certification instead of auditing of exhibition statistics

FKM aims to make certification of exhibition statistics a main quality hallmark of German exhibitions. When planning for exhibitions and monitoring their success exhibitors need to focus more on facts and be sure of reliable exhibition data.



For this reason the German exhibition organisers belonging to FKM, the Society for Voluntary Control of Fair and Exhibition Sta-

tistics, aim to take a more pro-active approach to offering FKM's services to their customers. These services include providing exhibitor and visitor statistics for some 300 exhibitions and above all comprehensive visitor breakdowns, which are obtained by applying a uniform set of rules and are verified by an auditor. From now on exhibitions audited by FKM are to be designated "FKM-certified" in order to make it even clearer that data supplied by FKM is transparent and reliable and hence trustworthy.

FKM re-positions itself as service provider for exhibitors ■ Furthermore, FKM's website at ▷ www.fkm.de now features a new concept. It presents certified exhibitor and visitor statistics and the rules based upon which

they have been obtained, offers tips for making use of data and has information on FKM's role as a provider of services for everyone involved with exhibitions.



BioEnergy Decentral, Hanover (DLG – German Agricultural Society)

In 2011, German organisers had auditing carried out on the exhibitor, space and visitor statistics of 208 domestic trade fairs and exhibitions. A total of 62 German organisers are now members of FKM. One new member was added in 2011, three trade fair companies are no longer members. The two guest members from abroad, the Verona Trade Fair Company and the Hong Kong Trade Development Council, as well as two German organisers, had 17 trade fairs abroad audited. **International transparency of trade fairs** In collaboration with European auditing companies including FKM, the Global Association of the Exhibition Industry (UFI) released the brochure entitled Euro Fair Statistics. It contains audited trade fair data on close to 2,000 exhibitions held in 2010. 21 countries were involved.

For more information: ► www.fkm.de



Metav, Duesseldorf (VDW - German Machine Tool Builders' Association)

Upturn in AUMA members' congress business

The majority of AUMA members anticipate stable or slightly increased demand over the next 12 months. None of the respondents expects a fall in demand in 2012.

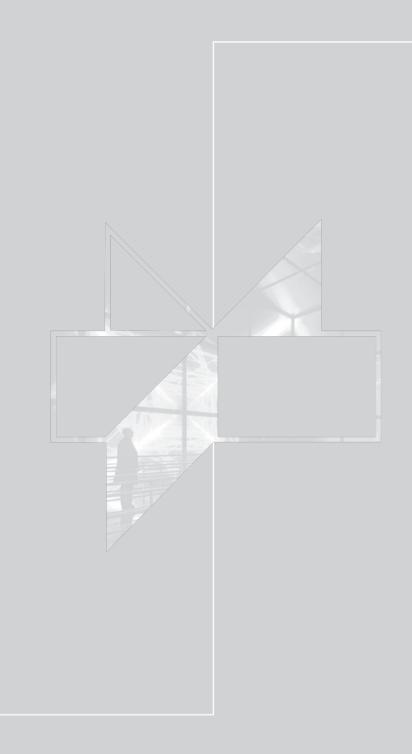
Z, Leipzig (Leipziger Messe GmbH)



Overall, the situation has improved since the economic downturn in 2009. The statistics report more than 10,500 B2B events and over 2.7 million visitors. There were more than 6,400 B2B events accompanying trade fairs, 7 % more than in 2010. As in previous years, trade fairs and congresses are becoming more interconnected. Visitor attendance at B2B events accompanying trade fairs totalled 900,000, 35 % more than in 2010.

Reaching more than 4,000, the number of independent B2B events grew by 9 %. Visitor attendance at these events rose to almost 1.8 million, an increase of around 25 %.

Lobbying and legal aspects



Lobbying and legal aspects

Current developments regarding German VAT law

The ruling "Inter-Mark Group" by the European Court of Justice on 27 October 2011 led to a fundamental change in the taxation of services in respect of the designing, rental and construction of exhibiton stands.

Previously, the German financial authorities had classified these services as pertaining to the venue in question and fiscally the trade fair venue was designated as the place of supply of services unless the services were supplied within the scope of event-related services. Taxes for event-related services were payable at the location of the service recipient's place of business.

On 19 January 2012 the Ministry of Finances incorporated the ruling by the European Court of Justice into the German decree on the application of VAT act. Accordingly, in respect of the planning, designing, construction and dismantling of stands in connection with exhibitions § 3 a, Section 2 of the German VAT act applies, which designates the recipient's place of business as the location where services are supplied. Thus, in respect of stand construction services supplied to foreign exhibitors in Germany as a rule German VAT no longer applies. This concerns all services supplied after 31 December 2011.



Essen MotorShow (Messe Essen GmbH)

Visas for trade fairs

In 2011 AUMA continued to hold talks on the subject of visas for trade fairs with the Foreign Ministry, individual foreign representations of the Federal Republic of Germany, the Association of German Chambers of Industry and Commerce (DIHK) and trade fair organisers.

AUMA's aim in particular is to make Germany's foreign representations aware of how essential it is for Germany as a country hosting trade fairs that exhibitors and visitors be provided with swift and efficient help by embassies and consulates.

GalaBau, Nuremberg (Nuernberg Messe GmbH) At the beginning of April 2011 a discussion took place to assess the results of a poll by AUMA which had been carried out among the trade fair organisers' local representatives abroad. Taking part were representatives of



the Foreign Ministry, the Ministry of Economics, the Ministry of the Interior, the DIHK and companies organising trade fairs. AUMA and the trade fair organisers called for greater transparency regarding the documents and requirements for issuing visas, urged that waiting times for appointments be reduced and that the duration of visas for exhibitors be extended. The issue of so-called visa shopping,



Euroblech, Hanover (Mack Brooks)

a problem that has arisen due to differing procedures within Schengen countries, was also discussed. In principle, this is not an issue of substantive law, but an organisational problem. In addition, many of the issues concern individual countries and need to be discussed with local employees. The trade fair companies as well as the representatives of the DIHK emphasised their concern that methods need to be improved.

In order to enable embassies and consulates to deal with increased numbers of applications ahead of trade fairs AUMA regularly updates the Foreign Ministry on the anticipated number of foreign exhibitors.

AUMA Round Table in Brussels

At the beginning of February 2012 the twelfth AUMA Round Table took place at the DIHK in Brussels. In the working group the representatives of German trade fair companies responsible in EU matters met.

Christian Siebert, Head of Unit for International Affairs, DG Enterprise and Industry, European Commission, reported on EU efforts to provide support for SME's exporting to third countries. According to an EU survey, only 13 % of SME's in the EU cooperate with third countries.

For this reason the European Commission has put together measures to facilitate access to these markets. Siebert noted that the aim had to be to provide SME's with a better overview of the existing support measures offered by the EU and member states. He added that the underlying principle of every EU measure was to avoid competing with national support measures. In AUMA's opinion this is important, especially as regards joint exhibition participations as a subsidy instrument.

