



German Trade Fair Industry | Review 2012

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AUMA

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

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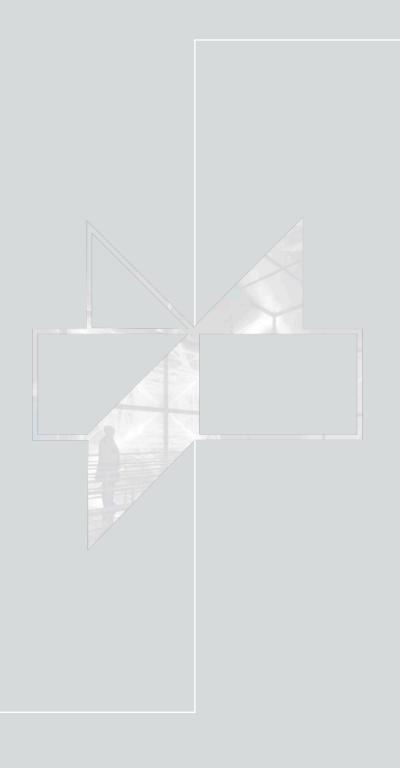
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Regarding the choice of photos:

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

In future, more than in recent years, external factors will determine developments in the trade fair industry. That is the result of two studies published by AUMA in 2012.

Which trade fairs benefit from globalisation? German trade fair organisers have, in two respects, already reaped the benefits of globalisation. On the one hand, globalisation has been responsible for the growth of many domestic trade fairs, as in recent years participation by exhibitors and visitors from Germany has frequently been below average. On the other, organisers have succeeded in considerably expanding their business activities abroad, in particular because of largely open markets in many growth regions.

In the future, it is likely that the positive aspects of globalisation will be concentrated in regions outside Europe. Thus, by expanding their operations abroad German organisers have laid the foundations for profiting from globalisation. However, weak demand in many parts of Europe could lead potential exhibitors from outside Europe to focus less on trade fairs in Europe. In short, globalisation trends over the coming years will foreseeably benefit German organisers, but not necessarily trade fairs in Europe. As to the possibility of countries implementing protectionist measures, one can only speculate on that. Political or social tensions, be they in Asia or South America, might well lead to such measures. However, given the international nature of the trade fair industry such actions would probably have a negative impact on every country involved.



How much space do trade fairs need to achieve their communication aims? Based on current developments in communications the future is hard to predict. Naturally, in this digital age the fact that there is a demand for face-to-face meetings basically benefits the trade fair industry. What is not clear is what shape communicating through trade fairs will take in five to ten years' time. There are indications that less space will be needed than at present. Already there are signs that trade fairs are becoming less product-oriented, although showcasing technical products and designs will of course always be central to a trade fair's purpose. The more dominant the act of communicating, the less essential the space needed to achieve that will become.

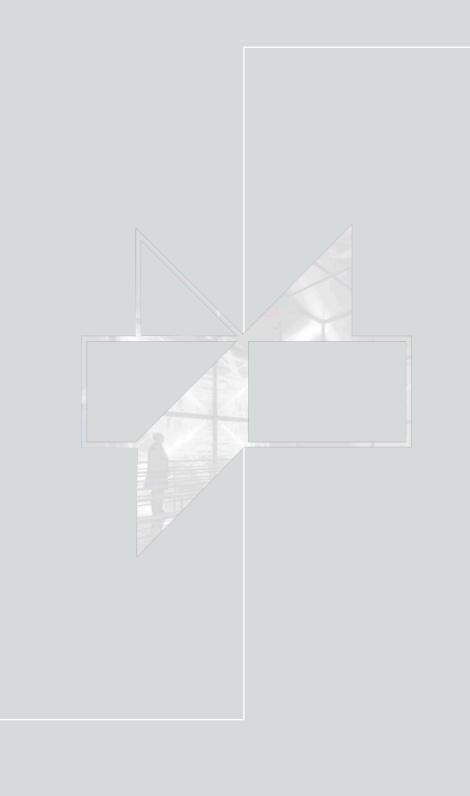


What makes trade fairs unique? • More than ever, success will depend on promoting the unique selling proposition of trade fairs. Ultimately, the important thing is to provide trade visitors and the public with an experience they can find nowhere else, and only within the live environment of a trade fair. This may be stating the obvious, but the reality of many traditionally designed trade fair stands makes it clear that much has yet to be achieved. That also applies to the overall layout of fairs, as evidenced by the traditional grid layout, one that seldom

changes. Certainly, it is possible to imagine alternative ways of presenting certain industries and sub-industries in a more attractive manner.

What goals will become important? • German exhibitors have always pursued a wide range of aims at trade fairs and in doing so have demonstrated relatively clear priorities. Chief among them are the »classical« aims of acquisition of new customers, customer care, image improvement, showcasing innovations and concluding business deals. Lately however, according to the AUMA_MesseTrend, formerly secondary priorities are becoming more important. In particular, they include goals that reach far beyond day-to-day affairs. Thus, 74 % of exhibitors nowadays want to gain new business partners, 16 percentage points more than four years ago. 15 points more exhibitors are looking to »establish new sales channels.« The search for new employees, which used to be a negligible aspect, has become much more important, and the percentage of companies doing so at trade fairs has doubled. The fact that such strategic aims have grown in importance shows that in this digital age exhibitors are in fact placing more, not less, trust in trade fairs. And the greater the range of aims pursued at trade fairs, the more effective a company's participation in such events is. In short, the success story of the trade fair, that supposedly oldfashioned communication instrument, is without doubt destined to continue.







Exhibitions in Germany

Overview

Despite a considerable slowdown in Germany's economic growth its international trade fairs reported outstanding results, with only visitor attendances in slight decline.

One reason is that trade fair business lags behind general economic developments. At the same time, exhibitors are keen to make use of trade fairs as a marketing instrument independent of fluctuations in the economy. The trust they place in the ability of trade fairs, particularly of international events, to satisfy their aims remains high. It is also worth highlighting the success story of trade fairs for certain industries, a phenomenon that is difficult to explain to outsiders, as

evidenced for example by the continuing growth of agricultural exhibitions in Germany. In this case the internationalisation strategies of organisers and exhibitors ideally complement each other.

In general, German trade fairs have profited from the fact that because of the economic slowdown in some parts of southern Europe many events there are in decline. On the other hand, trade fairs in Asia have reported significantly higher growth than events in Germany. Despite this, German trade fairs are not at

imminent risk of losing their position as international leaders, a role they have acquired over many years and decades. A trade fair's standing cannot simply be defined by taking the volume of exhibitors and visitors into

account, for example. More than ever, what counts at a trade fair is the quality of the participants representing supply and demand and its role as a forum for showcasing and evaluating new technology and industry trends. Equally important is the exchange of knowledge, which not only includes exhibitors and visitors but also scientists, the representatives of trade associations, politics and the media. This is where German trade fairs enjoy an ad-

automechanika Frankfurt (Messe Frankfurt GmbH)

vantage that will ensure the leading role of many events for some time to come.

2012 review In 2012, AUMA statistics registered around 2.0 % more exhibitors at 160 national and international events, compared with corresponding events in previous years (2011: +3.1 %). in view of the overall economic situation this was a much better result than expected. On the one hand, the pace of economic growth had slowed down. In many cases the order books in the capital goods industry were no longer full. In parts of

southern Europe economic output was in decline, resulting in lower consumption and investment. The ongoing Euro crisis also had a negative impact on the economic climate. On the other hand, the continuing levels of substantial growth in the Far East and Brazil had a positive effect, even though they were no longer as high as the past. Against this backdrop participation by German com-

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



panies, unsurprisingly, fell slightly, by 0.5 %. By contrast, the number of foreign participations grew by 4.2 %. Germany's relatively positive consumption and investment climate attracted foreign companies. Many companies from recession-hit countries in southern Europe also made use of German trade fairs to export their products abroad, and beyond German borders as well.

The stand space occupied at international trade fairs rose remarkably, by 4.1 % (2011: 4.8 %). Companies spent their money cautiously but continued to present their goods on adequately sized stands. Visitor attendance was 0.6 % down on the figure for corresponding events in previous years (2011: +4.1 %), but this decline is negligible. Nor does it represent any consistent trend, but instead reflects the problems experienced in individual sectors. The results for 2012 show that even in an uncertain economic climate trade fairs occupy a reliable and functioning role as a communication and marketing instrument. According to AUMA − Trade Fair Trends they are still the main form of B2B communications (see also ▶ p. 16).

Results by exhibition category • A comparison of individual exhibition categories shows that capital goods trade fairs produced the best results. 3.3 % more exhibitors took part in 89 trade fairs, compared with corresponding events in previous years. Participation by foreign companies increased by 6.0 % and growth in the amount of stand space was even higher (+7.0 %).



Visitor figures remained constant, with only a few fairs reporting negative figures, due to structural problems in individual sectors. Overall, capital goods trade fairs accounted almost entirely for Germany's positive trade fair results in 2012.

By contrast, the 46 consumer goods events for trade visitors that took place in 2012 reported much less positive results. Compared with events in previous years exhibitor numbers rose by only 0.9 %, while participation by German companies fell significantly, by 4.1 %. At -2.6 %, average visitor attendance was smaller than that of previous events. The results in this category reflect the continuing decline of manufacturing of consumer goods in Germany and stagnation in the retail market. To this can be added an expanding online retail market dominated by large companies. At the same time the over-the-counter sales of certain industries are in decline, which in turn impacts on visitor numbers.

The 17 international exhibitions for the public representing individual consumer goods sectors reported overall stable results. Exhibitor and visitor numbers fell by 0.3 % respectively while the amount of stand space occupied remained the same. In particular, trade fairs such as those representing the automotive and electronic games industries attracted keen interest. Trade fairs catering for the service sector, being mainly tourism, marketing and financial services trade fairs, reported a 3.5 % increase in visitors. Average exhibitor numbers fell slightly, by 1.4 %, while stand space figures remained the same. Bucking the trend, online



marketing events reported significant growth. However, in assessing these results one should take into account that the entire category catering for the service sector numbers only eight events.

Overall results for 2012 ■ In total, AUMA statistics registered 345 domestic events attended by 238,000 exhibitors, 8.7 million m² of stand space and 16.2 million visitors. The 160 national and international trade fairs in

AERO Friedrichshafen (Messe Friedrichshafen GmbH)

Ligna Hanover (Deutsche Messe AG)



2012 were attended by 180,823 exhibitors, of whom 98,926 came from abroad. These companies occupied stand space covering 7,022,411 m². 10,071,036 visitors attended these events. AUMA also collected data on 162 regional exhibitions which reported 53,665 exhibitors, 1,579,958 m² of stand space and 6,006,712 visitors. 23 specialised national trade fairs took place which registered 3,454 exhibitors, 44,907 m² of stand space and 109,141 visitors.

