



German Trade Fair Industry | **Review**

2015

Publisher:

AUMA

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Trade Fair Industry
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Layout / Production:
CCL, Berlin

Photos:
Cover photo: EuroShop,
Messe Düsseldorf / Tillmann

We would like to thank the exhibition companies
for providing us with pictures of trade fairs
and exhibition centers.
Further photos: page 72

Printing:
Königsdruck – Printmedien
und digitale Dienste GmbH, Berlin

Printed in the Federal Republic
of Germany 2016

ISSN: 1430-8983



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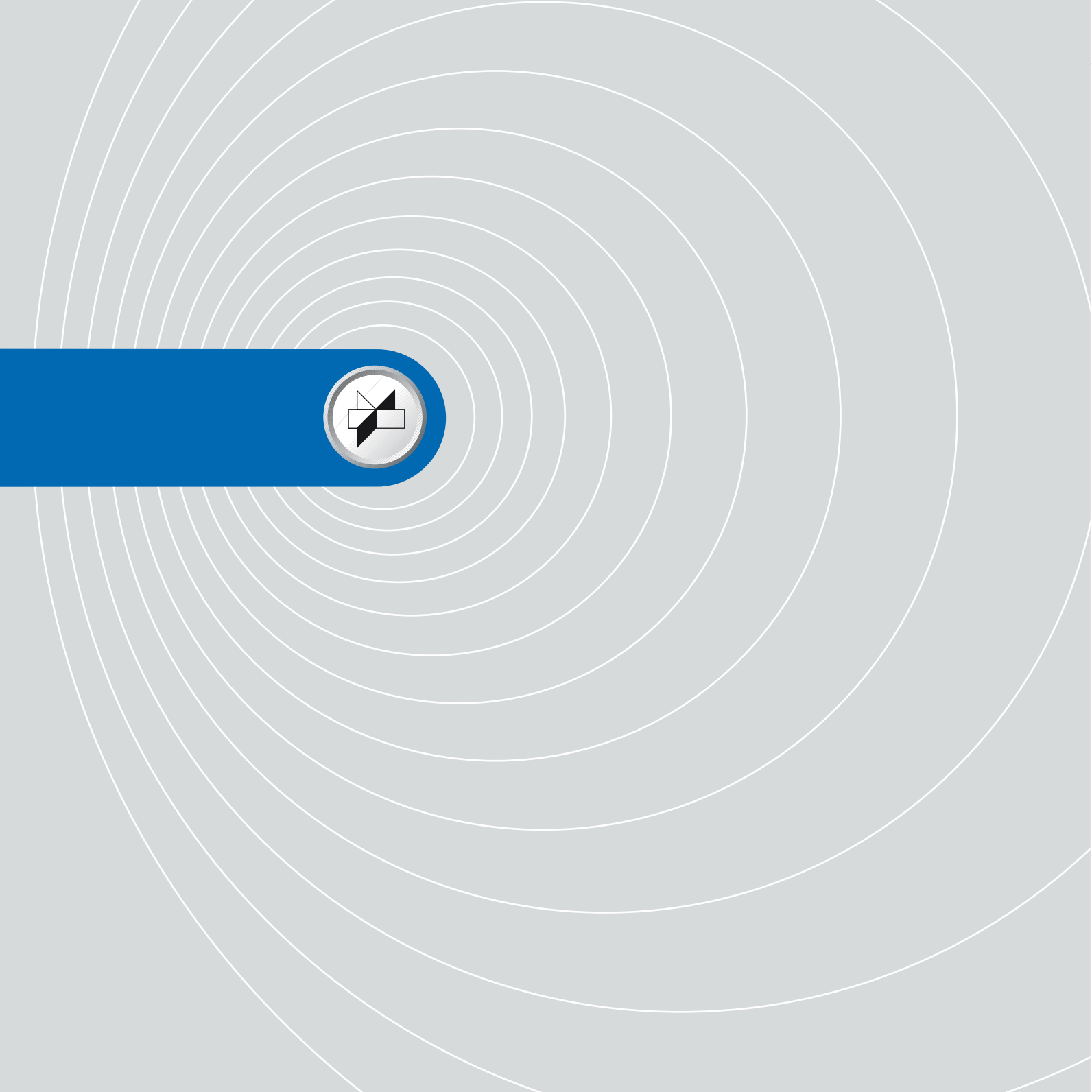
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Regarding the choice of photos:

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





■ Outlook

Walter Mennekes, AUMA Chairman

It is often said today that trade fairs have transformed from product shows to communication platforms. It is true that the importance of presenting a full range of products or services is waning. Yet products are not about to disappear, and nor should they – they are the heart of every exhibition, as the link between a face-to-face discussion and the sight of the real product is precisely what gives an exhibition its strength. But of course, trade fairs are not about yesterday's products and sometimes only incidentally about today's – increasingly, trade fairs are about the products, procedures and services of tomorrow.

One might object that nowadays, some global firsts, in consumer electronics especially, are no longer unveiled at exhibitions but at expensive company events. Yet this is by no means standard, and relates only to a few per cent of industrial innovations. Conversely, it was never the case in the past either that every new product was exhibited at a trade show. This function of a fair remains relevant, however, and especially so for small and medium-sized firms. And many large firms in the B2B sector use fairs as a shop window to present their innovations to a specialist public.



Key goals of an exhibition: presenting and evaluating innovation ■

AUMA surveys have shown that the significance of innovation is also reflected in the aims of today's exhibitors and visitors. The relevance of many aims naturally varies according to whether you look at them from the seller's or the buyer's point of view. There is one point, however, on which both sides agree almost unanimously: innovation is high up the list. For visitors, the most important aim is to find out about new products, while the presentation of new products and services is one of the four main aims of exhibitors,

and almost tops the list. This makes it clear that day-to-day business does play an important role at fairs, such as in the form of preliminary discussions or actual contracts made. But in addition to that, they are always about how the future of the industry looks, new ways in which newly developed products can be used, whether and when they will take off, and about which of today's research results will lead to new products and procedures in a few years' time. Exhibition

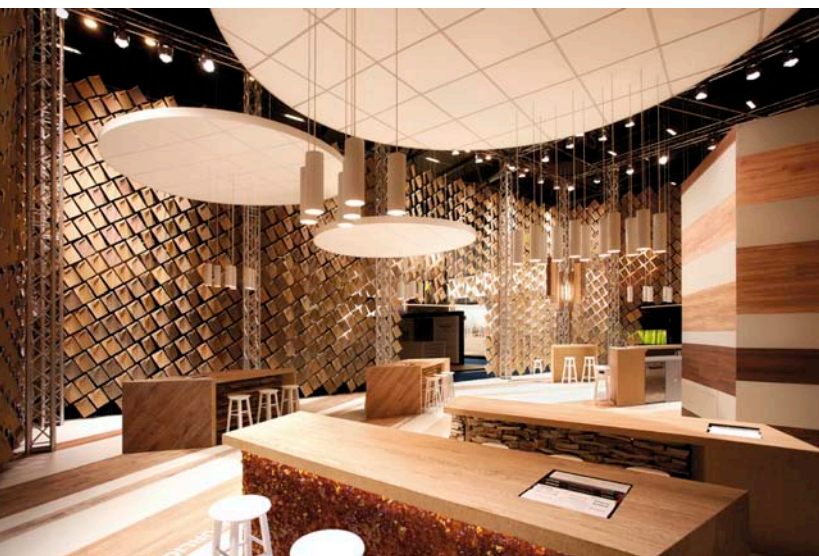
organisers support this in numerous ways. They award prizes for innovative techniques and innovative designs, often in cooperation with industry associations and the specialist media. They make space available for

special displays about the future of the industry. In Germany, young innovative companies are also supported by a special promotional programme from the Federal Ministry of Economic Affairs; each year, 600 firms obtain support from this programme alone.

Presenting research results also plays a key role in exhibitions. Universities and research institutions especially play a vital role here. Every year in Germany there are around 1,000 exhibition stands at which universities present the results of their research. Another 3,000 stands provide information about courses of study. To support this development, AUMA has agreed to intensify cooperation with the Messe-Arbeitskreis Wis-

senschaft, an organisation of universities and government ministries who organise participations with scientific or academic relevance.

Exhibition + Congress: an increasingly important combination ■ In addition, many trade fairs in Germany are accompanied by congresses at which future industry trends are debated. Congresses also facilitate knowledge transfer between developers and users, and between universities and businesses. Exhibitors too are increasingly keen to offer speaker events while presenting at shows, which act as a special draw to visitors. Unlike in the past, such talks go beyond mere uses and applications and are increasingly about mapping out general future perspectives for the industry, with the exhibitor acting as sponsor. This strong general focus on the future makes many German trade fairs attractive to attendees from all over the world. Up to 100,000 foreign exhibitors and 2.7 million foreign visitors do not come to German trade shows each year just to conduct routine business. Maintaining this attractiveness above and beyond day-to-day business and enhancing it vis-à-vis their competitors is without doubt one of the key future challenges for German exhibition organisers.

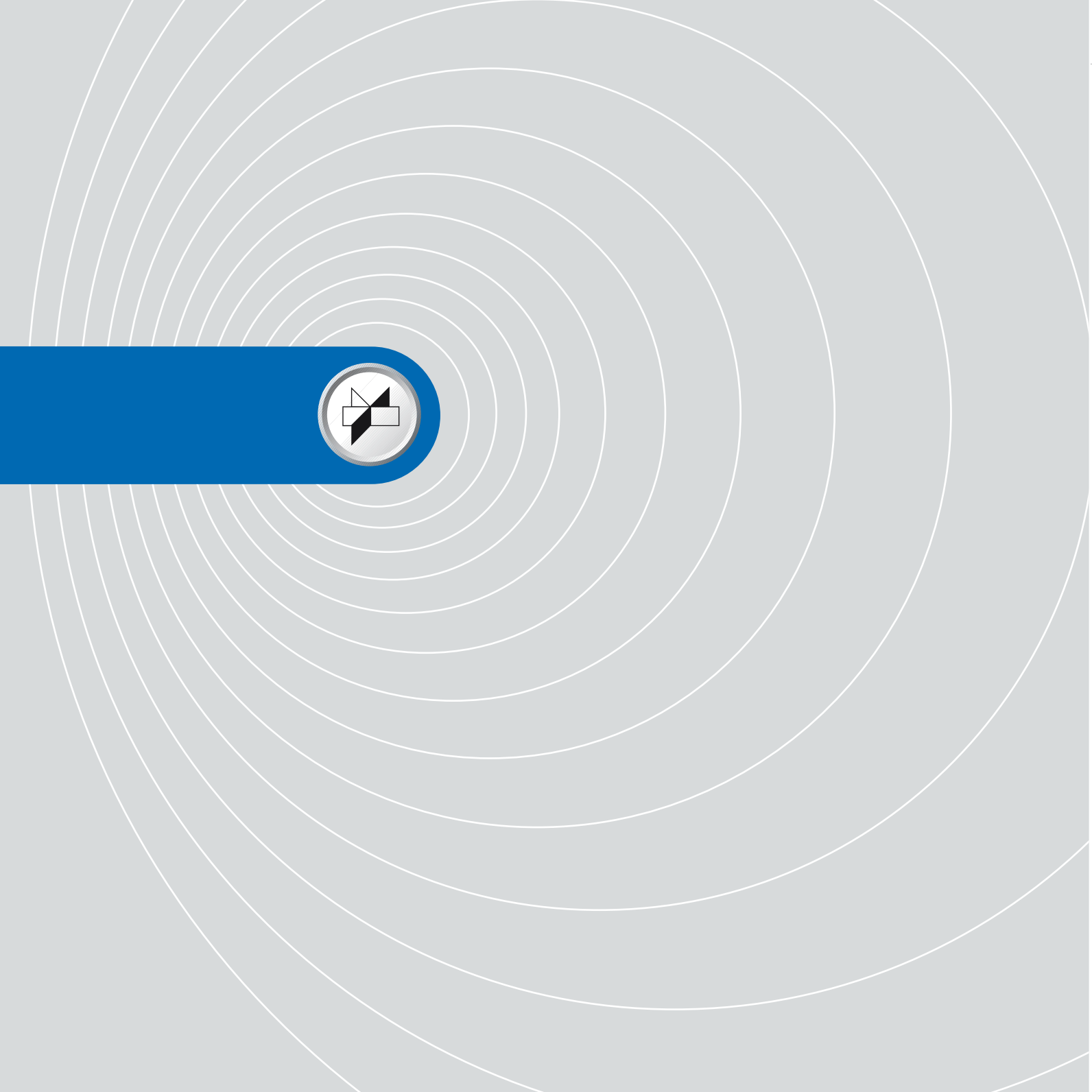


A handwritten signature in blue ink, reading "W. Mennekes".

Walter Mennekes
AUMA Chairman



Exhibitions in
Germany



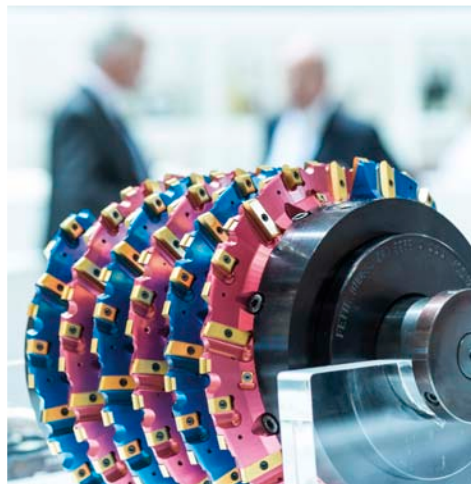


■ Exhibitions in Germany

Overview

Once again, German exhibitions have generally enhanced their position in businesses' marketing mix. With the country's economy also robust, fairs saw a further slight improvement on average.

The procurement of products and services has become a landscape of remarkable contradictions. On the one hand, placing routine orders is getting easier all the time, especially online, which is gaining in importance even in B2B. On the other, many products are growing ever more complex and thus harder for buyers to evaluate, be it in terms of quality, cost-effectiveness or sustainability. Hence there is a need for procurement methods that can be relied on to work well. Personal contact between buyer and seller plays a central role here, as an AUMA survey of decision makers clearly shows – and where better to form such contacts than at an exhibition where the product itself is also on show? It makes perfect sense, therefore, that the survey also shows trade fairs to be among the most important information channels for German decision makers. It's no surprise either that the numbers of trade visitors to international capital and consumer goods shows went up by quite a bit in 2015. This high level of popularity is

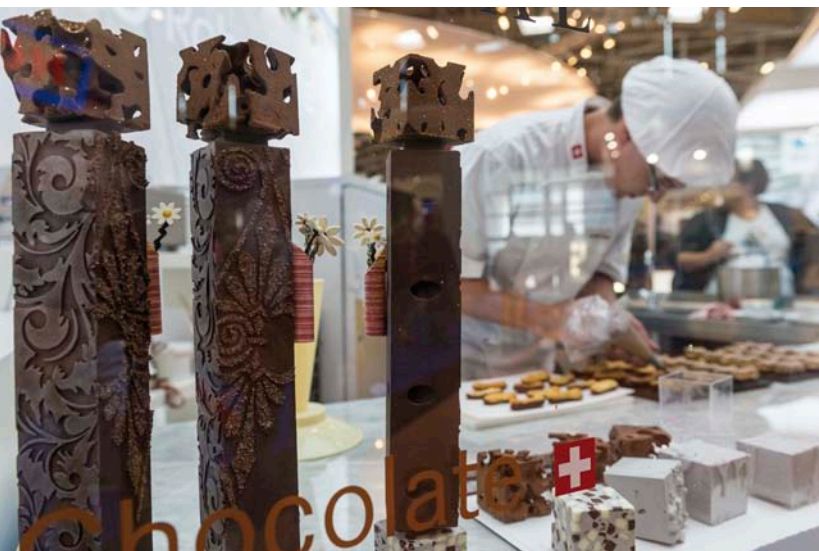


all the more remarkable for the fact that the time gaps between shows are quite large. Evidently, the permanent availability of digital media has not led automatically to their greater use in complex decisions.

And if online traders are now increasingly creating personal contact with customers by opening their own shops even for less complex products, that is no bad sign for the future of the fairs. What's more, the German economy was in a relatively good state in 2015 too, with GDP growth of 1.7%. Continued growth in export trade is also having ongoing positive effects on Germany's trade fairs, even though the growth rate is not the same as in previous years. The year 2015 also showed, however, that even central Europe is not immune to security issues that make extra caution necessary at big exhibitions especially. Despite this, no major effects were noted on the numbers of either exhibitors or visitors.

*AMB, Stuttgart
(Landesmesse
Stuttgart GmbH)*

Summary 2015 ■ On balance, the underlying conditions were generally positive and the 164 international and national exhibitions produced solid results that were clearly ahead of the previous year. Exhibitor numbers grew by an average of 2.0% over the equivalent previous



iba, Munich
(Gesellschaft für
Handwerks-
messen mbH)

events (2014: +1.5%). This growth was again driven exclusively by foreign exhibitors, participations by whom rose by 5.6%.