Bertrand Montfort, Senior Manager, Ernst & Young, talked about VAT on services provided at trade fairs within the EU. His report showed that in respect of services supplied at trade fairs there are differences in implementation and interpretation of the EU VAT Directive in individual member states. According to Montfort it had no negative effect on industry based in Germany.



I.L.M. Offenbach, (Messe Offenbach GmbH)



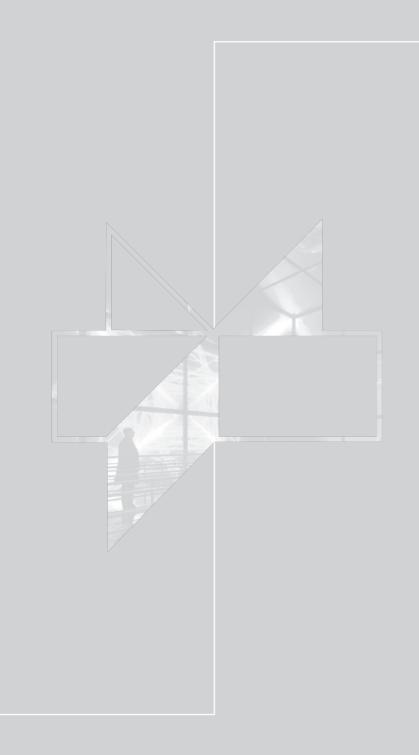
Productronica, Munich (Messe Muenchen GmbH)

> Sofia Muñoz, Deputy Head of Unit for Trade Relations with Euromed and the Middle East, DG Trade, European Commission, talked about the opportunities and risks which North African countries in particular face during their current process of transformation.

She emphasised that EU support depended on a country's willingness to cooperate with the EU. For example, it had reduced support for Egypt as the government in power was very protectionist. She expected new support programmes for cooperation with countries bordering on the Mediterranean to be announced this summer.

Dr. Sara Borella, AUMA's local representative at the DIHK in Brussels, made it clear why Germany needed to be cautious whenever the EU established new rules of origin. Even if the planned customs directives had no initial impact on products "made in Germany" there was nevertheless a risk that sooner or later third countries would introduce similar regulations affecting goods imported from the EU. Dr. Borella also talked about the DIHK survey entitled "Going International 2011/2012". Of those companies interested in export activities two-thirds of the respondents had knowledge of the support programmes for taking part in trade fairs abroad and close to 20 % made use of them.

Institute of the German Trade Fair Industry



Institute of the German Trade Fair Industry

Vocational training and advanced training

AUMA gives its full support to the vocational training and advanced training courses of public and private sector sponsors. Supporting conferences for career starters in the events industry has also become a key issue. Furthermore, AUMA has commissioned teaching material for lecturers.

Training courses for vocational teachers in the events industry Organised by AUMA, on 14 and November 2011 the specialist forum entitled "advanced training for vocational teachers" took place for the tenth time. Some 40 teachers from all parts of Germany took part in the event which was held in event rooms at the Olympic Stadium in Berlin.

The aim of these training courses is to provide teachers with tangible instruments and concepts which they can incorporate in their daily lessons and to explain important new developments pertaining to the events industry with regard to law, taxes or insurance.

University courses teaching trade fair related subjects

More than 40 universities and technical colleges in Germany currently offer in-depth courses dealing with trade fair related subjects. The courses and contact details of the relevant universities are listed on the AUMA website, where professors and lecturers can also find surveys, statistics and presentation material for immediate use at teaching events. Members of AUMA held lectures and seminars at more than 10 universities. Groups of visitors from universities who came to visit AUMA also had a look at the German Trade Fair Library, which with its wide range of literature on trade fairs is an indispensable source of information, in particular to students.



Creativa, Dortmund (Messe Westfalenhallen Dortmund GmbH)

University projects on trade fairs in Istanbul and Wismar

Two trade fair projects co-organised by AUMA have now firmly established themselves at universities. Taking place for the second time, on 24 June 2011 a joint German and Turkish university project conducted at the University of Wismar and supported by AUMA was successfully concluded.

Some 20 students of the German-language Faculty of Economics at the University of Marmara in Istanbul as well as architecture students from the Faculty of Design at the University of Wismar presented concepts for ten Turkish companies who aim to take part in German trade fairs. They were able to draw on experience gathered from a similar project at the University of Wismar which, as a result of its success, is now being offered on a regular basis as a practical marketing course.

Conferences for career starters in the events industry AUMA is regularly involved in a number of events of varying size and in various regions of the country which are planned, organised, carried out and later on assessed by young professionals from the industry. AUMA's role is that of a sponsor or patron and it also actively participates in lectures, workshops and panel discussions. The conferences are attended by trainees, students, mem-



Spielwarenmesse, Nuremberg (Spielwarenmesse eG)



opti, Munich (Gesellschaft für Handwerksmessen mbH)

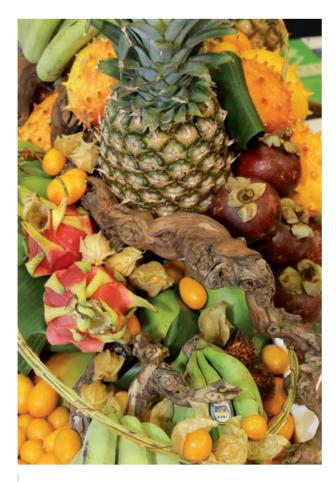
bers of agencies, service providers and teachers from the events industry. In 2011 AUMA supported four conferences of this kind in Berlin, Hamburg, Cologne and Muenster.

AUMA supports the Federal Conference of Deans Since autumn 2011 AUMA has been supporting the Federal Conference of Deans, an association of deans at the faculties of economics at German universities of applied science. The Institute of the German Trade Fair Industry at AUMA intends this collaboration to help in firmly establishing the subject of trade fairs on the university curriculum, together with research and training.

This collaboration was first set up by the trade fair companies in Duesseldorf, Frankfurt, Hanover and Nuremberg, which support universities by providing them with model lectures, helping them with excursions and procuring traineeships. **Trade fairs in economics classes at secondary schools** AUMA aims to provide schoolchildren interested in economics with a knowledge of what trade fairs are about from an early age. The Institute for Economic Education (IÖB) at the Carl-von-Ossietzky University in Oldenburg is currently putting together a four-part course for A-level students entitled "Praxiskontakt Messen". The first part of the course under the heading of "Marketing mix concepts based on trade fairs as an example" was completed in January 2012.

Eunique, Karlsruhe (Karlsruher Messe und Kongress GmbH)





fruit logistica, Berlin (Messe Berlin GmbH)

Research

In 2012, in addition to publishing AUMA_MesseTrend, AUMA will conclude two other research projects which are being carried out by a team headed by Prof. Dr. Manfred Kirchgeorg at the Department of Marketing Management of the Leipzig Graduate School of Management.

One of the aims is to analyse scenarios and forecast the possible direction trade fairs will take by the year 2020. In 2007 Prof. Dr. Manfred Kirchgeorg of the Leipzig Graduate School of Management had already carried out a similar survey, which was very well received, and of which 7,000 copies were published.

