



German Trade Fair Industry | Review

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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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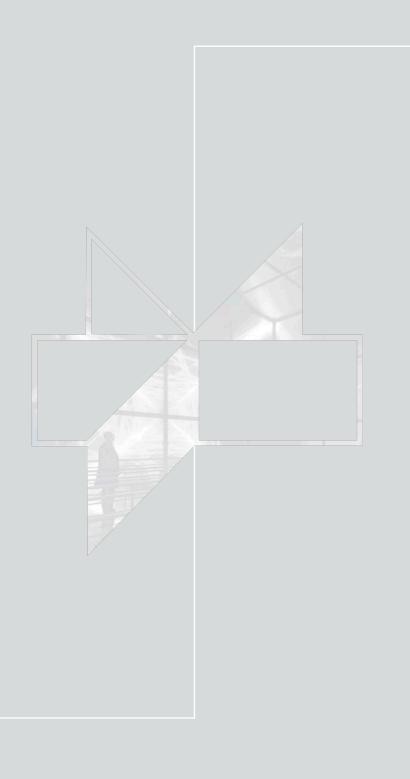
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Regarding the choice of photos:

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

The international reputation of Germany as a trade fair venue is doubtless based primarily on the quality of the individual trade fairs. But to make trade fairs enduringly successful, a number of other factors also need to be right, particularly the infrastructure in and around the exhibition site.

Securing trade fair infrastructure This is firstly a question of the quality of the exhibition site. The building and expansion boom of the 70s and 80s in particular set the international standard. And, almost without exception, the halls erected today are globally leading. However, the halls erected back then are now 30 to 40 years old and it is therefore logical that the trade fair companies (have to) spend a considerable amount of money to keep this capacity at a leading level internationally. And trade fair venues which are only able to recognise or act on this necessity with a delay will feel this from their customers – whether exhibitors, sponsor associations or guest organisers. Continuous investments in maintaining the inventory will therefore be the order of the day in the near future.

The external infrastructure, particularly the transport infrastructure in trade fair cities or regions, is just as important for enduring success as the exhibition site infrastructure. Germany as a trade fair venue has also set the standards in this sector, from air and train connections to motorway access and public transport. Maintaining and expanding the transport infrastructure is also a key requirement for trade fair success in the future.



#### Positioning the trade fair as an instrument of dialogue

■ It is common knowledge that the difference between information and communication is – put simply – that the former stands for monologue, but the latter stands for dialogue.

However, many supposed communication measures actually only work in one direction, without even experts recognising the contradiction in this. For example, at the end of 2013, one marketing magazine reported that »companies discover dialogue for brand communication«. Apparently communication had previously been possible without dialogue.

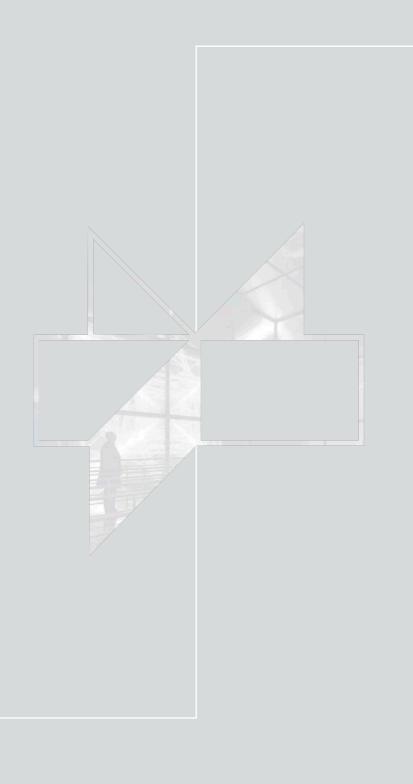


Other experts are coming to the realisation that markets emerge through conversations and that therefore the future of marketing is in conversation with the customer. Those who have been exhibiting for many years will probably correctly become convinced that they have been doing everything right so far.

This means the basic idea of the trade fair – dialogue with the customer on neutral ground – has not just always been a good one, but is obviously also extremely modern. It is all the more important that trade fair or-

ganisers and AUMA emphasise the function of trade fairs as one of the few genuine instruments of dialogue with a unique role in connection with creating emotions. Current examples show that producers of brandname goods, who had previously taken a sceptical stance on trade fairs, are gradually beginning to recognise the possibilities trade fairs offer for dialogue with customers. It also speaks volumes for the quality of trade fairs that even primarily »virtual« companies from Google to Amazon turn to real participation in trade fairs to market their advertising offerings.







### Exhibitions in Germany

### **Overview**

The international and national trade fairs in Germany also stayed on course in 2013 – slight growth in key performance indicators shows that weakness in the economy, problems on the financial markets and even the growing significance of digital business is not currently seriously damaging the position of trade fairs.

The strong industrial base in Germany in particular is continuing to benefit capital goods fairs. The strong pres-

ence of German industry at trade fairs in Germany is also an important signal to foreign exhibitors and visitors, showing the quality of German trade fairs. Trade fairs do not just contribute to the export of German products like this, they are also an important instrument for promoting the import of capital goods and consumer goods – a field where many other countries think Germany still needs to catch up.

An exhibitor's success is doubtless – especially at international

trade fairs in Germany – first and foremost determined by the high quality of the visitors that the organisers and exhibitors are together able to mobilise. On the other hand, the exhibitor's participation concept must be right – this is self-evident in principle. But for a long time, it did not seem to be clear to some exhibitors that, for example, an attractive stand was not enough to achieve success. Nor are systematic trade fair planning and follow-up work everything; and motivated and well trained stand staff alone cannot ensure success either unless the framework conditions are right. Instead, you need it all at once, i.e. integrated trade fair communication so as to be able to optimally benefit from the quality of the visitors at a trade fair with broad

international competition. In short, if you make savings in the wrong place, you will have problems achieving a positive cost-benefit ratio.

Anyone who sustainably invests in participating in trade fairs will also have above average success at German trade fairs. Many exhibiting companies have understood this connection and largely kept their trade fair budget stable even in times of strong media competition and cost pressure. This is

because the visitor potential available at a trade fair in Germany is, by tendency, increasing in quality. Around 60% of trade visitors at German trade fairs are decision-makers, around a third of the trade visitors come from other countries, and the number of relatively young de-



AUTOMATICA Munich (Messe München GmbH) cision-makers who visit trade fairs is remarkably high. Around 90% of the decision-makers up to the age of 29 in German companies and public authorities at least occasionally visit trade fairs, around 70% do so at least once a year. That is to be inferred from the 2013 reader analysis of decision-makers in business and public administration. Thus, the young generation seem not to have had any problems – at least so far – in accepting the trade fair as an instrument in the B2B sector.



Christmasworld Frankfurt (Messe Frankfurt GmbH)

Review 2013 • The national and international trade fairs in Germany had a 0.7% increase in exhibitors despite the further reduction in economic growth, the number of foreign visitors rose by as much as 3.2%. This confirms the long-term trend of strong foreign interest in German trade fairs and the German market. In addition, German trade fairs have come through currency and economic crises better than most others in Europe and therefore have increased the gap between them and many competitors.

The stand space is developing in parallel with the number of exhibitors and has grown 1.0%. The 0.5% growth in visitor numbers was not necessarily to be expected after a slight decrease in 2012 and rather restrained economic performance. This growth is due almost entirely to just a few trade fairs, for example for construction and agricultural machines, whereas the majority of trade fairs have instead seen stable and in some cases somewhat weaker results than last time.

**Results by exhibition type** In a comparison of types of exhibition, the 41 consumer goods trade fairs for trade visitors recorded a slightly positive result. 0.9% more exhibitors and an unchanged amount of stand space compared to previous events largely confirm the previous year's results; and 1.6% more visitors give hope for a medium-term stabilisation of visitor interest following a relatively large decline in 2012. The structural prob-



lems of traditional retail combined with the continuing growth of e-commerce will probably not become any smaller in the next few years, with corresponding effects on trade fair results.

The segment comprising the 18 international and national consumer exhibitions is faring somewhat better at 1.5% more exhibitors and 3.4% more stand space. Here in particular, the number of foreign exhibitors rose (+7.9%), whereas German participation fell slightly. The number of visitors remained virtually stable at +0.1%, although several exhibition reported decreases. This result is due, in particular, to exhibition that address younger visitors – a sign that consumer shows are even interesting for digital natives if they present the »right« topic.

The eight service trade fairs with topics as diverse as tourism, marketing, finance and software were just able to maintain their results on average – with 1.4% more exhibitors, but 0.7% less stand space and 0.9% fewer visitors. The area of digital marketing in particular experienced strong growth. In contrast, the boom in investor trade fairs seems to be over.

The 72 capital goods trade fairs reported largely positive or stable results; some anomalies – caused by structural problems in individual industries, e.g. the solar industry, or by strong international trade fair competition – had a negative impact on the overall result for this segment. Some trade fairs also consolidated after several



years of growth. For this reason, exhibitor numbers only rose by 0.3% on average and the number of German exhibitors even fell by 2.6%. The stand space also only increased by 0.9%. The number of exhibitors had even risen by 3.3% in the previous year, and stand space by 7%. However, the number of visitors increased 0.5% in 2013 compared to previous events, having remained unchanged in 2012.

EuroTier Hanover (Deutsche Landwirtschaftsgesellschaft e.V. – DLG)



LASYS Stuttgart (Landesmesse Stuttgart GmbH) overall result in 2013 ■ Overall, AUMA registered 304 exhibitions in Germany with around 220,000 exhibitors, 8.25 million m² of exhibitor stand space and 16.1 million visitors. There were 166,444 exhibitors at the 139 international and national trade fairs, 94,881 of whom came from other countries. They used a total of 6,696,994 m² of stand space. 10,065,153 visitors were registered. In addition, AUMA gathered the results of 148 trade fairs with regional visitor catchment areas. These events involved 51,558 exhibitors, 1,514,418 m² of exhibitor stand space and 5,991,975 visitors. 17 national special trade fairs accounted for 2,888 exhibitors with 34,449 m² of stand space and 77,271 visitors.

The revenues of German trade fair organisers reached around  $\in$  3.2 billion according to preliminary calculations. Compared to the 2011 trade fair year, which was also rather weak due to rotation of events, that is  $\in$  300 million more all the same. For example, the organisers were able to hire out somewhat more space in Germany, but also make price increases and sell more additional services. However, the growing foreign business of large and mid-sized organisers is also having an increasing influence on revenues.

