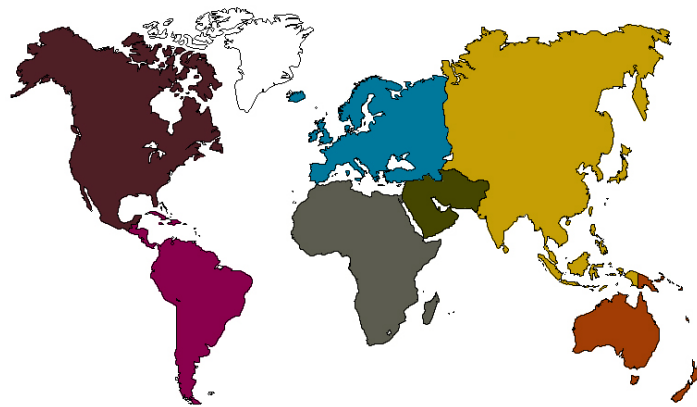


THE WORLD MAP OF EXHIBITION VENUES and future trends



October 2007

***In addition to all the venues that directly provided their data,
UFI would like to thank the following organizations
and individuals, who contributed to this study:***

*AEFI (Italy),
AEO (UK),
AFE (Spain),
AFIDA (Central & South America),
AGECO (Greece),
AHEFO (Hungary),
AUMA (Germany),
BAFEO (Bulgaria),
Board of External Trade (Tanzania),
BSG (Asia),
CAEC (China),
CEIR (North America),
CICEC (Morocco),
CITEM (Philippines),
CLC–Centrum voor Live Communication (The Netherlands),
Cyprus State Fairs Authority (Cyprus),
EASE (Serbia),
Ecommerce Gateway (Pakistan),
EFU (Ukraine),
EVVC (Germany),
EXSA (Botswana, Kenya, Mozambique, Namibia, South Africa, Zimbabwe),
Fairlink (Denmark, Finland, Norway, Sweden),
FEBELUX (Belgium & Luxembourg),
FEXPE (Peru),
FKM Suisse (Switzerland),
Fondazione Fiera Milano (Italy),
FSCF (France),
General Board of Fairs (Libya),
HKCEC & Cliff Wallace (Worldwide),
HKF Trade Fairs Fuarcilik A.S. (Turkey),
IAAM (North America),
IFP (Lebanon),
Izmir fair (Turkey),
JMA (Japan),
M+A (Worldwide),
Malta Trade Fairs Corporation (Malta),
Olaf Banse (Central & South America)
PTFC (Poland),
Reed Messe (Austria),
R.E.ROGERS INDIA PVT Ltd (India),
Romexpo (Romania),
RUEF (Russia),
Singapore Exhibition Services Pte Ltd (Singapore)
SOVA (Czech Republic),
TAITRA (Taiwan),
TEA (Thailand),
TECA (Taiwan),
Tradeshaw Week (USA Directory),
Visit Mexico (Mexico),
VMA (Australia & New Zealand),
Zagreb Fair (Croatia)*

SUMMARY OF FINDINGS

Introduction: scope and methodology

As a part of its strategy, UFI is developing its Research activities (for a complete overview of UFI activities, please look at www.ufi.org).

An important step is now reached with this study focusing on the “hardware” of the Exhibition Industry. The objective was to identify all venues¹, worldwide, with a minimum of 5,000 sqm of indoor exhibition space².

The data collection, initiated with information available from national associations, key operators and documentation (trade media, industry directories, etc.), was cross checked and enriched with direct information from the venues. Please refer to the list on the previous page for all organizations and individuals who contributed.

The results are therefore considered reliable. They cannot however be considered as 100% accurate or complete, especially when dealing with developments planned until the year 2010 and UFI cannot be held responsible for errors or any consequences arising from the use of this information.

Main results

1,062 venues (with a minimum of 5,000 sqm of indoor exhibition space) **were identified for the year 2006 and their total indoor exhibition space reaches 27.6 million sqm.**

Europe and North America, followed by Asia offer the highest venues capacities, with respectively 44%, 34% and 12% of the total number of venues, and 52%, 26% and 14% of the total indoor exhibition space (cf. table 1 for complete results and mapping of regions).