Turnover by German trade fair organisers rose significantly and according to preliminary results reach approximately 3.3 billion euros (2011: 2.9 billion). This was due to a packed events calendar in 2012 which resulted in considerably more stand rentals. Furthermore, there was a significant increase in German trade fair organisers' business activities abroad.



Trade fairs as a communication process • The wide range of aims pursued by exhibitors participating in German trade fairs reflects the considerable degree of trust they place in these events. On average exhibitors have nine aims, proof that they understand the many functions of trade fairs.

In particular, the pursuit of goals such as raising public awareness, improving one's image and presenting new products requires the use of additional marketing instruments, even if the focus is on a company's participation in a trade fair. This means that participation in a trade fair should be understood less as occupying a communication platform but more as taking part in a communication process, one that extends over weeks and months. Only the combination of many instruments, such as advertising, direct marketing and social media, culminates in the live setting and experience of taking part in a trade fair. Very few exhibitors make full use of the options available to them. As communication instruments, the potential of trade fairs has yet to be fully exploited.

Forecast for 2013 • During the first half of 2013 international trade fairs in Germany reported a slight increase in exhibitor numbers but a decline in the average visitor attendance. Even if these six months are not representative of trade business throughout the entire year the relatively high levels of growth in exhibitor numbers and stand space in 2012 are unlikely to be repeated. Overall economic performance will probably take some time to regain momentum in 2013. Nevertheless, AUMA expects

exhibitor and stand space figures to rise in the order of 1 %, and visitor numbers to remain slightly below those of events in previous years. The importance of trade fairs will remain unaffected as visitor numbers are only one of many factors representing the demand side of business that contribute to a fair's success.

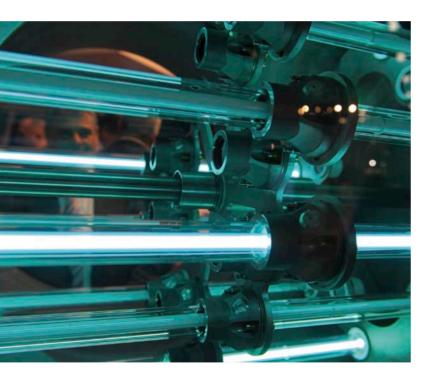


European
Coatings Show
(NuernbergMesse
GmbH)

AUMA_MesseTrend

German companies continue to make widespread use of trade fairs for their B2B communication. Close to a quarter of exhibiting companies plan to increase their trade fair spending in 2013/14 and 60% intend to spend the same. These are the results of a representative survey commissioned by AUMA and carried out by TNS Emnid which polled 500 German exhibitors who took part in B2B events.

Wasser Berlin International (Messe Berlin GmbH)



Against the backdrop of a deteriorating economy AUMA Trade Fair Trends revealed remarkably positive figures. In Germany, 24 % of exhibiting companies plan trade fair budget increases and only 14 % are targeting cutbacks. In particular, larger companies aim to spend more on trade fairs. Around 30 % of exhibitors with a turnover of more than 50 million euros intend to spend more and only 10 % plan to spend less. 27 % of capital goods manufacturers, a group frequently present at trade fairs, aim to increase their trade fair budgets.

Improved quality of trade fair participation ■ In particular, those companies planning to increase their trade fair budgets also aim to invest in larger stands and stand construction as well as in communications and services. Thus, there is substantial willingness to improve the quality of participation.

Over the next two years, almost two-thirds of German exhibitors intend to take part in the same number of domestic fairs as in the past. 17 % plan to participate in more trade fairs and the same percentage in less, indicating stable exhibitor numbers at home. Three-quarters of German companies who exhibit abroad intend to participate in the same number of fairs. Despite the relatively uncertain prospects for the global economy, 12 % aim to participate in more and 14 % in less trade fairs abroad.



Trade fairs account for over 40 % of B2B communications

Currently, trade fairs account for 42 % of B2B communications budgets, the same percentage as in recent years. In the capital goods industry the figure is 47 %. Among the industry's various forms of communications trade fairs continue to play an important role. 83 % of exhibiting companies consider trade fair participation to be an important or very important part of their communications strategy, the same percentage as five years ago. Trade fairs represent the main form of communications for these companies. Neither the recession nor the growing significance of other instruments can affect that. Thus, in recent years online sales in the B2B sector have become only slightly more relevant: five years ago, 38 % regarded them as an important instrument, as opposed to 42 % today.

By contrast, advertising in trade publications are in significant decline. It should also be positively noted that in the medium term cultivating personal relations remains important for the trade fair industry. This was one of the findings of a scenario analysis entitled »Trade Fairs & Live Communications 2020«, carried out by HHL Leipzig Graduate School of Management and published by AUMA in 2012 (\triangleright p. 34).

For more information: Print ▶ AUMA Trade Fair Trends in 2012 is available for downloading at: www.auma.de / English / Downloads & Publications

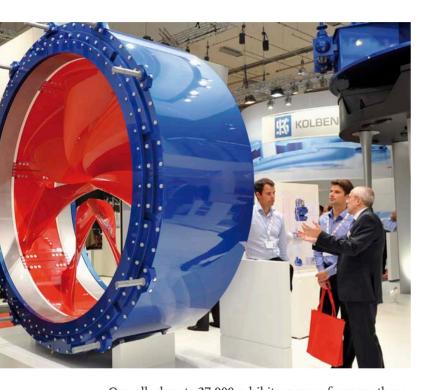
For the first time China is biggest foreign exhibitor

Once again, it was participation from abroad that contributed to higher exhibitor numbers at German exhibition centres. Numerous countries even registered double-digit growth.

As was almost expected, in terms of exhibitor numbers the country now most represented at German trade fairs is China. Two years ago, Italy led the field by only a slight margin. Compared with corresponding events in previous years, the number of representations from China rose by around 11 %, the same figure as in 2011. It should also be noted that China was represented at 80 % of international trade fairs, reflecting a significant recent increase in the range of products it is now able to export.

AGRITECHNICA Hanover (Deutsche Landwirtschaftsgesellschaft e.V.)





SMM Hamburg (Hamburg Messe und Congress GmbH) Overall, close to 27,000 exhibitors came from southern, eastern and central Asia (+4.5 %). Besides China, there was significant growth in exhibitor numbers from Korea (+8 %), Indonesia (+9 %), Japan (+9 %) and Malaysia (+8 %). By contrast, compared with events in previous years, there was a significant decline in participation from Thailand (-12 %), Singapore (-10 %), Vietnam (-14 %) and the Philippines (-15 %). India also reported a slight decline. Thus, it cannot be said that there is consistent growth in exhibitors from Asian countries at German trade fairs.

Increase in participation from EU countries ■ On average, exhibitor numbers from EU countries rose by 3.5 %. There was an above-average increase in companies from central and southeastern Europe, including Poland (+14 %), the Czech Republic (+10 %), Hungary (+10 %), Romania (+20 %) and Bulgaria (+14 %). Increases in representations from the Baltic states, whose figures had previously been low, ran well into double digits.

Despite their economic and financial difficulties countries from southern parts of the EU, such as Italy, Portugal and Spain, attended German trade fairs in stable numbers. Only Greece (+20 %) undertook an export market offensive at German trade fairs

Exhibitor numbers from European countries outside the EU rose by 4.0 %, in particular from Russia (13 %). Participation from Ukraine, whose figures had previously been low, grew by 20 %. Exhibitor numbers from Turkey, the country most represented in this group, increased by 6 %.

Participation from the countries of the Middle East grew substantially, on average by 16 %. The countries with the highest growth rate were Israel (+19 %) and the United Arab Emirates (+29 %). They were also the region's most represented countries in terms of exhibitor numbers. Syria served as an example of how political conflict can affect business. Its participation at German trade fairs fell by half.



In 2012, compared with events in previous years, participation from the USA increased by 5 %. Exhibitors from Canada took part in close to 100 German trade fairs and their numbers rose by 2 %. Thus, following a recent stagnation and even decline in participation, the USA reported relatively high growth once again.

Exhibitor numbers from South America increased only slightly. Of the three largest countries only Argentina reported above-average growth, at 8 %. There was a significant rise in exhibitor numbers from Peru, Uruguay and Bolivia. By contrast, participation from countries such as Chile and Colombia stagnated.

In 2012, compared with events in previous years, exhibitor numbers from Africa fell by 5 %. This was due mainly to a decline in participation from South Africa (-13 %). Exhibitor numbers from Egypt, the region's most represented country, fell by 3 %. Participation from Kenya, which in 2011 had risen by 26 %, grew by 14 %. By contrast, the mood of change driving North Africa's export market seemed to have disappeared again. Figures for Tunisia remained more or less stable, while Morocco reported a significant decline (-16 %).

Exhibitor numbers from Australia and Oceania remained practically the same. Participation from by Australia, the biggest exhibitor from this region, fell slightly, whereas there was a significant increase in exhibitor numbers from New Zealand.

The country with the largest number of exhibitors at international trade fairs was China (12,305), which overtook Italy (11,123). They were followed at a distance by France (5,682), the Netherlands (5,576), the UK (5,528), the USA (5,517), Spain (4,150), Austria (3,971), Taiwan (3,850) and Switzerland (3,584). India (3,085) and Turkey (2,741) ranked eleventh and twelfth respectively.

The country which took part in more trade fairs than any other was Austria, which was represented at 156 international trade fairs, ahead of the Netherlands and Switzerland (153 each), the UK (150) and Italy (148).

Book Fair, Frankfurt/Main (Ausstellungsund Messe-GmbH des Börsenvereins des Deutschen Buchhandels)



Number of foreign visitors at German trade fairs rises to 2.65 million

Last year, international and national trade fairs in Germany reported a total of 2.65 million foreign visitors, more than ever before. The highest number to date has been recorded in 2008 (2,60 million). This was one of the findings of a study recently concluded by the Association of the German Trade Fair Industry (AUMA).



photokina, Cologne (Koelnmesse GmbH) Despite the unsettled economy a number of German trade fairs were able to consolidate or even strengthen their position on the international market, thus attracting even larger numbers of visitors from around the world.

Obviously, these visitors come to find out about a qualified, worldwide offer at German trade fairs and to pave the way for corresponding business. In 2012, the percentage of international visitors rose marginally once again and reached 26.3 %. In 2011 and 2008 the figures had been 26.2 % and 25 % respectively.

The majority of overseas visitors came from South, East and Central Asia (220,000), with the Middle East (95,000), North America (85,000) and South America (80,000) following in the rankings. Large numbers of visitors also came from Africa (65,000) and Australia/Oceania (35,000).

Out of more than 2 million visitors who came from other European countries, 1.73 million came from the EU and 335.000 from non-EU countries.

In 2012 the countries which dominated the visitor statistics were the Netherlands (250,000), Italy (180,000), Austria (160,000), France (155,000), Belgium and Switzerland (140,000 each).