Exhibition space – which remains the key source of income for organisers – rose by 1.1%. The most noticeable thing, however, is the average 2.6% increase in visitor numbers. This is a strong sign not least because, while higher visitor numbers do not automatically mean more business for the exhibitors, they are a demonstration that the popularity of fairs as instruments of information and procurement is high and continuing to rise. This in turn strengthens the conviction of firms that their decision to take part in a fair was the right one.

Results by exhibition type ■ The 40 consumer goods shows for trade visitors produced substantially better results than in previous years. Rises of 3.6% in exhibitor numbers and 1.5% in stand space show there is still plenty of potential in this type of exhibition, something that has been doubted in some quarters. A 3.3% uptick in visitor numbers further emphasizes the fundamental popularity of such fairs in the commercial world. It is also becoming clear, however, that there is a broadening spectrum of trends, depending on the industry and competitive situation of the fairs in question.

Results for the 94 capital goods shows were positive but unexciting. A rise of 1.8% in visitors (2014: 0.8%) shows, however, renewed growth in the attraction of these events. Growth of 1.4% in exhibitor numbers (as against 2.1% the year before) came about due to a substantial increase in interest from foreign exhibitors (+7.0%), whereas event participations by German exhibitors saw an above-average decline (-3.7%). This was the result in many cases of mergers and takeovers, however.

Developments were very different amongst the 20 consumer goods exhibitions aimed at the general public. Substantial rises at some shows contrasted with considerable falls at others. Obviously the crucial thing here is how well the shows succeed in focusing on their target audience. On average, however, exhibitor numbers rose by 2.5% and visitor numbers by 2.8% over the equivalent previous events. Stand space alone fell, by 2.0%, which was largely due to smaller stands in the automotive sector.



In the relatively small category of services exhibitions, visitor numbers grew on average by 5.8%, due especially to strong growth in the digital marketing field. Growth in other key indicators was less marked. Exhibitor numbers rose by an average of 0.9%, stand space by 1.7%. There were a total of ten trade fairs in this category.

Overall results 2015 ■ AUMA recorded 308 events in Germany with a total of 224,000 exhibitors, 7.7 million m² of stand space and 15.4 million visitors. The 164 international and national fairs clocked up 9,771,954 visitors. A total of 172,878 exhibitors took part, of whom 101,891 were from abroad, occupying a total of 6,257,868 m² of stand space. AUMA has also surveyed the results of 144 fairs with a regional visitor catchment. These events recorded a total of 50,992 exhibitors, 1,462,241 m² of stand space and 5,628,993 visitors.

In 2015, revenues at German exhibition organisers were almost equal to the previous year despite a cyclical drop in the number of fairs put on. Preliminary results indicate total income of around € 3.4 billion, as opposed to € 3.45 billion in 2014. Although 2015 did not see any striking rise from the holding of exhibitions abroad, the significance of the service sector – from catering to exhibition stand construction – is growing steadily. In addition, a number of organisers have been increasing their activities in the digital sector with a view to enhancing future revenues from this source.

Several venues are also planning substantial investments – in the hundreds of millions, in some cases – in their facilities. This is partly to keep them up to date, since some exhibition halls are 30 or 40 years old and in need of full renovation. The purpose is also to maintain a qualitative lead over the many new venues being built abroad, especially in East Asia. A total of some €900 million is set to be invested by 2019.



*CeBIT, Hanover
(Deutsche Messe
AG)*

Frankfurter
Buchmesse
(Frankfurter
Buchmesse
GmbH)



Forecast 2016 ■ Results from the first quarter of 2016 show that the positive underlying trend from 2015 is continuing. For 2016 as a whole, AUMA expects the 185 planned exhibitions to produce growth on a similar scale to the previous year, in other words around 1-2% more exhibitors and visitors compared to the equivalent previous events. This forecast is largely consistent with the result of an AUMA survey of exhibition organisers carried out as part of the Cologne Institute for Economic Research's survey of industry associations, in which AUMA was involved.

According to the survey, exhibition organisers expect total domestic and foreign revenues, adjusted for cyclical fluctuations in exhibition programmes, to be somewhat higher than in 2015. Capital expenditure at exhibition firms is also expected to go up slightly this year, as will employee numbers. Most organisers also feel that the general mood is more positive than at the start of 2015.

AUMA_MesseTrend 2016

In 2016 and 2017, exhibitor firms in Germany want to invest more money in their presence at fairs in the B2B sector. The average firm wants to spend a total of € 326,000 on participations over the two-year period, 4.6% more than in 2014/15. This was the result of a survey of a representative sample of 500 firms conducted for AUMA by TNS Emnid in November 2015.

Such a rise has been exceeded only twice in the last ten years. Around 27% of exhibitors want to spend more in 2016-17, while only 14% want to spend less. Just under 60% plan to keep spending at the same level. The predominance of firms intending to spend more is higher amongst manufacturers: 31% of manufacturers are planning higher spending, while only 11% expect to cut back. Amongst trading and services companies, the proportions planning increases and cuts are roughly equal.

Some increases in exhibition budgets must inevitably go to cover price rises. Irrespective of that, however, the survey shows that exhibiting at trade fairs remains a highly popular marketing instrument for German business: in the long run, companies only invest more money if the utility can be seen. Other results underline this assessment. Exhibitor firms currently spend around 44% of their B2B marketing budgets on attending exhibitions. This proportion has remained steady for a number of years, despite the spectrum of marketing instruments, such as online media becoming larger and larger. This is consistent with the fact that 84% of exhibitors surveyed saw participation at trade fairs as an important or very important part of their B2B communications. That re-



sult is not self-evident, as most exhibitor firms also employ a wide range of other instruments – yet these are evidently considered to be less important. Personal contact, it appears, counts for more than many other things.

Thus, although 90% of companies surveyed saw their own websites as important or very important instruments of basic communication, even the sales team (76% of respondents) scored well below exhibition attendance while a mere 40% regarded ads in the trade press and promotional events as important. About two thirds of exhibitor firms plan to attend the same number of shows in Germany in 2016-17 as in the previous two-year period. Of the remainder, 19% want to attend more shows, 16% fewer. For the first time in years, the number of companies planning to exhibit at a larger number of German exhibitions thus exceeds the number of those planning to cut down. In recent years, the proportions of each have been roughly the same. Very many firms are keen to maintain continuity in relation to export markets: three quarters want to take part in the same number of foreign exhibitions as before. It is noticeable, however, that only 9% are planning to participate in more events whereas 17% are planning to cut back. This could be due in part to uncertainties over developments in some foreign markets, such as Brazil, India or Russia. Exhibiting in Germany is evidently becoming more attractive by comparison, not least because of the high level of foreign attendance at German events.

Strong growth in number of Asian exhibitors

2015 trends in exhibitor numbers at Germany's trade fairs were marked by large increases in the number of exhibitors from Asia. Around 10% more companies attended in comparison to the equivalent previous events from South, East and Central Asia alone. However, many EU countries are increasingly present in Germany's exhibition landscape too. The total number of foreign firms at the 164 international and national fairs thus rose by 5.6%; they now account for 58.9% of all exhibitors.

In addition to East Asia, remarkable rates of increase were also seen from the Middle East (+14%), Africa (+6%) and Latin America (+4%). EU countries also produced a 4% rise. The presence of exhibitors from Aust-

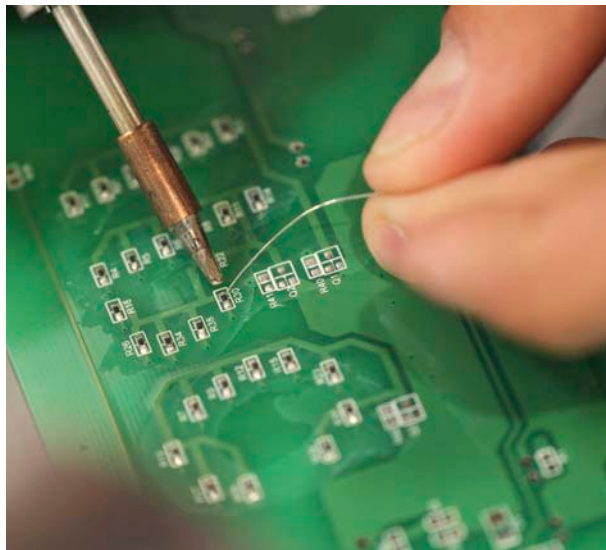


*IDS, Cologne
(Koelnmesse
GmbH)*

ralia and Oceania rose by more than 10%. Rates of increase for North America and non-EU European countries were much lower than the average, at 1% each.

Growth of 12% from the People's Republic of China contributed substantially to the growth from Asia overall. China nonetheless lost its 2014 top spot in terms of exhibitor numbers, which was reclaimed by Italy, not least due to over 1,000 Italian exhibitors at the Anuga food fair.

Substantial rises in exhibitor numbers also came from other Asian countries such as India (+12%) and Japan (+10%). By contrast, numbers from Thailand and Indonesia fell by 9% and 4% respectively.



*SMT, Nuremberg
(MESAGO Messe
Frankfurt GmbH)*

The biggest exhibitor from the Middle East is Israel, which posted an increase in exhibitor numbers of around 11%. Growth from the United Arab Emirates, the second-largest exhibitor from the region, was only 2%. The most noticeable increase, however, was the 60% rise from Iran, albeit from a low starting point of just 100 exhibitors. This shows that the substantial increase in German presence at Iranian trade fairs is not a one-way street. An extraordinary rise of 70% was recorded for Saudi Arabia.

Increases, in some cases substantial ones, were also seen for plenty of EU countries, in spite of an already high base. Italy rose by a further 6% in 2015 in comparison to the equivalent previous events, France by 7%, Spain by 5%, Poland by 9% and Portugal and Hungary by 11%. The reason for this in some cases is that the exhibition landscape at home has grown thinner and companies are using Germany as a platform for exports not only to Germany itself but to other countries too. Countries from which participation fell included Romania (-5%) and Bulgaria (-2%).

The most striking development in relation to non-EU European countries was a 30% drop in the number of exhibitors from Russia, which is doubtless due chiefly to the sanctions and countersanctions imposed as a result of the Ukraine/Crimea crisis. By contrast, rises of 13% were seen from both Turkey and Ukraine.



Trends varied amongst the biggest exhibitor nations from Latin America. Whilst no real movement was seen in presence from Brazil and Mexico, Argentina went up by 13% and almost drew level with Brazil. Chile rose by 5%. Only a small increase (+2%) was seen from the US, while presence from Canada saw a slight decline.

Considerably more exhibitors came from Australia (+11%) and New Zealand (+15%). Presence from other countries in this region is relatively rare and chiefly relates to tourism.

Trends in exhibitor presence from Africa were very varied. While South Africa, Morocco and Tunisia all rose by around 15%, the number of Egyptian firms fell by 7%. The number of Kenyan exhibitors fell by a quarter. Substantial fluctuations were again visible in the number of firms from the remaining African countries, although all of them had total numbers of well under 50 exhibitors. Italy, with 12,735 event participations, was the biggest exhibitor nation at Germany's international and national fairs in 2015, followed by the People's Republic of China (12,395), France (6,144), the US (5,441), the UK (5,353) and the Netherlands (5,347). Next highest were Spain (4,492), Austria (3,772), Switzerland (3,261), India (3,190) and Turkey (3,057).

Switzerland was represented at the largest number of shows (156), followed by the Netherlands (154), Austria (152) and Italy (151). The leading non-European country was the US, which had a presence at 137 fairs, followed by China (119) and Japan (96).

Over 500,000 exhibition visitors came from overseas

About 26% of the visitors to international and national exhibitions in Germany in 2015 came from other countries – approximately 2.55 million people. Of those, about 530,000 came from countries outside Europe. This is what an analysis by AUMA, released in summer 2016, shows.



It is worth noting that nearly all continents have contributed to this result. Participation from South, East and Central Asia, for example, increased by almost 6.5%, very nearly as expected. But 4.7% more exhibitors came from other European countries as well, along with 5% more from Latin America and Australia/Oceania each and 4.2% more from North America. The increase for Africa, however, was 1.5%, considerably below the average. From the Middle East there were even 5% fewer exhibitors.

*Metav, Düsseldorf
(Verein Deutscher
Werkzeug-
maschinen-
fabriken
VDW)*

What is most interesting is that 230,000 of these potential clients travelled from South, East and Central Asia to Germany to inform themselves at exhibitions before preparing and making their final buying decisions. This was the highest number of visitors ever from that region, despite the fact that last year there were slightly fewer exhibitions scheduled and, even in 2015, the in-

ternational security situation was already somewhat tense. The main countries in Asia from which the visitors came were the People's Republic of China with about 75,000 visitors, followed by India (38,000), Japan (28,000) and the Republic of Korea (25,000).

Visitors from North America also come in large numbers to exhibitions in Germany: over 55,000 came from the USA in 2015, and about 17,000 from Canada.

German exhibitions also made a big impact in the Middle East, attracting a total of 90,000 visitors, of whom 25,000 came from Israel and about 12,000 from each of Saudi Arabia, the United Arab Emirates and Iran.

Attendance from Latin America was down slightly, with about 60,000 visitors, no doubt partly due to the economic problems in some of the bigger countries there.

The majority of visitors to German exhibitions from abroad continue to come from the EU and other European countries, with visitors interesting in Germany's big public exhibitions, while the visitors from overseas are almost exclusively trade visitors. Altogether, about 1.65 million visitors came from the EU and 360,000 from other European countries. The main visitor countries in 2015 were the Netherlands (225,000), followed by Italy (175,000), Austria (165,000), France and Switzerland (140,000 each), the UK (135,000) and Belgium (125,000).



*Creativa Dortmund
(Messe Westfalenhallen Dortmund GmbH)*



Steady development at regional fairs

Exhibitions with a regional visitor catchment were steady overall. Changes in the three key figures – exhibitors, stand space, and visitors – were all slightly negative, a fractionally worse result than in 2014.

Germany's 144 regional exhibitions recorded on average 0.9% fewer exhibitors and 0.9% less exhibition space relative to the equivalent prior events – a virtually stable outcome, albeit one which failed to match the previous year's

growth. Visitor numbers also slipped into the negative, dropping 1.0% after having risen in previous years. It was clear for all exhibition types in the regional segment that the range of movements is becoming ever wider – positive and negative movements of 10% or more are not uncommon. The immediate influence of industry and regional trends, as well as of changes in exhibition designs, is evidently greater in the regional segment than for international and national fairs.



SHK, Essen
(Messe Essen
GmbH)

Overall, 5,628,993 visitors were recorded at the 144 regional fairs. A total of 50,992 exhibitors booked 1,462,241 m² of stand space. These figures cover events that were organised by AUMA or FAMA member firms and were listed in AUMA's »regional« category.



GDS Düsseldorf (Messe Düsseldorf GmbH)

FKM: 50 years of ensuring quality trade fair data



In Germany, visitor and exhibitor numbers have been measured and audited according to uniform standards for 50 years. The FKM – the Society for the Voluntary Control of Fair and Exhibition Statistics – commenced activities in early 1966.

The FKM was founded by six exhibition businesses in late 1965: Düsseldorfer Messegesellschaft mbH NOWEA, Messe- und Ausstellungs-GmbH Frankfurt, Deutsche Messe- und Ausstellungs-AG Hannover, Messe- und Ausstellungs-GmbH Köln-Deutz, Offenbacher Messe GmbH, and Spielwarenmesse eGmbH in Nuremberg. Twenty-two fairs were audited in the first year. In this regard, the German exhibition industry was setting an international lead: at the time, the only other country in which similar efforts were being made was France.

The main reason for this step was the fierce competition between fair organisers at many events over »reports of success«, which were being met with increasing scepticism from exhibitors. To combat this, the FKM set strict definitions for key event indicators, adherence to which was then checked by an external auditor. The clear aim was to create trust amongst exhibitors.

Today, the FKM has 54 members. Around 200 exhibitions are certified in Germany each year, and visitor profile data, first introduced in 1975, exists for around 80%. Two



*EuroBLECH
Hanover
(Mack Brooks
Exhibitions Ltd)*

foreign guest members, the Hong Kong Trade Development Council and Veronafiere, together have 17 exhibitions audited. During 2015, the FKM expanded its online newsletter »FKM knowhow«, a key part of its communications strategy. The newsletter reports on the potential

uses of FKM data, what conclusions can be inferred from visitor profile data, how exhibition terminology is defined and how the FKM works. In addition to exhibitors, the newsletter is targeted at consultants, exhibition stand constructors, industry associations and the media.

