

THE 2011 WORLD MAP OF EXHIBITION VENUES



December 2011

SUMMARY OF FINDINGS

Introduction: scope and methodology

As a part of its strategy, UFI's objective is to provide reliable data on the exhibition market to its members and to all those interested in exhibitions. This data covers 3 elements: the exhibition venues, the exhibitions held in those venues and the companies who organize those events.

This report relates to the first element. The objective was to identify all venues¹, worldwide, with a minimum of 5,000 sqm of indoor exhibition space² (for a complete overview of UFI activities, please look at www.ufi.org).

The data collection was conducted through several channels:

- Regional directories, when available (Trade Show Executive for USA & Canada, BSG for Asia) and otherwise national associations (see list in note ³),
- Individual information from venues.

The results are considered reliable. They cannot however be considered as 100% accurate or complete, given the poor availability of reliable data in some countries and UFI cannot be held responsible for errors or any consequences arising from the use of this information.

Main results

1,197 venues (with a minimum of 5,000 sqm of indoor exhibition space) **were identified for the year 2011 and their total indoor exhibition space reaches 32.6 million sqm.**

Europe and North America, followed by Asia offer the highest venues capacities, with respectively 48%, 24% and 20% of the total indoor exhibition space (cf. table 1 for complete results and mapping of regions).

The size of venues also varies from one region to another (cf. table 2). 55 venues – 36 of them being in Europe and 12 in Asia – have an indoor exhibition space of 100,000 sqm and more (cf. table 3).

In terms of countries, 5 of them (USA, China, Germany, Italy and France) account for 59% of the total world indoor exhibition space (cf. table 4 for the capacity details of the 34 countries with a minimum of 100,000 sqm of indoor exhibition space).

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

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

³ AEFI (Italy), AEO (UK), AFE (Spain), AFIDA (Central & South America), AMPROFEC (Mexico), AUMA & EVVC (Germany), BAFEO (Bulgaria), CAEC (China), CLC–Centrum voor Live Communication (The Netherlands), EFU (Ukraine), EXSA (Botswana, Kenya, Mozambique, Namibia, South Africa, Zimbabwe), FAIRLINK (Denmark, Finland, Norway, Sweden), FEBELUX (Belgium & Luxembourg), FSCEF (France), PCEI (Poland), RUEF (Russia), TFOA (Turkey), UBRAFE (Brazil).

The exhibition space has grown by an annual average of 2.3% since 2006.

The additional indoor exhibitions space between 2006 and 2011 reaches 3.4 million sqm. 54% of this additional space relates to the construction of new venues and 46% to extensions of existing venues.

All regions, except Africa where one large venue has closed, have significantly increased their capacity (cf. table 5). This is particularly true for Asia/Pacific (+38%) and the Middle East (+16%). One significant change is the shift of 2% of the global “market share” from both Europe and North America to Asia / Pacific (+4%).

15 countries have increased their total indoor capacity by at least 50,000 sqm between 2006 and 2011 (cf. table 6). China accounts for 46% of the global increase and 69% of the Chinese increase relates to new venues.

Conclusion

The exhibition space has still expanded, proving the strength of the exhibition industry. However, the overall 2006-2011 rhythm of development (2.3% per year on average) is lower than it had been anticipated in 2007 (3.1% - see 1st UFI World Map of Venues).

These trends also result from different situations. In addition to the need of market adjustment in some countries with “under capacity”, the increase of exhibition space often result from fierce competition, both locally and internationally, with a “development race” often justified by operators with:

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

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Table 1 - Venues and indoor exhibition space in 2011 - Number & Capacity