Among non-European countries the USA (70,000) led the field, followed by China (55,000) and India (50,000). It should be noted that large numbers of visitors from neighbouring countries who attended German trade fairs were members of the general public, whereas audiences from abroad consisted almost entirely of trade visitors.



Regional exhibitions

For the first time in many years there was an increase in the three main statistics for regional exhibitions: exhibitor numbers, stand space and visitor attendance. It shows that this category of exhibition, which in recent years has repeatedly been the topic of debate, has now gained stability.

A total of 162 regional events took place in 2012 which, compared with corresponding events in previous years, reported a 1.6 % rise in stand space, significantly less than in 2011 (+7.9 %). However, following a previously weak period of two years there had been a lot of catching up to do, so that considering the unstable economy this result is in fact outstanding. The same applies to exhibitor numbers, which grew by 2.5 %, following a rise of 2.9 % in 2011. The growth in visitor numbers in particular is cause for optimism, even if at 0.8 % the increase was rather modest.

It does however show that the widespread marketing measures undertaken by organisers in recent years have had an effect. In particular, a number of exhibitions for the public have undergone restructuring in an effort to show (potential) visitors what awaits them at what are frequently very wide-ranging events.

Furthermore, many organisers now extend their marketing efforts beyond the use of classical media and also bank on social media. Altogether, 53,665 exhibitors took part in 162 regional exhibitions, occupying stand space covering 1,579,958 m². Visitor attendance was 6,006,712. The statistics include trade fairs and exhibitions held in 2012 by organisers registered with AUMA and which are listed by AUMA as regional events.

art Karlsruhe (Karlsruher Messe und Kongress GmbH)



FKM establishes itself as a service provider for the exhibition industry

As part of its new communications concept FKM, the German organisation responsible for certifying exhibition statistics, has significantly stepped up its public relations effort.



In a redesign of its website FKM has made some far-reaching changes. It underlines the benefits of certifying exhibitor and vis-

itor statistics, offers a variety of tips on how to make use of trade fair data, in particular visitor breakdowns, and from its online database supplies up-to-the-minute information collected in accordance with the standards of FKM. Representatives of exhibiting and organising companies comment on the importance of certification for trade fairs. For more information:

www.fkm.de

Aluminium
Duesseldorf
(Reed Exhibitions
Deutschland
GmbH)



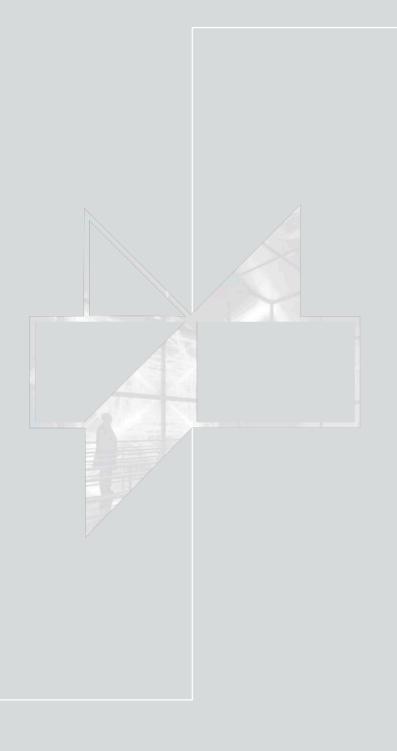
In the space of one year there has been a five-fold increase in the number of visitors to this website. The companies belonging to FKM, close to 60 trade fair organisers, now draw much greater attention to the fact that their trade fairs are certified. Several members have placed the

FKM logo on the homepage of their website and some even use the logo on their admission tickets. The latest advertising by FKM can be found in catalogues and customer publications. Additional plans to step up the communications campaign are under way.

In 2012, German organisers had auditing carried out on the exhibitor, space and visitor statistics of 220 domestic trade fairs and exhibitions. A total of 57 German trade fair organisers are now members of FKM. One new member was added in 2012, six trade fair companies are no longer members. These were organisers of only one or two trade fairs. The two guest members from abroad, the Hong Kong Trade Development Council and the Verona Trade Fair Company, had a total of 17 trade fairs audited.

International transparency of exhibitions In collaboration with other European auditing companies FKM released the brochure entitled Euro Fair Statistics, which the Global Association of the Exhibition Industry (UFI) has published since 2009. It contains audited trade fair data on more than 2,000 exhibitions held in 2011. 21 countries participated. FKM is also involved in the work of UFI committees, including the Associations' Committee and the Auditors' Meeting, in a bid to improve the transparency of trade fairs at international level. It also maintains ties with auditing companies in other countries.







Lobbying and legal aspects

Visas for visiting trade fairs

At the annual business meeting of the German ambassadors' conference AUMA again raised the issue of visas for visiting trade fairs. Representatives of AUMA and trade fair companies took the opportunity to meet with ambassadors to discuss problems with obtaining visas, an issue which foreign representations had addressed following AUMA's annual survey on the subject.

Speaking at a forum on the topic of visa issues, AUMA's managing director Dr. Peter Neven presented the results of a survey conducted by AUMA on the subject. He made it clear that overworked embassies needed to improve their organisation and staff. There are still countries where it is difficult to obtain visas for exhibitors and visitors who wish to attend trade fairs. The main problem is that appointments are often scheduled too late in order for applicants to obtain a visa in time.

In particular in countries such as China, where there is high demand for visas, German embassies and consulates often operate at their limits. In some countries emigration issues also cause added pressure, leading to stringent visa requirements and consequently visa applications being denied. Particularly in Nigeria, trafficking organisations often give 'visiting a trade fair' as the (false) reason for a request to travel and forge large numbers of trade fair companies' invitations. As a result, visa divisions must take great care to ensure an invitation is genuine.



High-ranking representatives of the Federal Foreign Office and individual embassies stressed that the reason for the delayed processing of business visa applications was not due to a fundamentally restrictive visa issuing policy. Rather, the cause was that the embassies of individual countries often had organisational problems, so that they were unable to handle the volume of applications. A first round of measures due to be implemented soon promises to alleviate the problem.

Intergastra (Landesmesse Stuttgart GmbH)

Product piracy and brand theft at trade fairs

In 2012 two court decisions unanimously declared that exhibiting at trade fairs does not per se constitute an act of offering a product for sale in accordance with industrial property rights. Exhibitors and trade associations are now fearful of the difficulties likely to arise when pursuing breaches of property rights.

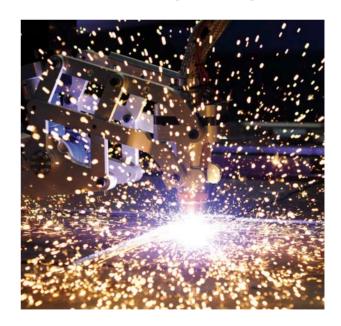
On 26 April 2012 a panel discussion took place at the Conference on Intellectual Property of the Federation of German Industries (BDI), to which AUMA contributed input. The results were controversial. The judge of the Federal Supreme Court presiding in this matter remained of the opinion that in order to prove that a product is being offered for sale in breach of industrial property rights it is essential to have full knowledge of the accused's intentions. By contrast, the exhibitors' representatives and lawyers were of the opinion that a trade fair constituted more than the act of showcasing an industry's capabilities. Exhibitors at trade fairs not only presented their products but frequently also aimed to sell them. Thus, this regularly constituted the act of offering a product for sale. This coincides with AUMA's opinion and ultimately with the wording of \(\) 64 of the Trade Law. Notwithstanding, there are certain courts that rule that products are being offered for sale.

MerkzeugmaschinenOrganisers recommend that exhibitors take out an infabriken VDW) junction providing sufficient details of the accused's offering a product for sale.

Unofficial exhibitor directories: Expo-Guide

Prior to trade fairs, exhibitors frequently receive mail from the publishers of unofficial exhibitor directories such as the Mexico-based company Expo-Guide, requesting them to check their company data for inclusion in an online exhibitor directory and to fill in or amend details using an enclosed order form

AUMA has for some time been advising exhibitors who have mistakenly agreed to their data being included in unofficial exhibitor directories of this kind. The small print on the form making the offer contains a proviso which, as in the case of Expo-Guide, stipulates three



EMO Hanover (Verein Deutscher Werkzeugmaschinenfabriken VDW)





years of annual payments of \in 1,271. AUMA's advice to those concerned is to contest any demands and withhold payment. AUMA is not aware of any cases in which publishers of unofficial exhibitor directories have taken legal action against exhibitors.

An information sheet is available for downloading on the AUMA website. Among several items, this sheet contains a form letter which exhibitors concerned can use to withdraw and to call into question any mistakenly given declaration to have their names listed.

Sustainability in the trade fair industry

Sustainability in the trade fair industry represents a combined effort of the industry. This is evidenced by a growing number of joint projects in which AUMA and its members are involved.

AUMA is a member of the UFI Sustainable Development Committee, which in 2012 presented the Sustainable Development Award for the first time. The award was given in recognition of an outstanding sustainability concept and it was hoped that this would inspire others in the industry to emulate it. RAI Amsterdam's sustainability strategy received the award for its outstanding success. In 2013 UFI will invite entrants to contest two Sustainable Development Awards, in the categories »Best reporting on sustainability« and »Best innovative environmental initiative«. AUMA will again be a member of the jury. Within the committee AUMA is also working on a draft for reporting on sustainability, specifically for use by the trade fair industry.

Midora Leipzig (Leipziger Messe GmbH)

Besides working to make trade fairs and trade fair displays as sustainable as possible the companies belonging to AUMA are involved in various public sector projects in a bid to help reduce CO² emissions. One of them is ÖKOPROFIT, a joint venture involving councils and local businesses, whose aim is to reduce company operating costs while saving natural resources. A number of trade fair companies also regularly take part in the meetings of the working group of the German Sustainable Building Council (DGNB) which has established a norm for sustainable construction practices.



ProWein,
Duesseldorf
(Messe Duesseldorf
GmbH)

2012 also saw work finalised on two sustainability norms specifically developed to meet the requirements of the events and trade fair industry. These are DIN ISO 20121, which aims to provide the framework for a sustainable events management system, and GRI EOSS, a manual for reporting on sustainability by companies in the events industry. Both sets of rules complement each other, as a sustainable management system provides the basis for subsequent reporting on

sustainability. The only problem from the point of view of the trade fair industry is that both norms subsume trade fairs under the heading of »Events«, along with conferences, sports events, art and music festivals, large concerts and sales events, without any further examination of what characterises these individual types of events. How relevant DIN ISO 20121 and GRI EOSS are to the activities of the trade fair industry must first be put to the test.



AUMA office in Brussels

At the end of January 2013 the annual AUMA Round Table took place in Brussels. Participants of the working group were the representatives of German trade fair companies responsible in EU matters and leading associations of German industry.