**Outlook for 2014** The improved economic situation of industry and the relatively good consumer climate obviously support the development of trade fairs in 2014. In addition, there is also a positive basic mood in business towards using trade fairs as a marketing instrument. Accordingly, exhibitor numbers and stand space grew by a good 1% in the first quarter of 2014 compared to previous events. Only visitor numbers fell slightly, primarily due to changes in the concepts of individual trade fairs.

AUMA expects growth of around 1% for exhibitors and stand space and also a slight increase in visitor numbers for the full year 2014. This thus gives German trade fairs a strong position in the competition amongst B2B marketing instruments, and the live experience at the international consumer shows obviously remains in great demand.



### AUMA\_MesseTrend 2014

German exhibitors are cautiously optimistic about the near future. In the next two years, 57% aim to keep their trade fair budget stable and 26% want to increase it. This shows that trade fairs remain the most important instrument of business-to-business communication. This is what a representative survey of 500 German exhibitors at business-to-business trade fairs reveals. The survey was carried out for AUMA by TNS Emnid.

As many as 29% of small exhibitors with sales of less than €2.5 million aim to invest more in trade fairs and only 14% plan to spend less. The fact that exhibitors who have only taken part in trade fairs once or twice within a two-year period want to expand their involvement is also notable. Around 30% intend to spend more on trade fairs and 19% at least want to increase their participation in future, while 71% plan on maintaining the same level of participation.

Clearly, these companies have had positive experiences of trade fairs to date. Exhibitors who are planning budget increases frequently want to improve their participation in trade fairs. For example, 34% want to enlarge their stands, 30% want to invest more in stand construction, and 38% plan to take part in additional fairs.

Those who have to reduce costs are primarily reviewing the size of their portfolios; two thirds of companies want to reduce the number of shows they take part in in such cases. The tendency is not to make savings on the quality of participation in trade fairs. For example, when costs are cut, staff and communications costs are barely reduced.

The number of times exhibitors take part in trade fairs in Germany will remain largely unchanged over the next few years, according to the results of the survey.



CeMAT Hanover (Deutsche Messe AG) Around 18% of exhibitors are planning to take part in more and around 18% are planning to participate in fewer trade fairs.

German exhibitors focus strongly on continuity in terms of international involvement: over three quarters intend to continue to take part in the same number of trade fairs and roughly equal numbers of them want to take part more or less often. The proportion of trade fair budgets that is spent on B2B marketing remains very high. It is presently at 42%, a level similar to that of the past five years. Small companies spend as much as around 45% of their budget on trade fairs. Companies who need to make targeted use of their money are obviously focusing disproportionately on trade fairs.

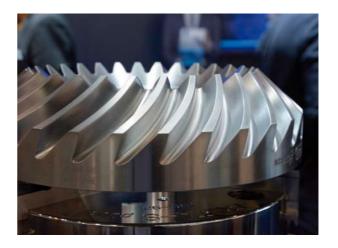
Almost 80% of German exhibitors regard trade fairs as an important or very important element of their communications mix. This is only marginally less than the average of recent years, despite growing media competition. Trade fairs continue to be at the centre of B2B communication for exhibiting companies. In contrast, the importance of advertising in trade publications has declined considerably in the last five years. The use of events is also judged to be less important today.

Metav Dusseldorf (German Machine Tool Builders' Association – VDW)

### Italy is the leading foreign exhibitor again

At +3.2%, the number of foreign exhibitors at German trade fairs has increased relatively significantly compared to previous events. However, for the first time in years it was not the Asian countries that were the drivers of growth. In contrast, there was an above-average increase in the number of exhibitors from non-EU countries in Europe.

Overall, participation in trade fairs by exhibitors from Asia only grew a good 1% compared to previous events, and the increase in participation by exhibitors from South-East-Central Asia was even slightly lower than that. Even the People's Republic of China, whose exhibitor numbers have in the past often grown by almost double digits, "only" showed an increase of around 3.5% in the number of exhibitors. There are obviously many reasons for this. For example, some industries with traditionally strong participation from East Asia





are currently performing badly. In other cases, trade fairs concentrated more strongly on higher quality European products. The relatively weak economy in parts of Europe is also likely to have an impact. Just under 2% fewer companies came from India, the second biggest exhibitor in Asia, around 4% fewer came from Taiwan and around 5% fewer from Hong Kong. Other South-East Asian countries also reduced their participation in trade fairs, for example Pakistan, Thailand and Malaysia. In contrast, there was significant growth in participation in trade fairs by exhibitors from South Korea and Japan.

Exhibitor numbers from the Middle East increased sharply, rising by around 6%, albeit from a relatively low level. The United Arab Emirates, which with 400 exhibitors represents around a third of the number of exhibitors from the region, increased by 8%. As many as twice the previous number of exhibitors came from Saudi Arabia.

Around 4% more exhibitors came to German trade fairs from other European countries, around 3% more from the EU member states. Obviously there is still potential in Germany's neighbouring countries. Italy had around 4% more exhibitors, the UK increased by around 3%. There was even more growth from some southern European countries such as Portugal (+13%) and Greece (+7%). The EU member states in eastern and southern Central Europe, such as Poland (+15%), Hungary (+10%) and Slovenia (+20%), showed high



Internationale Eisenwarenmesse, Cologne (Koelnmesse GmbH)

growth rates. However, fewer companies came, for example, from the Czech Republic (-4%). In the year it joined the EU, the number of exhibitors from Croatia increased by 12%.

Intermodellbau

Dortmund
(Messe Westfalenhallen Dortmund

GmbH)



Stronger growth from Eastern Europe The number of exhibitors from the European non-EU countries increased by 7%, the greatest level of growth of all the regions surveyed. For example, German trade fairs reported 12% more exhibitors from Turkey and 13% more from Russia. Hardly any country in this group of countries had fewer exhibitors. Participation by exhibitors from Kosovo, Macedonia, Montenegro and Serbia grew strongly in percentage terms, but from a very low level. However, export marketing by these countries appears to be intensifying significantly.

Participation by exhibitors from North America reduced slightly, by around 2%. This affected both the US and Canada. The previous year's upturn has thus slowed again. Exhibitor numbers from Latin American

countries increased slightly overall, although Brazil, as the region's largest exhibitor, decreased slightly. Argentina's involvement remained stable; however, several other countries increased their trade fair presence in Germany, such as Chile, Ecuador, Mexico and Peru.

African countries increased their presence in Germany by a total of 1%, albeit with major regional differences. The two largest exhibitors from Africa were Egypt and South Africa. Egypt maintained the same number of exhibitors as before, but South Africa increased its number of exhibitors slightly. Significantly fewer companies than at previous events came from Kenya (-30%) and Tunisia (-20%), whereas, for example, significantly more came from Morocco (+50%). In total, the export marketing strategies in many countries seem not to be oriented towards the long term. Exhibitor numbers from Australia/Oceania increased by a good 2%. Whereas the number of exhibitors from Australia remained stable, there was an increase of around 8% for New Zealand.

Italy had the highest number of exhibitors at international and national trade fairs in Germany at 12,319 exhibitors, taking first place again after a one-year break primarily caused by the rotation of events in the trade fair programme. It is followed by the People's Republic of China (10,912), France (5,515), the USA (5,042), the UK (5,035) and the Netherlands (4,955). These are in turn followed by Spain (4,251 exhibitors), Austria (3,656), Switzerland (3,132), Turkey (2,795), India (2,795) and Taiwan (2,696).



## Number of international visitors reaches 2.7 million

The number of international visitors to trade fairs in Germany increased despite a relatively small fair programme in 2013. 2.7 million visitors attended 139 international and national trade fairs to get information and do business. This is slightly more than in 2012, when 2.65 million international visitors attended 160 trade fairs.

A number of investment and consumer goods fairs reported significantly greater international interest than in the past. In a rather uncertain international economic climate, therefore, customers appreciated German trade fairs, because of their quality and international range of offerings. A total of 1.7 million visitors from the European Union attended German trade fairs, while 430,000 visitors came from other European countries. This means that 22% of international visitors travelled to Germany from countries outside Europe.

The most important region was South-East-Central-Asia with 225,000 visitors; 90,000 came from the Middle East and the same number from North America. 80,000 Latin American visitors and 65,000 African visitors travelled to Germany to attend the trade fairs. Australia/Oceania brought up the rear with a still impressive 25,000 visitors attending. In 2013, the top countries for visitors were the Netherlands (230,000 visitors), Austria (210,000) and Italy (190,000). These were followed by Switzerland and France (150,000 each), United Kingdom (130,000) and Belgium (120,000). The USA (65,000), the People's Republic of China (60,000) and India (40,000) led the countries outside Europe. It should also be noted that a certain number

of visitors from neighbouring countries attend German trade fairs for personal reasons, while nearly all overseas visitors attend for professional reasons. The results for the individual countries are partly based on estimates, as numbers of visitors from each country are not ascertained at all trade fairs.

NUFAM Karlsruhe (Karlsruher Messe und Kongress GmbH)



### Hall capacities remain largely constant

At the start of 2014, hall space of 2,776,545 m² was available in German trade fair venues with at least national significance; this was slightly higher than in the previous year (2,752,001 m²). This was one of the findings of a survey by AUMA in spring of 2014.

The survey included 23 exhibition sites at which at least one trade fair took place that AUMA classified as international or national. Exhibition venues of regional significance had, according to a survey in 2013, gross hall space of more than 390,000 m², meaning that just under 3.2 million m² of hall space is currently available for holding exhibitions in Germany.

A small amount of additional capacity came on stream in 2013. There will be further growth by 12,000 m² during 2014. The intention is to expand the hall capacities by an additional 19,500 m² by 2015. That is equivalent to growth of a total of 1.1% to around 2.8 million m². A total of a good  $\in$  177 million was invested in international or national trade fair venues in 2013. This went, inter-alia, into maintenance, renovation and modernisation, redevelopment of halls, parking areas, new façades, improvement of infrastructure and catering.

A total of more than € 323 million will be invested from 2014 to 2016, primarily for hall expansion and modernisation measures. Further investments are planned for expanding conference facilities, erecting office buildings, improving infrastructure, changing the lounge and catering areas, expanding parking areas and various repovation measures.