In collaboration with the organisers' associations FAMA and IDFA, AUMA also commissioned a project examining the future role of trade fairs and exhibitions as part of B2C communications. Both studies will be completed in autumn 2012.

The annual exhibitor survey entitled "AUMA_Messe-Trend" took place in autumn 2011 and was carried out for the thirteenth time. As in previous years, TNS Emnid undertook a representative survey of 500 companies and questioned them on their plans for participation in trade fairs over the next two years (details on pages 14/15). As a public institution the German Trade Fair Library in Berlin offers services to 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 on the subject of trade fairs. Located in close proximity to the specialist departments of AUMA and its contacts, it offers an opportunity for an uncomplicated and direct exchange of information. The German Trade Fair Library, which AUMA has built up since 1997 and continues to expand, now has more than 7,500 titles in stock.

The items stocked in the German Trade Fair Library comprise a constantly expanding collection of the latest trade fair literature as well as books, surveys and presentations, as well as out-of-print publications, including several from bygone trade fair days.



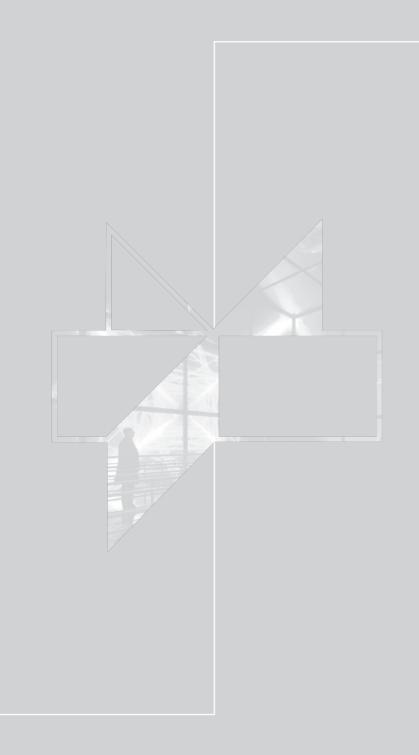
Internorga, Hamburg (Hamburg Messe und Congress GmbH)



imm cologne (Koelnmesse GmbH) 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. After accessing the catalogue via the Englishlanguage pages of the AUMA website users can search for titles in English with English keywords.

Exhibitions abroad



Exhibitions abroad

The competitive situation around the world

In 2011 it was developments in Europe and the USA which above all dictated the growth rate of the global economy. The financial problems experienced by individual states in the European Union proved to be persistent. In the USA the debt burden weighed heavily on the public sector and economic recovery was very slow. As a result, trade fair industry fortunes varied greatly around the globe.

Against this backdrop the International Monetary Fund (IMF) recorded only slight economic growth for the developed economies last year and its forecasts for 2012 are even less optimistic. By contrast, the developing economies were able to achieve higher growth, even if their figures were down on 2010. According to the IMF, developments in Europe and the USA will have a far greater effect on those economies than those factors influenced by the nations themselves.

According to the Federal Statistical Office, despite the weak global economy, in 2011 Germany exported 11.4 % more goods and services than the previous year. In 2011, for the first time, German exports exceeded one trillion euros. Growth in exports to members of the EU (9.9 %) was lower than that of exports to non-EU countries. Exports to these third countries, where German participation in trade fairs is high, grew by 13.6 %. Despite uncertainty in some quarters over future economic developments German exhibitors' plans over the



next two years for taking part in trade fairs abroad remain relatively stable. According to the findings of AUMA_MesseTrend 2012 around 75 % of companies intend to take part in the same number of fairs as over the past two years, 10 % aim to take part in more, and 16 % in less. In 2012/2013 they plan to take part in an average of 3.0 trade fairs abroad, as compared with an average of 3.2 events in 2010/2011.

Opening of "High-Tex from Germany" in Moscow For this reason AUMA closely monitors trade fairs abroad which compete with international trade fairs in Germany. AUMA undertook a survey of all the organisers of international trade fairs in Germany to find out their most important competitors abroad. As a result, over 360 relevant trade fairs were identified.

Strong international competition According to German trade fairs, there is relatively serious competition from developed markets. Currently 77 US trade fairs compete strongly with German trade fairs, alongside



Milan Exhibition Center, Italy

60 fairs in Italy and 57 in France. After the UK (28 trade fairs), China (22) ranks fifth among major competing nations, ahead of Spain (20). They are followed by Switzerland and the Netherlands which hold 13 of those trade fairs each. Approximately two-thirds of competing trade fairs are held in Europe, the majority in countries of the EU. One in five competing trade fairs takes place in the US, one in seven in Asia.

The trade fairs abroad which German organisers frequently name as competitors are events for the food industry, the automotive industry, for information and communication technology, for the building engineering and building equipment industry, sports articles, as well as for agriculture and the catering industry.

Despite strong international competition, from 2007 to 2010 international trade fairs in Germany continued to be in the lead. An average trade fair abroad competing with an average international trade fair in Germany reported 74 % of stand space, 88 % of exhibitors, and 85 % of the visitor attendance of its corresponding German counterpart. In this context it should be noted that in Germany around 200 international trade fairs take place, whereas the above-mentioned competitors abroad represent a relatively small group of leading events in their respective countries. Accordingly, the average statistics for a hypothetical trade fair abroad competing with a German trade fair are as follows: stand space to-talling 34,100 m², 930 exhibitors and 54,500 visitors.

Supporting German exhibitors abroad

Once again, the foreign trade fair programme of the Federal Ministry of Economics played an important part in the success of the German export industry. Industry associations are consulted on which trade fairs to choose, ensuring that the funds are well spent.

Summary of the 2011 foreign trade fair programme The programme, a collaboration between the Federal Ministry of Economics and Technology (BMWi) and AUMA, included 229 German Pavilions. There were numerous cancellations after the earthquake and nuclear disaster in Japan and the conflict in Libya.

Exhibitor numbers reached 6,405, an increase of 186 (+3 %) and stand space rented out in the pavilions rose to an overall 131,761 m², close to 3 % more than the previous year.

Focus on Asia In 2011 most German participations (95) were organised in Southern, Eastern and Central Asia, followed by 60 in non-EU countries, 25 in the Middle East and 20 in North America. South America reported a high growth ratio. Representations here increased by one-third, from 12 to 16, mirroring the German export industry's growing interest in this part of the world.

Once again, the countries hosting the most representations were China (46), followed by the USA (20) and the United Arab Emirates (19). India has now established itself among the leaders (17) and Brazil is also closing in on this group (10). **German Pavilions online** ■ The internet portal ► www. german-pavilion.com, which links to the individual pages of joint participations, makes it even easier to get in touch with companies taking part in a German Pavilion.



Foreign trade fair programme for food and agriculture The Federal Ministry for Consumer Protection, Food and Agriculture (BMELV) supports German companies exhibiting farming products. In 2011 the ministry was involved in 36 trade fairs abroad.