The size of venues also varies from one region to another (the average size reaches around 30,000 sqm in Europe and Asia, 20 to 25,000 in North America, Central & South America, the Middle East and Africa, and 16.000 in Oceania). 47 venues – 35 of them being in Europe – have an indoor exhibition space of 100,000 sqm and more (cf. tables 2 & 3).

In terms of countries, 5 of them (USA, Germany, China, Italy and France) account for 58% of the total world indoor exhibition space (cf. table 4 for the capacity details of the 30 countries with a minimum of 100,000 sqm of indoor exhibition space).

The exhibition space will expand in the coming years, with an overall development estimated at 3.5 million sqm identified for the 2007-2010 period (+13% with 2006) for a total expenditure estimated at around 13.5 billion € (18.7 billion US\$)³.

This level can be considered as a minimum, since some projects, for which space details or deadlines were not fully validated, were not taken into account.

¹ “Venue” definition (for the purpose of this survey): any public assembly premises with a minimum of 5,000 square meters (sqm) of indoor Exhibition Space and that hold various types of exhibitions, trade fairs or consumer/public shows on a regular basis. The premises may be purpose-built exhibition centre space or other premises including Exhibition Space (e.g. hotels, arenas, sport venues, and amusement fair grounds).

² “Exhibition Space” (for the purpose of this survey): the amount of gross exhibition space in the Venue regularly marketed and rented/licensed/used for exhibitions, trade fairs or consumer/public shows.

³ This estimation relates to construction costs only and it represents a minimum amount since some projects, not yet confirmed, were not taken into account in the study.

Europe will account for 52% of this total additional indoor exhibition space, with 99 projects precisely identified. 21% will be in Asia (28 projects), 17% in North America (44 projects) and 7% in the Middle East (10 projects).

As a result, the regional shares of the total world indoor exhibition space won't change much (cf. table 5 for complete regional results).

However, some countries will largely increase their exhibition space. This is the case especially (cf. table 6 for the "top 10" countries in 2010, in terms of indoor venue capacity and table 7 for the largest venue capacities by year 2010, in each of the 4 main regions):

- in Europe: for the Western part of Russia (with around 463,000 additional sqm between years 2006 and 2010, corresponding to a +103% progression), Spain (+240,000 sqm, +18%) and Italy (+215,000 sqm, +10%);
- in North America: for the USA (+469,000 sqm, +8%) and Mexico (+80,000 sqm, +22%);
- in Asia: for China (+445,000 sqm, +18%), India (+79,000 sqm, +33%), South Korea (+65,000 sqm, +41%), Singapore (+54,000 sqm, +35%); and
- in the Middle East, mainly for the UAE (+147,000 sqm, +115%).

By year 2010, it is anticipated that there will be a minimum of 1,104 venues (with a minimum of 5,000 sqm of indoor exhibition space) **totalising 31.1 million sqm of indoor exhibition space** (cf. table 8 for detailed regional results).

Conclusion

The exhibition space is still expanding, proving the strength of the exhibition industry. However, the overall 2006-2010 rhythm of development (13% anticipated at this stage) may be less significant than it has been in the recent years.

The Western European countries (collectively leaders in terms of total capacity and size of venues) and the US are still developing their capacities, whereas some market adjustments will happen in Asia and Central & Eastern Europe, where some current obvious under capacity situations are about to disappear, or diminish. Russia, and Moscow especially, will become an important player.

The Middle East region is booming, with a global space increase of 38%, which will also lead to an average size of venues getting close to the ones in Europe or Asia.

These trends also tend to prove the existence of a fierce competition, both locally and internationally, with a "development race" often justified by operators with:

- the need to enlarge facilities to keep the growing shows from moving;
- the growing awareness by local authorities of the benefits of the industry, both in terms of direct and indirect economic impact; and
- the coexistence of various economic models and financial expectations.