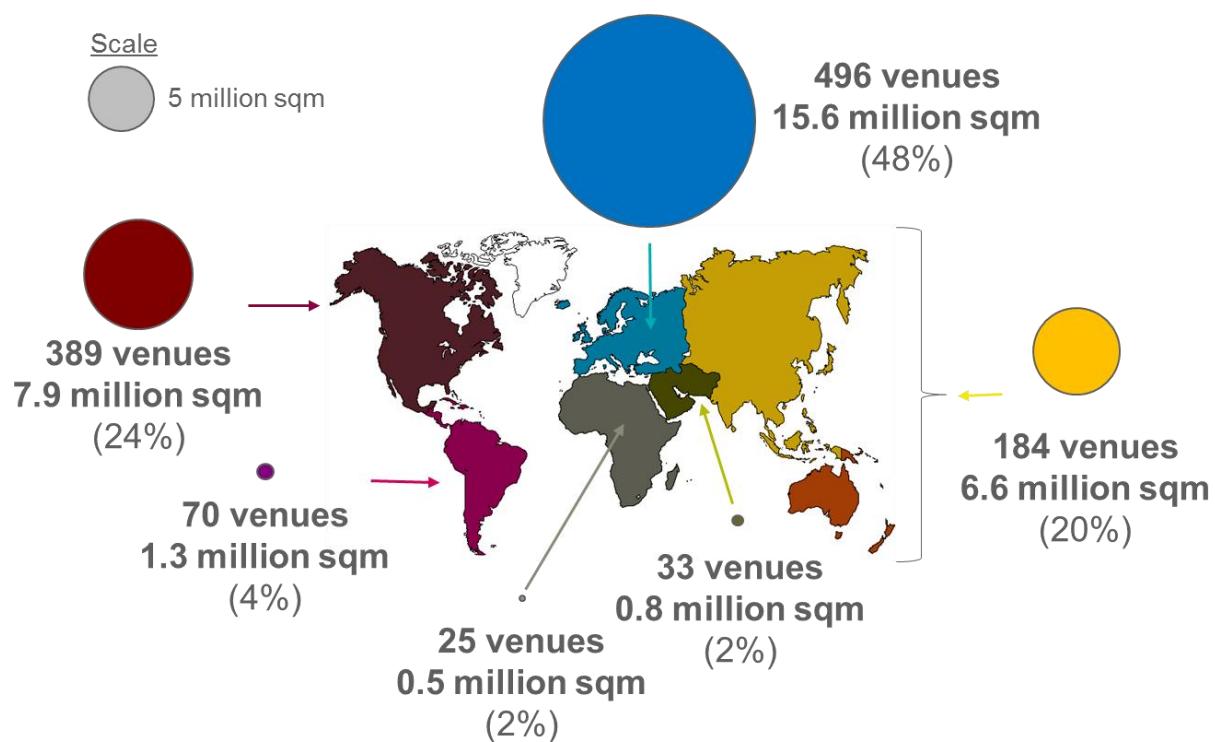


Table 2 - Venues and indoor exhibition space in 2011 - Number of venues by size (in sqm)