Freya Lemcke of Eurochambres reported on activities by the European Business Centres, part of an EU strategy to attract international business for SME's. The range of services provided by the EU Centres varies: In India and Thailand, for example, it involves support for EU exhibitors taking part in trade fairs. Ms. Lemcke said that the Centres were unable to provide financial support for representations at trade fairs. As the Centres and their services were still being set up it was possible that any offers made to exhibitors might not meet the goal of covering the costs.

The report of Dr. Corinna Boelhoff, a member of the economic department of the German federal government's Permanent Representation, examined the political work undertaken in Brussels from the point of view of an EU member. She noted that agreements had to be reached by a qualified majority. However, due to the fact that a blocking minority could veto projects it was imperative to look for partners early on who pursued identical or similar aims. Decisions were often compromises achieved after hard bargaining.



Boatfit Bremen (Messe Bremen GmbH)



Spielwarenmesse Nuremberg (Spielwarenmesse eG)

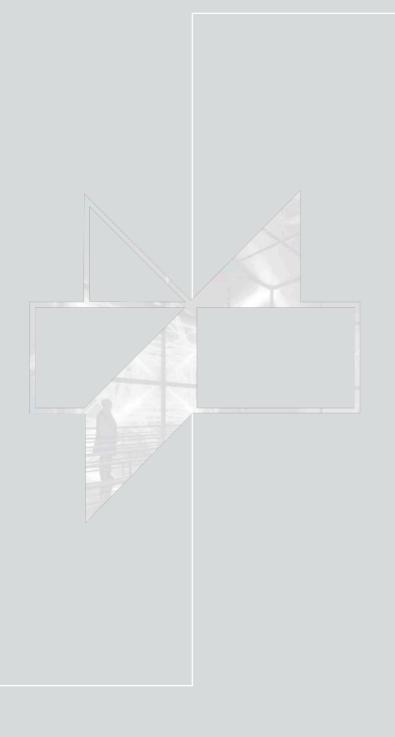
Nicola-Elizabeth Morris, a member of the European Commission's Directorate General for Enterprise and Industry, outlined the Enterprise European Network (EEN). Its goals are similar to those of the European Business Centres and aims to attract international business for SME's.

It was shown that EEN services such as matchmaking tools could be used to augment the impact of trade fairs. The future challenge would be to draw a clearer line between the responsibilities of the EEN and European Business Centres.

Barbara Weizsäcker, general secretary of the European Exhibition Industry Alliance (EEIA), reported on the current state of the alliance, set up in 2012, and its collaboration involving the Global Association of the Exhibition Industry (UFI) and the European Major Exhibition Centres Association (EMECA). Work to date had included collecting data on the European trade fair market and interviewing the association's members on topics concerning the EU.

Other topics included the latest developments regarding the right to revoke purchase agreements, and trade fair visas.







Institute of the German Trade Fair Industry

Vocational and advanced training

AUMA supports the vocational and advanced training courses of the public and private sector in a number of different ways. This includes promoting conferences for career starters in the events industry. Furthermore, AUMA has commissioned teaching material for lecturers.

Training courses for vocational teachers in the events industry ■ Organised by AUMA, on 6 and 7 December 2012 the specialist forum entitled »Advanced training for vocational teachers« took place for the eleventh time. 35 teachers who hold events management classes at state-run business colleges all over Germany took part in the event. Topics included »crowd funding« and a lecture and workshop on »creativity techniques«. Other topics included the marketing of event venues followed by a visit to a venue in question, a transformer station in Berlin, as well as test papers for events management students taking exams at the Chambers of Industry and Commerce (IHK).

University courses teaching trade fair related subjects

According to research conducted by AUMA, more than 40 universities and technical colleges in Germany currently offer in-depth trainee courses dealing with trade fair related subjects. The courses and contact details of the relevant universities are listed on the AUMA website, where professors and lecturers can also find surveys, statistics and presentation material for immediate use at teaching events.



ispo Munich (Messe Muenchen GmbH)

Research

In 2012, AUMA concluded four studies which focused mainly on the future of trade fairs. Each of these was advised by experts from the trade fair industry, in particular by the AUMA working group for Trade Fair Transparency.

Scenarios describing trade fairs and face-to-face communications in 2020 This study, conducted by Dr. Manfred Kirchgeorg at the HHL Leipzig Graduate School of Management sets out three different scenarios outlining future developments in the trade fair market. Commissioned by AUMA, the study is based on a previous analysis regarding the trade fair industry. The authors held interviews with experts, and evaluated numerous trend assessments, following which they

iba, Munich (Gesellschaft für Handwerksmessen mbH)



named eight key factors likely to impact on the B2B trade fair market in the years up to 2020.

- Globalisation
- Brand recognition strategies
- Face-to-face communication experience
- Environmental protection as a market factor
- Competitive pressures
- Society and ecology-driven discontinuity
- Variables of economic policy

Whereas the first five factors represent positive elements driving future demand for trade fairs, the remaining three limit international demand for trade fairs by exhibitors and visitors alike. Each key factor is determined by numerous minor factors which trade fair decision-makers should take into account when deciding on future strategies.

The factors in question impact on each other in a variety of different circumstances and have a strengthening or weakening effect. Based on these parameters, the study produced three model scenarios for the future:

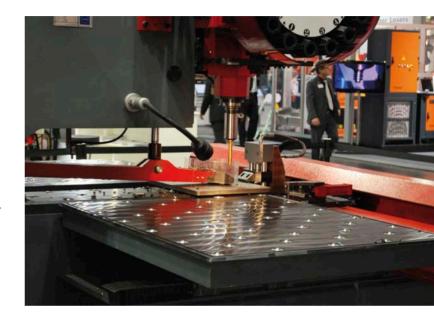
- Scenario A: Growing world markets with globally recognised trade fair groups
- Scenario B: Trade fair markets abroad in a world full of tensions
- Scenario C: Smart exhibitions in a digital world



Scenario A describes a situation in which, against the backdrop of current globalisation tendencies, in particular in Asia, the business models and brands of trade fair organisers and exhibitors continue to focus and develop. National trade fair groups evolve into global full service providers and communications continue to be integrated in a world in which economic policy remains stable. In this scenario the industry will continue to develop without deviating from its course and under similar conditions to the present.

Scenario B differs from this. Against the backdrop of weaker economic policy strategies and protectionist tendencies demand for trade fairs focuses on continental markets, in particular the emerging markets in Asia. The strengths of neighbouring countries abroad exert a greater attraction on trade fairs and exhibitors alike. According to this scenario, in the years up to 2020 globalisation tendencies become weaker and are the subject of much debate. The trade fair industry has to achieve greater brand recognition abroad. With online and faceto-face communication platforms converging everywhere and high-tech and high-touch communications on the increase, competition intensifies as a result of surplus capacity. The issues of growing shortages of raw materials and gradual climate change are important topics in the business world.

By contrast, **Scenario C** describes a situation in which globalisation continues along its path. However, the trade fair industry must stand its ground amid strong competition, due to the pressures of digital communi-



cation and virtual/sensory worlds. Thus, despite being important for business, venues for face-to-face meetings become extensively replaced by digital communication platforms. By considerably reducing travel this also reduces costs, is in many cases more efficient and helps to make communicating a more individual experience. People only go on business trips for special reasons. Trade fairs in their traditional guise only take place at irregular intervals and there is significantly less demand for them. Smart exhibitions, which are likely to take place spontaneously and on the initiative of exhibitors, are a firmly established part of the trade fair business in 2020. According to scenario C, the growing environmental problems of recent years remain un-

Euroblech Hanover (Mack Brooks Exhibitions Ltd.)



Schweißen & Schneiden, Essen (Messe Essen GmbH) solved and climate change continues. Business trips are increasingly regarded as a waste of resources unless they produce tangible benefits that significantly outweigh those of 3-D communication methods.

In conclusion, globalisation, resource shortages and changing communication habits will also have a significant impact on trade fairs as a marketing instrument. In view of the changing overall situation, the industry and in particular companies who organise trade fairs or regularly meet their customers at trade fairs need to become aware that their corporate strategies must be constantly re-assessed. This publication is available in print and can be downloaded as a PDF file at ▶ www.auma.de / Downloads & Publications.

Study on the future of public exhibitions Due to economic and demographic change and the arrival of new information channels consumer exhibitions face considerable challenges. There is also a good chance that they will emerge as the winners in the race for the time, money and attention of consumers. These are the findings of a study entitled »The outlook for consumer exhibitions - their prospects and role« which AUMA commissioned in collaboration with FAMA - Special Association for Fairs and Exhibitions and IDFA - Pool of German Trade Fair Organisations and Exhibition Cities. The study was carried out by the Department of Marketing Management of the HHL Leipzig Graduate School of Management under the supervision of Prof. Dr. Manfred Kirchgeorg. Its focus is on exhibitions for the public, which include general consumer exhibitions as well as regional and national special interest events.

In particular, the study examined the consumer and communication behaviour of a number of audiences. It took a close look at the opportunities and risks in connection with socio-demographic developments, changing leisure and shopping habits, the changing media world and the numerous alternatives to face-to-face communications at exhibitions for the public.



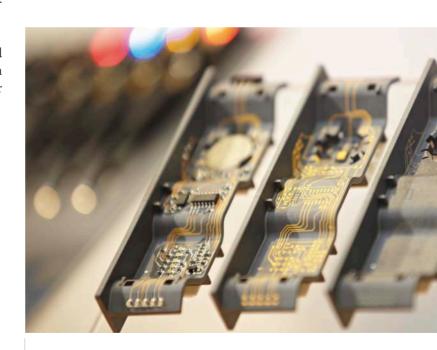
An analysis of the status quo of exhibitions for the public formed the basis of the study. This was undertaken by evaluating how exhibitions and exhibition statistics have developed from 2000 to 2010. A survey polling members of the public who do not visit exhibitions was carried out in order to include them in the analysis as well. Furthermore, the study identified the changes and factors which during the last decade have had a major influence on supply and demand at exhibitions for the public. Based on this assessment it highlighted prospects for the future and options for positioning exhibitions for the public amid a competitive environment comprising other marketing instruments featuring face-to-face communications.

As a result of the information gained from interviews and by analysing 120 factors the study was able to identify ten key trends that will influence the future of exhibitions for the public in decisive ways:

- Exhibition experiences with a pleasant and intimate atmosphere
- Networked high-tech and high-touch communications
- Special interests with a brand image
- Regional curiosity and proximity
- Specific and concentrated trade fair experiences
- Multi-channel 4.0 experiences
- Digital experiences preferred to covering distances
- Stagnant and volatile markets
- Erosion of the mid-range
- Information overload and time pressure

Whereas the first five factors represent positive elements driving future demand for exhibitions for the public, by contrast multi-channel experiences, digitisation, stagnant and volatile markets, the erosion of the mid-range and stresses experienced by visitors limit demand. Each of these trends is influenced by a range of factors which the study documents in detail.