For any information on UFI's Research activities, please contact Christian DRUART
(research@ufi.org)

Table 1 - VENUES AND INDOOR EXHIBITION SPACE IN 2006
Number & Capacity

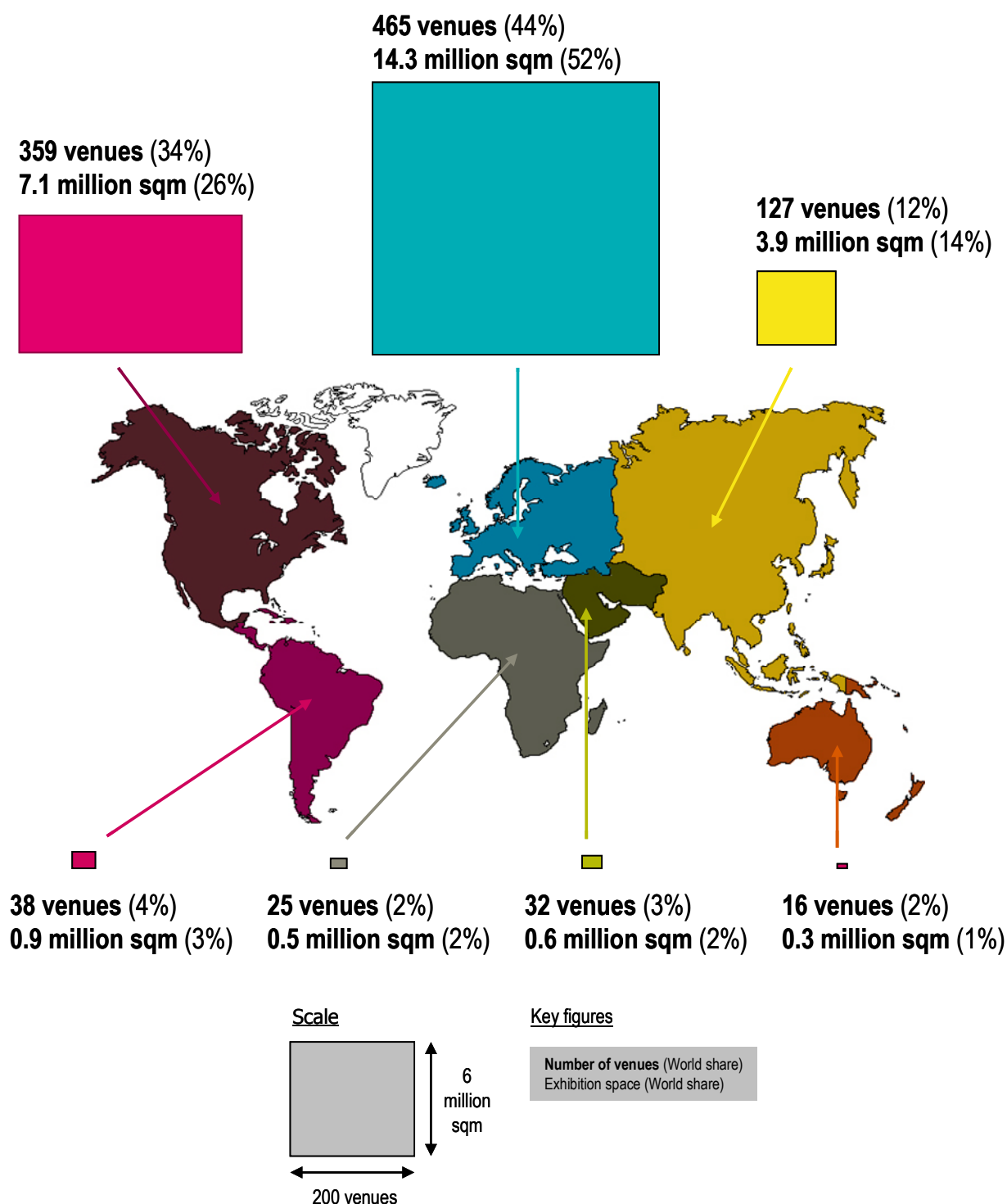


Table 2 - VENUES AND INDOOR EXHIBITION SPACE IN 2006

Number of venues by size (in sqm)