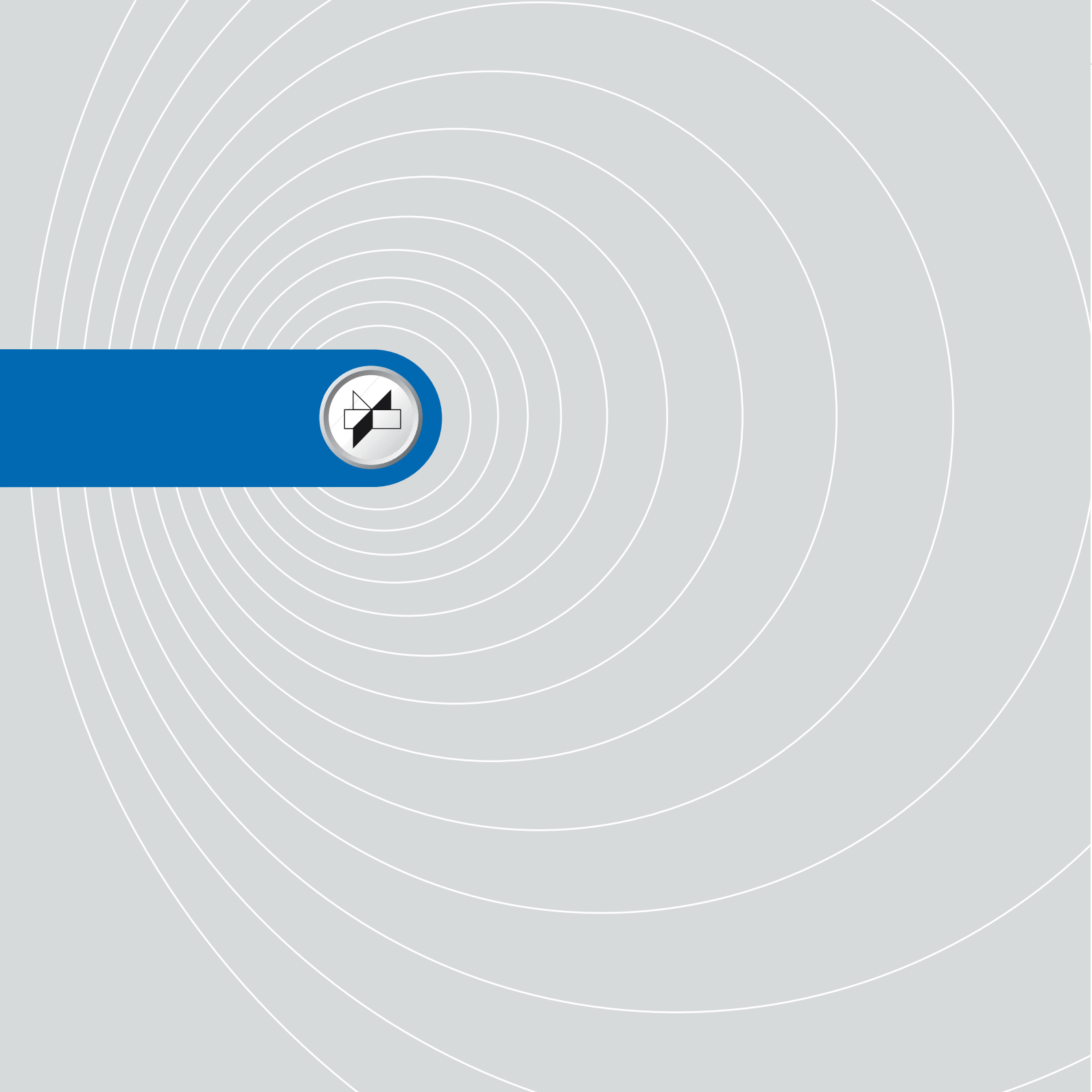
fish international
(Messe Bremen
GmbH)



International trade fair transparency ■ The FKM and other European data auditors have joined forces to produce a brochure on Euro Fair Statistics, which has been published by UFI, the global association of the exhibition industry. It contains key figures for over 2,300 events held in 23 countries during 2014. The FKM also takes part in UFI working groups on improving transparency at exhibitions and clarifying the definition of terminology at an international level, including the Associations Committee and the Auditing Meetings. It also maintains bilateral contacts with auditing organisations in other countries.



Lobbying
and legal work





■ Lobbying and legal work

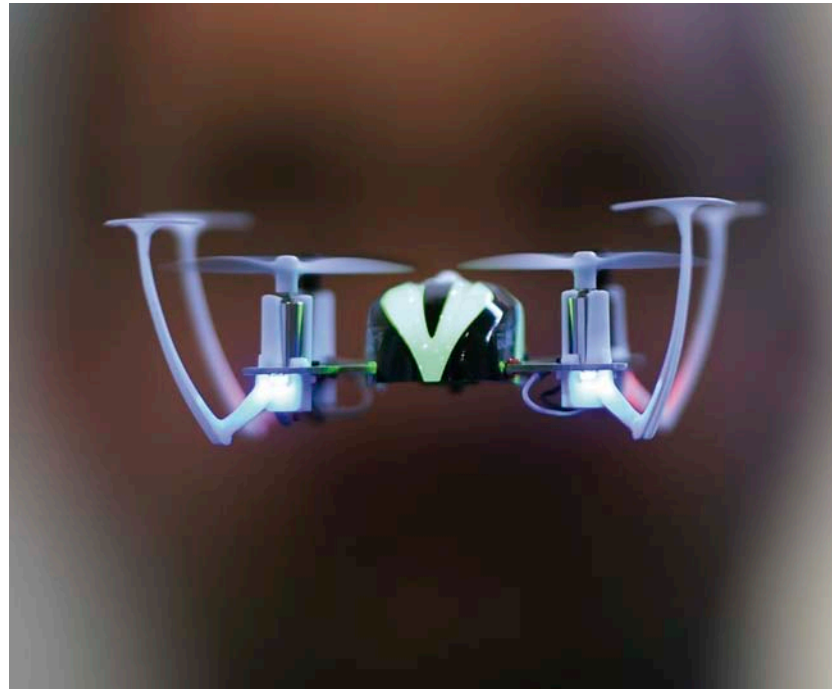
Exhibition visas

In 2015, AUMA and representatives of exhibition organisers and exhibitors again attended the Conference of Ambassadors in Berlin, in order to raise the topic of visas for foreign visitors and exhibitors and address problems in direct discussions with the diplomats.

Criticisms were underpinned by the results of the visa survey that AUMA carries out each year amongst the organisers' foreign sales representatives. There were also plenty of improvements in 2015, however: the opening of numerous new visa application centres in Russia and India led to reduced waiting times and shorter journeys, thus saving time and costs on the part of applicants. Visa requirements were abolished altogether for the UAE and Colombia.

The gradual introduction of the Visa Information System (VIS), a central database for the exchange of short-term visa data between states in the Schengen area, was also completed in 2015. The main aims of VIS are to simplify the visa application process, enable border checks to be made and increase security, including for the applicants themselves. VIS was rolled out in 2015 in China, Japan, India and Pakistan. Its introduction has led to some changes: applicants must appear in person to submit their first visa application, so that biometric

data can be recorded. A full set of fingerprints is taken from the applicant, along with a photo. However, the fingerprints saved in the VIS file can be reused for any further applications made in the next five years, thus obviating the need for a personal interview.



AERO, Friedrichshafen (Messe Friedrichshafen GmbH)

Importing meat products for exhibition purposes

In 2015, the Federal Ministry of Food and Agriculture issued a new information leaflet on »Food of animal origin from non-EU countries for exhibitions and trade fairs in Germany«. The leaflet sets out the legal principles applicable in this regard.

Exhibitors from non-EU countries must comply with both animal health and food hygiene regulations. Which rules need to be applied in which instance depends on the purpose of the import. The decisive factor is whether or not the food will be given to exhibition visitors to taste.

German law has introduced simplified procedures for foods from non-EU countries that are imported for exhibition purposes (section 22 para. 4 of the Internal Market Animal Diseases Protection Regulation and section 18 para. 3 of the Food Imports Act). These apply only to products that will not be brought into circulation. In other words, such products are not marketable under EU law; they cannot be given to visitors to taste and can only be exhibited »under glass«, so to speak. At the end of the exhibition, they must either be destroyed or re-exported.

The Ministry's information leaflets are available for download in German, English and Russian on auma.de, under the section »Legal Matters«.

Spielwarenmesse, Nuremberg (Spielwarenmesse eG)

Sustainability

Sustainability in the exhibition industry is a shared undertaking, as can be seen from the constantly rising number of joint projects in which AUMA and its members are taking part.

AUMA is participating in a book project led by the German Federal Environmental Foundation on »Sustainable Event Management – Green Meetings as a Future Project for the Event Industry«. In its chapter, AUMA analyses the aims and opportunities of sustainability in the exhibition industry along with potential obstacles to their introduction. The book was published by Oekom Verlag in January 2016.

On an international level, a UFI Focus Meeting, »Winning strategies for sustainability in the event industry: let's work together!«, was held in March 2015 in Hong Kong. Particularly beneficial was the panel discussion on the question of »How can venue operators, exhibi-





tion organisers, service providers and industry associations work together?» The presentations are available online to UFI members.

Two first prizes were awarded in 2015 at the annual UFI Sustainable Development Awards. One went to the Sands Expo and Convention Centre in Singapore for the in-house development of an interface between booking and stand management that has led to remarkable energy savings in relation to air conditioning, while the other was won by event organiser UBM EMEA for integrating sustainability into all of its business processes. The theme for this year's UFI Sustainable Development Award is »Best actions to engage participants around sustainability«. It is open to exhibition organisers, site operators and service partners who can present innovative measures to motivate participants at their shows towards sustainable activities.

European standardisation in entertainment technology

CEN/TC 433, the European standardisation project on »Entertainment Technology – Machinery, Equipment and Installations«, was set up in 2013. Its work continued with several meetings in 2015.

CEN/TC 433 now comprises four working groups: WG 1 »Machinery« is currently working on an EN standard for entertainment machinery. WG 2 »Work equipment« is developing an EN standard for the design and manufacture of steel and aluminium trusses and structures. WG 3 »Terminology« and WG 4 »Codes of Practice« are in the course of being set up.

*EuroTier, Hanover
(Deutsche Landwirtschafts-
gesellschaft e.V.)*

AUMA members have voiced approval for working with CEN Technical Committee 433 so as to contribute the views of the exhibition industry to, for instance, the development of standards affecting floor loading or hanging points in exhibition halls. The standardisation project is now being jointly supported and financed in equal parts by the Media and Entertainment Technology Association (VPLT), the German Theatre Technical Society (DTHG), the European Association of Event Centres (EVVC), the German Stage Association, FAMAB and AUMA.



*INHORGENTA
MUNICH
(Messe München
GmbH)*

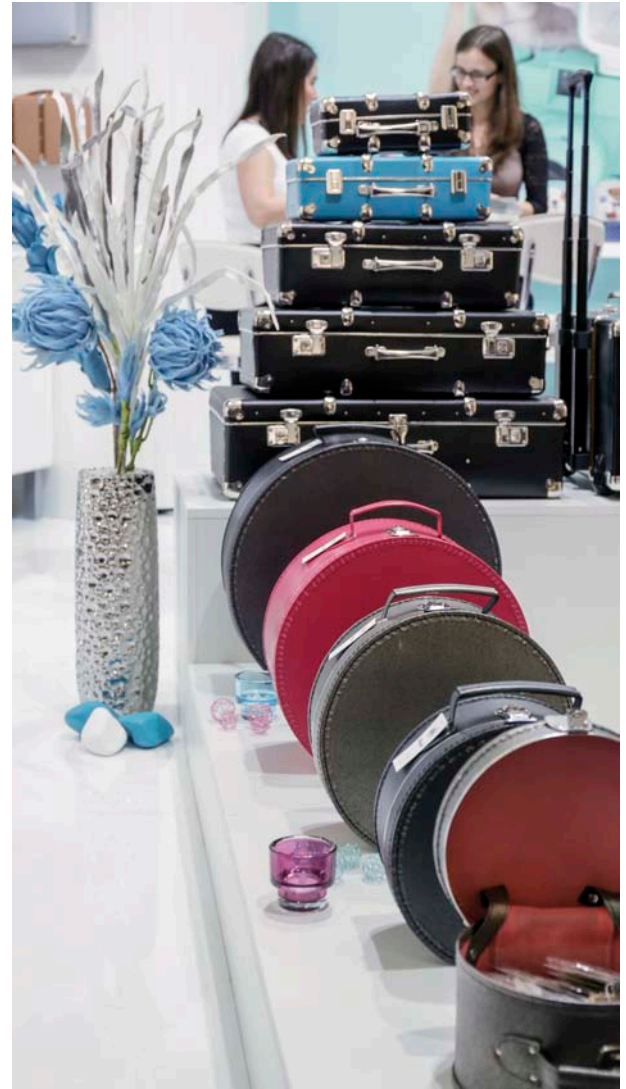
Unofficial Exhibitor Directories

Firms offering unofficial exhibitor directories are a persistent nuisance. The most prominent amongst them is Expo Guide, a Mexican firm which writes to exhibitors in advance of exhibitions with a form asking them to check their company details.

This makes many exhibitors believe that they are reviewing their entry in the organiser's official catalogue and that the entry is free of charge. Only the fine print reveals the fact that the addressee is being asked to sign a three-year contract for an entry in an online catalogue at a price of €1,181 per year.

Like the years before 2015, many exhibitors still contacted AUMA for advice after receiving an unexpected bill from Expo Guide. AUMA's advice is not to pay the bill and to ignore all further payment reminders or correspondence from the legal department. Exhibitors can also find information, standard letters and court rulings about »unofficial exhibitor directories« on ► auma.de.

*Ambiente,
Frankfurt/M.
(Messe Frankfurt
GmbH)*





AUMA Brussels Office

The 16th AUMA Round Table in Brussels took place in early February 2016. Representatives of German exhibition organisers and top German industry associations were in Brussels to attend the event.

Dr Philippe de Taxis du Poët, from the European Commission's Directorate-General of the Internal Market, Industry, Entrepreneurship and SMEs, gave a presentation to attendees on the planned Commission Communication on economic diplomacy, stating that it aims to improve and harmonize the assistance given to European companies with international expansion in non-EU countries. Those in attendance emphasized that participation at exhibitions in Europe can help



companies to prepare for international expansion outside the EU. AUMA also made the point that EU aid measures should not be allowed to undermine national initiatives and quality marks such as »made in Germany«.

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

Sven Schade, Policy Officer at the Directorate-General of the Internal Market, Industry, Entrepreneurship and SMEs, spoke on the subject of EU calls for tender in relation to exhibitions. These aim, among other things, to enable companies to take part in joint stands at up to 15 exhibitions overseas, if they receive support under the Horizon 2020 programme and have no experience with exporting to non-EU countries. AUMA reported on the efficiency of the aid programme for young innovative exhibitors at German exhibitions and on the foreign exhibition programme of the Federal Government.

*art Karlsruhe
(Karlsruher
Messe- und
Kongress-GmbH)*

*PS1, Dusseldorf
(Reed Exhibitions
Deutschland
GmbH)*



Teresa Archer Pratas from the European External Action Service spoke on the lifting of trade and financial sanctions against Iran. She pointed out that sanctions could be reimposed immediately if Iran breaches its obligations, and also that it could not be ruled out that business trips to Iran might have potential adverse effects, for example when entering the US, although the EEAS was liaising with the US on this point.

Some German exhibition organisers are already active in Iran, and for 2016 participation at Iranian exhibitions is now being offered again under the foreign exhibition programme of the Federal Government.

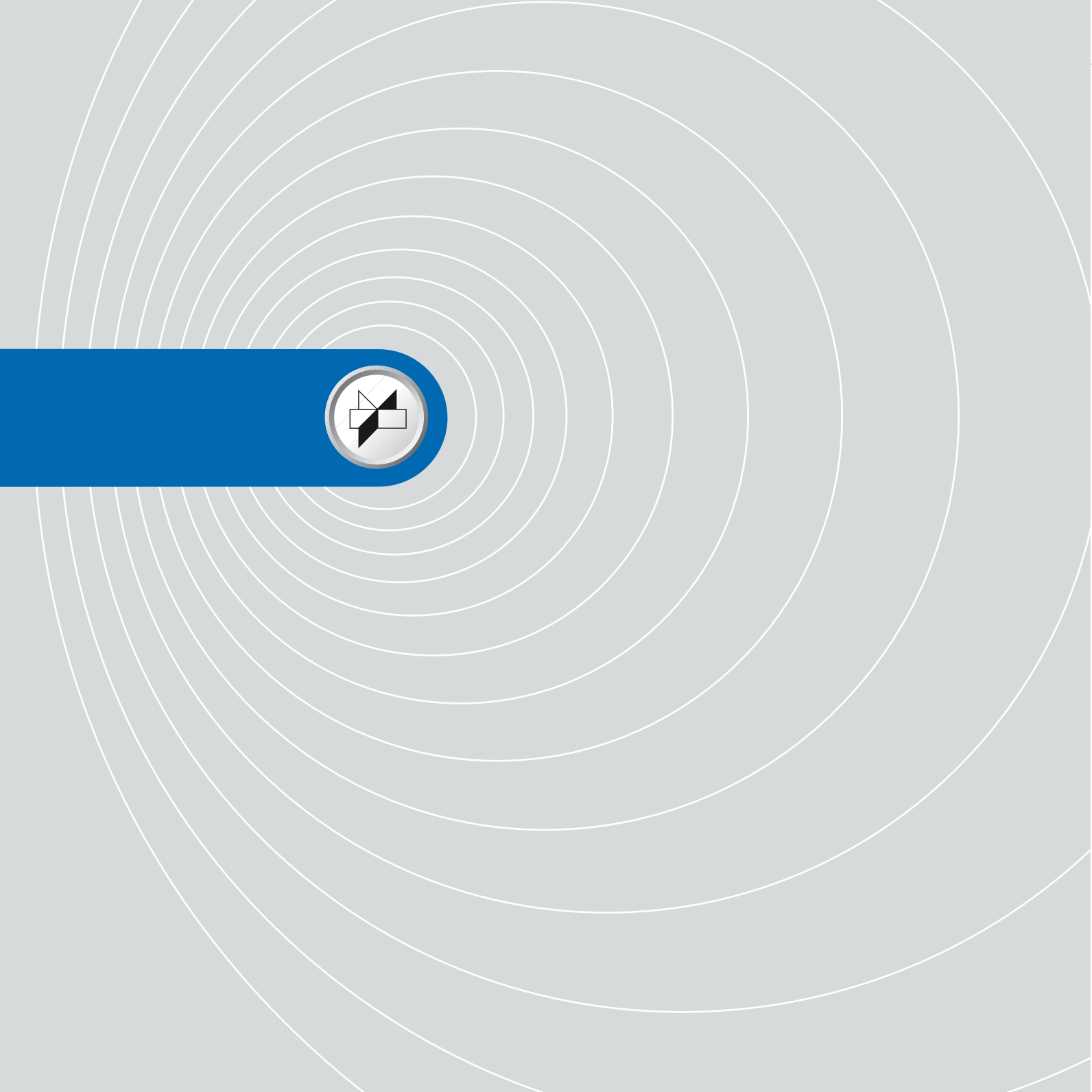
Ralf Sauer from the Directorate-General of Justice updated attendees on EU/US negotiations over a general data protection treaty.