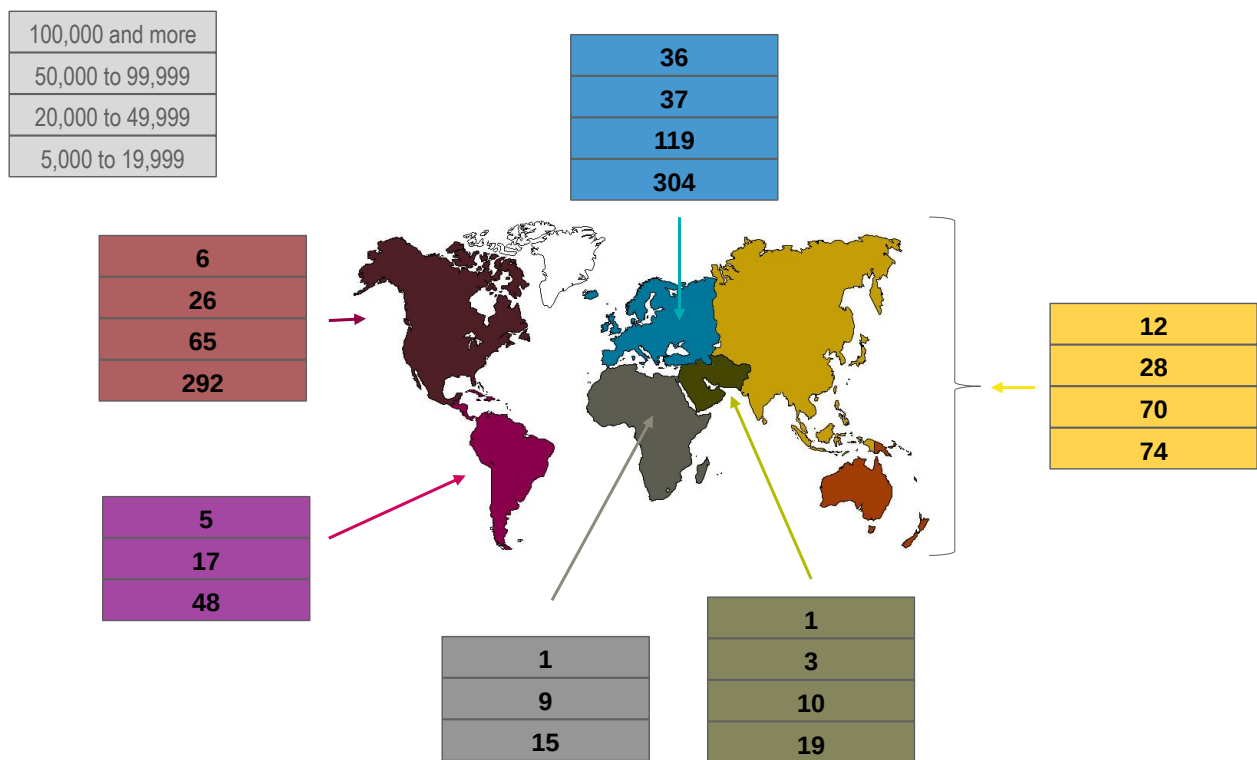


Table 3 – Venues with a minimum of 100,000 sqm of indoor exhibition space in 2011

				Indoor exhibition space (sqm)	Europe	North America	Asia	Middle East
1	Messe Hannover	Hanover	Germany	466 100	1			
2	Messe Frankfurt	Frankfurt/Main	Germany	345 697	2			
3	Fiera Milano (Rho Pero)	Milano	Italy	345 000	3			
4	Chinese Export & Import Commodities Fair Ground - Pazhou Complex	Guangzhou	China	338 000			1	
5	Koelnmesse	Cologne	Germany	284 000	4			
6	Messe Duesseldorf	Duesseldorf	Germany	262 704	5			
7	Paris Nord Villepinte	Paris	France	241 582	6			
8	McCormick Place	Chicago	USA	241 524		1		
9	Feria Valencia	Valencia	Spain	230 602	7			
10	Porte de Versailles	Paris	France	228 211	8			
11	Crocus International	Moscow	Russia	226 399	9			
12	Fira de Barcelona: Gran Via venue	Barcelona	Spain	205 000	10			
13ex	BolognaFiere	Bologna	Italy	200 000	11ex			
13ex	Feria de Madrid/IFEMA	Madrid	Spain	200 000	11ex			
13ex	Shanghai New International Expo Centre (SNIEC)	Shanghai	China	200 000			2	
16	The NEC (Birmingham)	Birmingham	United Kingdom	198 983	13			
17	Orange County Convention Center	Orlando	USA	195 077		2		
18	Wuhan International Expo Center	Wuhan	China	190 000			3	
19	Las Vegas Convention Center	Las Vegas	USA	184 372		3		
20	Neue Messe Muenchen	Muenchen	Germany	180 000	14			
21	Chinese Export & Import Commodities Fair Ground - Liuhua Complex	Guangzhou	China	170 000			4	
22	Investimenti S.p.A. (già Fiera di Roma S.p.A.)	Roma	Italy	167 000	15			
23	MCH Messe Schweiz (Basel) AG	Basel	Switzerland	162 000	16			
24ex	Messe Berlin	Berlin	Germany	160 000	17ex			
24ex	Nuernberg Messe	Nuernberg	Germany	160 000	17ex			
26	IMPACT	Bangkok	Thailand	137 000			5	
27	Verona Fiere	Verona	Italy	135 904	19			
28	Georgia World Congress Center	Atlanta	USA	130 052		4		
29	E.A. Fiera del Levante	Bari	Italy	128 000	20			
30	Veletrhy	Brno	Czech Republic	120 300	21			
31ex	Feria de Zaragoza	Zaragoza	Spain	120 000	22			
31ex	Yiwu International Expo Centre	Yiwu	China	120 000			6	
33ex	Brussels EXPO	Brussels	Belgium	115 000	23ex			
33ex	Fira de Barcelona: Montjuic venue	Barcelona	Spain	115 000	23ex			
35	EUREXPO	Lyon	France	113 719	25			
36	ExCeL London	London	United Kingdom	110 411	26			
37ex	MCH Messecenter Herning	Herning	Denmark	110 000	27ex			
37ex	Messe Essen	Essen	Germany	110 000	27ex			
37ex	Fiere di Parma SpA	Parma	Italy	110 000	27ex			
37ex	Chengdu New International Convention and Exhibition Center (Century City)	Chengdu	China	110 000			7	
41	Rimini Fiera	Rimini	Italy	109 000	30			
42	Bilbao Exhibition Centre	Bilbao	Spain	108 000	31			
43ex	Messe Stuttgart	Stuttgart	Germany	105 200	32			
43ex	Shenyang Exhibition Center	Shenyang	China	105 200			8	
45	Shenzhen Convention & Exhibition Center	Shenzhen	China	105 000			9	
46	Korea International Exhibition Center (KINTEX)	Seoul	South Korea	104 000			10	
47	Poznan International Fair	Poznan	Poland	102 791	33			
48	Palexpo Geneva	Geneva	Switzerland	102 470	34			
49ex	Kentucky Exposition Center	Louisville	USA	102 183		5ex		
49ex	New Orleans Ernest N. Morial Convention Center	New Orleans	USA	102 183		5ex		
51	Jaarbeurs Utrecht	Utrecht	The Netherlands	102 000	35			
52	Leipziger Messe	Leipzig	Germany	101 200	36			
53	Tehran Permanent Fair Ground / Iran International Exhibitions Co.	Tehran	Iran	101 185				1
54ex	New China International Exhibition Center (NCIEC)	Beijing	China	100 000			11ex	
54ex	Singapore Expo	Singapore	Singapore	100 000			11ex	