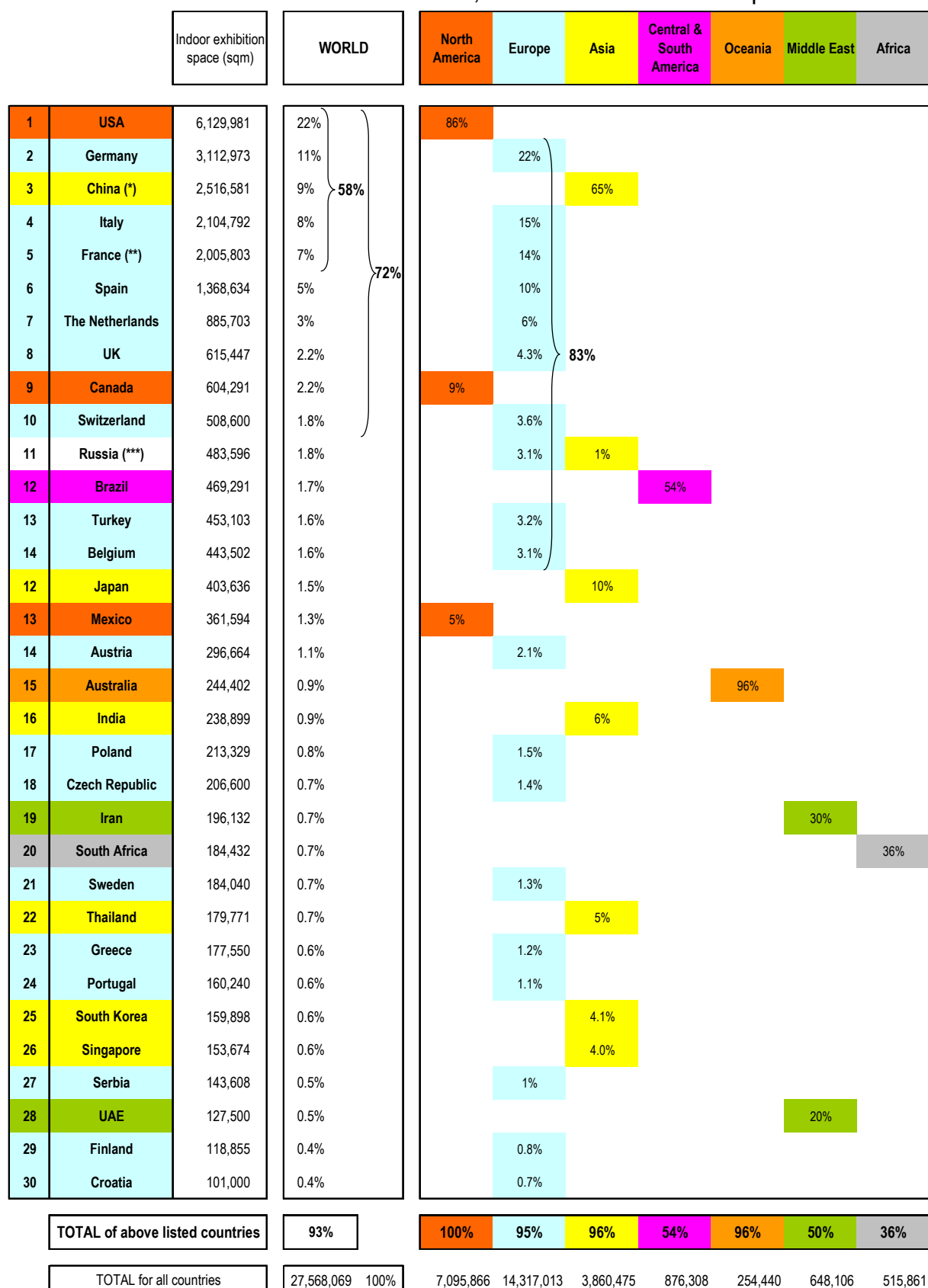
	5,000 to 19,999	20,000 to 49,000	50,000 to 99,000	100,000 and more
Africa	14	9	2	-
Asia	53	49	18	6
Central & South America	22	12	4	-
Europe	286	109	35	35
Middle East	22	7	2	1
North America	270	64	20	5
Oceania	10	6	-	-
WORLD	677	256	81	47
	100%	64%	24%	8%
			8%	4%