Such a treaty became necessary after the European Court of Justice overturned the EU Commission's Safe Harbour Decision in October 2015. All data to the USA transferred on the basis of the Safe Harbour Decision have consequently been rendered illegal. AUMA gave participants advice on the storage, internal communication and transmission of personal data.

Barbara Weizsäcker, Secretary General of the European Exhibition Industry Alliance, reported on the lobbying conducted by the EEIA in the form of stakeholder events and cooperation with the European Commission. Dr Rowena Arzt from UFI presented results from the current 2016 UFI Barometer and alerted participants to Global Exhibitions Day on 8 June 2016. Finally, AUMA reported on a variety of topics, including exhibition visas, food imports, minimum wage laws and business tax.



Institute of the
German Trade Fair
Industry





■ Institute of the German Trade Fair Industry

AUMA's Institute of the German Trade Fair Industry cements the place of trade fairs in the academic world and opens doors for knowledge transfer and skills networking within the sector. The Institute links theory with practice and the findings of its research are made accessible to all interested parties.

AUMA has coined the term »Trade Fair Science« to cover the activities of universities and research institutions in relation to the study of trade fairs. »Trade Fair Science« encapsulates the idea that the academic approach to exhibition-related topics in the broadest sense is a field of study in its own right.

The German Trade Fair Library acts as a gateway and information centre for trade fair-related topics. The AUMA Institute of the German Trade Fair Industry conducts studies in conjunction with market research institutes, which are made available in a series of publications. It also supports university projects and educational and training initiatives within the industry.

For more information:

► messewissenschaft.de

Education and Training

A number of education and training opportunities are available within the trade fair industry. AUMA works closely with a large number of educational providers. It also supports advice on trade fairs for young innovative companies.

Committed to the next generation ■ AUMA has been an active patron and sponsor for many years, and also takes an active role in workshops and podium discussions at events organised by young people in the industry. Such conferences are aimed at students, vocational trainees, agencies, service providers, teaching staff at schools and universities and anyone else with an interest in the event industry. During 2015, AUMA took



*Fruit Logistica,
Berlin
(Messe Berlin
GmbH)*



*FENSTERBAU
FRONTALE,
Nuremberg
(NürnbergMesse
GmbH)*

part in MEET Hamburg and in the VIA Münster Forum. Both events were accompanied by specialist displays, location tours and evening events.

The Institute of the German Trade Fair Industry also offers talks, seminars and workshops for groups of students and vocational trainees with a view to raising the profile of exhibitions amongst young people. By way of example, students at the BEST-Sabel Educational Centre in Berlin made use of the Institute and Library for course work on exhibitions and attended a workshop on learning to conduct academic research. Trainee exhibition sales staff studying at the Schiller Vocational College in Dortmund also came to the Institute for information.

Teaching duties of the Institute at universities and colleges

■ The AUMA Institute of the German Trade Fair Industry, together with its associated library, has the objective of further cementing the place of trade fairs in general commercial education and training. Last year, AUMA staff consequently again fulfilled a wide range of teaching duties at universities and colleges all over Germany. One highlight was a lecture given by Dr Peter Neven, AUMA Managing Director, and Hendrik Hochheim to 130 students at Würzburg University of Applied Sciences in September 2015. They were invited to discuss the topic of trade fairs on an interdisciplinary basis by five professors from the Marketing, Engineering & Business Studies and Brand & Media Management departments. Talks were also given to visitor groups from universities at the Institute in Berlin, who also had the opportunity to discover the German Trade Fair Library. AUMA also provides wide-ranging teaching and study material for universities, which is used in seminars and cited in the technical literature. According to AUMA's research, around 40 higher educational institutions in Germany offer in-depth teaching on topics relating to trade fairs.

100PRO training initiative ■ 100PRO is an initiative of different associations aimed at raising the quality of training in the event industry. A training code of practice has been developed, which sets guidelines for the key components of training for event industry sales and technical staff.



Trade Fair Science Working Group ■ Going forward, AUMA intends to enhance its support for the Trade Fair Science Working Group. The Working Group includes representatives from universities, organisations and government ministries responsible for attendance at science-related trade fairs, as well as from several exhibition organisers.

It discusses in particular questions such as how academic institutions add value to exhibition themes, how they can act in partnership with exhibition organisers to identify themes for the future, and how they can support transfer of know-how at trade fairs.



Research

AUMA_MesseTrend 2016 exhibitor survey ■ The 17th AUMA_MesseTrend survey, an annual survey of German exhibiting companies, was conducted in autumn 2015. TNS Infratest again asked a representative sample of 500 firms to answer questions about their trade fair activities (Details ► Page 17).

Study on Information and Procurement Behaviour of Decision Makers ■ What channels do decision makers use to obtain information and what instruments do they use to prepare investment decisions? What role do trade fairs play in this process? On behalf of AUMA, the Link-Institut in Frankfurt put these questions to 1000 decision makers in German business. The results of the study have been published by AUMA in the publication series of the Institute of the German Trade Fair Industry, under the title »Information and Procurement Behaviour of Decision Makers« (in German only).

83% of the decision makers surveyed use trade fairs to find out about matters in their industry. Even more – 94% – obtain information to prepare for decisions from personal contacts, such as colleagues in house or in the industry at large; the same percentage do so via the internet and a little over 87% via the industry press. The position of trade fairs in this leading group is noticeable not least because fairs are only intermittently available as sources of information. Informational material from suppliers, sales visits or participation in conferences are all further down the list.

CADEAUX,
Leipzig
(Leipziger Messe
GmbH)



*WindEnergy,
Hamburg
(Hamburg Messe
und Congress
GmbH)*

Only a little over 30% of German decision makers use social media as a source of information. Remarkably, around 14% of exhibition-attending decision makers want to make more use of trade fairs over the next three-to-five years, while only 8% want to use them less. While stronger growth in future usage is expected from online media, this will evidently not come at the expense of visiting exhibitions.

The decision maker survey also showed that the crucial factor in the long-term use of a medium is the trust that users are willing to place in it. In this regard, the study showed that by far the greatest trust is placed in personal contact.

German Trade Fair Library

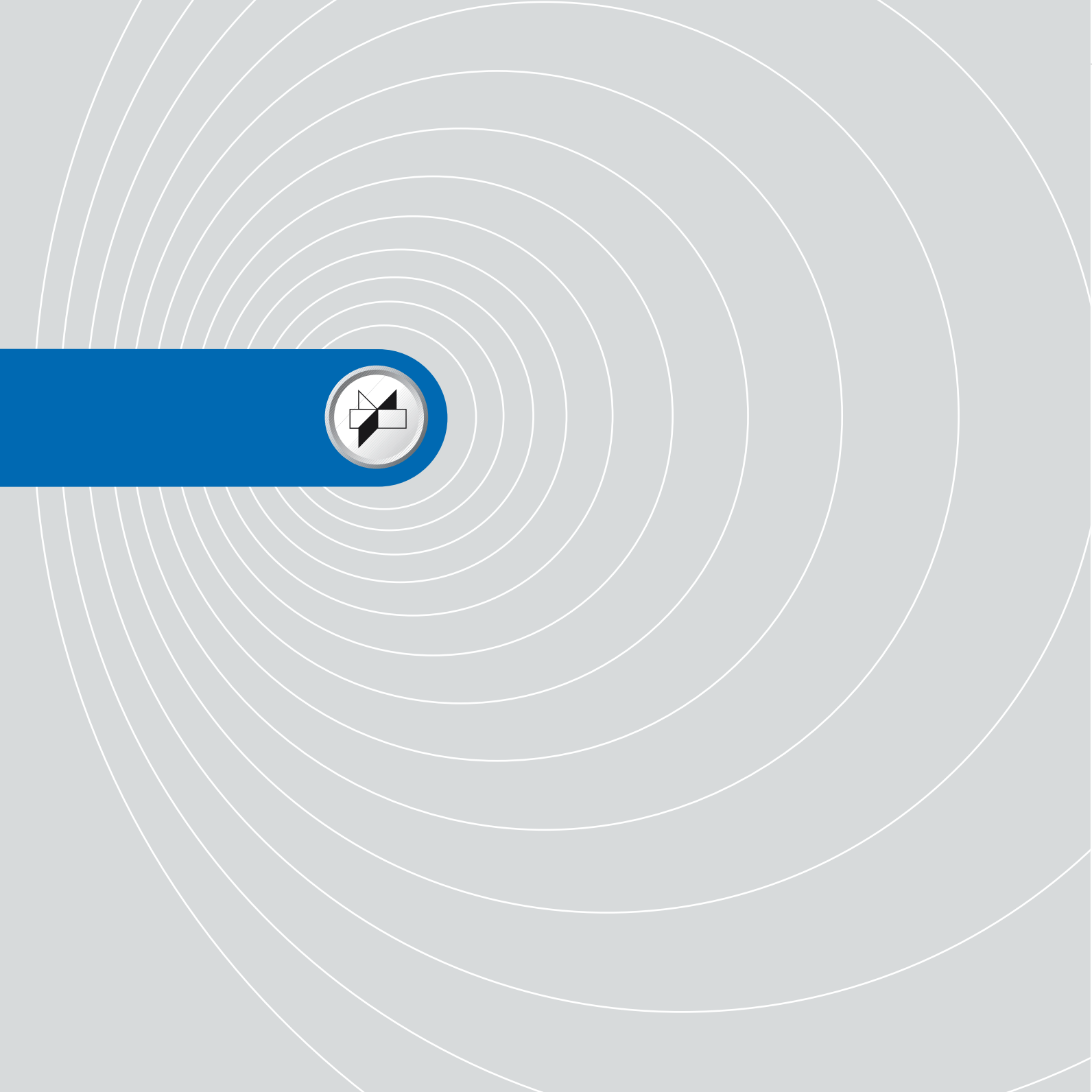
The German Trade Fair Library in Berlin offers comprehensive information and services with regard to trade fairs, congresses and events.

The Institute's Library helps students, teachers and anyone with an interest in the subject to find suitable publications on all aspects of live communications. With its specialist expertise, the Library can also provide information and advice, while its proximity to and contacts with AUMA's specialist divisions and their range of contacts also offers a direct line to the latest expert knowledge.

The German Trade Fair Library now has a catalogue of over 8,700 media items, including over 900 theses and dissertations. The library service enables AUMA to appeal especially to students and university staff concerned with the exhibition and event industry. However, consultants, journalists and staff from organisers and exhibition service providers have also come to the library or made enquiries. In total, over 300 visits were noted and 570 enquiries were answered in 2015. The number of loans also rose relative to 2014, to 380.



Exhibitions
abroad





■ Exhibitions abroad

International market situation

According to calculations by the International Monetary Fund (IMF), the global economy grew by 3.1% in 2015, slightly less than the 3.4% growth recorded the previous year. This was due primarily to lower growth in developing and emerging countries (4.0%), which is significant to many exhibition organisers with international operations. For 2016, the IMF is forecasting that global economic growth will accelerate only slightly to 3.2%. Growth in China is expected to slow from 6.9% to 6.5%, while Brazil and Russia face continued economic difficulties and will first have to overcome recession. The Fund predicts moderate growth of 1.5% in the Eurozone, and steady growth of 2.4% in the US. These developments will certainly influence the internationalisation strategies of German exhibitors and exhibition organisers.

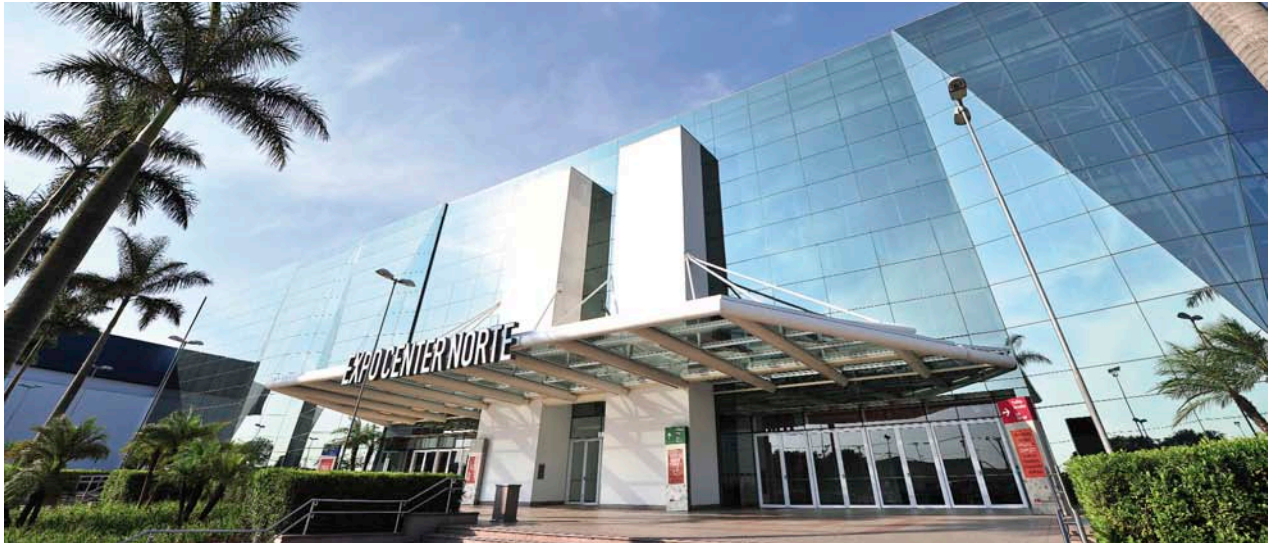
Given this situation, AUMA is keeping a particularly close eye on foreign trade shows that compete with international events in Germany. It is therefore conducting regular surveys of all organisers of international events in Germany on the subject of their main competitors abroad. The survey, which was first performed in 2004, was updated again in 2015. Some 400 exhibitions were identified around the world as particularly relevant competitors to over 80% of Germany's international events.

German exhibition businesses continue to see significant competition in other developed markets. Over the four-year period from 2011-2014, during which all German and non-German international exhibitions were



held at least once, 74 fairs in the US competed with international exhibitions in Germany, along with 57 in France and 49 in Italy. China was fourth with 47 trade fairs, the UK had 31 and Spain took sixth place with 16. Substantially more Chinese-based fairs were mentioned in comparison to the previous survey, while France and Italy swapped places.

Other European countries with relatively large numbers of competitor events were Switzerland (14) and the Netherlands (11). Over 10 competitor events were also noted in the United Arab Emirates (15) and Japan (14); there were 10 in Turkey.



Expo Center Norte,
Sao Paulo

Key competitors of German fairs located in Europe ■ With two exceptions, the competitor events were held on three continents, namely Europe (where 58% of all competitor fairs took place, predominantly in EU countries), North America (19%) and Asia, where roughly one in four (23%) events was held. A regional shift towards Asia can be identified in comparison to previous surveys, reflecting the growing economic significance of the continent as a whole and China in particular.

70% of the foreign exhibitions cited are capital goods fairs, while just under a quarter (22%) are consumer goods fairs for trade visitors. The remaining events are consumer goods shows aimed at the general public and

services exhibitions. Despite an upward trend in global competition, international fairs in Germany underlined their leading position during the 2011-14 cycle.