### Regional exhibitions

The exhibitions with regional catchment areas for visitors registered a slight positive result overall. This type of exhibition has thus confirmed its role as an important addition to international or national trade fairs or as a distinct instrument for directly addressing private customers.

The 148 regional exhibitions of 2013 registered 1.0% more visitors on average than in the relevant previous events, a similar result to 2012 (+0.8%). It is notable that by far the largest proportion of exhibitions had an increase or no change in visitor numbers. Decreases in visitor numbers remained in a clear minority – partly caused by weather or problems with the location and/or concept. The stand space also increased slightly – by 1.0% after 1.6% in the previous year. The number of exhibitors remained almost unchanged at -0.6% (2012: +2.5%). Even if these results represent a slight weakening compared to the results of the previous year, it is clear that the investments by organisers in conceptual improvements and more intensive visitor marketing in recent years are paying off. This is because, given strong media competition for the visitor's (free) time, considerably higher growth rates, particularly at consumer exhibitions, will tend to remain the exception in future.

A total of 51,558 exhibitors booked stand space of around 1,514,418 m²; a total of 5,991,975 visitors were counted at the 148 regional exhibitions. Those Exhibitions were included in the calculations which were held in 2013 by members of AUMA or FAMA and listed in the regional AUMA category.



## Certification of exhibition statistics becomes seal of quality



The certification of exhibition statistics has considerably increased in public prominence, with the »FKM certified« logo appearing today on

the exhibition websites of most large and mediumsized German exhibition companies, as well as on several specialist organisers' websites. This logo indicates that the exhibitor and visitor statistics have been certified by an auditing company working on behalf of the German Society for Voluntary Control of Fair and Exhibition Statistics (FKM). The certification, which marked a new direction in the FKM's communication strategy when it was introduced over two years ago, can therefore boast initial success.



fish international Bremen (Messe Bremen)



Statistics relating to around 200 exhibitions a year had been audited prior to this. However, due to growing debate about the quality of exhibition statistics, at the end of 2011 FKM members decided to use the »FKM certified« label to communicate data that has been collected and audited according to uniform standards more aggressively. Exhibition websites, press releases and organisers' print publications have all played a role.

l Book Fair l

Frankfurt

Another result of this approach is that the number of page views for the FKM website, which features the certified data and tips for use, has increased five-fold over a short period. This has enabled the FKM to make significant progress towards becoming a service provider for the exhibition industry.

EQUITANA Essen (Reed Exhibitions Deutschland GmbH)



In a second phase beginning this year, professional associations, stand construction companies and consultants for exhibiting companies will be informed about the advantages of certified trade fair statistics. FKM also plans to strengthen direct contact with the exhibitors.

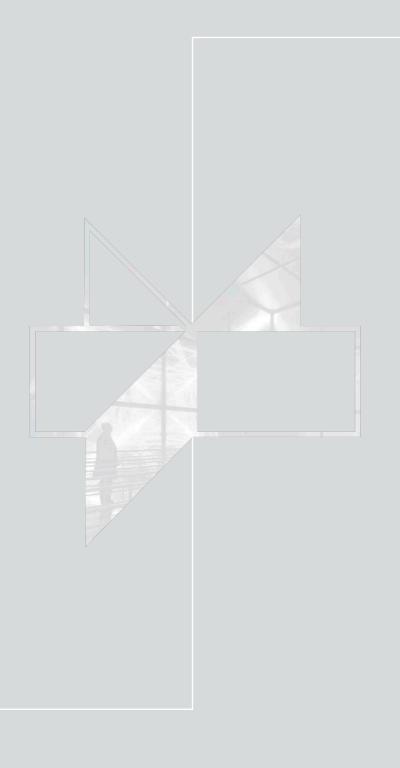
In 2013, the German organisers had the exhibitor, space and visitor statistics certified at 187 trade fairs and exhibitions in 2013. A total of 55 German trade fair organisers now belong to the FKM, one member having joined and three having left in 2013.

The two foreign guest members, the Hong Kong Trade Development Council and the Verona Trade Fair Company have together had 15 trade fairs audited.

**International trade fair transparency** Together with other European auditing organisations, the FKM has participated in publishing the Euro Fair Statistics brochure, which has been produced by UFI, the Global Association of the Exhibition Industry, since 2009. It includes the audited statistics on around 2,500 events in 2012. 23 countries took part.

The FKM is additionally involved in UFI committees for improving trade fair transparency at an international level, for example in the Associations Committee and in the Auditors' Meeting. In addition, it maintains bilateral contacts with auditing organisations in other countries.







## Lobbying and legal aspects

# Trade fair visa: Letters of invitation no longer necessary

In a decree by e-mail of 24 July 2013, the German Federal Foreign Office informed the visa offices of the German embassies and consulates all over the world that when requesting accompanying documents for an application for a trade fair visa, the trade fair companies' letter of invitation will generally no longer be needed. This decree by the Federal Foreign Office was in reaction to a demand that AUMA has been making for many years.

In the run-up to this decision, on 4 June 2013, representatives of the Federal Foreign Office, the Federal Ministry of the Interior and the Federal Ministry for Economic Affairs had met representatives of AUMA at the invitation of Secretary of State Ernst Burgbacher in order to discuss joint measures to facilitate visas. Secretary of State Ernst Burgbacher emphasised that the visa culture was defining for a country and was therefore particularly important for the German economy. He said he was endeavouring to introduce ways of making the process easier as far as this was possible within the framework of the EU visa code.

AUMA was also represented and pointed out the particular relevance of trade fair visas for the increasingly international German trade fair industry. The surveys that AUMA regularly carries out of the foreign representatives of international trade fair companies regarding visaissuing practice have provided AUMA with extensive information from local trade fair employees, meaning



ILA Berlin Air Show (Messe Berlin GmbH)

AUMA has been able to formulate practical requests for an improvement to the process based on this information. AUMA asked for waiting times for appointments to be reduced for trade fair customers in particular in order to guarantee that vitally important issuing of visas for trade fairs in particular will be done on time. In addition, embassies would have to clearly communicate the conditions for issuing visas and opportunities would have to be created for subsequently submitting original documents. Unlike with other business trip visas, the letter of invitation from a trade fair company does not generally serve any additional function as evidence. The production of thousands of letters of invitation has, however, led to great additional expense in terms of time and staff for trade fair companies in the past. Because of this decree, it is to be expected that this expense will no longer be necessary in future. Up-to-date information on the topic of »trade fair visas« is also available in German and English in the new »Legal matters« section on ▶ auma.de.

## Start of European standardisation activities in event technology

The DIN German Institute for Standardisation has drawn the attention of experts organised in the Event Technology, Photography and Cinematography Standards Committee (NVBF) (which AUMA belongs to) to the fact that efforts are being made at a European standardisation level to allocate the area of "event technology" to Technical Committee 10 "Lifts, escalators and moving walks" in the CEN (European Committee for Standardisation).



SPS Nuremberg (MESAGO Messe Frankfurt GmbH)

The German experts now fear that allocation to this different specialist subject area will mean the German standards that have been successfully developed for event technology (particularly DIN 56950 »machinery installations«) could be overturned. When national standards conflict with European standards, the national standards have to be withdrawn. The ideal objective from a German perspective is therefore that a completely new TC especially for event technology should be founded in the CEN, and if possible this should be located in Germany and accordingly have an office in the

DIN. This TC's first standardisation project would be to convert DIN 56950 into a European standard. Several professional associations from the events industry, including AUMA as well as VPLT and DTHG, have declared themselves willing to support this standardisation project.

### Sustainability in the exhibition industry

Sustainable concepts and best practice solutions are becoming increasingly important for the exhibition sector. These are the findings of a global survey carried out by UFI on the topic of sustainability in the exhibition industry. The participants in the survey included several German trade fair companies and AUMA.

By far the majority of those surveyed for the »Report on the Status of Sustainability in the Exhibition Industry« think that sustainability already plays an important role in the exhibition industry. There were no significant differences between the answers given by organisers, venue operators or service providers. The report is freely available through UFI and will be updated every two to three years. »Sustainability in the Exhibition Industry« is at the same time also frequently the subject of research for bachelor's and master's theses by German students. Here, AUMA provides help with its extensive library and also with interviews etc.

In addition, in 2013 AUMA was involved in an initiative by UFI to improve sustainability reporting. It developed its own model especially for preparing sustainability reports in the exhibition industry, as the terminology of the Global Reporting Initiative (GRI) is often confusing for interested companies and could prevent them from producing a sustainability report.



### Expo-Guide still active

AUMA has been giving advice to exhibitors who have mistakenly made applications for entries in unofficial exhibitor directories for many years already.



Exhibitors are particularly frequently targeted by the company Expo Guide, which is based in Mexico. Expo-Guide contacts exhibitors asking them to check their company data for the online exhibitor directory »Expo-Guide« and complete or correct an attached application form. It is only in the small print on the order form that there is a clause stating that the entry costs €1,271 per year for a period of three years.

AUMA always advises those affected to object to the payment requests and not to pay the bills. To AUMA's knowledge, Expo Guide has never yet taken legal action against non-paying exhibitors. The new »Legal matters« section on auma.de provides those affected with information, help and an overview of the case law on the topic of fraudulent entry offers.

### AUMA office in Brussels

In February 2014, the 14th AUMA Brussels Round Table took place at the German Chamber of Commerce and Industry in Brussels. Representatives of German trade fair companies responsible for EU matters and representatives of central German industry associations took part in the AUMA working group.

The first speaker, Felix Neugart from the Association of the German Chambers of Commerce and Industry (DIHK), explained the efforts by the EU to change the requirements for designations of origin on products and the possible consequences of this for using the »made in Germany« quality label. A regulation proposed by the European Commission to ensure the safety of consumer products is expected make specifying a product's origin mandatory. In addition, the country of origin is in future to be determined according to customs rules.

Beauty Dusseldorf (Messe Düsseldorf GmbH)

Together with other central German industry associations, AUMA argues that such rules are not likely to endanger the seal of quality »made in Germany«. Prof. Gerhard Sabathil, Director for East Asia and the Pacific in the European External Action Service, spoke about the development of the External Action Service in the first three years of its existence.