Table 3 – Venues with a minimum of 100,000 sqm of indoor exhibition space in 2006

					Indoor exhibition space (sqm)	Europe	North America	Asia	Middle East
1	Messe Hannover	Hanover	Germany	495,265	1				
2	Fiera Milano (Rho Pero)	Milano	Italy	345,000	2				
3	Messe Frankfurt	Frankfurt/Main	Germany	321,750	3				
4	Koelnmesse	Cologne	Germany	284,000	4				
5	Messe Duesseldorf	Duesseldorf	Germany	251,038	5				
6	Feria Valencia	Valencia	Spain	230,602	6				
7	Paris Expo Porte de Versailles	Paris	France	226,069	7				
8	McCormick Place	Chicago, IL	USA	204,367			1		
9	The NEC (Birmingham)	Birmingham	UK	201,634	8				
10	Paris Nord Villepinte	Paris	France	191,000	9				
11	Orange County Convention Center	Orlando, FL	USA	190,787			2		
12	Las Vegas Convention Center	Las Vegas, NV	USA	185,788			3		
13ex	Neue Messe Muenchen	Muenchen	Germany	180,000	10ex				
13ex	BolognaFiere	Bologna	Italy	180,000	10ex				
15	Fira de Barcelona: Gran Via venue	Barcelona	Spain	165,000	12				
16	MCH Basel	Basel	Switzerland	162,000	13				
17ex	Messe Berlin	Berlin	Germany	160,000	14ex				
17ex	Nuernberg Messe	Nuernberg	Germany	160,000	14ex				
19	Feria de Madrid/IFEMA	Madrid	Spain	150,000	16				
20	Chinese Export Commodities Fair (Pazhou) Complex	Guangzhou	China	130,000				1	
21	Georgia World Congress Center	Atlanta, GA	USA	126,893			4		
22	Fiera Milano (City)	Milano	Italy	125,000	17				
23	Verona Fiere	Verona	Italy	124,112	18				
24	IMPACT Bangkok	Bangkok	Thailand	122,000				2	
25ex	Chinese Export Commodities Fair (Liuhua) Complex	Guangzhou	China	120,000				3	
25ex	E.A. Fiera del Levante	Bari	Italy	120,000	19				
25ex	Tehran Permanent Fair Ground / Iran International Exhibitions Co.	Tehran	Iran	120,000					1
28	Fiera di Roma S.p.A.	Roma	Italy	118,300	20				
29	Fira de Barcelona: Montjuic venue	Barcelona	Spain	115,000	21				
30	Brussels EXPO	Brussels	Belgium	113,017	22				
31ex	Veletrhy	Brno	Czech Republic	110,000	23ex				
31ex	Messe Essen	Essen	Germany	110,000	23ex				
33	Rimini Fiera	Rimini	Italy	109,000	25				
34	All-Russia Exhibition Centre State (GAO VVC)	Moscow	Russia	108,500	26				
35	Bilbao Exhibition Centre	Bilbao	Spain	108,000	27				
36	Poznan International Fair	Poznan	Poland	107,116	28				
37	Shenzhen Convention & Exhibition Center	Shenzhen	China	105,000				4	
38	EUREXPO	Lyon	France	103,669	29				
39	Shanghai New International Expo Center (SNIEC)	Shanghai	China	103,500				5	
40	Palexpo Geneva	Geneva	Switzerland	102,470	30				
41	Ernest N. Morial Convention Center - New Orleans	New Orleans, LA	USA	102,183			5		
42	Leipziger Messe	Leipzig	Germany	101,200	31				
43	Zagreb Fair	Zagreb	Croatia	101,000	32				
44ex	Singapore Expo	Singapore	Singapore	100,000				6	
44ex	Fiera di Parma	Parma	Italy	100,000	33ex				
44ex	Feria de Zaragoza	Zaragoza	Spain	100,000	33ex				
44ex	Jaarbeurs Utrecht	Utrecht	The Netherlands	100,000	33ex				