Exhibition Center Paris Nord, France **2012 foreign trade fair programme** The foreign trade fair programme of the Federal Ministry of Economics and Technology planned a total of 262 participations at trade fairs in 2012. Once again, China (including 8 representations in Hong Kong) is the principal target of German Pavilions (58 in all). Russia ranks next, with 47 combined stands. The programme scheduled 23 representations for the USA and 21 for the United Arab Emirates. Underlining the importance of the respective regions, 16 representations were due to be organised in India and 12 in Brazil. In 2012, 39 trade fairs were included in the programme for the first time.

Trade fairs abroad held by German organisers

In 2011, taking "German Trade Fair Quality Abroad" (GTQ) as their slogan, German trade fair organisers increased their involvement abroad. There were 263 trade fairs, a record figure, whose concepts mirrored the standards of leading international events in Germany.

At these events the organisers rented out more than 2.8 million m² of stand space (2010: 2.2 million m²). In 2011 close to 93,000 companies exhibited their products, as compared to 86,000 in 2010. Visitor attendance reached 6.3 million, one million more than in 2010. The significant rise in visitor and exhibitor numbers as well as in stand space was due to yet another increase in trade fairs and the growth of individual events. The leap in visitor attendance was because some consumer trade fairs do not take place every year.

Last year, without exception, the trade fairs with the highest exhibitor attendances took place in China, with Automechanika Shanghai (3,619 exhibitors) and Intertextile Shanghai Apparel Fabrics (3,106) heading the list.

More than 2,000 exhibitors registered for the following events: the Guangzhou International Lighting Exhibition (2,648), CHINAPLAS (2,447) and the China International Hardware Show Powered by PRACTICAL WORLD (2,400). The trade fairs with the highest visitor attendances were motor shows: the Seoul Motor Show (more than one million visitors), Auto Shanghai (more than 715,000) and the Chengdu Motor Show (502,000). The Abu Dhabi International Book Fair (200,000), CeBIT Bilisim Eurasia in Istanbul (121,000), the Industrial Automation Show in Shanghai (101,000), and the Guangzhou International Lighting Exhibition (100,000) also attracted keen visitor interest.

In 2011 China increased its lead in this market segment even further. German trade fair companies rented out more than 1.3 million m² of stand space. More than 41,000 exhibitors and 2.8 million visitors attended 71 trade fairs, making last year almost as successful as 2010. Last year there was a renewed rise in the number of trade fairs held by German organisers in Russia. More than 15,300 exhibitors displayed their services and products at 41 trade fairs, occupying around 460,000 m² of stand space. Visitor attendance totalled around 470,000. In India the positive trend of recent years continued in 2011. The number of trade fairs held rose to 29. More than 4,700 exhibitors rented over 100,000 m² of stand space. Visitor attendance was 130,000. In 2011, more trade fairs held by German organisers abroad took place in Turkey than in any previous year. Hosting 20 trade fairs, Turkey was the fourth most important venue for GTQ trade fairs. Around 6,000 companies occupied 380,000 m² of stand space. 445,000 visitors came to see the events.



Guangzhou International Conference and Exhibition Centre Pazhou, China The United Arab Emirates appears to have recovered from its economic crisis. More than 5,500 companies attended 17 trade fairs, occupying 88,000 m² of stand space. Over 300,000 visitors were at the events. In 2012, 24 members of AUMA and FAMA intend to hold 275 trade fairs in every part of the world, more trade fairs than ever before.

For German trade fair organisers the most important markets are China (80 trade fairs) and Russia (42). India will host 29 GTQ trade fairs. 14 trade fairs are to





take place in Turkey, 13 each in the United Arab Emirates and the USA, as well as 10 in Brazil. For the first time more GTQ trade fairs will be taking place in Moscow (37) than in Shanghai (36), Other important cities include Mumbai and Beijing (16 each), Dubai (12) and Istanbul (11).

Every autumn AUMA publishes the information brochure entitled "German Trade Fair Quality Abroad" in German and English which contains trade fair dates and organisers' contact details. AUMA's internet database provides a special list of trade fairs bearing the GTQ seal of approval. Full information on German organisers' involvement abroad and on GTQ trade fairs is directly available from the website at \triangleright www.gtq.de.

Germany at World Expositions

EXPO 2012 From 12 May to 12 August 2012 the South Korean coastal town of Yeosu hosted a "minor" expo. This was agreed upon by the Bureau International des Expositions in Paris on 26 November 2007.

More than 100 nations, international organisations and companies were invited to submit their ideas on "The Living Ocean and Coast" in the shape of exhibits, presentations and numerous events. Eight million visitors are expected to attend. Occupying an area of 1,700 m², the German Pavilion bears the name "Seavolution", with the logo resembling a nautilus. The name alludes to the expo's slogan and to the technical innovations Germany is exhibiting in Yeosu. The pavilion is divided into three sections under the following headings: "Coast", "Living Environment" and "Treasure Chamber". A discovery tour beckons and by operating interactive elements visitors can influence events. The tour portrays aspects of deep sea fishing, the dangers of overfishing, waste at sea and climate change with its consequences for the world's oceans. The high point is an expedition inside a deep sea submersible. Hamburg Messe and Congress GmbH is responsible for organising the German Pavilion. They had previously gained experience with world fairs in Zaragoza/ Spain in 2008. At the Shanghai EXPO Hamburg was responsible for the Hamburg House which formed part of a presentation of cities.



German Pavilion at EXPO 2012 (Draft)



EXPO 2015 From May 1 to 31 October 2015, taking as its slogan "Feeding the Planet – Energy for Life", a major world fair will take place in the major Italian city of Milan, who were announced as organisers in 2008. 120 to 130 countries as well as international organisations and companies are expected to be there. Around 20 million visitors are expected to attend. The participating countries will show how they are contributing to feeding the planet in sustainable ways.

For the first time Messe Frankfurt will be responsible for organising the German Pavilion.

Marketing, media and events



Marketing, media and events

Marketing German trade fairs

AUMA supports German trade fair organisers' marketing efforts abroad with print media, advertising and posters as well as with a promotional film entitled "Trade fairs made in Germany". Furthermore, AUMA supplies information on trade fairs abroad held by German organisers under the GTQ heading (German Trade Fair Quality Abroad).

Promotional film - "Trade Fairs Made in Germany" This film is a concise and emotive portrayal of the strengths of German trade fairs as a marketing instrument, of their specific qualities and what they have to offer. Germany is shown as an international trade fair venue whose hallmarks are innovation and professionalism.

The DVD menu offers a listening choice of nine languages: Chinese, English, French, German, Japanese, Portuguese (in two versions, for Brazil and Europe), Russian and Spanish.

Overview of trade fair information The brochure entitled "Trade Fairs Made in Germany" contains dates, categories of products and services, and the statistics of international trade fairs in Germany and was specifically compiled with a view to distribution abroad.

They are available at German embassies, German chambers of commerce abroad and local offices representing German trade fairs abroad. AUMA publishes its own versions in German, English, Spanish and French. In collaboration with foreign chambers of commerce and other partners, additional versions are now available in Arabic, Chinese, Greek, Korean, Portuguese (for Brazil) and in Russian. The Russian version of the brochure is now also available as an e-paper catalogue which can be scrolled and searched.