Spielwarenmesse Nuremberg (Spielwarenmesse eG)



Christos Kyriatzis, European Commission, Directorate-General for Enterprise and Industry, reported on the progress of the EU internationalisation strategy for small and medium enterprises (SMEs). The EU's new website that gives companies an overview of national support schemes for their internationalisation efforts in third countries went online in April 2014. AUMA and its offering will also be listed on the website in order to provide information about AUMA's support for companies through its global trade fair database.

I.L.M. Offenbach (Messe Offenbach GmbH) Liesa Siedentopp, European Commission, Directorate-General for Enterprise and Industry, introduced the COSME programme for increasing the competitiveness of European SMEs. A budget of €2.3 billion is available for, inter alia, guaranteeing loans to companies and for supporting market entry. The programme, which is planned for the period 2014 to 2020, encompasses, for example, the Enterprise Europe Network that is currently being readvertised.

Elfriede Bierbrauer from the Policy Department for External Relations in the European Parliament reported on the European Parliament's work. She said that the most important trade-policy issue was currently the negotiations on the Transatlantic Trade and Investment Partnership TTIP.

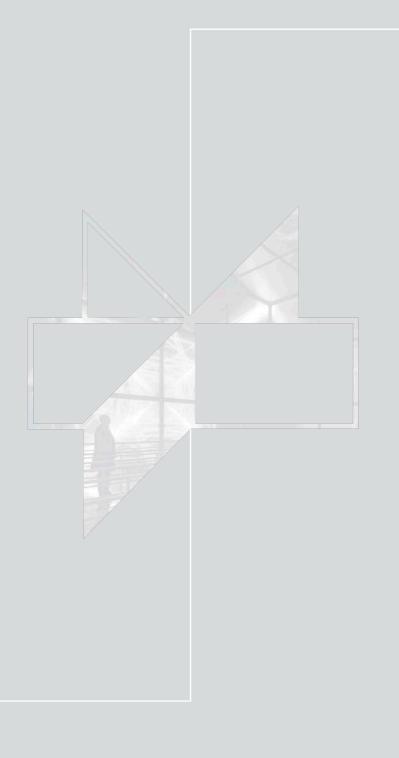
She said the negotiations on the TTIP currently face difficult challenges because there are different views on protecting investments. Europeans particularly value complying with social and environmental standards, whereas Americans put protecting investments first.

Barbara Weizsäcker, General Secretary of the EEIA – European Exhibition Industry Alliance, explained the alliance's activities. The new Internet presence and numerous meetings with representatives of the European Commission are intended to anchor the relevance of trade fairs in Europe. AUMA provided information on the topics of the right of revocation in purchase contracts, trade fair visas and samples at trade fairs.



Coteca Hamburg (Hamburg Messe und Congress GmbH)







## Institute of the German Trade Fair Industry

### **Training**

A wide range of training courses is available for the sector. AUMA works in close cooperation with numerous providers. In addition, it supports trade fair advisory services for young, innovative exhibitors.

**Commitment to the industry's next generation of employees** AUMA has supported events of various sizes and with different regional focuses that are planned, organised, executed and followed up on by the industry's next generation of employees for many years. AUMA is involved as a sponsor or a patron and also actively in the form of talks, workshops and panel discussions.

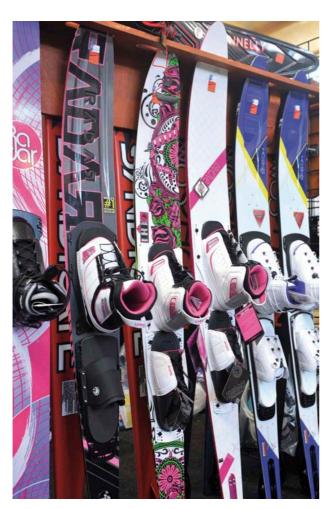
Trainees, students, representatives of agencies, service providers and teachers from the exhibition and event industry take part in the conferences. In 2013, AUMA took part in MEET Hamburg, EVENT HIGH SCHOOL in Cologne and Forum VIA in Munster. Each of the conferences was accompanied by specialist exhibitions, visits of locations and an evening event.

In addition, the Institute of the German Trade Fair Industry got involved through issuing real practice projects that are carried out together with students and/or trainees. There was one such project in 2013. It was car-



IPM Essen (Messe Essen GmbH)

INTERBOOT Friedrichshafen (Messe Friedrichshafen GmbH)



ried out in conjunction with, amongst others, the European Media and Business Academy (EMBA), Berlin. The 19 event management students developed concepts for AUMA events over a period of six weeks. This happened within the framework of briefings, interim reports and a final presentation that took place in AUMA. The project was part of the syllabus and the students were awarded credit points for their course.

Nine students studying event management at Best Sabel University of Applied Sciences Berlin used the support of the Institute of the German Trade Fair Industry and the German Trade Fair Library for their task »Taking part in trade fairs as a central component of university marketing« under the guidance of the lecturer Dr Thomas Knoll. The final presentation took place with AUMA's participation. The task was also part of the syllabus, accordingly credit points were awarded for it.

In addition, the Institute of the German Trade Fair Industry offers talks and seminars for student groups and trainees in order to focus the attention of the next generation on the significance of trade fairs, Germany as a trade fair venue and the activities of AUMA. In 2013, the institute's training department spoke on this topic to 165 students, trainees and their professors and lecturers.





Trade-fair-related course content at universities ■ More than 40 universities and universities of applied science in Germany currently offer advanced trade-fair-specific topics in their teaching. That is what research by AUMA found. Information about these universities including the particular course and degree and also the contact data for the university in question are available on auma.de for prospective students. Professors and lecturers will find studies, statistics and presentation documents that they may use free of charge for their courses on the website.

### Research

**New AUMA research plans** AUMA is carrying out studies on the trade fair trend and other areas in 2014. A representative study of the German population will ask the question of whether and to what extent people visit consumer exhibition in their free time. The findings will be compared to those of a study from 2011 in order to identify changes and trends.

DACH+HOLZ INTERNATIONAL Cologne (Gesellschaft für Handwerksmessen mbH)

In addition to the private visitors, trade visitors will also be considered more closely. In an extensive secondary analysis, the surveys of trade visitors to German trade fairs will be evaluated across exhibition venues. The participation of all the important German exhibition companies means there is data from more than 150 trade fairs and more than 100,000 interviews and interesting insights are therefore expected.



Euroguss Nuremberg (Nürnberg Messe GmbH)



AUMA will have further studies carried out on the role that the foreign trade fair programme plays for German exhibiting companies and how participation in the programme impacts the companies' export activities.

In this context, research will also be done on the significance participation in these foreign trade fairs has for the German economy overall and what tax effects this generates in Germany.

As there have already been similar studies in the past, it will also be possible to make a comparison here.

**»AUMA\_MesseTrend 2014« exhibitor survey ■** The annual exhibitor survey had already reached its fifteenth round in autumn 2013. As in previous years, TNS Emnid surveyed a representative selection of 500 companies on their trade fair planning in the next two years (see ▶ page 15 for details).

intec Leipzig (Leipziger Messe GmbH)



### German Trade Fair Library

For everyone looking for information on the topics of trade fairs, conferences and events, the German Trade Fair Library in Berlin has an extensive range of services.

The library supports students, teachers and other interested parties looking for suitable publications and answers to questions on the topic of live communication. The proximity to AUMA's specialist departments and contact persons offers the opportunity for the uncomplicated, direct exchange of information.

The German Trade Fair Library now has around 8,100 media resources. AUMA mainly reached students and lecturers from the trade fair and event sector through this facility in 2013. But consultants, journalists and employees of organisers and trade fair service providers also visited the library or made research queries. The library counted around 260 visits and answered over 600 research queries in 2013.



Euroblech Hanover (Mack Brooks Exhibitions Ltd.)



The German Trade Fair Library's stock comprises a constantly expanding collection of recent specialist literature such as books, studies and presentations and also a newspaper archive with article documentation and a collection of scientific papers.

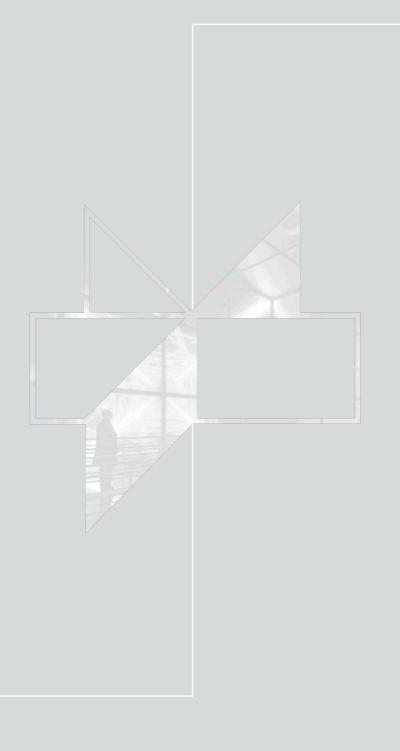
In addition, the library houses a selection of general literature on marketing, advertising, sales and foreign trade. Moreover, it has a collection of antique books

with numerous titles from trade fair history. Users are given access to all of AUMA and FKM's current and past publications. This includes studies, documentation and statements and also data from earlier years.

In addition, the library has an extensive collection of trade fair catalogues. It is equipped with two copiers and three Internet workstations that are available to visitors free of charge. It is possible to search the library's stock online and to make a request to borrow titles by e-mail.

The online catalogue has had a sophisticated search interface since October 2013. It is now possible to use a free text search or an advanced search with numerous input options, making research more convenient and quicker. Requests to borrow titles from the library can now be made more easily through a shopping cart system. The Trade Fair Library has also been active on Facebook since March 2013 and makes daily updates on findings of studies, book tips and the Institute of the German Trade Fair Industry's activities.







## Exhibitions abroad

## International competition

The group of developing economies consistently grows above the global average, as shown by analyses by the International Monetary Fund. In 2013, according to preliminary estimates GDP in these dynamic economies increased by 4.7%, in developed economies it only rose 1.9%. The world economy grew 3% in total.

The forecasts for 2014 paint a similar picture. Growth of 5.1% is forecast for developing countries, growth of 2.2% is anticipated for developed countries. Accordingly, considerable growth rates have also been registered in the trade fair industries of emerging markets. In the developed economies, in contrast, these are currently largely rather modest.