This publication is available in print and can be downloaded as a PDF file at ▶ www.auma.de / Downloads & Publications.



SMT, Nuremberg (Mesago Messe Frankfurt GmbH)



Jagd & Hund, Dortmund (Messe Westfalenhallen Dortmund GmbH)

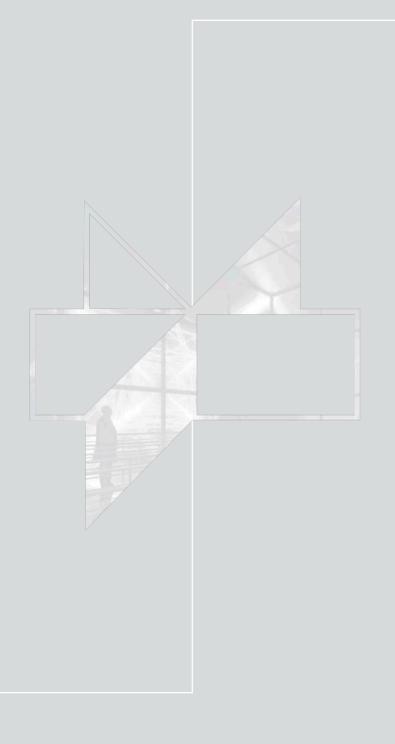
German Trade Fair Library

As a public institution the German Trade Fair Library in Berlin offers services to everyone looking for information on trade fair related topics.

Students, teaching staff and other visitors receive help in their search for relevant publications and for answers to questions on the subject of face-to-face communications. Located in close proximity to the specialist departments of AUMA and its contacts, the library offers an opportunity for a direct exchange of information.

The German Trade Fair Library currently stocks around 7,500 titles. Frequent use is made of the newspaper archive, with a subject index for articles, and of the collection of scientific works. Visitors can research the library's titles online and send loan requests by e-mail.







Exhibitions abroad

The competitive situation around the world

At 3 %, the global economy grew only moderately in 2012. The economic growth rate of the industrial nations was substantially below the global average. The gross domestic product (GDP) of the European Union actually shrank by 0.5 %. The USA reported a return to economic growth, although this was marginal. The GDP of developing countries was above-average, although compared with previous years growth was lower. Accordingly, the trade fair industry in emerging countries in particular reported growth, whereas in parts of southern Europe there was a significant decline.

Germany's GDP increased by 0.7 %, compared with 3.0 % in 2011. The Federation of German Industries (BDI) sees good prospects for a return to growth by the German economy from summer 2013. Forecasts that predict the German economy will grow by close to one per cent are regarded as realistic. The BDI expects that exports in particular will stimulate an economic upturn and forecasts at least three per cent growth in this market. Exports to eurozone countries are expected to decline, but this will be more than compensated for by exports to non-EU countries. Thus, exports to overseas markets represent a stabilising influence on Germany's domestic economy.

Small and medium-sized enterprises in particular require practical support in their efforts to tap into markets outside the EU's single market. Ever since the



earliest days of the Federal Republic of Germany the foreign trade fair programme of the Federal Ministry of Economics and Technology has represented an important, flexible and demand-driven instrument for establishing and securing markets. It provides support for exhibitors marketing products made in Germany in those regions where help is most needed, which is why for many years it has focused on trade fair participation in difficult overseas markets.



McCormick
Place Convention
Center, Chicago

In the long term German companies will foreseeably spread their exports across a wider range of countries. New markets outside the BRIC countries are now being targeted. In addition to a number of ASEAN countries such as Thailand and Indonesia, South Africa is now among those countries whose markets offer good prospects.

Strong competition • According to German trade fair organizers, they face relatively strong competition from developed markets. From 2008 to 2011, over a period of four years during which every international trade fair took place at least once both in Germany and abroad, 75 US trade fairs competed with German trade fairs, along-side 58 fairs in Italy and France respectively. Behind the UK (29 trade fairs), China (21) ranks fifth among major competing nations. Other European nations hosting competing trade fairs are Spain (19), Switzerland (13) and the Netherlands (12). Approximately two-thirds of

competing trade fairs are held in Europe, the majority in countries of the EU. One in five of competing trade fairs take place in the US, one in seven in Asia.

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

Two-thirds of trade fairs abroad are capital goods trade fairs and a quarter are consumer goods shows for trade visitors. The other events are consumer goods exhibitions for the general public and trade fairs catering for the service sector.

Despite serious international competition, from 2008 to 2011 international trade fairs in Germany continued to maintain the lead. An average trade fair abroad competing with an average international trade fair in Germany reported 71 % of stand space, 82 % of exhibitors, and 82 % of the visitor attendance of its corresponding German counterpart. In this context it should be noted that in Germany around 200 international trade fairs take place every year, whereas the above-mentioned competitors abroad represent a relatively small group of leading events in their respective countries. Accordingly, the average statistics for a hypothetical trade fair abroad competing with a German trade fair are as follows: stand space totalling 35,400 m², 930 exhibitors and 58,000 visitors.



Supporting German exhibitors abroad

In 2012 again, the foreign trade fair programme of the Federal Ministry of Economics played an important part in the success of the German export industry. Industry associations are consulted on which trade fairs to choose, ensuring that the funds are well spent and determined by demand.

Summary of the 2012 foreign trade fair programme The Federal Ministry of Economics and Technology (BMWi) and AUMA co-organised a programme of 252 representations. Last year the number of representations rose by 23, a 10 % increase over 2011.

Exhibitor numbers rose substantially, reaching 7,281, an increase of 876 (+13.7 %). The amount of space occupied in the German pavilions rose to an overall 156,508 m² (+18.8 %). However, these figures fell short of the 2008 statistics of 7,641 exhibitors and an overall space of 166,975 m², which at the time marked a record.

Focus on Asia The regional structure of participation in trade fairs around the world remains stable. It shifts only marginally from one year to the next. Thus in 2012 the regional focus was again on Asia, where there were 107 presentations, followed by presentations in European non-EU countries (62), the Middle East (26) and in North America (23).

Once again, pavilions in South America increased at an above-average rate, from 16 to 21, reflecting the growing interest of the German export industry in this region.

In 2012 German pavilions were organised in 43 countries, five more than in 2011. Since the programme focuses on overseas countries and difficult markets, participations were organised in 40 countries outside the European Union. Once again, the countries hosting the most pavilions were China (54) and Russia (46), followed by the USA (23) and the United Arab Emirates (21). India has now established itself among the leaders (17) and Brazil is also closing in on this group (11). Next is Turkey (8), followed by Singapore (7), Ukraine (5) and Kazakhstan (4).





HKCEC Hong Kong **2013 foreign trade fair programme** The foreign trade fair programme of the Federal Ministry of Economics and Technology plans a total of 271 pavilions at trade fairs in 2013, for which funds amounting to EUR 42.5 million have been made available. Russia is currently the principal host of German pavilions (50), followed by China (including 7 in Hong Kong) with 49 pavilions. The programme schedules 24 participations for the United Arab Emirates and 22 for the USA. Underlining the importance of the market in this region, 21 participations are due to be organised in India. 12 pavilions are due to be organised in Brazil and Turkey respectively. Over 40 trade fairs were included in the foreign programme for the first time.

Trade fairs abroad held by German organisers

In 2012, there was a further increase in German trade fair organisers' activities abroad. 266 trade fairs were held, three more than in 2011. Their concepts mirrored the standards of leading international events in Germany.

At these events, whose slogan was »GTQ – German Trade Fair Quality Abroad«, the organisers rented out around 3 million m² of stand space (2011: 2.8 million m²). In 2012 more than 108,000 companies exhibited their products, as compared to 93,000 in 2011. Visitor attendance rose to 6.4 million (2011: 6.3 million).

Last year, the trade fairs with the highest exhibitor attendances took place in China again. More than 4,000 companies exhibited their products at Automechanika Shanghai (4,109) and more than 3,000 were at Intertextile Shanghai Apparel Fabrics (3,358). More than 2,000 exhibitors registered to take part in five other events as follows: CHINAPLAS (2,729), Bauma China (2,718), the Guangzhou International Lighting Exhibition (2,653), Auto China (2,500) and the China International Hardware Show Powered by PRACTICAL WORLD (2,400). PRODEXPO in Moscow, attracted 2,191 exhibitors.

The trade fairs with the highest attendances were motor and book shows for the public: Auto China (780,000 visitors), the Chengdu Motor Show (over 581,000) and the Wuhan Motor Show (184,000). The Abu Dhabi International Book Fair attracted 220,000 visitors. Bauma China attracted the largest number of trade visitors (over 177,000).

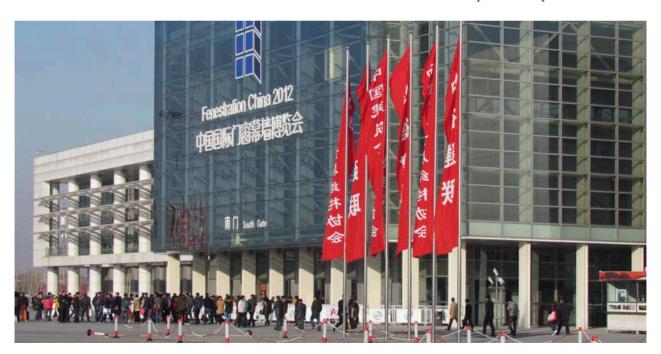


In 2012 China continued to extend its market lead. German trade fair companies rented out more than 1.6 million m^2 of stand space. More than 52,000 exhibitors and 3.6 million visitors attended 79 trade fairs, making last year the most successful ever for trade fair business of German organisers.

At 40, the number of trade fairs held by German organisers in Russia stagnated. However, they reported better results throughout, with 500,000 of rented space and over 16,800 exhibitors representing a record in each case. Overall visitor attendance rose to 510,000.

In India the positive trend of recent years continued in 2012. Plastindia, India's largest trade fair organised under the GTQ label, exerted a positive influence. More than 6,000 exhibitors rented over 150,000 m² of stand space at the 30 trade fairs held in 2012. Visitor attendance was 260,000.

In 2012, the number of trade fairs held by German organisers in Turkey was lower than in 2011, due to the regular cycle of the events. Hosting 13 trade fairs, Turkey was the fourth most important venue for GTQ trade fairs. Around 5,700 companies occupied 330,000 m² of





stand space. 510,000 visitors came to see the events. Only 12 trade fairs were held by German organisers in the United Arab Emirates in 2012, due to the regular cycle of the events. Around 5,000 exhibitors rented more than 76,000 m² of stand space. Over 300,000 visitors attended the events. Aided by some shows held for the first time in 2012, German organisers held 11 trade fairs in the USA. 2,600 exhibitors rented around 52,000 m² of stand space. Visitor attendance exceeded 160,000. In 2013, 22 members of AUMA and FAMA intend to hold 275 trade fairs in every part of the world.