Table 4 - Countries with a minimum of 100,000 of indoor exhibition space in 2011

Indoor exhibition space (sqm)			WORLD	North America	Europe	Asia / Pacific	Central & South America	Middle East	Africa
1	USA	6 712 342	21%	86%					
2	China (*)	4 755 102	15%			72%			
3	Germany	3 377 821	10%		22%				
4	Italy	2 227 304	7%		14%				
5	France	2 094 554	6%		13%				
6	Spain	1 548 057	5%		10%				
7	The Netherlands	960 530	3%		6%				
8	Brazil	701 882	2,2%		5%		54%		
9	United Kingdom	701 857	2,2%						
10	Canada	684 175	2,1%	9%					
11	Russia (**)	566 777	1,7%		3,3%	1%			
12	Switzerland	500 570	1,5%		3,2%				
13	Belgium	448 265	1,4%		2,9%				
14	Turkey	433 904	1,3%		2,8%				
15	Mexico	431 761	1,3%	6%					
16	Japan	345 763	1,1%			5%			
17	Austria	287 475	0,9%		1,8%				
18	South Korea	280 190	0,9%			4%			
19	India	278 010	0,9%			4%			
20	Poland	268 068	0,8%		1,7%				
21	Australia	257 990	0,8%			4%			
22	Czech Republic	252 700	0,8%		1,6%				
23	Greece	223 400	0,7%		1,4%				
24	Sweden	217 060	0,7%		1,4%				
25	Denmark	216 070	0,7%		1,4%				
26	Singapore	203 600	0,6%			3%			
27	Thailand	200 174	0,6%			3%			
28	Iran	198 980	0,6%					26%	
29	South Africa	178 432	0,5%						38%
30	UAE	177 000	0,5%					23%	
31	Portugal	163 690	0,5%		1,0%				
32	Argentina	137 929	0,4%				11%		
33	Finland	133 850	0,4%		0,9%				
34	Serbia	126 174	0,4%		0,8%				
35	Hungary	119 000	0,4%		0,8%				
36	Ukraine	105 018	0,3%		0,7%				
37	Slovak Republic	100 906	0,3%		0,6%				
TOTAL of above listed countries			94%	100%	96%	97%	65%	48%	38%
TOTAL for all countries			32 569 276 100%	7 828 279	15 595 345	6 593 388	1 301 225	775 454	475 586

(*) including Hong-Kong, Macau & Taiwan

(**) European + Asian parts

Table 5 – Regional trends and shares of the total world indoor exhibition space in years 2006 and 2011