On average, competing events abroad achieved 63% of the net exhibition space, 73% of the exhibitor numbers and 83% of the visitors of trade fairs in Germany. An imaginary average foreign event would thus have a net exhibition space of 34,132 m², 910 exhibitors and 59,841 visitors. Equivalent figures for these three key indicators for 2010/13 were 35,643 m², 925 exhibitors and 58,045 visitors. It should be borne in mind that the international exhibition segment in Germany covers over 180 events, whereas the foreign competitors each belong to a relatively small elite group in their respective countries.



Support for German exhibitors abroad

Germany's growing export trade is often closely linked to the Foreign Exhibition Programme run by the Federal Ministry of Economic Affairs and Energy, especially for small and medium-sized businesses. The inclusion of industry bodies in the event selection process ensures that funding is efficiently used and targeted at sources of demand.

Foreign Exhibition Programme 2015 in summary ■ For 2015, the Federal Ministry of Economic Affairs and Energy accepted 275 events in its Foreign Exhibition Programme, of which 239 were actually attended. Thirty of these – 12.5% of the total – were first-time participations.

The high proportion of realised participations achieved in previous years was not repeated. In nine cases this was due to withdrawal from Russian events for political reasons. Of the remaining 27 cancelled participations, 17 were due to a lack of participants and in three cases the relevant trade association withdrew its application. The remaining seven events were cancelled by the organisers.

In 2015, 6,417 exhibitors consequently took part in the Ministry of Economic Affairs' Foreign Exhibition Programme, as opposed to 7,154 the previous year, and »German Pavilions« covered a total space of 121,410 m² (2014: 147,809 m²). The average German Pavilion attended by participating firms featured around 27 exhibitors on 454 m² of rented space. The average participant thus had a stand occupying around 17 m² (includes information centre participants).

As in previous years, the German Pavilion at the Arab Health Exhibition had the largest number of participants (226). The largest pavilions in size terms were again those at the CPM (Collection Première Moscow) International Fashion Fair in spring (5,610 m²) and autumn (4,375 m²).

The strongest regional focus again lay in South, East and Central Asia, where 109 (45.6%) of the 239 German Pavilions were held. Forty-four events were attended in European countries outside the EU; this was fewer than in 2014, partly due to the withdrawal for political reasons from some events in Russia.

The largest number of exhibitors were seen in South, East and Central Asia (2,469), in the Middle East (1,363) and in Europe outside the EU (1,306). These were followed by North America (547), Latin America (313) and



MAFEX,
Casablanca



*Paperworld
Middle East, Dubai*

Africa (254). Another 126 exhibitors took part in German Pavilions in the European Union, and 39 at Pavilions in Australia/Oceania.

A total of 44 countries were covered by the Ministry of Economic Affairs' 2015 Foreign Exhibition Programme, 42 of which were outside the European Union. China and Russia were the countries in which the most events were attended. For the first time since 2008, there was a German Pavilion (in the form of an information stand) at a trade fair in Iran. The 2015 Programme provided support to exhibitors in 62 industries, as defined by AUMA's classification system.

During 2015, 29 events were attended in Shanghai under the aegis of the Foreign Exhibition Programme, which was thus the leading city, well ahead of Beijing, where nine German Pavilions were organised. Moscow took second place, with 27 events. Dubai, with 20 events attended, remains the leading Middle Eastern city covered by the Programme. All nine events attended in Turkey during 2015 were in Istanbul.

German Pavilions online ■ The ► german-pavilion.com website provides a gateway to the internet sites of joint German participation to individual fairs. It offers an overview of the export-oriented German companies taking part in international fairs under the Foreign Exhibition Programmes of the Ministry of Economic Affairs and the Ministry of Food and Agriculture. Exhibitor contact details, products and profiles are summarized on a single page, so that users can find the information they need in just a few clicks. German-pavilion.com



thus makes it easier to get in touch with the firms taking part in each German Pavilion. The individual Pavilion websites generally go live two months before the start of the relevant exhibition and remain online until the next time the exhibition is held.

Around 82% of visits to the website came from abroad (as against 79% in 2014). The largest number of foreign visitors in 2015 came from India (7.7%), Russia (7.6%), the US (5.7%) and China (3.3%). In total, online visits were received from 224 countries.

Foreign Exhibition Programme 2016 ■ China, where 55 German Pavilions are currently planned, including 6 in Hong Kong, is again the country in which the largest number of events is expected to be attended. In second place is Russia, with joint participation in 34 events planned. In addition to the cautious approach to German Pavilions in Russia, participation at trade fairs under the Programme will continue to be subject to special reviews of sanctions compliance by the Ministry of Economic Affairs.

The USA (24 events), the United Arab Emirates (19), India (14) and Turkey (14) also remain key markets for the Foreign Exhibition Programme in 2016. Joint representation is again planned at 14 events in Africa. Thirty-seven fairs will be attended for the first time under the Programme.

Food and Agriculture Programme ■ The Federal Ministry of Food and Agriculture supports German exhibitors from the farming and food industries. During 2015, the Ministry spent a total of €5.3 million on attendance at 24 foreign trade fairs, of which nine were in South, East and Central Asia and eight in European countries outside the EU. German exhibitors were able to participate in the Ministry's attendance at two fairs in North America and two in the Middle East. One event was attended in each of the European Union, Latin America and Africa.

German exports of agricultural produce and food to Russia have diminished sharply since the introduction of trade restrictions by the Russian government. German firms consequently need to open up new markets. The lifting of trade and financial sanctions against Iran is also creating opportunities for a new market to be unlocked. The Ministry of Food and Agriculture is consequently planning to increase the number of foreign exhibitions in which it takes part to 29 in 2016. The budget has also been raised to €7.3 million.

Exhibitions abroad by German organisers

During 2015, 17 AUMA and FAMA members put on a total of 295 trade fairs outside Germany, the design of which followed the standards of leading international exhibitions at home. This was eight fewer events than in the previous year. Events held abroad by AUMA and FAMA members are covered by the GTQ (German Trade Fair Quality Abroad) quality mark.

This was the first time since 2009 that the number of fairs held decreased. In some cases, fairs were called off due to the economic or political situation in the host country, while a few previously separate fairs also

merged, thus reducing the overall total. For 2016, however, a substantial rise in exhibition numbers is again being planned.

Trends in key figures varied. Due to the smaller number of events held, the total number of exhibitors dropped slightly to around 118,600 (2014: 124,200). They occupied just under 3.6 million m² of net exhibition space (2014: 3.7 million m²). The number of visitors actually rose, from 7.3 million to 7.7 million, which can be explained by a cyclical increase in the number of shows open to the general public.

The six GTQ exhibitions with the highest number of exhibitors were all held in China; overall, nine Chinese events feature amongst the top 15 GTQ events. Seven of these events were in Shanghai and two in Guangzhou. In terms of exhibitor numbers, the largest GTQ fair outside China was held in Moscow. The remainder of the top 15 took place in the UAE (two fairs, both in Dubai), Turkey, Thailand and India.

The most visited GTQ events were four exhibitions open to the general public, namely the car shows in Shanghai (China), Chengdu (China), Goyang near Seoul (Republic of Korea) and Wuhan (China). After the four car shows, the best attended capital goods fair was the PLASTINDIA exhibition in Gandhinagar, India.

Events in China thus continue to dominate the GTQ calendar: the 87 exhibitions held in the country again accounted for almost 29% of the total recorded. Other

*C-star, Shanghai
(Messe Düsseldorf)*





statistics provide even stronger evidence of this dominance: Chinese fairs accounted for 53% of total exhibition space (= approximately 1.9 million m²), 50% of exhibitors and 58% of visitors.

Russia was the second-ranked country, with 38 exhibitions forming 13% of total GTQ events. Russia accounted for 12% of both total exhibition space and total exhibitors, and for 6% of visitors. The number of events held in Russia was affected neither by the Ukraine conflict and the resultant sanctions nor by the fall in crude oil prices. Despite this, a slight decline was seen in Russia's proportion of the total number of exhibitors, visitors and exhibition space. Exhibitions in India accounted for the same proportion of the total (12%) as in the previous year; events in India nevertheless accounted for only 5% of the exhibition space, 7% of exhibitors and 6% of visitors for GTQ events as a whole.

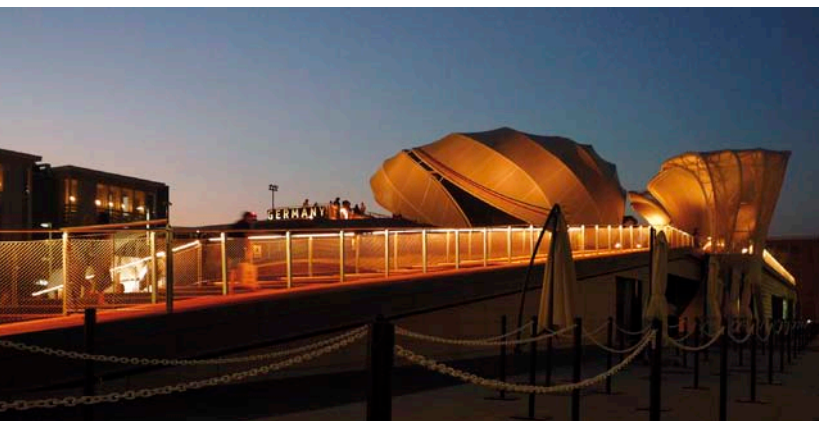
In 2016, 317 trade fairs are set to be held by 17 AUMA and FAMA members. China remains the most important market for German exhibition organisers with 91 events planned, followed by India (42) and Russia (37). Twenty-one fairs are scheduled for the USA, 20 in Turkey, 13 in Brazil and 12 in the United Arab Emirates. Eight fairs each are due to be held in France and Japan, seven in Singapore and four each in Indonesia, Iran, Canada, Poland and Ukraine.



During 2015, the Ministry of Economic Affairs and the Ministry of Food and Agriculture participated in a total of 84 GTQ fairs as part of the Foreign Exhibition Programme, attending 77 and seven events respectively. One or other of the two Federal Ministries thus participated in 28% of all GTQ exhibitions. This means that GTQ events accounted for 32% of the 265 events attended under the aegis of the Programme.

*Biofach,
Baltimore
(NürnbergMesse)*

World expositions



*German Pavilion,
EXPO Milano
2015*

EXPO MILANO 2015 ■ »Feeding the Planet – Energy for Life« – the theme of last year's Expo Milano was no less than securing global nutrition and conserving the Earth's resources. Over 20 million visitors came to Milan between 1 May and 31 October 2015 to see presentations from 144 countries and three international organisations.

Germany's »Fields of Ideas« pavilion was one of the biggest attractions, pulling in over 20 million interested visitors during the 184-day Expo and winning the Gold Award for the best interpretation of the theme. Giving the reasons for its choice, the panel declared that the German pavilion was especially successful in communicating the ideas behind the Expo slogan to visitors in

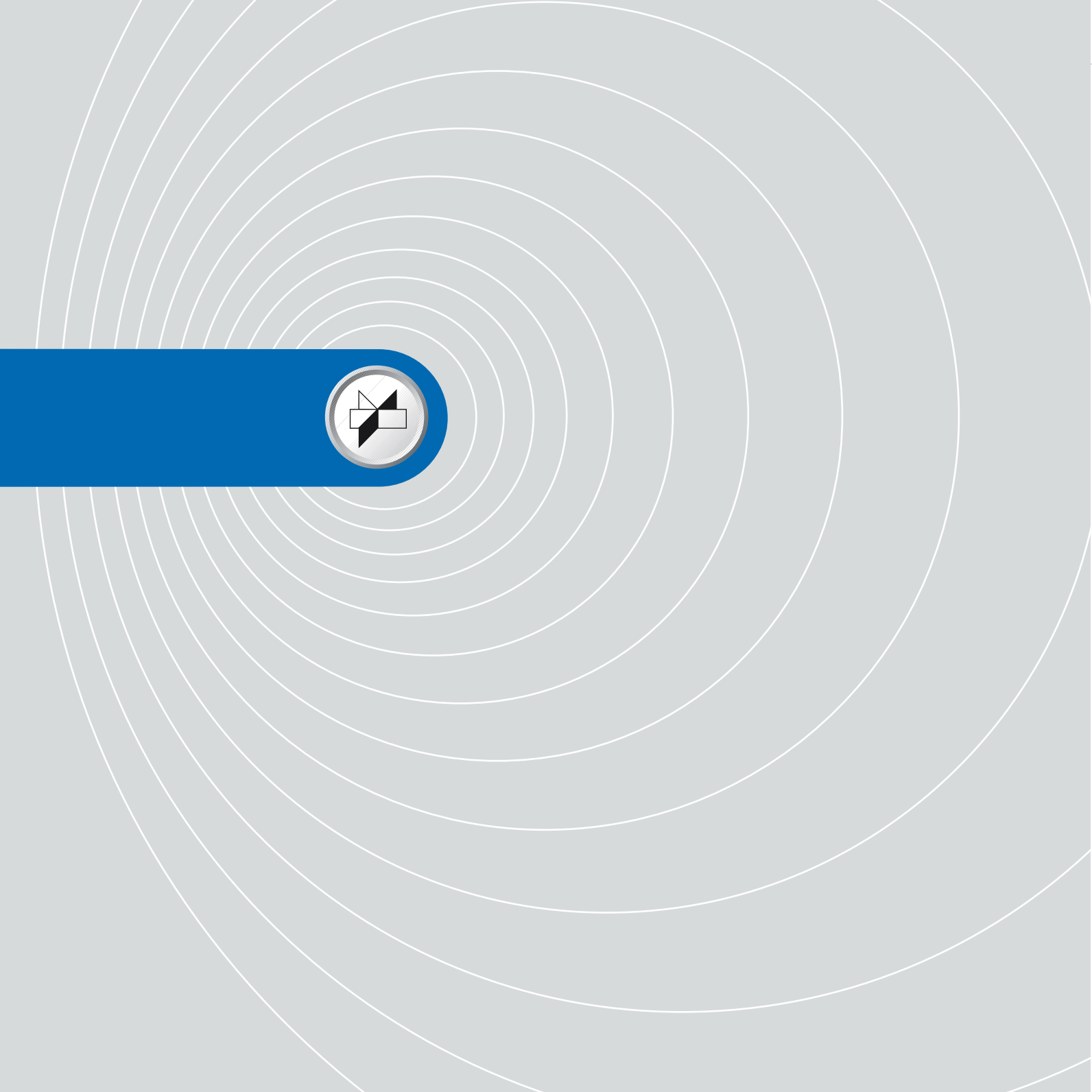
an interactive way. In both design and content, it created an awareness for the power of nature as the essential source of our food, which needs better conservation and intelligent use in the future.

The prize honoured the success of a German collaborative project: the design, planning and construction of the German pavilion were entrusted to a consortium of three companies, Milla & Partner of Stuttgart, Schmidhuber of Munich and Nüssli Deutschland of Roth, near Nuremberg. The organisation and running of the pavilion fell to Messe Frankfurt, which thus took charge for the first time of Germany's representation at an Expo. AUMA formed part of the panel which selected the design.

EXPO 2017 ■ The next »small« World Expo will take place in Astana, the capital of Kazakhstan, in 2017. This will be the first time an Expo has been held in Central Asia. The theme of the Expo will be »Future Energy«, currently an issue of vital global concern. The organisers expect the exposition to attract 5 million visitors between 10 June and 10 September 2017. The Federal Ministry of Economic Affairs and Energy awarded the organisation of the German pavilion to Hamburg Messe und Congress GmbH in mid-2015 following a tender process. HMC previously ran Germany's Expo pavilion at the 2008 smaller World Expo in Zaragoza, Spain.



Marketing,
media and
events





■ Marketing, Media and Events

Marketing German trade fairs

Trade fairs run by German organisers enjoy a strong competitive position over fairs in other parts of the world. Under the slogan »Trade Fairs Made in Germany«, AUMA supports the international marketing of German exhibition organisers so as to position Germany as the world's leading exhibition host country and further enhance the international character of Germany's fairs, to the benefit of both exhibitors and visitors. AUMA also promotes events held by German organisers in other countries through the use of the GTQ (German Trade Fair Quality Abroad) quality mark.

»Trade Fairs Made in Germany« promotional film ■

For foreign businesses, trade fairs in Germany are a vital entry route into the German and global markets. Every year 100,000 foreign exhibitors and some 2.7 million foreign visitors attend the 170 or so international fairs in Germany, many of which are the leading global events in their industry. Visitors gain first-hand experience of innovation and share knowledge and ideas with business partners. Exhibitors meet decision makers from all over the world and prepare the ground for international deals. Germany's exhibition centres also enjoy excellent transport links.