In order to determine the possible effects of such developments on German trade fairs, AUMA monitors foreign trade fairs that compete particularly intensely with events in Germany. AUMA asked all organisers of international trade fairs in Germany who their most important competitors abroad were. More than 340 particularly relevant competing trade fairs were identified worldwide.

However, German trade fairs continued to see relatively strong competition in the developed markets. In a period of four years (2009–2012), in which all the international trade fairs in Germany and abroad took place at least once, there were 73 competing trade fairs in the US, 55 in Italy and 54 in France. After the UK (28),



China and Spain are the fifth most important competitors with 20 trade fairs each. Other European countries with numerous competing trade fairs include the Netherlands (13) and Switzerland (12).

#### Europe is the main competitor to German trade fairs

Around two thirds of competing trade fairs take place in Europe, largely in EU countries. One in five competing trade fairs is held in the US, one in seven in Asia. There were no significant changes compared to the previous year, although the number of competing trade fairs in Italy and France did fall slightly. German organisers particularly frequently cite foreign trade fairs in the food, information and communication technol-

ogy, automotive manufacturing, construction engineering and construction machinery, sporting goods, agricultural and catering industries.

Two thirds of foreign trade fairs are capital goods trade fairs, one quarter are consumer goods trade fairs for trade visitors. The other events are consumer goods shows for the general public and services trade fairs.

Despite the serious international competition, the international trade fairs in Germany continued to underscore their leading position in the 2009 to 2012 cycle. On average, the foreign competing trade fairs had 74% of the net space, 82% of the exhibitors and 81% of the visitors of an average international trade fair in Germany. It should be taken into account that the international trade fairs segment in Germany comprises around 190 events, whereas the foreign competitors mentioned belong to a relatively small leading group in their own countries. The three key performance indicators for a notional, average foreign competing trade fair are accordingly: 37,300 m² of net space, 955 exhibitors, 58,000 visitors.

Las Vegas Convention Center



## Support for German exhibitors abroad

The 2013 foreign trade fair programme of the German Federal Ministry for Economic Affairs and Energy again made a key contribution to the success of German exports, particularly in difficult and distant regions. This is because the programme focuses on regions outside the EU. The involvement of the sector associations in the selection of trade fairs ensures a demand-oriented and efficient use of resources.

**2013 foreign trade fair programme at a glance** Participation in 287 trade fairs was included in the Federal Ministry for Economic Affairs and Energy's programme that is organised in close cooperation with AUMA; of which participation in 262 trade fairs were realised. That is equivalent to an implementation rate of 91%. The excellent result of the previous year was thus repeated.

The participation in 262 trade fairs that were realised amounted to participation in 10 more trade fairs (+4%) than in the record year of 2012. In comparison to the previous year, the programme's key indicators, such as the number of participants and the space occupied by German Pavilions increased disproportionately slowly compared to the increase in the number of trade fairs in which participation was realised. The number of participants increased by 167 exhibitors to 7,448 (+2.3%). The space occupied by German Pavilions increased 2.1% to 159,906 m².



Focus on Asia ■ The breakdown of the trade fairs participated in between the regions of the world remains unchanged, i.e. structural shifts from one year to the next are marginal. For example, the regional focus in 2013 was again on South-East-Central Asia (participation in 107 trade fairs); at participation in 67 trade fairs, the European countries outside the European Union came next, there was participation in 29 trade fairs in the Middle East and 23 in North America.

The expectations of Latin America proved false, where participation in 18 trade fairs was realised. After an increase in the number of German Pavilions in 2012, participation in three fewer trade fairs was realised in Latin America in 2013, which was primarily due to the region's most important market. A good quarter of the planned participations in trade fairs in Brazil were not realised. The Brazilian market has high barriers to entry for exporters who do not have production sites in Brazil due to its conditions of access.

42 countries were represented in the 2013 foreign trade fair programme of the Federal Ministry for Economic Affairs, one country fewer than in the previous year. As the programme concentrates on remote and difficult markets, the trade fairs were in 39 countries outside the European Union. The countries where the Federal Ministry for Economic Affairs participated in most trade fairs again included Russia (50 trade fairs) and China (49 trade fairs), meaning the two countries have switched their order in the ranking. The United Arab Emirates followed with participation in 23 trade fairs

and the USA with participation in 22. India caught up even more closely to the leading group with participation in 20 trade fairs.

Programme for food and agriculture ■ The Federal Ministry of Food and Agriculture supports German exhibitors in the agricultural production and food industries in particular. In 2013, the ministry participated in 24 foreign trade fairs; 8 of these trade fairs were in South-East-Central Asia and 8 in European countries outside the European Union (of which 6 were in Russia). It organised participation in 2 trade fairs within the European Union, 2 in North America and 2 in the Middle East. The Federal Ministry of Food and Agriculture participated in 1 trade fair in Latin America and 1 in Africa.



Fiera Milano

41

In 2013, the Federal Ministry of Food and Agriculture and AUMA laid the foundations for closer cooperation. From 2014, AUMA will for the first time take over coordinating the interests of the businesses applying for the Federal Ministry of Food and Agriculture's 2015 foreign trade fair programme.

**2014 foreign trade fair programme** ■ The foreign trade fair programme of the Federal Ministry for Economic Affairs and Energy includes participation in 260 trade fairs for 2014. € 42.5 million is available for this. China (including participation in 6 trade fairs in Hong Kong)

with 57 German Pavilions planned has by far the highest number of participations in the programme this time. Russia follows with 41 planned joint stands. The programme includes participation in 23 trade fairs in the USA and 21 in the United Arab Emirates. India (participation in 17 trade fairs) follows as another important regional target market.

The Federal Ministry of Food and Agriculture is planning to participate in 22 trade fairs in 2014 with a regional focus in Russia (6 trade fairs), China (3) and the USA (3).







# Foreign trade fairs with German organisers

German trade fair organisers further expanded their activities abroad in 2013. 277 trade fairs, whose concepts are oriented on the standards of leading international trade fairs in Germany, represent a new high. By way of comparison, 266 trade fairs were realised in 2012.

As in 2012, around 3 million m<sup>2</sup> of stand space was rented out. More than 108,000 companies exhibited their products in 2013, which is slightly more than in 2012. The number of visitors increased to 7.4 million (2012: 6.4 million), which was due, inter alia, to a large number of public exhibitions as a result of the rotation of events.

The five trade fairs with the most exhibitors last year were in China. More than 4,000 exhibitors came to Automechanika Shanghai (4,618), and more than 3,000 came to Intertextile Shanghai Apparel Fabrics (3,751) and to CHINAPLAS (3,186). More than 2,000 exhibitors registered for two other trade fairs: Guangzhou International Lighting Exhibition (2,588) and China International Hardware Show Powered by PRACTICAL WORLD (2,500). Moscow's PRODEXPO was also able to acquire more than 2,000 exhibitors (2,309).

The events with the highest visitor numbers were public exhibitions in the automotive sector – Seoul Motor Show with more than 1 million visitors, Auto Shanghai with 813,000, Chengdu Motor Show with 620,000 and Wuhan Motor Show with 413,000.



China maintained its leading position in 2013. The German trade fair companies again rented out more than 1.6 million m² of space there. More than 51,000 exhibitors and 3.8 million visitors at 79 trade fairs mean a 2% increase in exhibitor numbers and a 5% increase in visitor numbers compared to the previous year.

ISPO Beijing 2014

**German organisers held 39 trade fairs in Russia** ■ Although the number of trade fairs stagnated, the key performance indicators improved: more than 17,500 exhibitors compared to 16,800 in the previous year and 580,000 visitors (2012: 510,000). The stand space remained unchanged at 500,000 m².



bC India, Mumbai 2013 The positive development in previous years is also continuing in India. Without Plastindia, which only takes place every three years, the key performance indicators were weaker than in the previous year. However, compared with 2011, which was a year without Plastindia, all key performance indicators increased. Around 120,000 m² of space was rented out at 32 trade fairs and there were more than 4,800 exhibitors and around 170,000 visitors.

With 20 trade fairs, Turkey held its ground as the fourth most important GTQ target country. More than 6,400 exhibitors occupied 175,000 m<sup>2</sup> of space. 470,000 people visited the events.

With 16 trade fairs, Brazil took a place in the top 5 for the first time. Around 3,000 exhibitors rented more than 90,000 m<sup>2</sup> of space. More than 170,000 visitors frequented the trade fairs.

21 members of AUMA and FAMA want to hold 303 trade fairs on all continents in 2014. The most important of these markets for German organisers is China with 88 trade fairs, followed by Russia (41) and India (37). 19 trade fairs are to take place in the US, 17 in Turkey and 14 in Brazil. Shanghai (44) and Moscow (34) are the cities with the most GTQ trade fairs. Other important cities include Mumbai with 19, Beijing with 15, Istanbul with 13, New Delhi with 11 and Dubai with 10 trade fairs. In order to underline the quality standards of German foreign trade fairs, AUMA developed the »German Trade Fair Quality Abroad (GTQ)« label in consultation with its members who are active abroad. Since 2011, AUMA has also been awarding the GTQ label to foreign trade fairs held by members of FAMA (Fachverband Messen und Ausstellungen - the Trade Association for Fairs and Exhibitions). An AUMA working group with these members serves as a regular exchange of experience and opinions between the organisers.

In addition, AUMA's Internet database has a special filter for selecting trade fairs with the GTQ label. The AUMA\_trade fair database and all the information on activity abroad by German organisers and the GTQ trade fairs can be reached directly via the domain  $\triangleright$  gtq.de.



### World expos

**EXPO 2015** ■ »Feeding the Planet – Energy for Life« is the motto of the next world expo, which takes place from 1 May to 31 October 2015 in the Italian city of Milan.

The Federal Republic of Germany's participation will be strongly geared towards the EXPO motto. For example, the German Pavilion will provide visitors with insights into new approaches to human nutrition in future and invite them to take action themselves. A building is to be formed as a landscape level with a freely accessible surface and a thematic exhibition inside that takes the visitor on a journey through soil, water, climate and biodiversity, explains their significance for our nutrition and presents ideas for the protection and intelligent use of these natural resources.

The Federal Ministry for Economic Affairs and Energy commissioned a working group of the companies Milla & Partner in Stuttgart, Schmidhuber in Munich and Nüssli Deutschland in Roth (near Nuremberg) to design the EXPO pavilion. Messe Frankfurt is in charge of organising the German Pavilion.