GNTB Poster for the Business Travel theme year 2012

Greater cooperation with the GNTB Cooperation has intensified with the German National Tourist Board (GNTB) in preparation for its Business Travel theme year in 2012. AUMA will support the German National Tourist Board's efforts to realise the Business Travel theme year and will take this opportunity to draw even greater international attention to the quality of German trade fairs and their organisers as well as to Germany's outstanding trade fair infrastructure. Since 2011 the GNTB has been publicising information on international trade fairs under the Business Travel section of its new website. AUMA and its members, in particular those organisers with larger exhibition grounds, provide information for this section on Germany as a trade fair venue as well as on individual sites. An interactive map of Germany links to individual trade fair locations.

In addition, the two organisations have cooperated on putting together an advertising and poster motif for the Business Travel theme year. It forms part of the GNTB's promotional campaign and in 2012 it will also be on display on all the Federal Ministry's German pavilions as a promotional element of the trade fair programme abroad. Other joint public relations and research activities are also being planned.



MESSEN

AUMA Die deutsche Messewirtschaf

Annual meeting of the trade fair industry in Berlin

On 24 May 2011, at the House of World Cultures in Berlin, a meeting took place of more than 400 participants, including representatives of associations, exhibiting companies, politics and the media, organisers, trade fair companies from all parts of Germany and service providers.

Opening the trade fair industry's annual meeting, AUMA Chairman Hans-Joachim Boekstegers said: "The House of World Cultures is the perfect setting for a meeting of our industry, which is international in every respect."

Promoting participation in trade fairs

AUMA has continued its image campaign in order to make companies focus more on trade fairs as a marketing instrument.

Launched in 2007, the image campaign was augmented with new elements in 2011. In particular it targets small and medium-sized companies, with the aim of motivating them to take part in trade fairs.

It also addresses advertising and communications agencies and uses keywords such as "success", "contacts", "communications", "turnover" and "impetus" in association with trade fairs as marketing instruments. The motifs employ neither photos nor other images, instead they attract the audience's attention solely by using phonetic spelling.





AUMA Chairman Hans-Joachim Boekstegers (right) welcomes UFI President Eric Everard.

Boekstegers extended a special welcome to Eric Everard, President of the Global Association of the Exhibition Industry (UFI). However, there was more to be celebrated than just the industry's economic recovery. 2011 marked the tenth anniversary of AUMA in Berlin. For many guests the evening took on a sporting character. 32 teams contested the trade fair industry's table football tournament. The winners were Dr. Norbert Stoeck of Roland Berger Strategy Consultants and Jochen Witt of jwc GmbH.

Participation in international congresses

UFI Congress in Valencia From 9 to 12 November 2011 the 78th Congress of the Global Association of the Exhibition Industry (UFI) took place in Valencia. More than 400 exhibition professionals from 52 countries took part in this annual event.

Numerous meetings of committees took place, including those of the regional chapters and the Associations' Committee, whose deputy chairman is Dr. Peter Neven, the managing director of AUMA. During a presentation at the meeting of the Associations' Committee, Dr. Neven, representing AUMA, and Harald Kötter, as the managing director of FKM, were able to introduce their respective organisations.

UFI represents more than 574 member organisations in 84 countries around the world. Close to 900 international trade fairs are held under the UFI label. In 2011, UFI registered more than 30 new members, including NürnbergMesse and IDFA – Pool of German Trade Fair Organisations and Exhibition Cities.

Asian MICE Forum in Taipeh
From 3 to 5 November 2011 the Asian MICE Forum took place in Taipeh. The organisers of this congress for the Meetings, Incentives Conferences & Events industry were the Taiwan External Trade Development Council (TAITRA) and Taiwan's Ministry of Economics. 300 delegates took part, the majority of them from Taiwan. The panel members and speakers were experts from Asia, Europe and the USA, including AUMA's managing director Dr. Peter Neven and Messe Frankfurt's head of communications Kai Hattendorf.



Exhibition industry congress CEFCO on Hainan Island in China Taking as its slogan "Change a line, change a life", from 12 to 14 January 2012 the China Expo Forum for International Cooperation took place on Hainan Island in southern China. Participants included representatives of China's trade fair industry, associations from Germany, the USA and the UK, as well as organisers who operate in China. The congress was co-organised by the China Council for the Promotion of International Trade (CCPIT), the Global Association of the Exhibition Industry (UFI) and the US exhibition associations IAEE and SISO. AUMA supports the CEFCO events and was represented by Marco Spinger, head of Global Markets Division. Indian trade fair organisers met in New Delhi • On 24 and 25 March 2011 the Indian Exhibition Industry Association (IEIA) held a conference in New Delhi. Together with foreign experts, in particular from Germany, the association discussed "Making India a World Class Exhibition Destination", which was also the conference slogan. Four experts from Germany – Gerald Böse, CEO of Koelnmesse, Andreas Hitzler of MEPLAN, München, Carla Juegel, trade fair coach and consultant, as well as Dr. Peter Neven, managing director of AUMA – held papers whose aim in particular was to illustrate Germany's successful business model, that of publicly owned trade fair companies and of strong involvement of the exhibiting industry in the development of exhibitions.



Indra Mohan, President of IEIA (top center), opens the congress according to Indian tradition. Also present (left to right): Paul Woodward, UFI Managing Director, Eric Everard, UFI President, Subodh Kant Sahai, Union Minister of Tourism, Ashwani Pande, CEO Koelnmesse India.

AUMA media for international customers

Information on the trade fair industry and AUMA

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

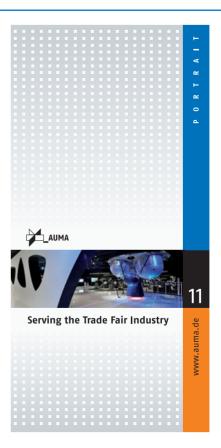
AUMA Statement – The German Trade Fair Industry Facts, functions, outlook. Forth revised edition, July 2011.

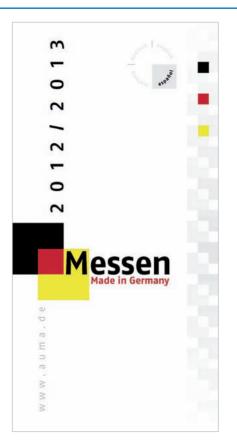
Portrait: AUMA – Serving the trade fair industry

Information on AUMA's responsibilities, its organisation and members. Published in 2011 in German and English.

Promotional film – "Trade fairs made in Germany"

This promotional film highlights and provides fascinating insights 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 long and offers a choice of languages: Chinese, English, French, German, Japanese, Portuguese, Russian and Spanish.





Information on trade fairs

AUMA Online

Information available from AUMA on the internet: a global trade fair database in four languages, information on planning trade fairs, supporting programmes, industry statistics, vocational training and advanced training, research, and the German Trade Fair Library. Available at >> www.auma.de.