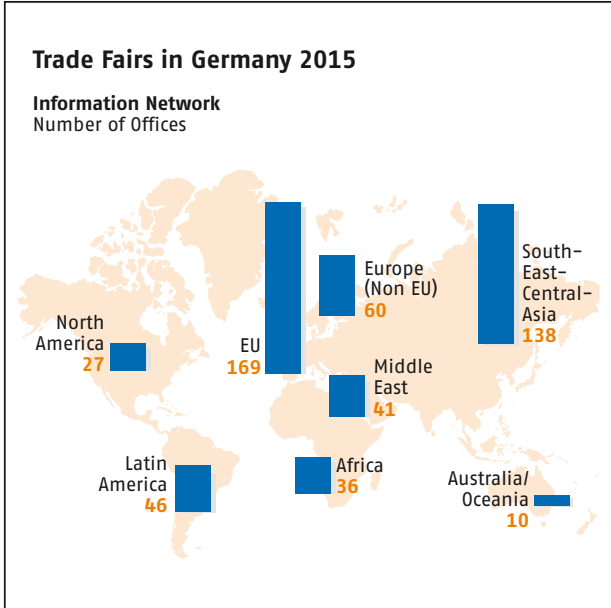
Under the banner »Trade Fairs Made in Germany – Made for You«, the new film makes all of these points in support of Germany as an international trade fair

venue. The film supersedes the previous version »Trade Fairs Made in Germany – the Global No. 1 in the Heart of Europe« and marks the first step in the updating of the entire »Made in Germany« line.

Like its predecessor, the new film is 2:30 minutes long. It is available for download or as a DVD in Arabic, Chinese, English, French, German, Korean, Portuguese, Russian, Spanish and Turkish.



»Trade Fairs Made in Germany« brochure ■ Requests for printed material have fallen slightly due to increased use of online material and the intelligent placement of hyperlinks to the AUMA Trade Fair Database. The brochure has been printed in just under 90,000 copies in German, English, French, Russian and Spanish. Over 60,000 copies are also being produced in Arabic, Brazilian Portuguese, Chinese, Greek and Korean in cooperation with the German Chambers of Foreign Trade. A Turkish version has also been recently produced, likewise in cooperation with the Chamber of Foreign Trade.



The »Trade Fairs Made in Germany« brochure sets out the dates, focus areas and statistics for Germany’s international and national trade fairs. The publication also contains basic information about Germany as a trade fair venue.

Advertising and poster ■ Posters bearing the slogan »German Trade Fairs – Marketplaces of the World« were very successfully employed at the joint pavilions of German firms organised under the Foreign Exhibition Programme. The slogan is also being used in locations abroad such as Chambers of Foreign Trade and German embassies and consulates where information on German trade fairs is provided. The ads and posters are available in five languages: German, Chinese, English, Russian and Spanish.



Marketing »Pro Messe«

The range of competing marketing instruments is constantly expanding, not least due to the growing importance of digital media. The »Erfolg durch Messen« (Success through Trade Fairs) advertising campaign thus focuses on the strengths of trade fairs as a marketing instrument. Under this banner, AUMA supports the marketing of German exhibition organisers through a number of measures and creates additional attention.

The campaign has run since 2007 and continues to be directed primarily at businesses. It is focused in particular on executive decision makers and the sales/marketing/exhibition divisions in companies in all industries. Small and medium-sized businesses are particular targets, the aim being to encourage them to take part in exhibitions.

Part of the campaign involved mid-column ads in national newspapers and banner ads on online portals with business information and Google AdWords. Billboard ads were also placed on station platforms on ICE high-speed train routes.

The accompanying website erfolgdurchmessen.de provides information about »Trade Fair Benefit Check«, an interactive tool to help exhibitors assess the costs and benefits of participating in a trade fair, and offers tips on how to exhibit successfully.

Exhibition organisers belonging to AUMA used the website for banner ads as part of their joint advertising and used the slogans for exhibition catalogues and customer magazines. The »Erfolg durch Messen« campaign was redesigned in 2015 and will be relaunched in 2016.

Messe [sək'sɛs]

Decidedly promising: 85% of all decision-makers in the German economy use trade fairs to keep themselves informed and award contracts. For young decision-makers aged up to 29, this figure even rises to 89%. So there's no better way for medium-sized companies to ensure a successful future. Be there – with our support: www.erfolgmessen.de

YOUR SUCCESS IS ONLY FAIR

AUMA die deutsche Messewirtschaft

Planning tools for exhibitors

AUMA offers a range of digital tools to help exhibitor firms plan for trade fairs.

MyFairs app ■ The MyFairs app, which provides details of trade fairs worldwide free of charge, was fundamentally redesigned in 2015 and is now available for smartphones running Android and iOS. Users in over 60 countries have downloaded the app since it was first launched for iOS in 2011. It is most frequently installed in the countries whose businesses most commonly appear at German shows, i.e. the USA, China, Switzerland, Turkey, the UK, India, the Netherlands, Austria, Italy, France, Spain, Taiwan and of course Germany itself. With MyFairs, users can use their mobile devices to check the dates of 5,000 trade fairs in Germany and worldwide.



The app can be used in German and English. Information about the mobile trade fair database is available on the accompanying website at ► myfairs.auma.de.

Toolbox ■ Also free of charge is toolbox.auma.de, which contains tips, checklists and details of trade fairs, as well as the Trade Fair Benefit Check. Since its launch in Summer 2014, the site has recorded over 20,000 visitors and 85,000 page visits.

Online-Services

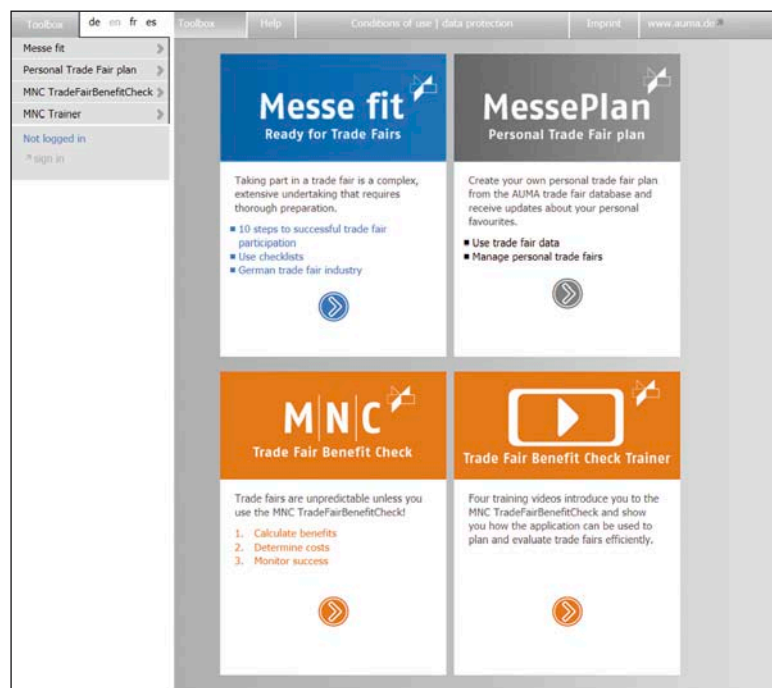
AUMA takes digitalisation literally: all services and information on preparing for a trade fair are available online.



The core offering of the auma.de website is the multi-lingual trade fair database. The 1.3 million page visits are a sign of significant interest in detailed information about the 5,000 or so exhibitions held in Germany and abroad. For most events, the database provides not only the dates but also detailed key figures as well as information on the origin of the exhibitors and visitors. For German fairs, breakdowns of the visitor structure are also shown. The trade fair database also features around 5,000 addresses for exhibition organisers, service providers and public authorities, as well as trade fair industry associations and organisations which audit exhibition attendance figures in Germany and abroad. The AUMA database can also be accessed from mobile devices via the MyFairs app.



Trade fair basics ■ The website gives exhibitors practical hints on how to plan their attendance at trade fairs. Practical exhibition planning is made easy through checklists and the Trade Fair Benefit Check, through which exhibitors can cost and evaluate trade fair participation, as well as information about supporting programmes. A wide range of court rulings help companies in their day-to-day fair planning, including information about unofficial exhibition guides, IP infringements and visa matters. All trade fair basics are available on the subdomain ► toolbox.auma.de.



Since 2013, AUMA has been hosting a blog in which staff members comment on developments and experiences in relation to all aspects of trade fairs and fair attendance. Over 160 articles have been published to date. The major theme in 2015 was Expo Milano: held between 1 May and 31 October 2015, the world expo was covered by a total of 15 articles reporting on the participant countries, the German pavilion and its architecture, and the programme behind the Expo theme of »Feeding the Planet, Energy for Life«. AUMA also uses social media to communicate information, posting

some 1,200 tweets on its German and English Twitter accounts. The number of followers had risen to just under 1,650 by the start of 2016, most of them being exhibition organisers, trade bodies and business organisations, reporters and exhibition service providers.

The YouTube channel »The German Exhibition Industry« offers video material about Germany as an exhibition venue. The AUMA Institute of the German Trade Fair Industry uses Facebook to provide information about education, training and research in the sector. AUMA also has profiles on XING and the B2B platform Induux.

Annual meeting of the trade fair industry at Berlin's Westhafen



»Trade fairs are indispensable to us. They make markets possible.« This was the message of AUMA chairman Walter Mennekes upon the opening of the industry gathering in Berlin on 9 June 2015.

Four hundred and eighty guests accepted AUMA's invitation to Berlin's Westhafen, including representatives of exhibition organisers, exhibition service providers and exhibitors as well as from industry associations, politics and the media. Held amidst the historic atmosphere of Berlin's largest commercial port, opened in 1923, the occasion was an opportunity for guests to meet colleagues and establish new contacts.



In the preceding general meeting of AUMA members, the association elected a new member to the Executive Board: Ulrich Reifenhäuser, Managing Shareholder of Reifenhäuser GmbH Maschinenfabrik, Troisdorf, who was elected as representative of the VDMA (Association of the Mechanical Engineering Industry).



Attendance at international congresses

UFI Congress in Milan ■ »The Exhibition Industry 2030« was the theme for the UFI 2015 annual congress, which was held in November in Milan. The UFI, the global association of the exhibition industry, was founded in Milan 90 years ago as a federation of European organisers of international trade fairs, including those in Cologne, Frankfurt and Leipzig. The speakers and podium discussions focused primarily on the relationship between the exhibition industry and the digital economy.

The Congress also featured a large number of working groups and committee meetings, in which AUMA was represented by Managing Director Dr Peter Neven, Divisional Directors Harald Kötter and Marco Spinger and managers Barbara Lüder (responsible inter alia for sustainability) and Bettina Rosenbach (education and training) as appropriate. AUMA's management team took part in particular in the European Chapter meeting, where discussion focused on the UFI's lobbying work with EU institutions, and in the Associations Committee, which amongst other things discussed preparations for the first Global Exhibitions Day on 8 June 2016.

The Associations Committee included presentations on the structure and activities of Italian trade fair associations and on auditing exhibition figures in South Korea. The UFI also presented the concept of a Global Exhibitions Day to draw attention to the significance of trade fairs around the world.



*Reunited
at the site of the
2015 Expo:
the UFI, the global
association of the
exhibition industry,
was founded in
Milan 90 years ago.*

In the European Chapter, chaired by Gerald Böse of Koelnmesse, the UFI presented in particular the lobbying work conducted by its Brussels office with the EU Commission and European Parliament.

Marco Spinger,
Director of
AUMA's Global
Markets Division,
participating in
a panel discussion
during CEFCO.



CEFCO, Chinese trade fair forum in Yinchuan ■ The China Expo Forum for International Cooperation (CEFCO) took place from 13-15 January 2016 under the slogan »Economic Incentives – New Impetus for the Exhibition and Congress Industry«. Over five hundred representatives from the Chinese trade fair industry and foreign exhibition organisers and associations participated in the Forum, which was held in Yinchuan, the capital of Ningxia province in north-west China. The Forum was organised by the China Council for the Promotion of International Trade (CCPIT) in collaboration with the UFI and the American trade fair associations IAEE and SISO. AUMA was represented by Marco Spinger, Director of the Global Markets Division.

International Trade Fair Seminar in Leipzig ■ Themed »Trade Fair Histories«, the 47th International Trade Fair Seminar took place in Leipzig on 27-30 June 2015. Around a hundred participants from Germany, Italy, Austria and Switzerland used the meeting to network and exchange ideas. The Seminar is an annual event which brings together members of the IDFA (Association of German Trade Fair Organisers and Exhibition Venues), the Austrian trade fair association Messen Austria and the Swiss association Expo Event and is hosted in rotation in each of these three countries. This year, the venue was provided by Messe Leipzig, which incorporated the meeting into the week of events celebrating »850 years of Leipzig Trade Fairs«. The programme included in particular talks on the history of trade fairs and future social developments. AUMA's representatives were Managing Director Dr Peter Neven, Divisional Directors Harald Kötter and Marco Spinger and managers Sylvia Kanitz, Ruth Nicolai and Heike Schöttle.

International Summer University 2015 ■ The theme of the International Summer University, held in Cologne on 24-26 June, was the influence of digitalisation on the trade fair industry. Eighty staff from exhibition organisers in 13 countries discussed how the industry should approach the increasing range of digital products and services, social media and mobile internet access. AUMA was represented by Christine Zander.



■ AUMA media at a glance

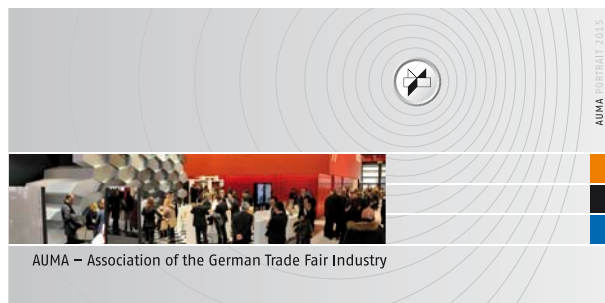
AUMA media

■ Review – The German trade fair industry

Overview of the trade fair activities by German business and the work of AUMA as the German trade fair industry association. Published annually in German (May) and English (August).

■ The German trade fair industry: facts, functions, outlook.

AUMA_Statement, 5th revised edition. Published in German and English in 2013.



■ Portrait: AUMA – Serving the trade fair industry

Information on the work, organisation and members of AUMA. Published in German and English in 2015.

■ German trade fair industry figures 2016

Published 2016 in German and English.

■ Promotional film: »Trade fairs made in Germany«

The promotional film highlights the strengths of trade fairs as a medium and the quality and effectiveness of German trade fairs. The DVD, which lasts 2 ½ minutes, includes the Arabic, Chinese, English, French, German, Korean, Portuguese (Brazil), Russian, Spanish and Turkish language versions.

■ World expo architecture

Dreamed, planned, built – demolished. By Dr. Thomas Schriefers. Publ. AUMA. Rasch Verlag, Bramsche. 432 pages. Published in German 2015. €78.00.

■ AUMA_Online

AUMA provides the following information online: a global trade fair database in four languages, tips for exhibitors, information on funding programmes, key performance indicators for the sector, training, research, German Trade Fair Library. Available on ► auma.de.

■ MyFairs – The Trade Fair Data Manager as an app

AUMA Trade fair database to go. Available in German and English free of charge. For iOS 7 and Android 4.4 or higher.

AUMA media



■ German Trade Fair Quality Abroad

Directory of trade fairs held abroad by German organisers. Titles, dates and organisers of around 320 trade fairs on all the continents. Published annually in November in German and English.

■ Trade fairs made in Germany in 2016/2017

International and national trade fairs in Germany with dates, areas of focus, statistical data and index. Published annually each autumn in

German, Greek, Korean, Portuguese (Brazil), Russian, Spanish and Turkish.