For German trade fair organisers the most important markets are China (77 trade fairs) and Russia (40). India will host 30 GTQ trade fairs. 21 trade fairs are to take place in Turkey, 16 each in the United Arab Emirates and Brazil, as well as 10 in Thailand. More GTQ trade fairs will be taking place in Shanghai (37) and Moscow (36) than in any other city. Other important venues include Mumbai (16), Dubai (15), Istanbul (14), as well as Beijing and São Paulo (13 each).

In order to underline the quality of German trade fairs abroad and in cooperation with its highly committed members abroad AUMA created the label entitled »German Trade Fair Quality Abroad«.

Furthermore, AUMA's internet database contains a special selection according to trade fairs organised under the GTQ label. Information on German organisers' activities abroad is available directly from the website at » www.gtq.de.



World expositions

EXPO 2012 From 12 May to 12 August 2012 the South Korean coastal town of Yeosu hosted a »minor« world exposition. The expo grounds covered an area of 174 hectares. More than 100 nations, international organisations and companies presented their ideas on »The Living Ocean and Coast« in the shape of exhibits, demonstrations and numerous events. 8.2 million people came to see the EXPO.

In mid-June 2012 AUMA organised a trip by a delegation to this minor world exposition. Headed by AUMA's managing director Dr. Peter Neven, thirteen representatives of federal ministries, associations, trade fair organisers and service providers took part. Following visits to numerous national pavilions, one special highlight was a tour of the German pavilion, which was among the major attractions at the EXPO.





Occupying an area of 1,700 m², the German pavilion was called »Seavolution«, a contraction of the words »sea« and »evolution«. The name alluded to the EXPO's slogan and to the technical innovations Germany exhibited in Yeosu. The pavilion was divided into three sections under the following headings: »Coast«, »Living Environment« and »Treasure Chamber«. A discovery tour beckoned and by operating interactive elements visitors were able to influence events.

The tour portrayed aspects of deep sea fishing, the dangers of overfishing, waste at sea and climate change with its consequences for the world's oceans. The highlight was the main show, which by using a 360-degree projection technique simulated a journey to the seabed inside a glass diving bell.

The German pavilion was among the most popular and fascinating national pavilions at EXPO and received the Gold Award for the best interpretation of the EXPO theme in the category for large pavilions exceeding 1,000 m² in size. Hamburg Messe and Congress GmbH were responsible for organising the German pavilion and were commissioned by the Federal Ministry of Economics and Technology. The concept for interpreting the theme was originated by the working group facts and fiction GmbH and GTP Architekten.







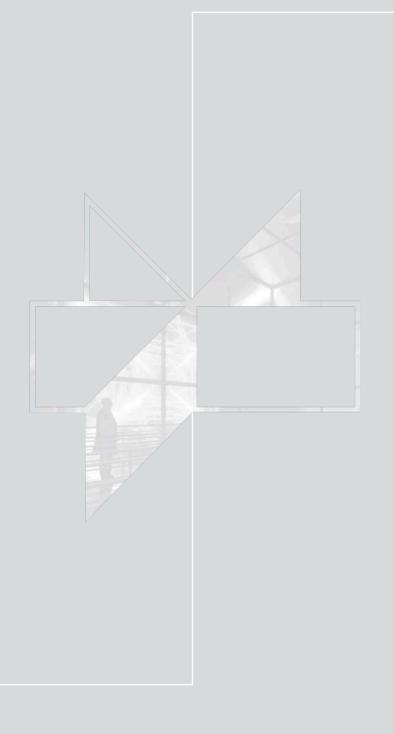


EXPO 2015 ■ From May 1 to 31 October 2015, taking as its slogan »Feeding the

Planet – Energy for Life«, a major world exposition will take place in the Italian city of Milan, which was announced as the venue by the Bureau of International Expositions (BIE) in 2008.

The EXPO will occupy an area to the north of Fiera Milano. 120 to 130 nations as well as international organisations and companies are expected to be there. Around 20 million visitors are expected to attend. Under the heading »Feeding the Planet – Energy for Life« the participating countries will show how they are contributing to feeding the planet in sustainable ways. For the first time Messe Frankfurt will be responsible for organising the German pavilion.







Marketing, media and events

Marketing German trade fairs

In support of the international marketing efforts of German organisers AUMA advertises their trade fairs around the world using the slogan »Trade fairs made in Germany« and the GTQ label (German Trade Fair Quality Abroad).

Embassies and chambers of commerce as marketing partners of AUMA • Worldwide, more than 500 opinion-formers, in particular German chambers of commerce abroad and the German diplomatic representations and the foreign representatives of German trade fair organisers, use brochures and online services to distribute information published by AUMA on Germany as a trade fair venue. As part of the foreign trade fair programme the brochure entitled »Trade Fairs Made in Germany« was made available on information stands throughout.

Brochure »Trade Fairs Made in Germany« Around the world, demand for hard copy information has declined due to the increasingly widespread use of online services via internet links. Close to 100,000 copies of the brochure were published in German, English, Spanish and French. In collaboration with chambers of commerce abroad and other partners, AUMA also publishes versions in Arabic, Chinese, Farsi, Greek, Korean, Portuguese (for Brazil) and Russian. The Russian version of the brochure is also available as an e-paper catalogue. A Japanese version is available as an online database at www.fairs-germany.jp. There is also an additional information flyer.



Poster for the joint participations of German companies abroad – available in five languages

DZT and GCB address the topic of business trips • As part of a campaign addressing the topic of business trips in 2012 the German National Tourism Board (DZT) and German Convention Bureau (GCB) promoted the business trip sector in important markets such as China, the USA. Brazil and the UK.

At the EIBTM
in Barcelona.
from left to right:
Matthias Schultze
(GCB),
Sylvia Kanitz
(AUMA)
and Ulrike Bohnert
(DZT), together
with Dr. Thietmar
Bachmann,
Germany's deputy
consul general in
Barcelona



The main communication tool was a completely redesigned international website. By going to ▶ www.germany.travel/en/business-travel, visitors can also obtain information on Germany's international trade fair venues in cooperation with AUMA and on trips to meetings, congresses and incentive travel in Germany in close cooperation with the GCB.

Rounding off this theme in 2012, the GCB, DZT and AUMA showcased Germany as a destination for business trips at the international event for the meetings and events industry (EIBTM) in Barcelona. Visitors to the fair included decision-makers from the MICE sector, travel managers and organisers of conferences and congresses, as well as leading buyers operating on the Spanish market. The participation in EIBTM was organised as part of the foreign trade fair programme of the Federal Ministry of Economics and Technology (BMWi).

Promoting participation in trade fairs

Despite the fact that trade fairs represent a firmly established marketing instrument among the various options at a company's disposal, they have to compete with other marketing instruments and must make the public aware of their quality. AUMA undertakes numerous measures to advertise the specific quality of trade fairs.

In 2012, the image campaign launched in 2007 and entitled »Your success is only fair« was augmented with new elements and motifs. It continues to address small and medium-sized companies with the aim of motivating them to take part in trade fairs and also targets advertising and communications agencies.

The campaign's motifs use keywords such as "successful", "direct", "genuine" and "effective" in connection with describing trade fairs as marketing instruments. They employ neither photos nor other images, instead they attract the audience's attention solely by using phonetic spelling in order to convey the message of the text.





Annual meeting of the trade fair industry at the Museum of Technology

On 23 May 2012 at the Museum of Technology in Berlin, more than 450 participants, including representatives of organisers, trade associations, exhibiting companies, politics and the media, trade fair companies and service providers from all parts of Germany attended the AUMA MesseTreff.

Opening the trade fair industry's annual meeting, AUMA Chairman Hans-Joachim Boekstegers said: »German exhibitors and organisers alike have demonstrated their strength amid international competition. That is something I believe we can be proud of.« On the roof patio of the Museum of Technology and in a warm summer atmosphere, the guests attending the annual meeting made use of this opportunity to hold talks and maintain business contacts.



Speaking at the annual meeting, AUMA Chairman Hans-Joachim Boekstegers reported on the industry's results



Participation in international congresses

2012 UFI Congress in Abu Dhabi ■ From 6 to 9 November 2012 the annual congress of The Global Association of the Exhibition Industry (UFI) took place in Abu Dhabi. 475 trade fair professionals from 55 countries took part, among them Dr. Peter Neven, AUMA's managing director, Marco Spinger, head of the Global Markets Division, Barbara-Maria Lüder, AUMA's advisor on legal aspects and sustainability, and Harald Kötter, the managing director of FKM.

AUMA_MesseTreff 2012 on the roof top of the Museum of Technology in Berlin



from left to right: Paul Woodward, managing director of UFI, and members of the UFI Trio: Chen Xinjin, the new president, Eric Everard and Arie Brienen

Numerous meetings of committees took place at the congress, including those of the regional chapters and the Associations' Committee, of which AUMA's managing director Dr. Peter Neven is deputy chairman. Topics at the meetings of the associations included various national research projects, the benefits of auditing trade fair statistics and a presentation of the US-based Society of Independent Show Organizers (SISO).

Representatives of AUMA also took part in other committee meetings, including the Researchers' Meeting, which presented several research projects on the global trade fair market as well as reports on the regional economic impact of trade fairs.

At the meeting of the UFI Sustainable Development Committee AUMA reported on the current state of progress on the German version of ISO 20121.



Europe Asia Event Forum in St. Petersburg ■ From 23 to 25 January 2013 the Europe Asia Event Forum (EFEA) took place in St. Petersburg. 250 delegates took part in this congress for the trade fair and MICE industries. As the Content Partner of the event, AUMA held lectures and moderated a workshop on German organisers in Russia as well as on vocational and advanced training



in the trade fair industry. Furthermore, AUMA's managing director Dr. Peter Neven took part in a panel discussion entitled »What are the benefits of trade fair statistics?« Representing AUMA, Natalja Winges and Bettina Rosenbach delivered motivational speeches at the above-mentioned workshops.



At the Event-Forum in St. Petersburg:
Wolfgang Lenarz (left), Hannover Fairs International,
Dr. Peter Neven, AUMA, Erhardt Wienkamp, Messe Duesseldorf,
Natalja Winges, AUMA, Michael Johannes, Messe Frankfurt.

CEFCO exhibition congress in Chongqing, China ■ From 17 to 19 January 2013, under the slogan of »Vista via Redefinition of Growth«, the China Expo Forum for International Cooperation (CEFCO) took place in Chongqing. In addition to members of the Chinese trade fair indus-

try those attending included representatives of associations and German, American, British and Dutch organisers operating in China. The congress was coorganised by the China Council for the Promotion of International Trade (CCPIT), The Global Association of the Exhibition Industry (UFI), and the American trade fair associations IAEE and SISO. AUMA, the organisation supporting this event series since 2008, was represented by Marco Spinger, the head of the Global Markets Division.