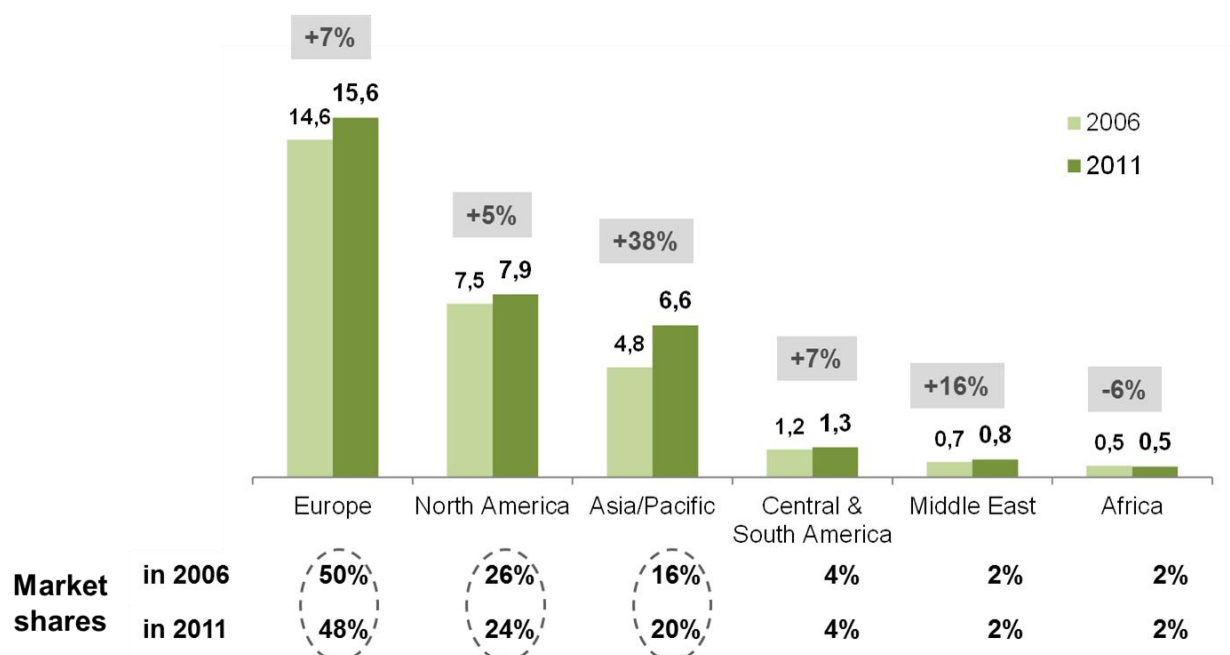
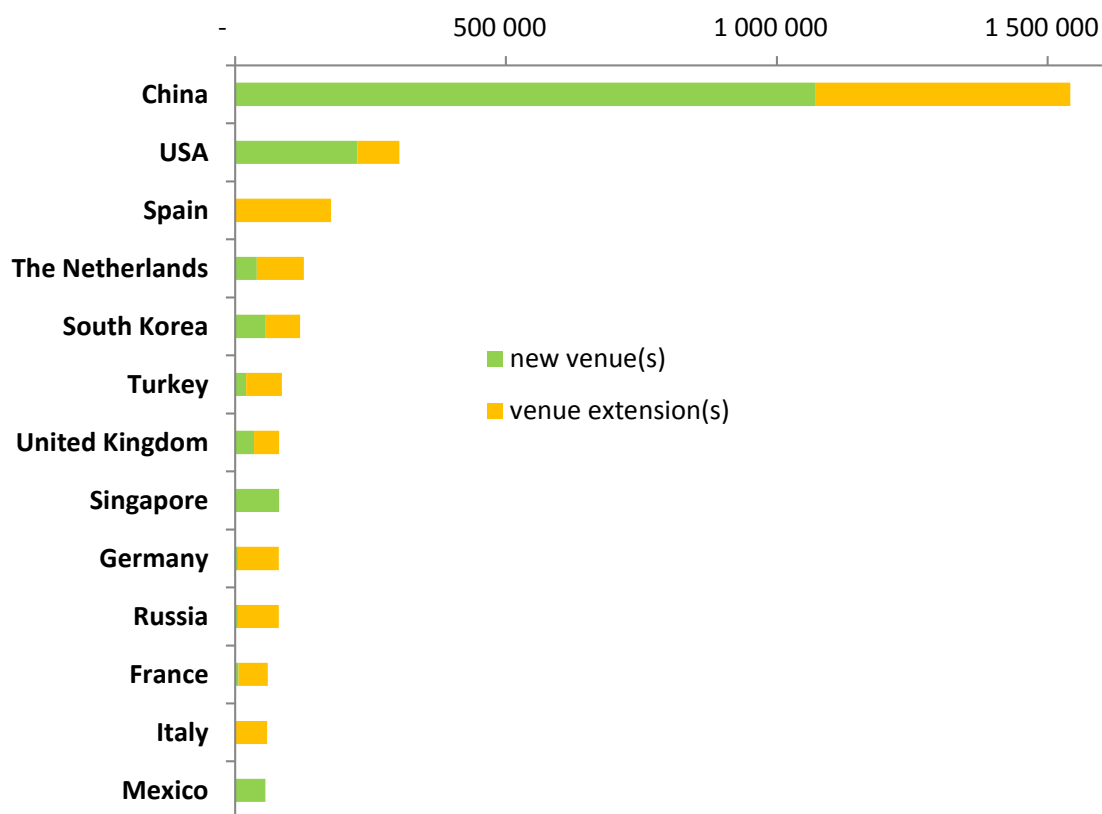


Table 6 – Countries with a minimum of 50,000 sqm of additional indoor exhibition space between 2006 and 2011



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