■ AUMA_practice: Successful participation in trade fairs – part 1: The basics

Detailed information for exhibitors from choosing a trade fair to assessing success – brochure with large numbers of images and PowerPoint presentation. Published in German and English. 2016. Only on the Internet: ► auma.de

■ AUMA_Toolbox

All aspects of trade fair participation for exhibitors. 10 steps to achieving success at trade fairs. How to make the most of the AUMA trade fair database incl. Trade Fair Benefit Check and check lists ► toolbox.auma.de

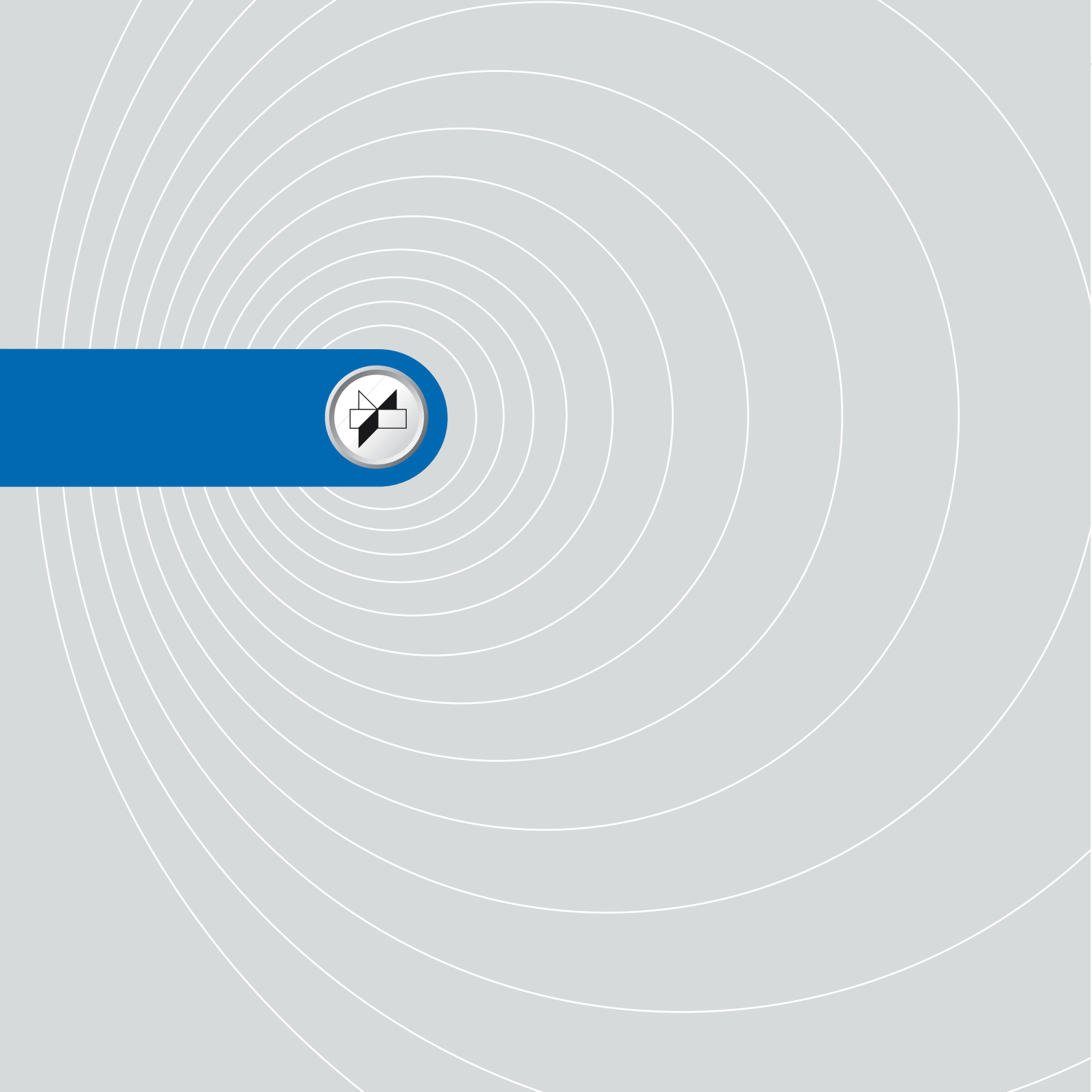
■ AUMA_Trade Fair Benefit Check

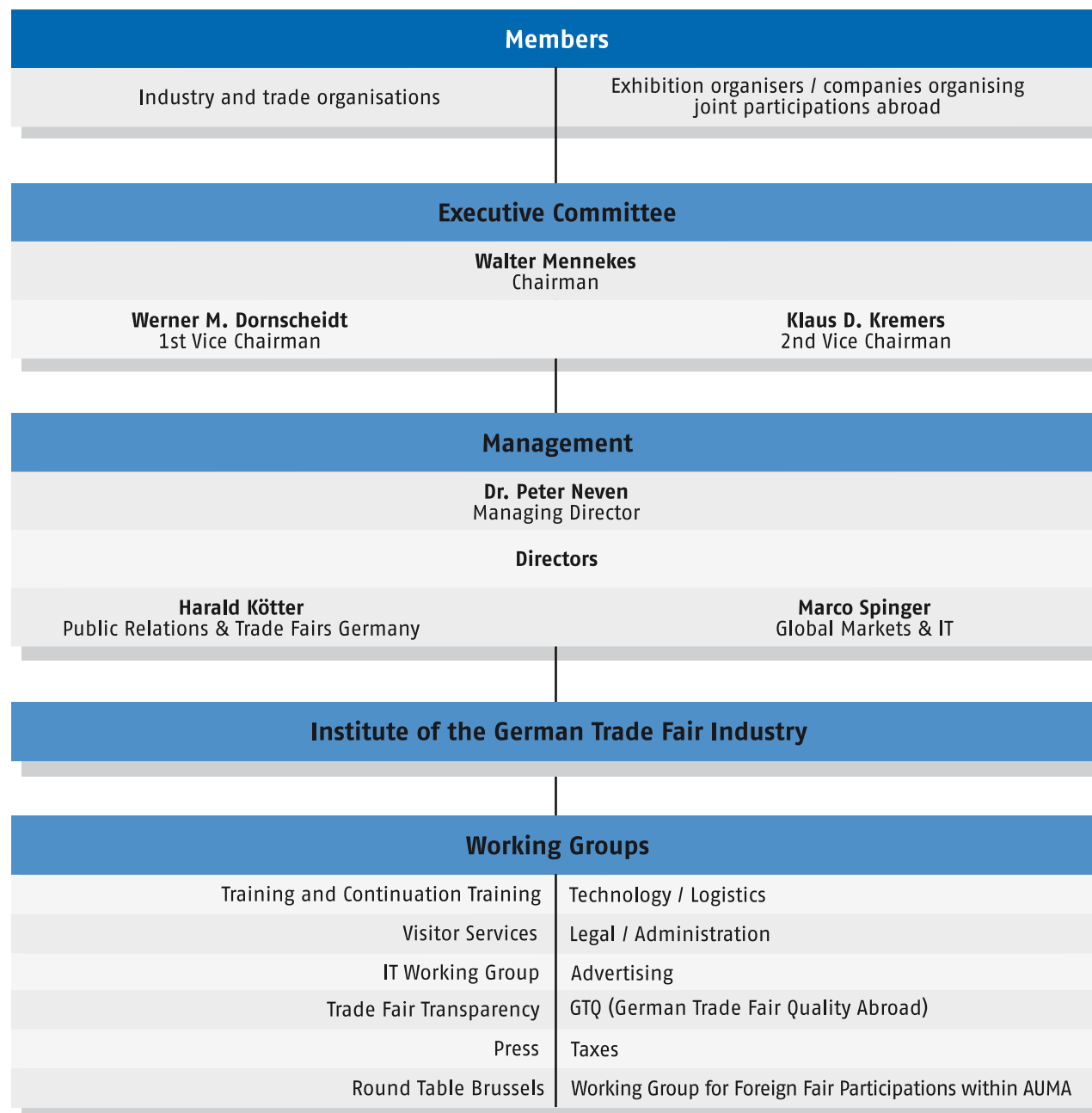
Software for planning, calculating and evaluating participation in a trade fair. Available free of charge in German, English, French and Spanish. With instructional videos introducing how to use the software. Version 2.3, published 2010. Only on the Internet: ► auma.de

Other AUMA publications are available at
► auma.de / English / Publications



Organisation

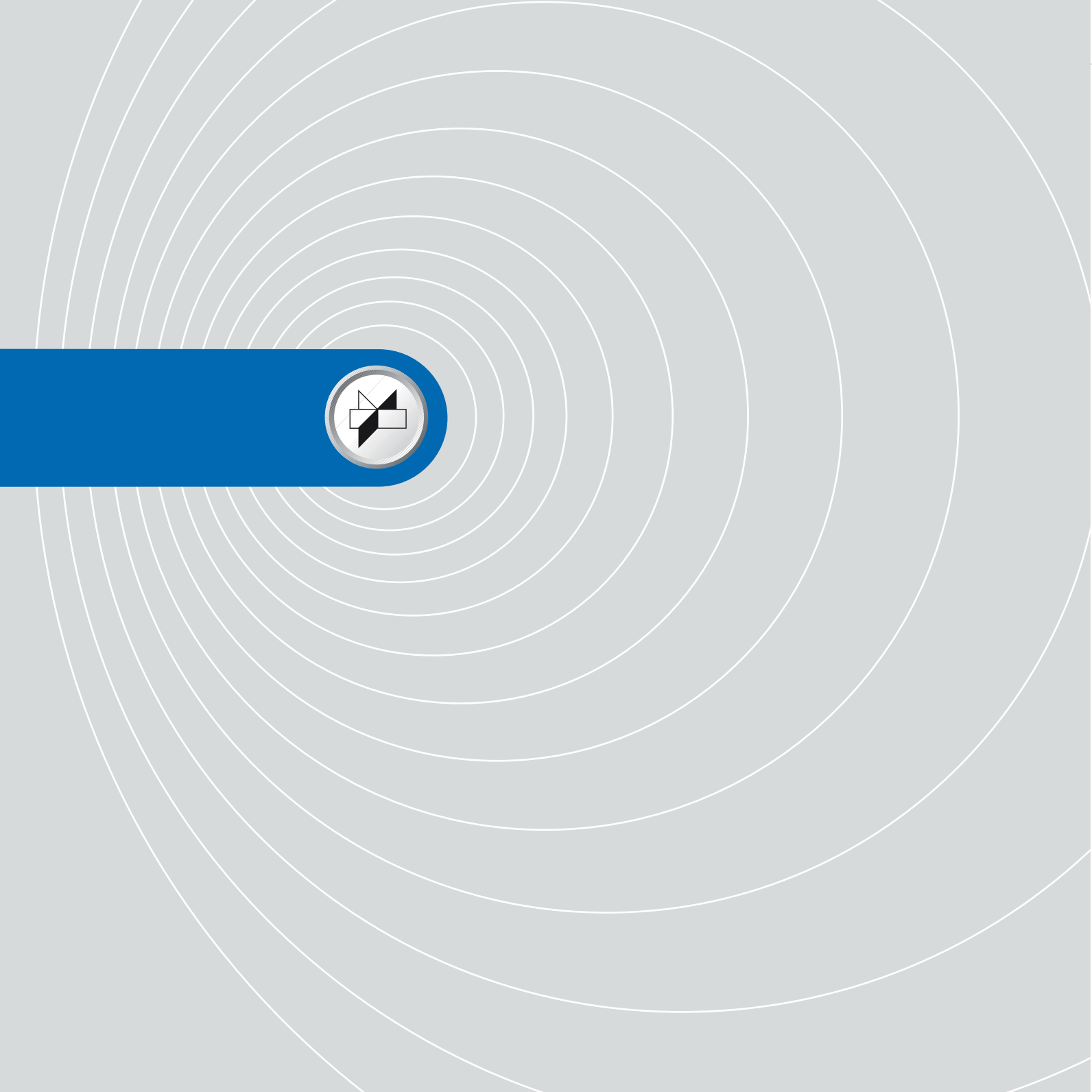




| Members | |
|---|--|
| Industry and trade organisations | Exhibition organisers / companies organising joint participations abroad |
| <ul style="list-style-type: none"> ■ Association of German Chambers of Commerce and Industry (DIHK), Berlin ■ Association of German Dental Manufacturers (VDDI), Cologne ■ Association of German Tool Manufacturers (FWI), Remscheid ■ Association of International Motor Vehicle Manufacturers (VDIK), Bad Homburg ■ Caravaning Informations GmbH (IG), Frankfurt/M. ■ Central Committee for German Agriculture (ZDL), Berlin ■ Confederation of German woodworking and furniture industries (HDH), Bad Honnef ■ Confederation of the German Textile and Fashion Industry, Berlin ■ Didacta Verband – Association of the German Education Industry, Darmstadt ■ European Association of Event Centres (EVVC), Frankfurt/M. ■ FAMAB – Association for Integrated Brand Experiences, Rheda Wiedenbrück ■ Federal Association for Information Technology, Telecommunications and New Media (Bitkom), Berlin ■ 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, Foreign Trade and Services (BGA), Berlin ■ Federation of the Manufacturers of High-grade Consumer Goods (IVSH), Solingen ■ 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 Association of Manufacturers and Importers of Automobile Service Equipment (ASA), Ditzingen ■ German Boat and Shipbuilding Association (DBSV), Hamburg ■ German Chemical Industry Association (VCI), Frankfurt/M. ■ German Confederation of Skilled Crafts (ZDH), Berlin ■ German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW), Frankfurt/M. ■ German Electrical and Electronic Manufacturers Association (ZVEI), Frankfurt/M. ■ German Hotels and Restaurants Association (DEHOGA), Berlin ■ German Industry Association for Coin-operated Amusement and Vending Machines (VDAl), Berlin ■ German Machine Tool Builders' Association (VDW), Frankfurt/M. ■ German Retail Federation (HDE), Berlin ■ German Shipbuilding and Ocean Industries Association (VSM), Hamburg ■ German Steel Federation, Düsseldorf ■ German Sweets e.V., Bonn ■ German Winegrowers' Association (DWW), Bonn ■ IELA – International Exhibition Logistics Association, German Chapter, Kelsterbach ■ Mechanical Engineering Industry Association (VDMA), Frankfurt/M. ■ SPECTARIS – German Hightech Industry Association, Berlin | <ul style="list-style-type: none"> ■ asfc atelier scherer fair consulting GmbH, Fuerth ■ Balland Messe-Service GmbH, Cologne ■ DEGA-EXPOTEAM GmbH & Co. Ausstellungs KG, Obersoechering ■ Deutsche Messe AG, Hanover ■ ECM Expo & Conference Management GmbH, Berlin ■ expotec gmbh, Berlin ■ FAMA – Special Association for Fairs and Exhibitions, Obertraubling ■ Frankfurt Book Fair, Frankfurt/M. ■ GDG – Association of Major German Exhibition Organisers, Nuremberg ■ GHM – Gesellschaft für Handwerksmessen mbH, Munich ■ Hamburg Messe und Congress GmbH, Hamburg ■ Hannover Fairs International GmbH, Hanover ■ IDFA – Association of German Trade Fair Organisers and Exhibition Venues, Hamburg ■ IEC Berlin INTER EXPO CONSULT GmbH, Berlin ■ IFWexpo Heidelberg GmbH, Heidelberg ■ IGEDO Company GmbH & Co. KG, Düsseldorf ■ IMAG – Internationaler Messe- und Ausstellungsdienst GmbH, Munich ■ 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, Düsseldorf ■ MESAGO Messe Frankfurt GmbH, Stuttgart ■ Messe Berlin GmbH, Berlin ■ Messe Bremen & ÖVB-Arena WFB Wirtschaftsförderung Bremen GmbH, Bremen ■ Messe Düsseldorf GmbH, Düsseldorf ■ Messe Essen GmbH, Essen ■ Messe Frankfurt GmbH, Frankfurt/M. ■ Messe Friedrichshafen GmbH, Friedrichshafen ■ Messe München GmbH, Munich ■ Messe Offenbach GmbH, Offenbach ■ Messe Westfalenhallen Dortmund GmbH, Dortmund ■ NürnbergMesse GmbH, Nuremberg ■ Reed Exhibitions Deutschland GmbH, Düsseldorf ■ Spielwarenmesse – International Toy Fair, Nuremberg |
| | Status: 1st July 2016 |



Key indicators of
the exhibition
industry





Macro-economic significance

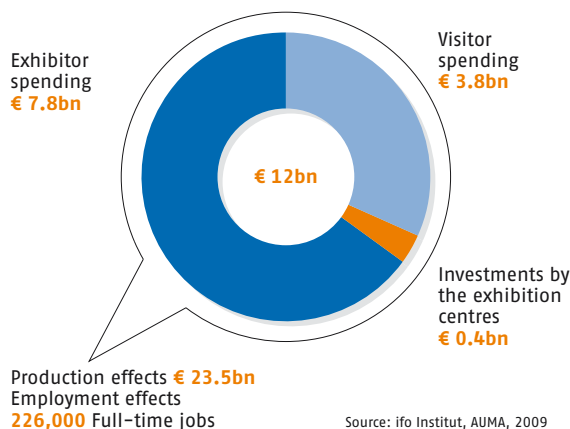
The exhibition industry is one of the leading services sectors of the German economy. It also ranks highly on the international stage. In terms of highest turnover, five of the world's top ten exhibition companies are based in Germany.