At the first plenary discussion trade fair experts from China, the USA and Germany reported on the impact of the current global economic situation on the international trade fair industry, among them Marco Spinger. It was noted that it was important both to gather experience in one's own region before becoming active in other regions and to establish trade fair brands for international business.

Meeting of the French exhibition association (FSCEF) in Strasbourg From 4 to 6 June 2012, under the slogan of »Innovation: new customers, new service«, the annual congress of the Association of Fairs, Trade Exhibitions, Congresses and Events of France (FSCEF) took place in Strasbourg. Some 300 members and guests took part, including representatives of exhibition venue operators, trade fair and event organisers and service providers. AUMA was represented by Heike Schöttle, manager within the global markets division.

AUMA media for international customers

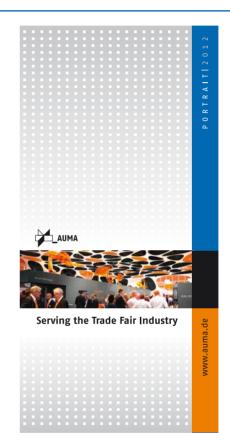
Information on the trade fair industry and AUMA

■ AUMA Review - the German Trade Fair Industry

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

- AUMA Statement The German Trade Fair Industry
 Facts, functions, outlook. Forth revised edition, July 2013.
- Portrait: AUMA Serving the trade fair industry Information on AUMA's responsibilities, its organisation and members. Published in 2012 in German and English.
- Promotional film »Trade fairs made in Germany«

This promotional film highlights and provides fascinating insights of trade fairs as a medium and the specific quality and efficiency which German trade fairs have to offer. The DVD is 2 minutes and 30 seconds long and offers a choice of languages: Chinese, English, French, German, Japanese, Portuguese, Russian and Spanish.







Information on trade fairs

AUMA Online

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

Available at

www.auma.de.

■ The AUMA Trade Fair Guide for Germany

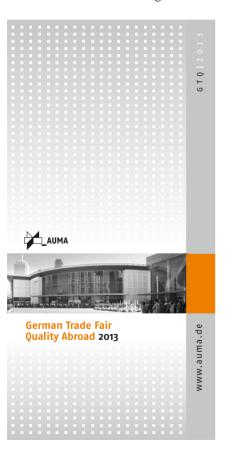
Profiles of German trade fairs by category: international / national and regional trade fairs. Trade fair register by industry, dates and venue. Published annually in autumn in German.

■ Messen Made in Germany, 2013/2014

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

German Trade Fair Quality Abroad

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



Information on preparing for trade fairs

■ Messe fit. Ready for Trade Fairs

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

■ Trade Fair Benefit Check

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

Successful Participation in Trade Fairs

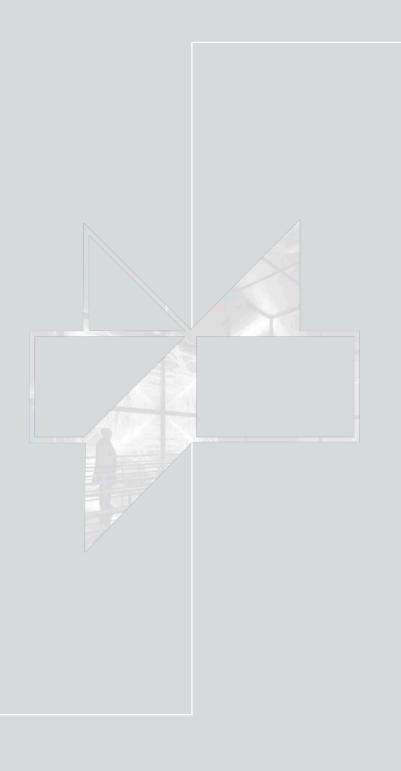
Brochure with Suggestions for planning and taking part in trade fairs: From choosing a trade fair to monitoring success. Published in German and English, January 2012.

■ MyFairs - The Trade Fair Data Manager for Your iPhone

Data from the AUMA trade fair database available as an iPhone app. Published 2010, updated 2013. Available in the App Store, Prize: 5.49 Euros.

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







Members

Industry and trade organisations

Trade fair organisers / companies organising joint participations abroad

Executive Committee

Walter Mennekes Chairman

Management

Dr. Peter Neven Managing Director

Directors

Richard Klotz Finance / Organisation Harald Kötter Public Relations & Trade Fairs Germany Marco Spinger Global Markets

Institute of the German Trade Fair Industry

Working Groups

AUMA Training and Continuation Training Working Group

AUMA Visitor Services Working Group

AUMA-IT Working Group

AUMA Trade Fair Transparency Working Group

AUMA Press Working Group

AUMA Technology / Logistics Working Group

AUMA Administration / Legal Working Group

AUMA Marketing Working Group

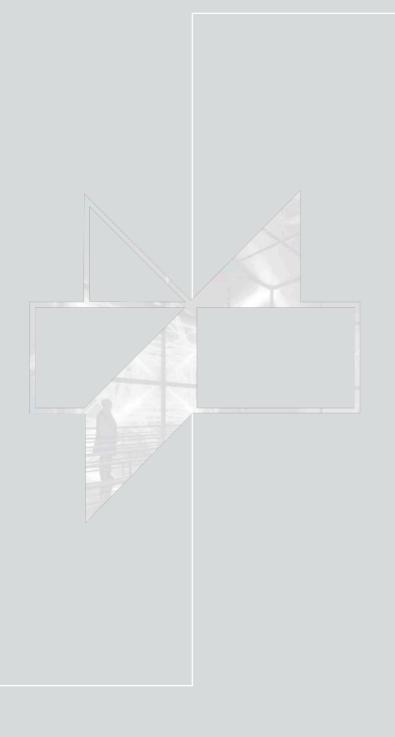
AUMA GTQ Working Group (German Trade Fair Quality Abroad)

AUMA-Round Table in Brussels

Working Group for Foreign Fair Participations within AUMA

Association of Direct Business Communication (FAMAB), Rheda Wiedenbrueck Association of German Chambers of Commerce and Industry (DIHK), Berlin Association of German Cutlery and Houseware (IVSH), Solingen Association of German Dental Manufacturers (VDDI), Cologne Association of German Tool Manufacturers (FWI), Remscheid Association of International Motor Vehicle Manufacturers (VDIK), Bad Homburg Caravaning Informations GmbH (CIG), Frankfurt/Main Central Committee for German Agriculture (ZDL), Berlin	Exhibition organisers / companies organising joint participations abroad asfc atelier scherer fair consulting GmbH, Fuerth Balland Messe-Service GmbH, Cologne DEGA-EXPOTEAM GmbH & Co. Ausstellungs KG, Obersoechering
Rheda Wiedenbrueck Association of German Chambers of Commerce and Industry (DIHK), Berlin Association of German Cutlery and Houseware (IVSH), Solingen Association of German Dental Manufacturers (VDII), Cologne Association of German Tool Manufacturers (FWI), Remscheid Association of International Motor Vehicle Manufacturers (VDIK), Bad Homburg Caravaning Informations GmbH (CIG), Frankfurt/Main Central Committee for German Agriculture (ZDL), Berlin	Balland Messe-Service GmbH, Cologne DEGA-EXPOTEAM GmbH & Co. Ausstellungs KG, Obersoechering
Confederation of the German Textile and Fashion Industry, Berlin Didacta Verband – Association of the German Education Industry, Darmstadt European Association of Event Centres (EWC), Bad Homburg Federal Association for Information Technology, Telecommunications and New Media (BITKOM), Berlin Federal Industrial Association of Germany House, Energy and Environmental Technology (BDH), Cologne Federation of German Food and Drink Industries (BVE), Berlin Federation of German Industries (BDI), Berlin Federation of German Industries (BDI), Berlin Federation of German Wholesale, Foreign Trade and Services (BGA), Berlin German 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 for Water, Wastewater and Waste (DWA), Hennef German Confederation of Skilled Crafts (ZDH), Berlin German Consmetic, Toiletry, Perfumery and Detergent Association (IKW), Frankfurt/Main German Electrical and Electronic Manufacturers Association (ZVEI), Frankfurt/Main German Engineering Federation (VDMA), Frankfurt/Main German Industry Association for Coin-operated Amusement and Vending Machines (VDAI), Berlin German Industry Association for Consumer Optics, Medical Technology, Optical Technology, Analytical and Laboratory Technology (SPECTARIS), Berlin German Retail Federation (HDE), Berlin German Shipbuilding and Ocean Industries Association (VSM), Hamburg German Shipbuilding and Ocean Industries Association (VSM), Hamburg German Shipbuilding and Ocean Industries Association, German Chapter, Kelsterbach National Association of German Commercial Agencies and Distribution (CDH), Berlin National Confederation of German Commercial Agencies and Distribution (CDH), Berlin	Deutsche Messe AG, Hanover expotec GmbH – Trade Fairs and Conferences, Berlin FAMA – Special Association for Fairs and Exhibitions, Obertraubling Frankfurt Book Fair, Frankfurt/Main GDG – Association of Major German Exhibition Organisers, Cologne GHM – Gesellschaft fuer Handwerksmessen mbH, Munich Hamburg Messe und Congress GmbH, Hamburg Hannover Fairs International GmbH, Hanover IDFA – Pool of German Trade Fair Organisations and Exhibition Cities, Leipzig IFWexpo Heidelberg GmbH, Heidelberg IGEDO Company GmbH & Co. KG, Duesseldorf IMAG – International Trade Fair Service GmbH, Munich IEC Berlin INTER EXPO CONSULT GmbH, Berlin Karlsruher Messe— und Kongress GmbH, Karlsruhe Koelnmesse GmbH, Cologne Landesmesse Stuttgart GmbH, Stuttgart Leipziger Messe International GmbH, Leipzig Mack Brooks Exhibitions Ltd, St. Albans Herts, (UK) MCO – Marketing Communication Organisation GmbH, Duesseldorf MESSAGO Messe Frankfurt GmbH, Stuttgart Messe Berlin GmbH, Berlin MESSE BREMEN & ÖVB–Arena, Bremen Messe Duesseldorf GmbH, Duesseldorf Messe Essen GmbH, Essen Messe Frankfurt GmbH, Frankfurt/Main Messe Friedrichshafen GmbH, Friedrichshafen Messe Westfalenhallen Dortmund GmbH, Dortmund NuernbergMesse GmbH, Nunemberg Reed Exhibitions Deutschland GmbH, Duesseldorf Saarmesse GmbH, Saarbruecken Spielwarenmesse eG, Nuremberg the fair agency gmbH, Munich







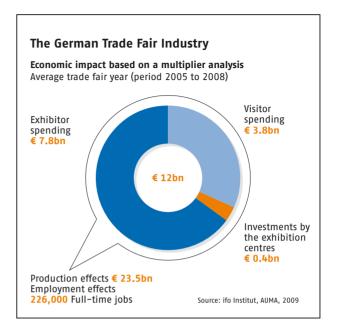
Macro-economic significance

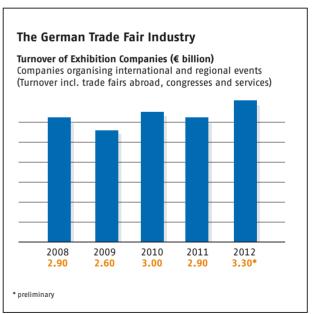
The exhibition industry is one of the leading services sectors of the German economy. It also ranks highly on the international stage. In terms of highest turnover, four of the world's top ten exhibition companies are based in Germany.