The AUMA Trade Fair Guide for Germany

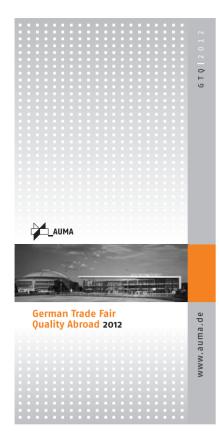
470 profiles of German trade fairs by category: international / national, specialised and regional trade fairs. Trade fair register by industry, dates and venue. Published annually in autumn in German.

Trade Fairs Made in Germany, 2012/2013

International trade fairs in Germany, with dates, main products, statistics and a subject index. Published annually in spring in Arabic, Chinese, German, English, French, Greek, Korean, Persian, Portuguese, Russian and Spanish

German Trade Fair Quality Abroad

A list of trade fairs abroad held by German organisers. The names, dates and organisers of approximately 260 trade fairs around the world. Published annually in November in German and English.



Information on preparing for trade fairs

Messe fit. Ready for Trade Fairs

This CD-ROM presents all aspects of taking part in trade fairs and offers exhibitors important tips on how to plan successful participation in trade fairs. The third, fully revised version contains the Trade Fair Benefit Check and instructional videos on how to use the software. Version 3.4 in German and English, released in January 2012.

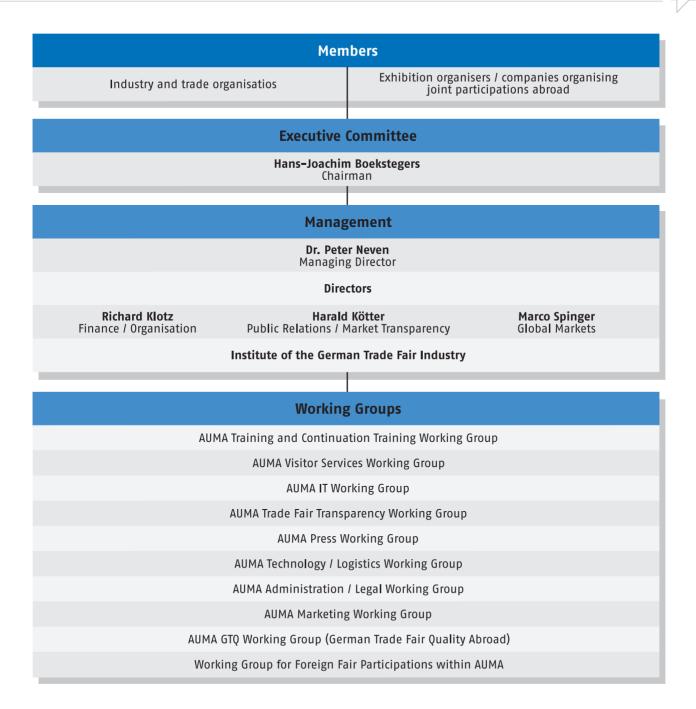
Trade Fair Benefit Check

Software for exhibitors, for planning, calculating and evaluating trade fair participation. Available free of charge in four languages: English, French, German and Spanish. Contains instructional videos on how to use the software. Version 2.3, released in 2010. Available only on the internet at >> www.auma.de

Other AUMA publications are available at • www.auma.de / English / Downloads & Publications

Organisation





Members

Industry and trade organisatios

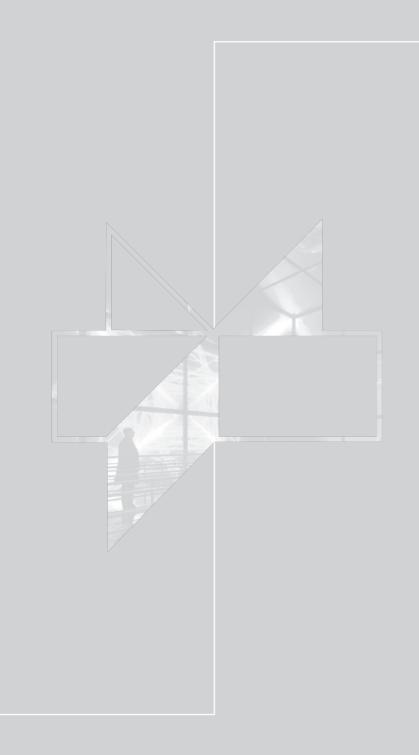
Exhibition organisers / companies organising joint participations abroad

- Association of Direct Business Communication (FAMAB), Rheda Wiedenbrueck
- Association of German Chambers of Industry and Commerce (DIHK), Berlin
- Association of German Cutlery and Houseware (IVSH), Solingen
- Association of German Dental Manufacturers (VDDI), Cologne
- Association of German Tool Manufacturers (FWI), Remscheid Association of International Motor Vehicle Manufacturers (VDIK).
- Bad Homburg
- Association of the Steel and Metal Processing Industry (WSM), Duesseldorf Caravaning Informations GmbH (CIG). Frankfurt/Main
- Central Committee for German Agriculture (ZDL), Berlin
- Confederation of the German Textile and Fashion Industry. Berlin
- Didacta Verband Association of the German Education Industry, Darmstadt
- European Association of Event Centres (EVVC), Bad Homburg
- Federal Association for Information Technology, Telecommunications and New Media (BITKOM), Berlin
- Federal Industrial Association of Germany House, Energy and Environmental Technology (BDH), Cologne
- Federation of German Food and Drink Industries (BVE). Berlin
- Federation of German Industries (BDI), Berlin
- Federation of German Wholesale, Foreign Trade and Services (BGA), Berlin
- General Association of the German Locks and Fitting Industry (FVSB), Velbert
- German Aerospace Industries Association (BDLI), Berlin
- German Airport Technology & Equipment e.V. (GATE), Taunusstein
- German Association for Water, Wastewater and Waste (DWA), Hennef
- German Boat and Shipbuilders Association (DBSV), Hamburg
- German Chemical Industry Association (VCI), Berlin
- German Confederation of Skilled Crafts (ZDH), Berlin
- German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW), Frankfurt/Main
- German Electrical and Elektronic Manufacturers Association (ZVEI), Frankfurt/Main
- German Engineering Federation (VDMA), Frankfurt/Main
- German Hotels and Restaurants Association (DEHOGA), Berlin
- German Industry Association for Coin-operated Amusement
- and Vending Machines (VDAI), Berlin
- German Industry Association for Consumer Optics, Medical Technology, Optical Technology, Analytical and Laboratory Technology (SPECTARIS), Berlin
- German Machine Tool Builders' Association (VDW), Frankfurt/Main
- German Retail Federation (HDE), Berlin
- German Shipbuilding and Ocean Industries Association (VSM), Hamburg
- German Sweets e.V., Bonn
- German Winegrowers' Association (DVW), Bonn
- IELA International Exhibition Logistics Associates, German Chapter, Kelsterbach
- National Association of German Commercial Agencies and Distribution (CDH), Berlin
- National Confederation of German Woodworking
- and Furtniture Industries (HDH), Bad Honnef
- Steel Information Centre, Duesseldorf