Turnover of Exhibition Companies worldwide (more than Euro 100 million)

| | 2015 | 2014 | 2013 |
|-----------------------------|---------|---------|---------|
| Reed Exhibitions (GB) | 1,183.0 | 1,104.0 | 1,017.0 |
| UBM plc (GB) | 855.5 | 561.1 | 546.0 |
| Messe Frankfurt (D) | 647.8 | 554.2 | 544.8 |
| GL events (F) | 456.0 | 409.8 | 397.7 |
| MCH Group (CH) | 384.5 | 373.6 | 385.5 |
| Informa (GB) | 356.1 | 248.7 | 196.0 |
| Fiera Milano (I) | 337.3 | 245.5 | 245.1 |
| Deutsche Messe (D) | 329.3 | 280.6 | 312.0 |
| Koelnmesse (D) | 321.2 | 231.2 | 280.6 |
| Messe Düsseldorf (D) | 302.0 | 411.5 | 322.9 |
| VIPARIS (F) | 283.0 | 303.8 | 297.4 |
| Emerald Expositions (USA) | 281.0 | 225.4 | 132.9 |
| Messe München (D) | 277.4 | 309.4 | 353.0 |
| Messe Berlin (D) | 242.0 | 269.4 | 187.6 |
| HKTDC (HK) | 223.1 | 172.8 | 163.4 |
| Coex (ROK) | 217.0 | 163.1 | 139.0 |
| i2i Events Group (GB) | 204.0 | 177.3 | 145.3 |
| NürnbergMesse (D) | 203.7 | 228.7 | 192.8 |
| ITE Group (GB) | 183.1 | 223.7 | 229.4 |
| Tokyo Big Sight (JP) | n/a | 159.5 | 140.8 |
| Fira Barcelona (E) | 148.0 | 152.6 | 117.8 |
| Jaarbeurs Utrecht (NL) | 133.3 | 131.6 | 140.9 |
| Svenska Mässan Göteborg (S) | 128.9 | 97.4 | 88.0 |
| dmg :: events (GB) | 128.1 | 128.0 | 103.8 |
| Amsterdam RAI (NL) | 126.2 | 119.7 | 116.6 |
| BolognaFiere (I) | 119.0 | 120.0 | 109.9 |
| Tarsus Group (GB) | 117.9 | 77.4 | 90.9 |
| SNIEC Shanghai (CN) | 115.7 | 139.0 | 116.6 |
| Landesmesse Stuttgart (D) | 115.0 | 137.0 | 98.8 |
| Comexposium (F) | 108.5 | 129.3 | 117.5 |
| Artexis Group (B) | 107.0 | 92.8 | 94.0 |

The German Exhibition Industry

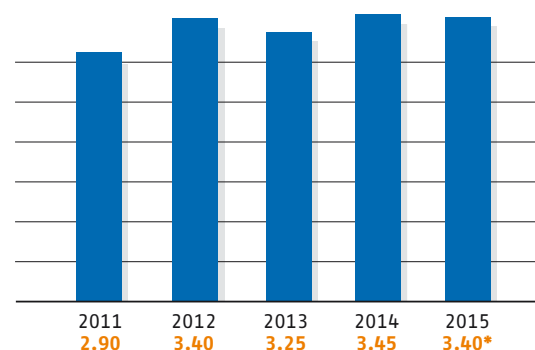
Economic impact based on a multiplier analysis
Average trade fair year (period 2005 to 2008)



The German Exhibition Industry

Turnover of Exhibition Companies (€ billion)

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



* preliminary

International / national trade fairs

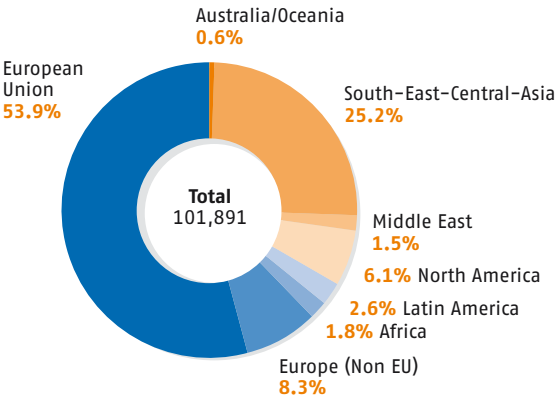
Germany as a trade fair venue is the global leader in holding international trade fairs. Almost two thirds of individual industries' globally leading trade fairs take place in Germany.

International and national trade fairs have grown again despite rather unstable economic conditions. Even growing media competition has barely affected German trade fairs.

Trade Fairs in Germany 2015

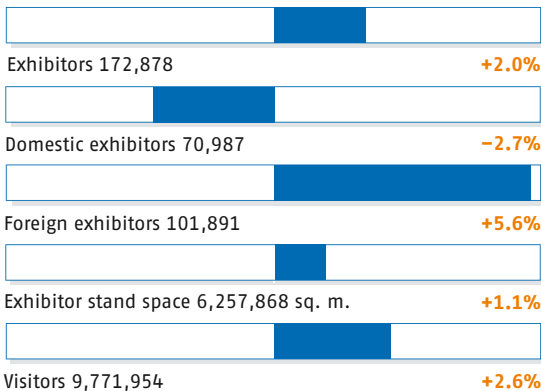
Foreign exhibitors

AUMA category international and national events



Trade Fairs in Germany 2015

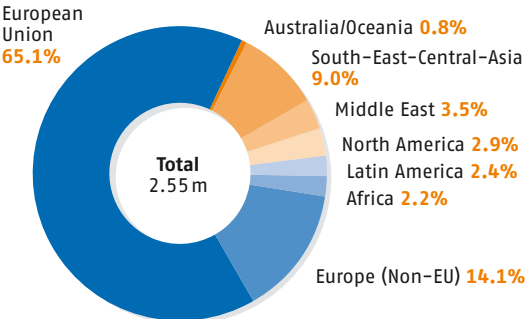
The 164 international / national events in comparison to the respective previous events



Trade Fairs in Germany 2015

Foreign visitors

AUMA category international and national events

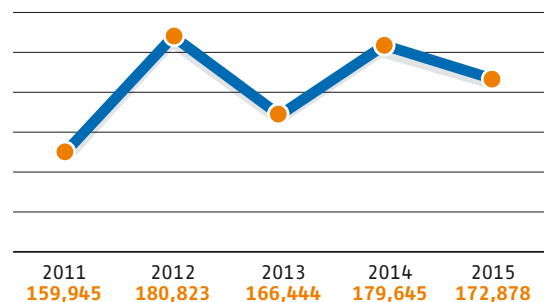




Trade Fairs in Germany

Number of exhibitors

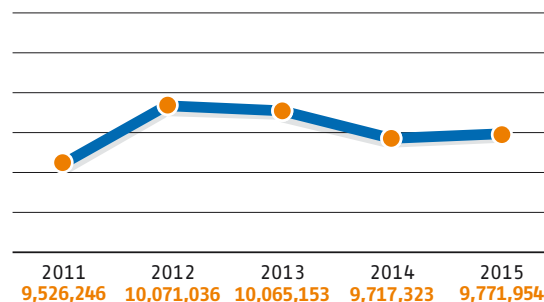
AUMA category international and national events



Trade Fairs in Germany

Number of visitors

AUMA category international and national events



At 26 exhibition centres in Germany the hall space available for holding international and national trade fairs and exhibitions totals around 2.8 million 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 2016

Exhibition capacities*
gross in sq. m.

| Location | Halls | Outdoor |
|---------------------------|---------|---------|
| Hanover | 463,165 | 58,000 |
| Frankfurt/M | 366,637 | 96,078 |
| Cologne | 284,000 | 100,000 |
| Düsseldorf | 261,817 | 43,000 |
| Munich Exh. Center | 180,000 | 425,000 |
| Berlin ExpoCenter City | 170,000 | 157,000 |
| Nuremberg | 170,000 | 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 Salzungen | 78,000 | |
| Dortmund | 59,735 | |
| Karlsruhe | 52,000 | 62,000 |
| Augsburg | 46,100 | 10,000 |
| Bremen | 39,000 | 100,000 |
| Erfurt | 25,070 | 21,600 |
| Offenburg | 22,570 | 37,877 |
| Freiburg | 21,500 | 81,000 |
| Münster | 20,800 | 10,000 |
| Offenbach | 20,100 | |
| Berlin ExpoCenter Airport | 20,000 | 57,000 |
| Chemnitz Messe | 11,000 | 8,000 |
| Idar-Oberstein | 6,000 | 1,000 |
| Husum | 5,500 | 50,500 |

Status: 1.1.2016

* Locations with at least one event
according to AUMA categories international or national events



Regional exhibitions

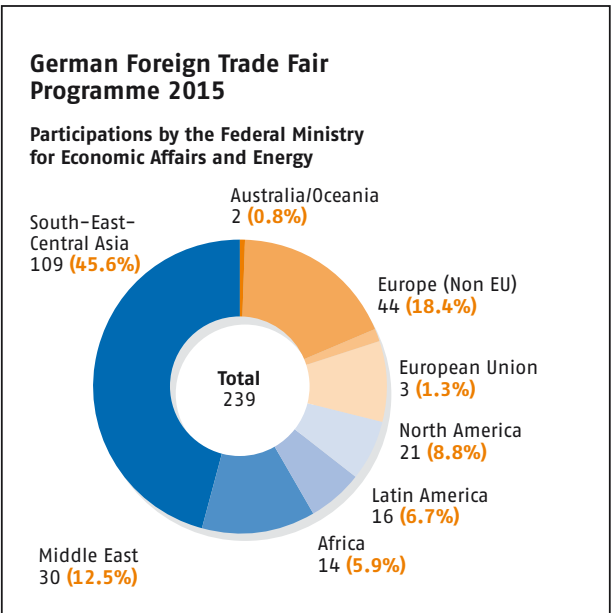
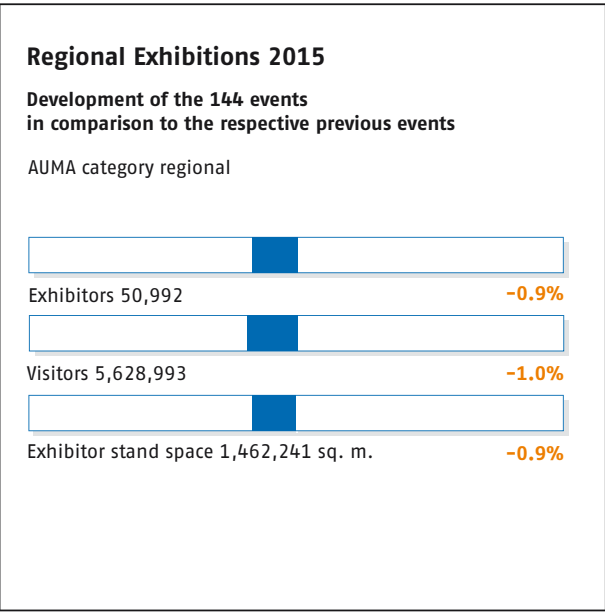
The international and national trade fairs are supplemented by a dense network of trade and consumer shows with regional catchment areas for visitors.

More than 50,000 exhibitors meet around 6 million visitors at these events each year.

Foreign trade fair programme

In addition to its participation in trade fairs in Germany, German businesses also make significant use of trade fairs abroad for their export marketing.

The foreign trade fair programme of the Federal Ministry for Economic Affairs and Energy is a key instrument here, particularly for small and medium-sized enterprises.



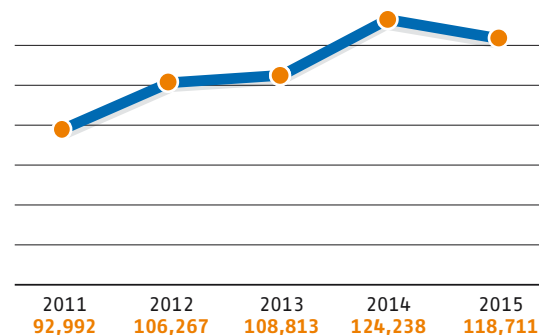


Trade fairs abroad by German organisers

The trade fair companies organised in AUMA and FAMA hold around 300 of their own events each year in important foreign growth regions – particularly in Asia, North and South America and Eastern Europe. It is largely leading trade fair concepts that have been tried and tested in Germany that are transferred to selected foreign markets. There have been increases in all the key performance indicators of trade fairs abroad held by German organisers except of variations of visitor figures caused by the cycle of events. This trend is likely to continue in the next few years.

Trade Fairs Abroad by German Organisers*

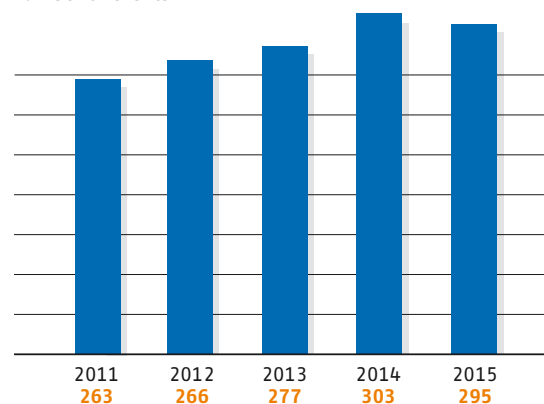
Number of exhibitors



* AUMA and FAMA members

Trade Fairs Abroad by German Organisers*

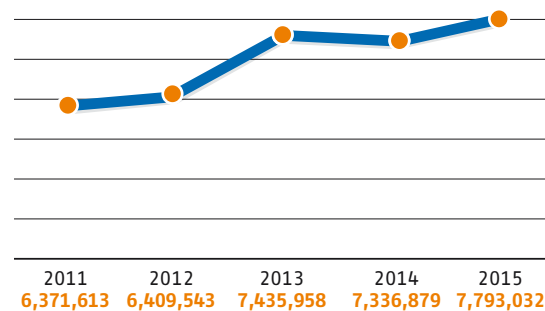
Number of events



* AUMA and FAMA members

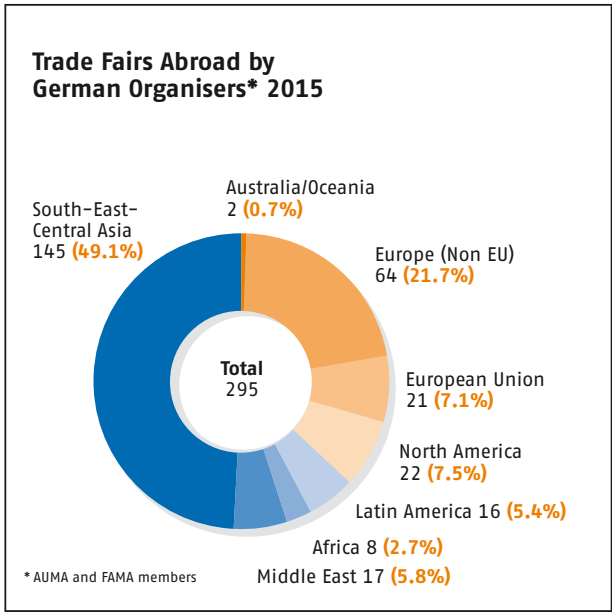
Trade Fairs Abroad by German Organisers*

Number of visitors



* AUMA and FAMA members

Around 50 % of the exhibitions 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 2016

Exhibition capacities

gross in sq. m.

| Location | Hall | Location | Hall |
|---|---------|--|---------|
| Hannover Exhibition Center | 463,165 | Georgia World Congress Center Atlanta | 130,112 |
| National Exhib. and Convention Center (NECC) Shanghai | 400,000 | BVW Veletrhy Brno | 121,314 |
| Frankfurt/Main Exhibition Center | 366,637 | NRG Park (formerly Reliant Park Houston) | 120,402 |
| Fiera Milano | 345,000 | Fiera del Levante Bari | 120,000 |
| China Import & Export Fair Complex Guangzhou | 340,000 | Yiwu International Expo Center | 120,000 |
| Cologne Exhibition Center | 284,000 | Kentucky Expo Center | 120,000 |
| Düsseldorf Exhibition Center | 261,817 | Tüyap Istanbul Fair | 120,000 |
| Paris-Nord Villepinte | 242,082 | Fiera Roma | 118,910 |
| McCormick Place Chicago | 241,549 | Fira Barcelona – Montjuïc | 115,211 |
| Fira Barcelona – Gran Vía | 240,000 | Brussels Expo | 114,445 |
| Feria Valencia | 230,837 | EUREXPO Lyon | 114,275 |
| Crocus Expo IEC Moskau | 226,399 | Leipzig Exhibition Center | 111,300 |
| Paris Porte de Versailles | 219,759 | Essen Exhibition Center | 110,000 |
| Chongqing International Expo Centre | 204,000 | New Int. Conv. & Exp. Center, Chengdu Century City | 110,000 |
| The NEC Birmingham | 201,634 | Rimini Fiera | 109,000 |
| BolognaFiere | 200,000 | KINTEX Goyang/Seoul | 108,483 |
| IFEMA Feria de Madrid | 200,000 | BEC Bilbao Exhibition Centre | 108,000 |
| SNIEC Shanghai | 200,000 | Palexpo Genf | 108,000 |
| Orange County Convention Center Orlando | 190,875 | Poznan International Fair | 107,654 |
| Las Vegas Convention Center | 184,456 | New China Int. Exhibition Center (NCIEC) Beijing | 106,800 |
| Munich Exhibition Center | 180,000 | Messe Stuttgart | 105,200 |
| Nürnberg Exhibition Center | 170,000 | Shenzhen Convention & Exhibition Center (SZCEC) | 105,000 |
| Berlin ExpoCenter City | 170,000 | Ernest N. Morial Convention Center New Orleans | 102,230 |
| Veronafiere | 151,536 | Singapore Expo | 101,624 |
| Wuhan International Expo Center | 150,000 | ExCeL London | 100,000 |
| Messe Basel | 141,000 | Fiere di Parma | 100,000 |
| IMPACT Muang Thong Thani Bangkok | 140,000 | Royal Dutch Jaarbeurs Exh. & Conv. Centre Utrecht | 100,000 |
| VVC Moskau | 132,720 | | |

Status: 1.1.2016

Four of the world's six largest exhibition centres are in Germany. Worldwide there are 55 venues where hall space exceeds 100,000 square metres. 19 of these are not in Europe. Of this number ten are in China. Of the 36 European exhibition centres occupying more than 100,000 square metres, 31 are in Western Europe, five are in Central and Eastern Europe.

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

Pictures

- p. 8 FAMAB-AWARD-Preisträger: Armstrong BAU SOMAA © FAMAB
- p. 14 Frankfurter Buchmesse GmbH / Alexander Heimann
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