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

(€ million)

12 2011 0 813.0 2 782.7 9 475.3 9 467.5 5 372.7 6 299.9 1 266.4	811.0 727.2 360.0 448.3 335.0
782.7 3.9 475.3 5.9 467.5 3.5 372.7 7.6 299.9 3.1 266.4	727.2 360.0 448.3 335.0
3.9 475.3 5.9 467.5 5.5 372.7 7.6 299.9 5.1 266.4	360.0 448.3 335.0
6.9 467.5 6.5 372.7 7.6 299.9 6.1 266.4	448.3 335.0
372.7 7.6 299.9 8.1 266.4	335.0
7.6 299.9 3.1 266.4	
.1 266.4	200 1
	2 J J . I
	294.4
3.4 222.5	301.8
6 201.2	208.0
.4 278.0	248.4
3 292.8	3 212.0
.8 182.1	217.4
173.3	204.8
.4 235.3	237.0
.5 180.5	132.2
.0 158.3	124.7
.1 194.7	184.5
ı/a 160.0	156.5
.7 141.6	138.4
.2 152.9	155.5
3.4 138.2	125.5
.7 133.9	125.0
.0 n/a	123.2
.0 99.0	110.0
114.7	101.6
	109.7
.0 101.4	128.7
	. 116.7
8 153.2	89.2
3	3.0 n/a 9.0 99.0 5.1 114.7 4.0 101.4 1.8 153.2

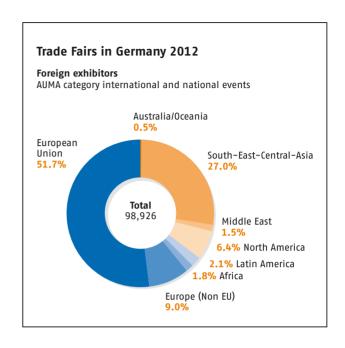


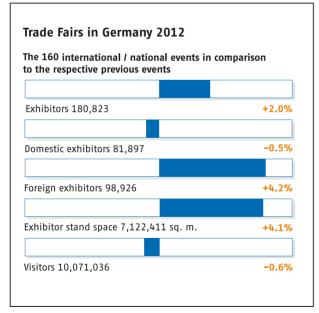


International / national trade fairs

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

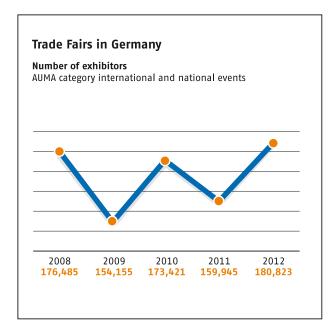
Despite the more difficult economic framework international trade fairs in Germany continue to grow. Only visitor figures fell slightly.











Trade Fairs in Germany

Number of visitors

AUMA category international and national events

2008 2009 2010 2011 2012

10,278,165 8,916,693 10,074,724 9,526,246 10,071,036

At 22 exhibition centres in Germany the hall space available for holding international trade fairs and exhibitions totals around 2.75 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 2013

Exhibition capacities*

gross in sq. m.

Location	Hall	Outdoor
Hanover	460 437	58 070
Frankfurt/M.	355 535	96 078
Cologne	284 000	100 000
Duesseldorf	262 704	43 000
Munich (Exh. Center)	180 000	425 000
Nuremberg	160 000	50 000
Berlin	155 000	100 000
Leipzig	111 300	70 000
Essen	110 000	20 000
Stuttgart	105 200	40 000
Hamburg	86 465	10 000
Friedrichshafen	86 200	15 160
Bad Salzuflen	77 500	4 000
Dortmund	59 735	
Karlsruhe (New Exh. Center)	52 000	62 000
Augsburg	48 000	10 000
Bremen	39 000	100 000
Munich (M, O, C,)	29 255	
Saarbrücken	24 600	27 400
Offenburg	22 570	37 877
Freiburg	21 500	40 000
Offenbach	21 000	

Status: 1.1.2013

according to AUMA category international and national events

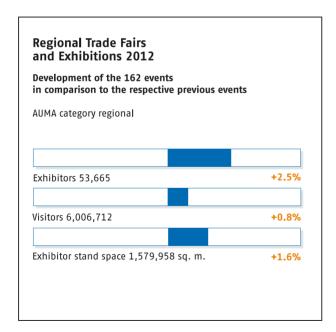
^{*} Locations with at least one event



Regional events

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

Beginning from 2010 small events for specialized industries are observed separately.



Foreign trade fair programme

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

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



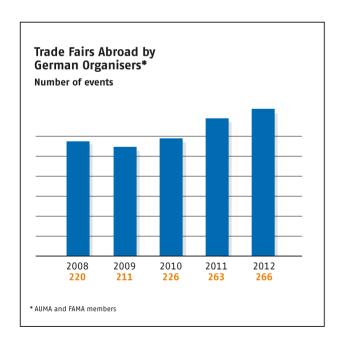


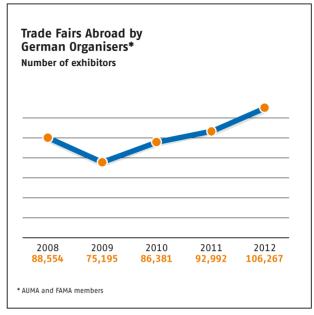


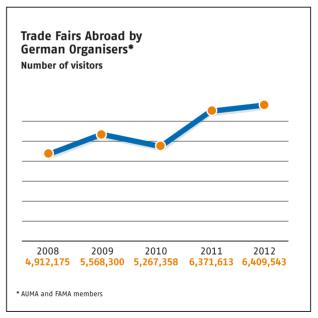
Trade fairs abroad held by German organisers

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

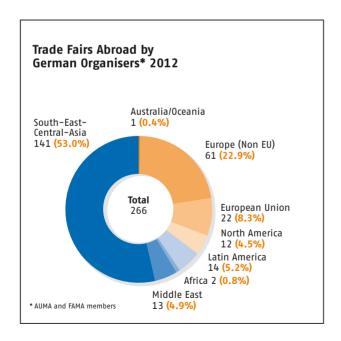
For the most part the tried and tested concepts of leading trade fairs in Germany are applied to selected markets abroad.





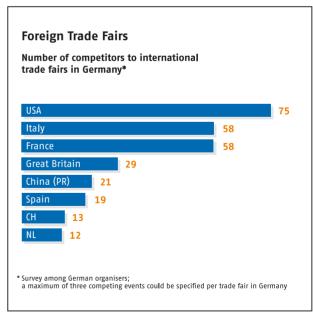


More than 50 % of the exhibitors organised abroad by German companies took place in South-East-Central-Asia. But also Europe, especially Russia, plays a substantial role here.



German trade fairs in the global competition

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





Hall 132,720 130,112 121,314 120,402 120,000 120,000 118,910 115,211 114,445 114,275 111,300 110,000 109,187 109,000 108,049 108,000 107,654 106,800 105,200 105,200 105,000 102,470 102,230 100,000 100,000 100,000

Exhibition Centres Worldwide 2013

Exhibition capacities

gross in sq. m.

Location	Hall	Location
Hannover Exhibition grounds	460,437	VVC Moskau
Frankfurt/Main Exhibition grounds	355,535	Georgia World Congress Center Atlanta
Fiera Milano	345,000	BVV Veletrhy Brno
China Import & Export Fair Complex Guangzhou	340,000	Reliant Park Houston
Cologne Exhibition grounds	284,000	Fiera del Levante Bari
Duesseldorf Exhibition grounds	262,704	Yiwu International Expo Center
Paris-Nord Villepinte	242,582	Fiera Roma
McCormick Place Chicago	241,549	Fira Barcelona Montjuic
Fira Barcelona Gran Vía	240,000	Brussels Expo
Feria Valencia	230,837	EUREXPO Lyon
Paris Porte de Versailles	227,380	Leipzig Exhibition grounds
Crocus Expo IEC Moskau	226,399	Essen Exhibition grounds
Chongqing International Expo Centre	204,000	Singapore Expo
The NEC Birmingham	201,634	Rimini Fiera
BolognaFiere	200,000	KINTEX Goyang / Seoul
IFEMA Feria de Madrid	200,000	BEC Bilbao Exhibition Centre
SNIEC Shanghai	200,000	Poznan International Fair
Orange County Convention Center Orlando	190,875	New China International Exhibition Center Beijing
Las Vegas Convention Center	184,456	Stuttgart Exhibition grounds
Munich Exhibition grounds	180,000	Shenyang International Exhibition Center
Nuremberg Exhibition grounds	160,000	Shenzhen Convention & Exhibition Center
Berlin ExpoCenter City	155,000	Geneva Palexpo
Veronafiere	151,536	Ernest N. Morial Convention Center New Orleans
Wuhan International Expo Center	150,000	ExCeL London
Messe Basel	141,000	Fiere di Parma
IMPACT Muang Thong Thani Bangkok	140,000	Jaarbeurs Utrecht

Status: 1.1.2013

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

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

Pictures

P. 7:	Messe Frankfurt GmbH/Pietro Sutera
P. 8:	Messe Muenchen GmbH
P. 11:	Messe Frankfurt GmbH/Petra Welzel
P. 17:	Deutsche Landwirtschaftsgesellschaft/Stefan Klarner
P. 19:	Frankfurt Book Fair/Peter Hirth
P. 25:	Landesmesse Stuttgart GmbH/Uli Regenscheidt
P. 28:	Messe Duesseldorf GmbH/Constanze Tillmann
P. 29:	Messe Bremen GmbH/Jan Rathke
P. 30:	Spielwarenmesse eG/Alex Schelbert
P. 37:	Mesago Messe Frankfurt GmbH/Nino Halm
P. 41:	632088/URS Foto Pixelio.de
P. 45:	Beijing International Union Expo
P. 47:	German Pavilion/Sisco
P. 48:	Deutsche Messe AG
P. 48:	Expo 2015 S.p.A
P. 52:	German Convention Bureau (GCB)
P. 54:	UFI Congress 2012/UFI
P. 54:	UFI Congress 2012/UFI

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