- asfc atelier scherer fair consulting GmbH, Fuerth
- Balland Messe-Service GmbH, Cologne
- DEGA-EXPOTEAM GmbH & Co. Ausstellungs KG, Obersoechering Deutsche Messe AG. Hanover
- expotec GmbH Trade Fairs and Conferences Berlin
- FAMA Special Association for Fairs and Exhibitions. Obertraubling
- Frankfurt Book Fair, Frankfurt/Main
- GDG Association of Major German Exhibition Organisers, Cologne
- GHM Gesellschaft fuer Handwerksmessen mbH, Munich
- Hamburg Messe und Congress GmbH. Hamburg
- Hannover Fairs International GmbH. Hanover
- IDFA Pool of German Trade Fair Organisations
- and Exhibition Cities, Essen
- IFWexpo Heidelberg GmbH, Heidelberg
- IGEDO Company GmbH & Co. KG, Duesseldorf
- IMAG International Exhibition and Fair Service GmbH, Munich INTER EXPO CONSULT GmbH. Berlin
- Karlsruher Messe- und Kongress GmbH. Karlsruhe
- Koelnmesse 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 Westfalenhallen Dortmund GmbH, Dortmund
- NuernbergMesse GmbH, Nuremberg
- Reed Exhibitions Deutschland GmbH, Duesseldorf
- Saarmesse GmbH, Saarbruecken
 - Spielwarenmesse eG International Toy Fair, Nuremberg
- the fair agency gmbH, Munich
- WFB Bremen Economic Development Corp., Bremen

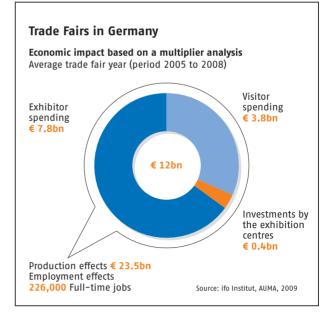
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Key indicators of the exhibition industry



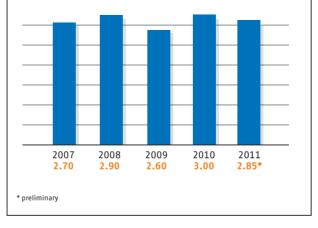
The exhibition industry is one of the leading services sectors of the German economy. It also ranks highly on the international stage. In terms of highest turnover. four of the world's top ten exhibition companies are based in Germany.

Turnover of Exhibition Companies worldwide (more than Euro 100 million)					
(€ million)					
	2011	2010	2009		
Reed Exhibitions (GB)	813,0	811,0	715,0		
GL events (F)	782,7	727,2	581,4		
United Business Media (GB)	475,3	360,0	324,5		
Messe Frankfurt (D)	467,5	448,3	423,8		
Messe Düsseldorf (D)	372,7	335,0	255,5		
VIPARIS (F)	299,9	299,1	285,3		
Deutsche Messe (D)	292,8	212,0	222,0		
Fiera Milano (I)	278,0	248,4	297,1		
MCH Group (CH)	266,4	294,4	190,9		
Koelnmesse (D)	235,3	237,0	229,0		
Messe München (D)	222,5	301,8	215,2		
Comexposium (F)	201,2	208,0	195,7		
Tokyo Big Sight (JP)	194,7	184,5	157,5		
Messe Berlin (D)	182,1	217,4	157,5		
ITE Group (GB)	180,5	132,2	128,3		
Nürnberg Messe (D)	165,0	204,8	132,7		
Coex (ROK)	160,0	156,5	139,6		
Informa (GB)	158,3	124,7	100,8		
dmg :: events (GB)	153,2	128,7	192,4		
Jaarbeurs Utrecht (NL)	152,9	155,5	152,0		
НКТДС (НК)	141,6	138,4	99,6		
Nielsen Expositions (USA)	138,2	125,5	125,6		
Amsterdam RAI (NL)	133,9	125,0	108,2		
NEC Birmingham (GB)	n/a	123,2	139,0		
IFEMA Madrid (E)	n/a	116,7	116,5		
Fira Barcelona (E)	n/a	101,6	116,1		
BolognaFiere (I)	101,4	109,7	105,0		



Trade Fairs in Germany

Turnover of Exhibition Companies (€ billion) Companies organising international and regional events (Turnover incl. trade fairs abroad, congresses and services)



International / national trade fairs

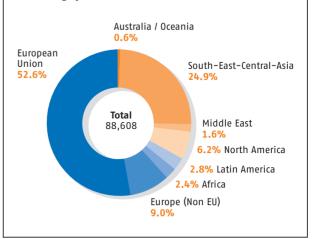
Germany is the world's number one venue for organising international trade fairs. Nearly two-thirds of the world's leading trade fairs for specific sectors are held in Germany.

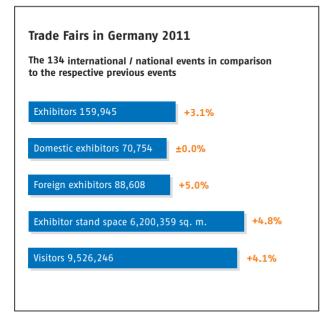
Compared to 2010, the key figures of the 2011 exhibitions increased substantially. Following a slow recovery in 2010, German trade fairs found back to their old form.

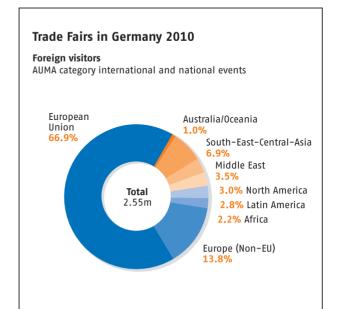
Trade Fairs in Germany 2011

Foreign exhibitors

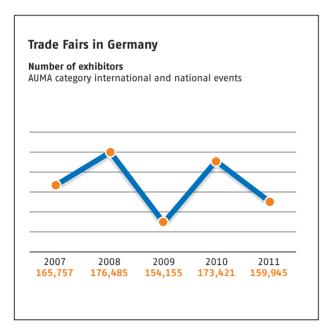
AUMA category international and national events





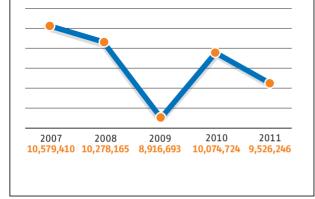






Trade Fairs in Germany

Number of visitors AUMA category international and national events



At 22 exhibition centres in Germany the hall space available for holding international trade fairs and exhibitions totals nearly 2,737,425 square metres.

At ten exhibition centres hall space exceeds 100,000 square metres. At five others hall space exceeds 50,000 square metres.

Over the coming years no significant growth in hall space is expected.

Trade Fairs in Germany 2012

Exhibition capacities* gross in sq. m.