**EXPO 2017** The next so-called small world expo will be held in the Kazakh capital city of Astana. This is the first time an EXPO will take place in Central Asia. Numerous nations and organisations will showcase themselves under the topic of »Future Energy« from 10 June to 10 September 2017. The organiser expects 5 million visitors.



**Large world EXPO 2020 goes to Dubai** The emirate of Dubai in the United Arab Emirates will host EXPO 2020. It is to be held from 20 October 2020 to 10 April 2021.

German Pavilion for EXPO 2015 (draft)

This decision was made by the members of the Bureau International des Expositions (BIE) in Paris on 26 November 2013 after a lengthy bidding process. With the theme »Connecting Minds, Creating the Future«, Dubai was able to win the bid against its competitors Ekaterinburg, Izmir and São Paulo. This is the first time in the history of world expositions that an Arabic country will be the host. The EXPO site is to be built near Dubai's new airport in the direction of Abu Dhabi for around €4.8 billion. Large world expos are held every five years with a duration of six months.



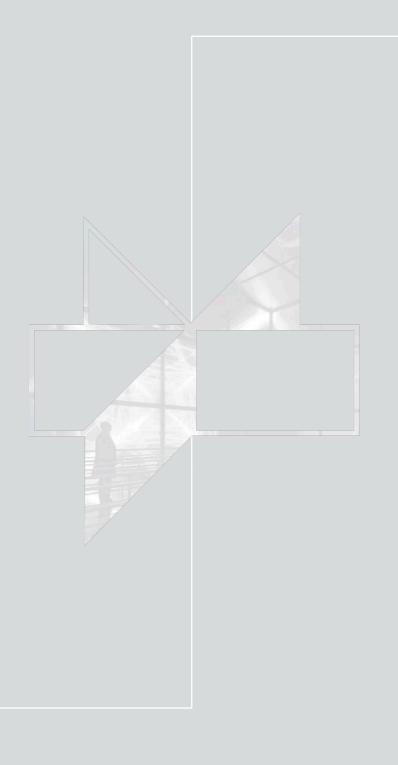
Book on EXPO architecture published • What messages the country pavilions at world Expos convey through their architecture is the topic of a new book by architect, artist and EXPO expert Dr Thomas Schriefers that appeared in 2013 under the title of »Weltausstellungsarchitektur« (World expo architecture). The publisher of this

work, which is the most comprehensive to date on EXPO architecture, is AUMA. The volume of 432 pages comprises 188 chronologically ordered texts on the world expos from 1851 to 2012, illustrated with a large number of pictures. In addition, the author discusses individual

national pavilion structures and EXPO contributions and describes and explains their architecture and core messages in historical context. This gives the reader a picture of a vanished world of architecture, as the majority of the world expo structures of the 19th to 21st centuries were only erected for a limited period of time.

The illustrated book »Weltausstellungsarchitektur« has been the subject of great interest since it was published. An English version is in preparation. Its promoters and sponsors include the Bureau International des Expositions (BIE), the German Federal Ministry for Economic Affairs and Energy, AUMA and Rasch Verlag. The English version will include a pictorial documentation of the 2015 world expo in Milan.







## Marketing, media and events

## Marketing for German trade fairs

Under the slogan »Trade Fairs Made in Germany«, AUMA supports the international marketing of German trade fair organisers with print media, advertisement and poster motifs and a promotional film in order to position Germany as the global leading trade fair country and to further increase the internationality of German trade fairs for the benefit of exhibitors and visitors. In addition to advertising Germany as an international trade fair venue, AUMA also promotes the trade fairs held by German organisers abroad under the label GTQ (German Trade Fair Quality Abroad).

Information on German trade fairs ■ The demand from abroad for detailed information – for example statistical data – on trade fairs held by German organisers has again increased. Close to 200 queries from institutions worldwide, such as German diplomatic missions or German chambers of commerce abroad were answered in 2013. Special analyses on statistics on foreign exhibitors and visitors of the international trade fairs in Germany were the focus of interest. At the same time, the number of links to AUMA's information remained as high as ever. Around 250 German and foreign embassies and chambers of commerce linked to ➤ auma.de from their websites, especially to the trade fair database.

The foreign representatives of the German trade fair organisers, the German diplomatic missions and German chambers of commerce abroad provide information about Germany as a trade fair venue worldwide and use AUMA's material in the form of brochures and online content to this end. The brochure »Trade Fairs Made in Germany« was also used on all the information stands in the foreign trade fair programme.



**»Trade Fairs Made in Germany« brochure** ■ The requests for printed information have fallen slightly as a result of increased use of the online content and targeted links to the AUMA trade fair database.

A print run was made of 90,000 copies of the brochure in German, English Spanish and French. In addition, more than 50,000 copies were produced in Arabic, Brazilian Portuguese, Chinese, Greek, Farsi, Korean

and Russian in cooperation with German chambers of commerce abroad and other partners. The brochure is also available as an e-paper in Russian (▶ fairbizz.de/auma). There is a Japanese version in the form of an online database ▶ fairs-germany.jp, and an information flyer is also available. The »Trade Fairs Made in Germany« brochure provides information on dates, offers and statistics on international and national German trade fairs.

This information medium is conceived and designed especially for marketing abroad. The publication also contains basic information on Germany as a trade fair venue. Its advantages, such as internationality, professionalism of the organisers and top infrastructure are emphasised.

**»Trade Fairs Made in Germany« promotional film** ■ The promotional film points out the strengths of trade fairs as instruments of communication and the specific quality and effectiveness of German trade fairs. It is primarily available to the information agents for German trade fairs abroad. More than 500 copies were ordered in 2013. Nine different language versions can be selected on the DVD: German, English, French, Spanish, Russian, Chinese, Japanese and Brazilian and European Portuguese.



## Pro trade fair marketing

The strengths of the trade fair as a marketing instrument are at the heart of the »success through trade fairs« advertising campaign. AUMA uses numerous measures to support marketing by trade fair organisers and create additional attention.

The main target group of the campaign, which was started in 2007, remains the same - current and potential exhibitors. Small and medium-sized enterprises across all sectors are the primary target audience, particularly decision-makers in the management boards and in the areas of sales/marketing/trade fairs. In addition, the campaign is aimed at propagators of information, for example consulting agencies. The motifs with the headlines successful, direct, real, effective could again be seen throughout Germany at various locations on high-speed ICE train platforms in the form of billboards. Other campaign measures include banner advertising on online portals and Google AdWords. In addition, AUMA places small press advertisements in national dailies. There is also an accompanying website at ▶ erfolgmessen.de.

The aim of the campaign is to spread information on the benefits of taking part in trade fairs. The campaign's core message is that trade fairs lead to success because you can present innovations to an international specialist public as trade fairs enable direct personal contact and the vast majority of trade fair visitors are decision-makers. The campaign's motifs show the word trade fair equated with typical aspects of participating in a trade fair and supplemented by arguments in favour of trade fairs.



## Annual meeting of the trade fair industry in Berlin

The AUMA trade fair meeting took place in Berlin on 4 June 2013. It had over 450 participants including representatives of trade fair organisers, associations, exhibiting companies, politics and the media, contractors and service providers from throughout Germany.

**Walter Mennekes is the new chairman** — »German trade fairs are an important instrument for exhibitors, including in uncertain times. They are perfectly organised and offer access to the world market on your doorstep«, said Hans-Joachim Boekstegers, the outgoing chairman of AUMA. He also thanked the members and partners of

AUMA for their support during his term of office as chairman. After almost six years as chairman, he handed over to his successor Walter Mennekes who was elected in the afternoon. When he was introduced, the new chairman of AUMA, who is the owner and managing director of MENNEKES Elektrotechnik, explained that he wanted to continue to support the success story of German trade fairs in his new office.»We must work to ensure that Germany remains one of the world's leading exporters. To this end, we need to strengthen the umbrella brand »made in Germany«, particularly at trade fairs abroad in which German businesses participate.«



The former and new
AUMA chairmen,
Hans-Joachim
Boekstegers (left),
Multivac, and
Walter Mennekes,
MENNEKES
Elektrotechnik



Gold AUMA medal for Hans-Joachim Boekstegers Hans-Joachim Boekstegers, who was chairman of AUMA for many years and Spokesman of the Executive Board of the packaging machine manufacturer MULTIVAC Sepp Haggenmüller GmbH, Wolfertschwenden/Allgäu, was awarded the gold AUMA medal at the AUMA member meeting in Berlin on 4 June 2013. Boekstegers was a member of AUMA's Executive Board from May 2006 onwards. He was the chairman of AUMA's Executive Board from the start of 2008 until 4 June 2013.

During his term of office, AUMA expanded its marketing for the trade fair medium and carried out important research projects in a period of relative economic difficulty. During this period, the association brought about the expansion of Germany's foreign trade fair programme to support German exhibitors.

AUMA's two deputy chairman, Werner M. Dornscheidt, Chairman of the Executive Board of Messe Düsseldorf GmbH, and Klaus D. Kremers, owner and managing director of Paradies GmbH, Neukirchen-Vluyn, paid tribute to the achievements of the outgoing chairman at the member meeting. They said that, in particular, he succeeded in bringing together the by nature sometimes differing positions of exhibitors and organisers in AUMA. They also stated that the association and the trade fair industry always came first for Boekstegers, rather than his own needs.

# Participation in international congresses and conventions

**2013 UFI Congress in Seoul** the 80th Congress of UFI, the Global Association of the Exhibition Industry, took place in Seoul from 13 to 16 November 2013 with more than 400 participants. The participants included AUMA managing director Dr Peter Neven and Marco Spinger, Director of the Global Markets Division in AUMA.

Under the motto »Managing for the future« congress focused on the question of how to get members of the Facebook generation interested in trade fairs as a marketing instrument. The speakers challenged trade fair managers from all over the world to pay more attention to generation Y, as they will be the ones to change the array of communications instruments and not vice



versa. They said that the pro-trade fair arguments are largely known to experts, but they also need to be conveyed to the next generation in a modern way using new channels.

A large number of committee meetings took place at the UFI Congress, including the Regional Chapters and the Associations Committee. In the »European Chapter« regional forum, Dr Peter Neven, Managing Director of AUMA explained the German trade fair industry's current situation. Discussions in the »Special Interest Group China« included the licensing policy of Chinese government bodies. International trade fair organisers see themselves put under a lot of pressure to involve Chinese regional organisations as partners in the events. The participants therefore also support the further liberalisation of the markets recently announced by China's central government.