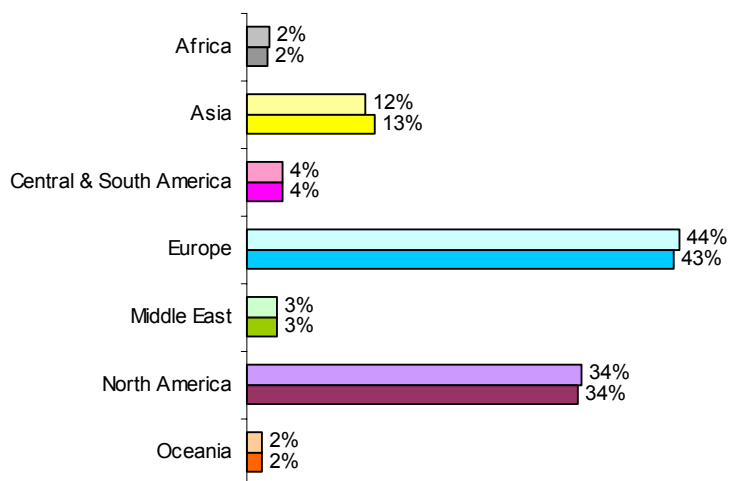
Table 4 - VENUES AND INDOOR EXHIBITION SPACE IN 2006

Countries with a minimum of 100,000 of indoor exhibition space in 2006



**Table 5 – SHARES OF THE TOTAL WORLD EXHIBITION VENUES
IN YEARS 2006 & 2010**

In terms of number of venues



In terms of indoor exhibition space

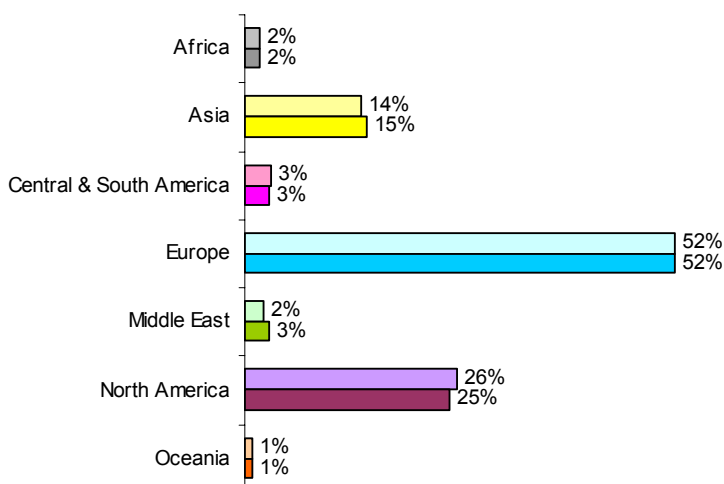


Table 6 – COUNTRY VENUE CAPACITY BY 2010 (“top 10”)

	2006 (cf. note)		2010			sqm increase
	rank	sqm	rank		sqm	
USA	1	6,134,421	1	(same)	6,603,033	8%
Germany	2	3,112,973	2	(same)	3,258,275	5%
China (*)	3	2,516,581	3	(same)	2,961,088	18%
Italy	4	2,104,792	4	(same)	2,319,310	10%
France (**)	5	2,010,937	5	(same)	2,103,087	5%
Spain	6	1,368,634	6	(same)	1,608,663	18%
Russia (***)	11	500,220	7	(+4)	983,325	97%
The Netherlands	7	885,703	8	(-1)	889,103	0.4%
UK	9	615,447	9	(same)	666,575	8%
Canada	8	604,291	10	(-2)	654,640	8%