1		0
Location	Halls	Outdoor
Hanover	470 167	58 070
Frankfurt/M.	355 586	96 078
Cologne	284 000	100 000
Duesseldorf	262 704	43 000
Munich (Exh. Center)	180 000	360 000
Berlin	160 000	100 000
Nuremberg	160 000	50 000
Leipzig	111 300	70 000
Essen	110 000	20 000
Stuttgart	105 200	40 000
Hamburg	86 465	10 000
Friedrichshafen	86 200	15 160
Bad Salzuflen	65 195	4 000
Dortmund	59 535	
Karlsruhe (New Exh. Center)	52 000	62 000
Augsburg	48 000	10 000
Bremen	39 000	100 000
Munich (M, O, C,)	29 113	
Saarbrücken	24 600	27 400
Freiburg	21 500	80 000
Offenburg	22 570	37 877
Offenbach	18 000	400

Status: 1.1.2012

* Locations with at least one event

according to AUMA category international and national events

Regional events

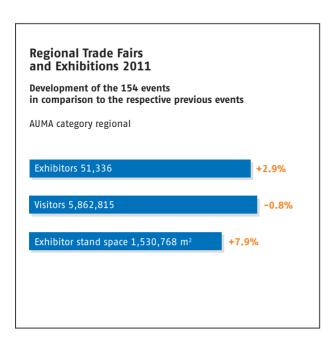
International trade fairs are augmented by a large number of regional trade fairs and consumer exhibitions. Annually around 50,000 exhibitors and 6 million visitors attend these events.

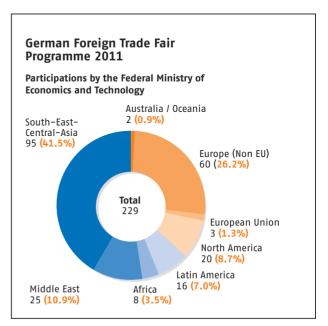
Beginning from 2010 small events for specialized industries are observed seperately. For more information about this type of events see \triangleright p. 13.

Foreign trade fair programme

In addition to taking part in events at home German industry also makes widespread use of trade fairs abroad to promote export trade.

Particularly for small and medium-sized enterprises the foreign trade fair programme of the Federal Ministry of Economics and Technology represents an important marketing instrument.

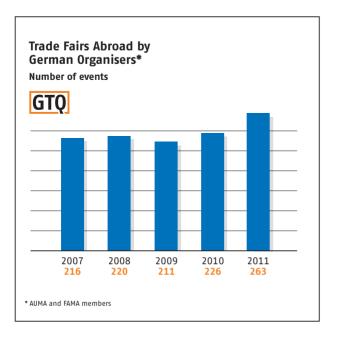




Trade fairs abroad held by German organisers

Annually, German organisers belonging to AUMA and FAMA hold approximately 260 trade fairs in important growth regions abroad, in particular in Asia, North and South America and Eastern Europe.

For the most part the tried and tested concepts of leading trade fairs in Germany are applied to selected markets abroad.



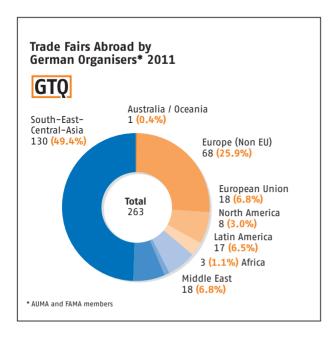


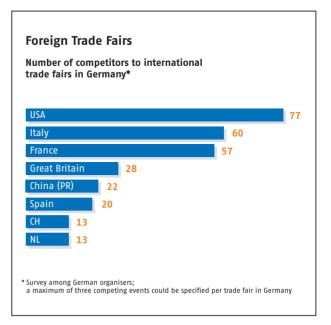


More than 50% of the exhibitors organised abroad by German companies took place in South-East-Central-Asia. But also Europe, especially Russia, plays a substantial role here.

German trade fairs in the global competition

The leading trade fairs competing with German events are still in the USA and Western Europe. On average they are still considerably smaller than international trade fairs in Germany.





Exhibition Centres Worldwide 2012

Exhibition capacities

gross in sq. m.

Location	Hall
Hanover Exhibition grounds	470 167
Frankfurt/Main Exhibition grounds	355 678
Fiera Milano	345 000
China Import & Export Fair Complex Guangzhou	340 000
Cologne Exhibition grounds	284 000
Duesseldorf Exhibition grounds	262 704
Paris-Nord Villepinte	242 582
McCormick Place Chicago	241 549
Fira Barcelona Gran Vía	240 000
Feria Valencia	230 837
Paris Porte de Versailles	227 380
Crocus Expo IEC Moskau	226 399
The NEC Birmingham	201 634
BolognaFiere	200 000
IFEMA Feria de Madrid, Parque Ferial Juan Carlos I	200 000
SNIEC Shanghai	200 000
Orange County Convention Center Orlando	190 875
Las Vegas Convention Center	184 456
Munich (New Exhibition Center)	180 000
Messe Basel	162 000
Berlin Exhibition grounds	160 000
Nuremberg Exhibition grounds	160 000
Wuhan International Expo Center	150 000
IMPACT Muang Thong Thani Bangkok	140 000
VVC Moskau	132 720
Georgia World Congress Center Atlanta	130 112

Status: 1.1.2012

Four of the world's six largest exhibition centres are in Germany. Worldwide there are 52 venues where hall space exceeds 100,000 square metres. 17 of these are not in Europe. Of this number eight are in China. Of the 35 European exhibition centres occupying more than 100,000 square metres, 31 are in Western Europe, four are in Central and Eastern Europe.

Location	Halle
Veronafiere	122 000
Reliant Park Houston	120 402
Fiera del Levante Bari	120 000
Yiwu International ExpoCenter	120 000
BVV Velethry Brno	119 281
Fiera Roma	118 910
Fira Barcelona Montjuic	115 211
Brussels Expo	114 445
Eurexpo Lyon	114 275
Leipzig Exhibition grounds	111 300
Essen Exhibition grounds	110 000
Nanjing International Expo Center	110 000
Rimini Fiera	109 000
KINTEX Goyang / Seoul	108 049
BEC Bilbao Exhibition Centre	108 000
Poznan International Fair	107 654
New China International Exhibition Center Beijing	106 800
Stuttgart Exhibition grounds	105 200
Shenyang International Exhibition Center	105 200
Shenzhen Convention & Exhibition Center	105 000
Geneva Palexpo	102 470
Ernest N. Morial Convention Center New Orleans	102 230
ExCeL London	100 000
Fiere di Parma	100 000
Singapore Expo	100 000
Jaarbeurs Utrecht	100 000

These and more charts on key figures are available at > www.auma.de, also for download.

Pictures

- P. 12: Messe Duesseldorf / Constanze Tillmann
- P. 13: Messe Friedrichshafen / EUROBIKE
- P. 14: Messe Frankfurt Exhibition GmbH / Pietro Sutera
- P. 15: Deutsche Messe AG Hanover
- P. 16: Messe Frankfurt Exhibition GmbH Peter Hirth / Frank
- P. 19: Messe Duesseldorf / Constanze Tillmann
- P. 24: NuernbergMesse GmbH / Thomas Geiger
- P. 25: Messe Offenbach ILM / Aristo Grunge
- P. 30: Spielwarenmesse eG / Alex Schelbert
- P. 33: HMC / Romanus Fuhrmann
- P. 43: HMC / Michael Zapf (Z), facts and fiction GmbH (f+f)
- P. 49: AUMA_MesseTreff 2011 / Giraf Picture Berlin

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