Renaude Hamaide, CEO of Comexposium Paris, began his tenure as UFI President at the UFI Congress. He replaces Chen Xianjin, Chairman of the Organising Committee of the China Association for Exhibition Centres (CAEC). The incoming president is Andrés López Valderrama, President of Corferias in Bogotá.

UFI represents close to 640 member organisations in 85 countries around the world. More than 930 international trade fairs are held under the UFI label. UFI gained 22 new members in 2013. The next UFI Congress will take place from 29 October to 1 November 2014 in Bogotá.

**CEFCO China Expo Forum in Wuxi** The China Expo Forum for International Cooperation (CEFCO) took place in Wuxi from 9 to 11 January 2014. The more than 600 participants included not only a large number of representatives of the Chinese trade fair industry, but also organisers from Germany, the USA, France, Singapore, Thailand and Korea who are active in China. The convention was organised by the China Council for the Promotion of International Trade (CCPIT) in conjunction with UFI and the US trade associations IAEE and SISO. AUMA has been supporting the convention since as early as 2008. AUMA was represented by lawyer Silvia Bauermeister this year. As part of the plenary session under the slogan of »Guidelines Beyond the Decade«, representatives of organisers in China, including Eugen Egetenmeir, Messe München, and Jason Cao, Messe Frankfurt, gave talks on the future of the Chinese trade fair industry. These talks explained that the Chinese trade fair market is continuing to grow and that, particularly in Beijing and Shanghai, exhibition space is now reaching its limits.

In a joint statement, the Chinese trade fair industry declared that it was in favour of open, standardised and transparent trade fair data and statistics, supporting trainUFI-President: Renaud Hamaide, CEO Comexposium, Paris ing and protecting intellectual property and fair competition. On the second day of the convention, Silvia Bauermeister held a talk on mobile applications at trade fairs in Germany as part of a session on the topic of »Mobile Internet, a Smart Gear for Trade Shows«. The talk outlined the outlook for the possible future development of the mobile Internet and its influence on the trade fair business.

**Europe+Asia Event Forum in St Petersburg** The 3rd Europe+Asia Event Forum took place in St Petersburg from 22 to 24 January 2014. 330 people from 30 countries took part in the convention for the trade fair and MICE industry, including Russian and international trade fair organisers, representatives of associations, exhibition service providers and decision-makers from politics and business. The German trade fair industry was represented, inter alia, by AUMA. The most important forum topics were the similarities and differences between the trade fair industry and MICE industry in Russia and the Asia-Pacific region.

»National expositions and overseas events under governmental support« was the central topic on the second day of the forum. Tilo Berger from AUMA's Global Markets division, presented as best practice how AUMA supports trade fairs held abroad by German organisers and also supports the German government's foreign trade fair programme. AUMA advertises the quality of its members' trade fairs abroad with the label »German Trade Fair Quality Abroad (GTQ)«. Together with the Federal Ministry for Economic Affairs and Energy and the Federal Ministry of Food and Agriculture,



AUMA activities for supporting trade fairs abroad held by German organisers and the foreign trade fair programme as the best practice example at the Europe+Asia Event Forum in St Petersburg.

AUMA supports German companies in participating in trade fairs abroad with joint stands under the quality label »made in Germany«. The Europe+Asia Event Forum was organised by R&C Market Research Company (Restec Group) with support from the Russian Federation's Chamber of Commerce and Industry.

IEIA Open Seminar in New Delhi for the third time ■ The Open Seminar of the Indian Exhibition Industry Association (IEIA) took place on 25 and 26 April 2013. Around 200 representatives of Indian trade fair organisers, trade-fair-related service providers and Indian ministries, other public bodies and foreign trade fair experts took part in the third event in this series under the motto »Indian Exhibition Industry – Where will it be in 2020?«. AUMA was represented by Marco Spinger, Director of AUMA's Global Markets Division.



A large number of Indian speakers explained to the representatives of the state and the regions how important trade fairs are for India's general economic development and that they would perform this role even better if the quantity and quality of the trade fair capacities significantly increased, particularly in New Delhi and Mumbai. Although the speakers from the government acknowledged the positive role of trade fairs, they said that private investors also had to be involved in the construction of exhibition sites.



Marco Spinger, the Director of AUMA's Global Markets Division, gave a talk at IEIA's Open Seminar from 25 to 26 April 2013.



The seminar's other topics included »standards and rules« in the areas of trade fair data and safety and »mergers and acquisitions« in the Indian trade fair market. Marco Spinger, the Director of AUMA's Global Markets Division, gave an overview of the situation of the trade fair industry in Germany. He particularly spoke about the shareholder structure, requirements for good trade fair infrastructure and the involvement of industry associations.

UFI Open Seminar in Europe in Malmö ■ UFI's Open Seminar in Europe took place at exhibition center in Malmö from 17 to 19 June 2013 under the slogan »Success factors for tomorrow's exhibition business«. 150 people from 32 countries took part. Committee meetings were held during the seminar, including the summer meeting of the Associations Committee and the UFI European Chapter Meeting in which Dr Peter Neven, Managing Director of AUMA and Vice-Chairman of the UFI Associations Committee and Harald Kötter, Managing Director of FKM, were amongst the participants.

### AUMA media at a glance

#### Information on the trade fair industry and AUMA

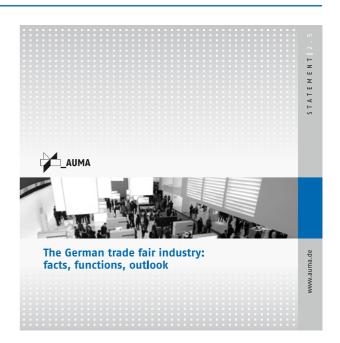
#### Review – The German trade fair industry

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

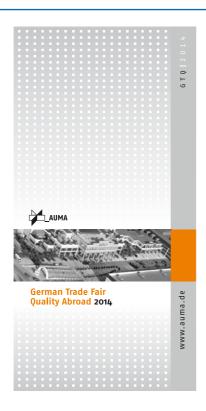
## ■ The German trade fair industry: facts, functions, outlook.

AUMA\_Statement, 5th revised edition. Published in German and English in 2013.

- Portrait: AUMA Serving the trade fair industry Information on the work, organisation and members of AUMA. Published in German and English in 2013.
- Promotional film: »Trade fairs made in Germany«
  The promotional film highlights the strengths of trade fairs as a medium and the quality and effectiveness of German trade fairs. The DVD, which lasts 2 ½ minutes, includes the German, Chinese, English, French, Japanese, Portuguese, Russian and Spanish language versions.
- Weltausstellungsarchitektur (World expo architecture)
  Dreamed, planned, built demolished. By Dr Thomas
  Schriefers. Publ. AUMA. Rasch Verlag, Bramsche. 432
  pages. Published in German 2013. €78.00.







#### Information on trade fairs

#### AUMA\_Online

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

#### MesseMediaGuide 2014

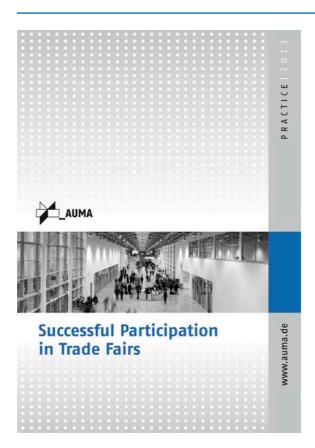
Information for the media: trade fairs, organisers and exhibition sites in Germany with contact details. 114 pages. Print and PDF versions. Published annually in German.

#### German Trade Fair Quality Abroad

Directory of trade fairs held abroad by German organisers. Titles, dates and organisers of around 260 trade fairs on all the continents. Published annually in November in German and English.

#### ■ Trade fairs made in Germany in 2014/2015

International and national trade fairs in Germany with dates, areas of focus, statistical data and index. Published annually each spring in Arabic, Chinese, English, French, German, Greek, Japanese, Korean, Portuguese, Russian and Spanish.



#### Information on participating in a trade fair

#### AUMA\_practice:

Successful participation in trade fairs – part 1: The basics Detailed information for exhibitors from choosing a trade fair to assessing success – brochure with large numbers of images and PowerPoint presentation. Published in German and English. January 2014. Only on the Internet: 

auma.de

#### Messe fit. Ready for trade fairs

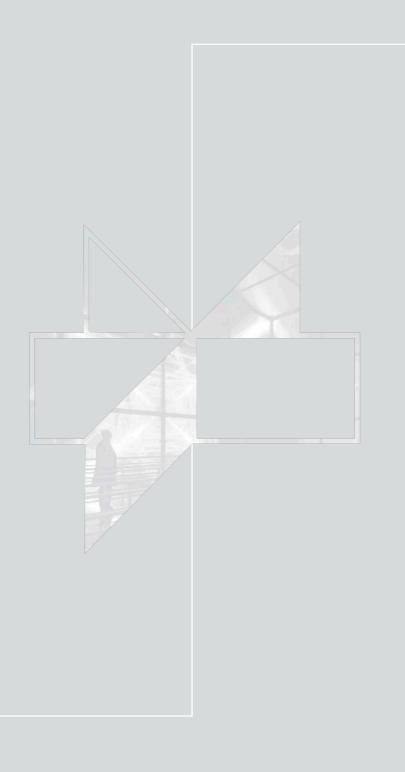
The CD-ROM covers all aspects of participating in a trade fair and offers exhibitors important help with planning for their trade fair success. The fourth edition contains the Trade Fair Benefit Check and instructional videos with an introduction on how to use the software. Version 3.4 German/English, 2012.