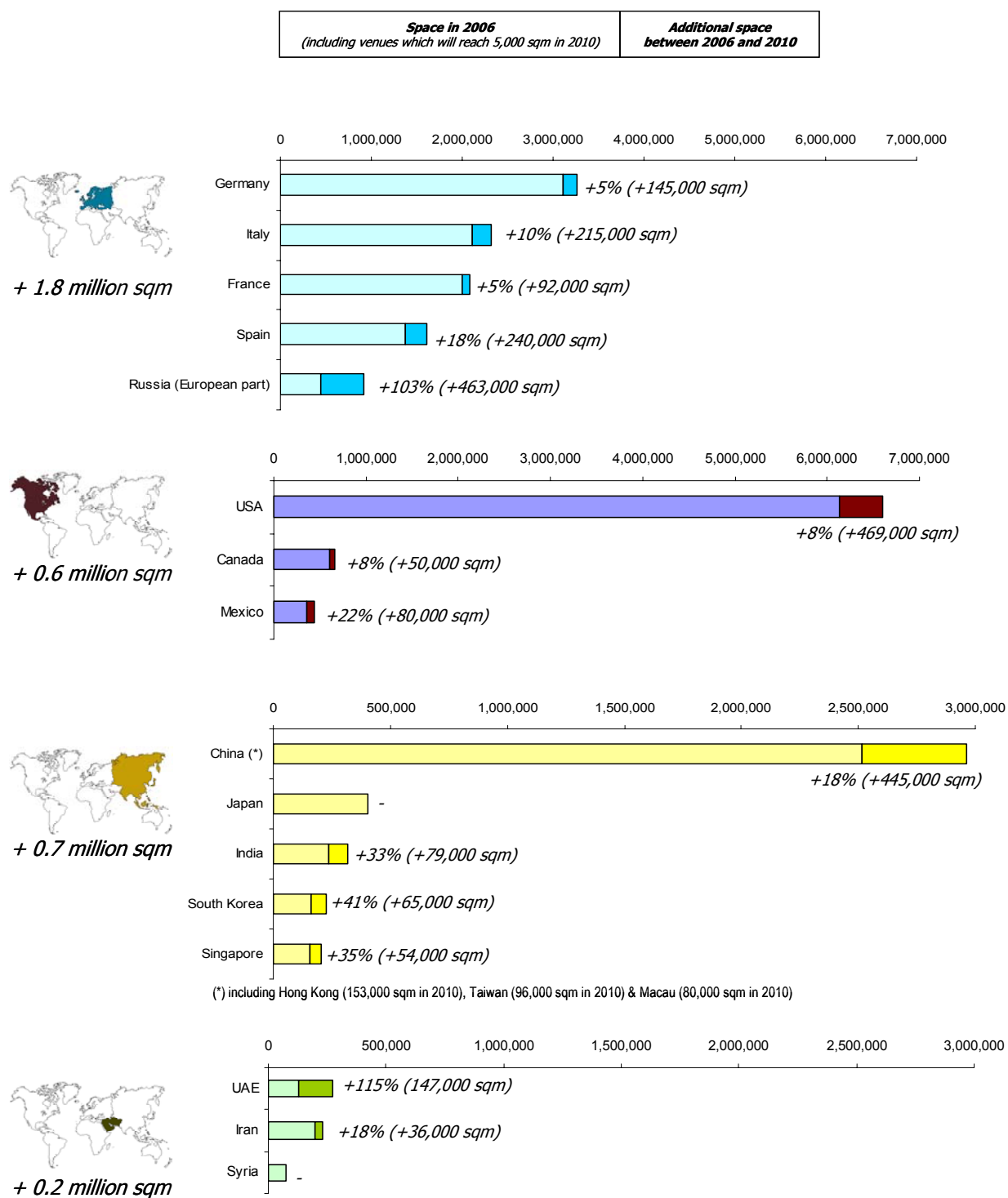
Note: including venues which will reach 5,000 sqm in 2010

(*) including Hong-Kong, Macau & Taiwan

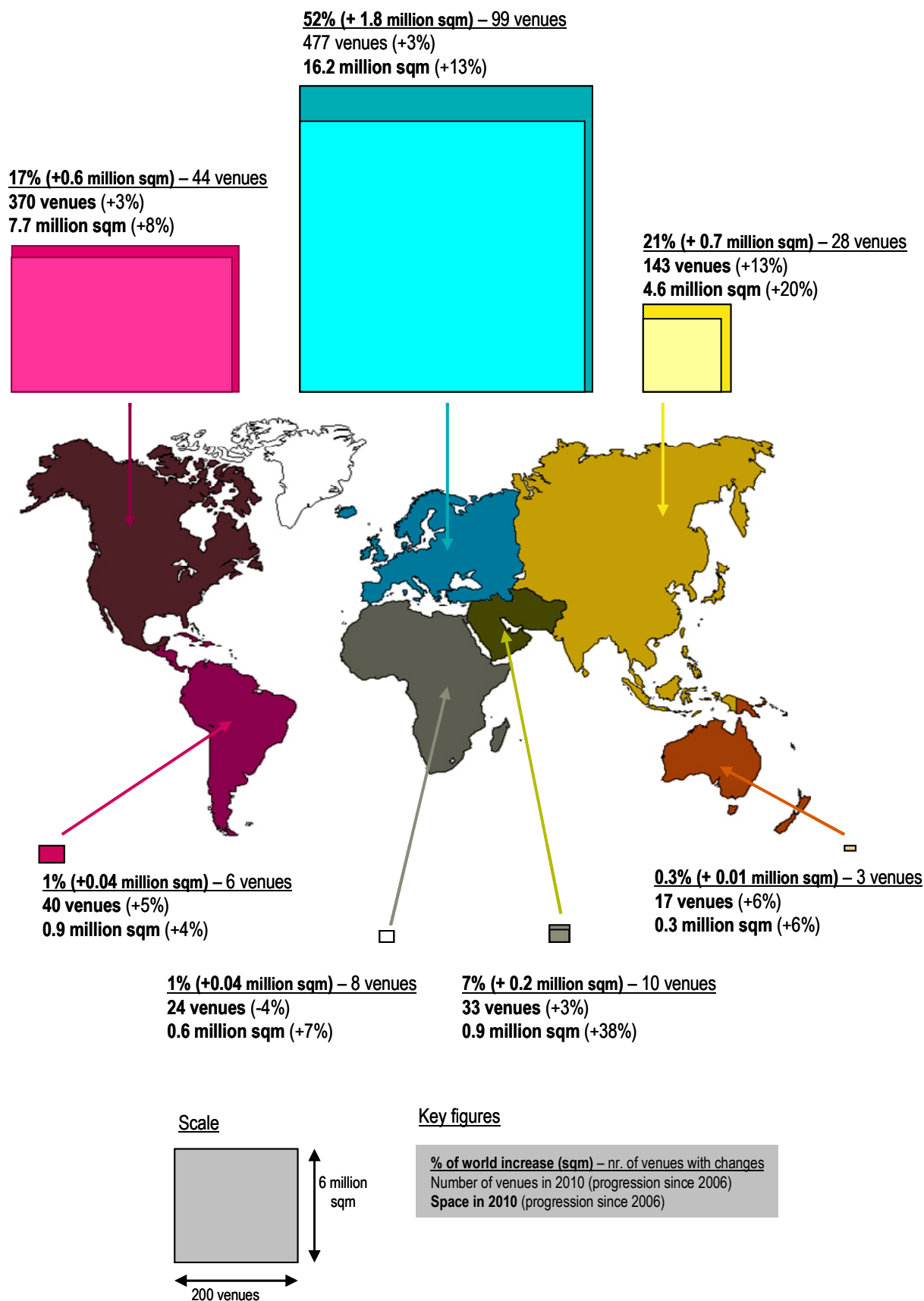
(**) including overseas territories

(***) European + Asian parts

Table 7 – LARGEST VENUE CAPACITIES BY 2010 by region



**Table 8 - VENUES AND INDOOR EXHIBITION SPACE IN 2010
and growth since 2006**



Your UFI contacts

UFI Headquarters

35 bis, rue Jouffroy d'Abbans
F-75017 Paris
France

Tel: +33 (0)1 42 67 99 12

Fax: +33 (0)1 42 27 19 29

E-mail: info@ufi.org

UFI Asia/Pacific Office

1101 Wilson House,
19-27 Wyndham Street,
Central, Hong Kong
China, People's Republic

Tel: +852 2525 6129

Fax: +852 2525 6171

E-mail: asia@ufi.org

UFI Middle East/Africa Office

Exhibition Center, Grandstand
Arabian Gulf St.

P.O.Box 60507
Abu Dhabi, UAE

Tel: +971 (0)2 406 4115

Fax: +971 (0)2 449 4166

E-mail: mea@ufi.org

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www.ufi.org