#### AUMA\_Trade Fair Benefit Check

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

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

#### Members

#### Industry and trade organisatios

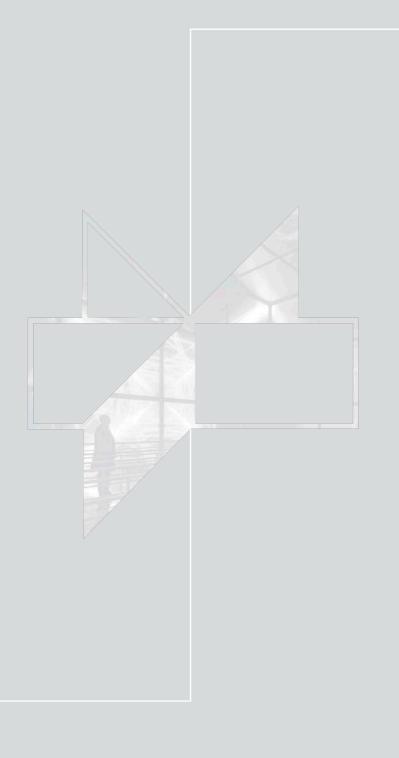
## Exhibition organisers / companies organising joint participations abroad

- Association for Direct Business Communication (FAMAB), Rheda Wiedenbrueck
- Association of German Chambers of Commerce and Industry (DIHK), Berlin
- Association of German Dental Manufacturers (VDDI), Cologne
- Association of German Tool Manufacturers (FWI), Remscheid
- Association of International Motor Vehicle Manufacturers (VDIK), Bad Homburg
- Association of the German Woodworking and Plastic Industries (HDH),
  Bad Honnef
- Caravaning Informations GmbH (CIG), Frankfurt/M.
- Central Committee for German Agriculture, Berlin
- Confederation of the German Textile and Fashion Industry, Berlin
- Didacta Verband Association of the German Education Industry, Darmstadt
- European Association of Event Centres (EVVC), Frankfurt/M.
- Federal Association for Information Technology.
- Telecommunications and New Media (BITKOM), Berlin
- Federal Industrial Association of Germany House, Energy and Environmental Technology (BDH), Cologne
- Federation of German Food and Drink Industries (BVE), Berlin
- Federation of German Industries (BDI), Berlin
- Federation of German Wholesale, Foreign Trade and Services (BGA), Berlin
- Federation of the Manufacturers of High-grade Consumer Goods (IVSH), Solingen
- General Association of the German Locks and Fitting Industry (FVSB), Velbert
- German Aerospace Industries Association (BDLI), Berlin
- German Airport Technology & Equipment e.V. (GATE), Taunusstein
- German Association for Water, Wastewater and Waste (DWA), Hennef
- German Association of Manufacturers and Importers
- of Automobile Service Equipment (ASA), Ditzingen
- German Boat and Shipbuilding Association (DBSV), Hamburg
- German Chemical Industry Association (VCI), Frankfurt/M.
- German Confederation of Skilled Crafts (ZDH), Berlin
- German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW), Frankfurt/M
- German Electrical and Electronic Manufacturers Association (ZVEI), Frankfurt/M.
- German Engineering Federation (VDMA), Frankfurt/M.
- German Hotels and Restaurants Association (DEHOGA), Berlin
- German Industry Association for Coin-operated Amusement and Vending Machines (VDAI), Berlin
- German industry association for medical technology, optical technologies and analytical, biological, laboratory and ophthalmic devices (SPECTARIS), Berlin
- German Machine Tool Builders' Association (VDW), Frankfurt/M.
- German Retail Federation (HDE), Berlin
- German Shipbuilding and Ocean Industries Association (VSM), Hamburg
- German Steel Federation, Dusseldorf
- German Sweets e.V., Bonn
- German Winegrowers' Association (DVW), Bonn
- IELA International Exhibition Logistics Association, German Chapter, Kelsterbach
- National Association of German Commercial Agencies and Distribution (CDH), Berlin

- asfc atelier scherer fair consulting GmbH, Fuerth
- Balland Messe-Service GmbH, Cologne
- DEGA-EXPOTEAM GmbH & Co. Ausstellungs KG, Obersoechering
- Deutsche Messe AG, Hanover
- ECM Expo & Conference Management GmbH, Berlin
- expotec gmbH, Berlin
- FAMA Special Association for Fairs and Exhibitions, Obertraubling
- Frankfurt Book Fair, Frankfurt/M.
- GDG Association of Major German Exhibition Organisers, Munich
- GHM Gesellschaft für Handwerksmessen mbH, Munich
- Hamburg Messe und Congress GmbH, Hamburg
- Hannover Fairs International GmbH, Hanover
- IDFA Association of German Trade Fair Organisers
- and Exhibition Venues, Leipzig
- IEC Berlin INTER EXPO CONSULT GmbH, Berlin
- IFWexpo Heidelberg GmbH, Heidelberg
- IGEDO Company GmbH & Co. KG, Dusseldorf
- IMAG Internationaler Messe– und Ausstellungsdienst GmbH, Munich
- Karlsruher Messe- und Kongress GmbH, Karlsruhe
- Koelnmesse GmbH, Cologne
- Landesmesse Stuttgart GmbH, Stuttgart
- Leipziger Messe GmbH, Leipzig
- Leipziger Messe International GmbH, Leipzig
- Mack Brooks Exhibitions Ltd, St. Albans Herts, (UK)
- MCO Marketing Communication Organisation GmbH, Dusseldorf
- MESAGO Messe Frankfurt GmbH, Stuttgart
- Messe Berlin GmbH, Berlin
- Messe Düsseldorf GmbH, Dusseldorf
- Messe Essen GmbH, Essen
- Messe Frankfurt GmbH, Frankfurt/M.
- Messe Friedrichshafen GmbH, Friedrichshafen
- Messe München GmbH, Munich
- Messe Offenbach GmbH, Offenbach
- Messe Westfalenhallen Dortmund GmbH, Dortmund
- NürnbergMesse GmbH, Nuremberg
- Reed Exhibitions Deutschland GmbH, Dusseldorf
- Saarmesse GmbH, Saarbruecken
- Spielwarenmesse International Toy Fair, Nuremberg
- the fair agency gmbH, Munich
- WFB Wirtschaftsförderung Bremen GmbH, Bremen

Status: 1st July 2014





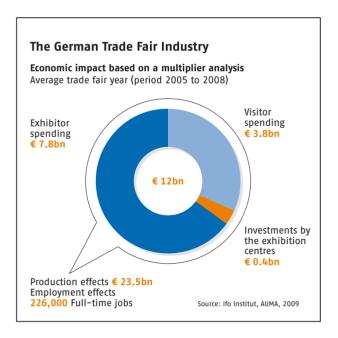
\* preliminary

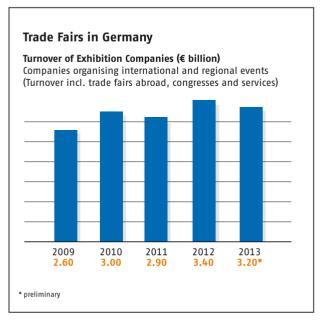


## Macro-economic significance

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

Turnover of Exhibition Companies worldwide (more than Euro 100 million)			
	2013	2012	2011
Reed Exhibitions (GB)	1,017.0	1,051.0	813.0
GL events (F)	809.1	824.2	782.7
United Business Media (GB)	546.0	538.9	475.3
Messe Frankfurt (D)	544.8	536.9	467.5
MCH Group (CH)	385.5	323.1	266.4
Messe München (D)	353.0	298.4	222.5
Messe Düsseldorf (D)	323.0	380.5	372.7
Deutsche Messe (D)	312.0	251.3	292.8
VIPARIS (F)	297.4	327.6	299.9
Koelnmesse (D)	280.6	227.4	235.3
Fiera Milano (I)	258.1	263.4	278.0
ITE Group (GB)	229.4	216.5	180.5
Informa (GB)	196.0	179.0	158.3
NürnbergMesse (D)	192.8	236.0	173.3
Messe Berlin (D)	190.0*	246.8	182.1
HKTDC (HK)	163.4	155.7	141.6
Coex (ROK)	n/a	n/a	160.0
NEC Birmingham (GB)	148.6	133.0	n/a
i2i Events Group (GB)	145.3	124.3	111.1
Jaarbeurs Utrecht (NL)	140.9	149.2	152.9
Tokyo Big Sight (JP)	140.8	176.1	194.7
Emerald Expositions (USA)	132.9	138.4	138.2
Fira Barcelona (E)	117.8	115.1	114.7
Comexposium (F)	117.5	145.8	201.2
Amsterdam RAI (NL)	116.6	134.7	133.9
BolognaFiere (I)	109.9	114.0	101.4
dmg :: events (GB)	103.8	111.8	153.2
Landesmesse Stuttgart (D)	98.8	129.0	99.0
IFEMA Madrid (E)	88.9	100.0	107.1
Svenska Mässan Göteborg (S)	88.0	104.6	90.5



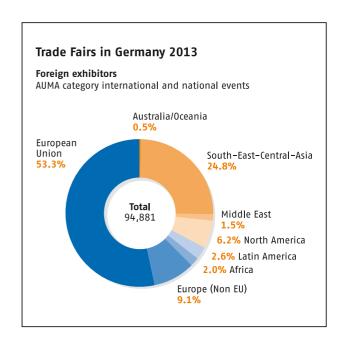


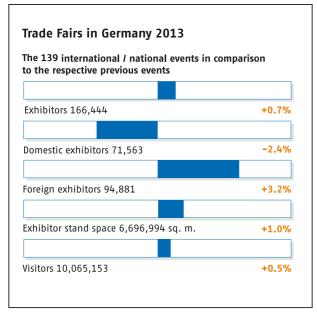
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#### National / international trade fairs

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

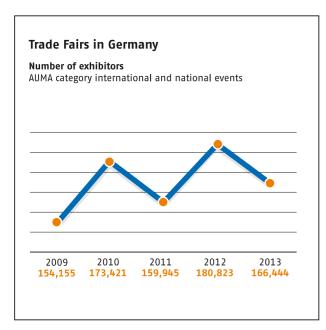
International and national trade fairs have grown again despite rather unstable economic conditions. Even growing media competition has barely affected German trade fairs.











Trade Fairs in Germany

Number of visitors

AUMA category international and national events

2009 2010 2011 2012 2013

8,916,693 10,074,724 9,526,246 10,071,036 10,065,153

At 23 exhibition centres in Germany the hall space available for holding international trade fairs and exhibitions totals around 2.8 million square metres.

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

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

#### Trade Fairs in Germany 2014

#### Exhibition capacities\*

gross in sq. m.

Location	Hall	Outdoor
Hanover	448,900	58,070
Frankfurt/M.	358,913	96,078
Cologne	284,000	100,000
Duesseldorf	262,407	43,000
Munich (Exh. Center)	180,000	425,000
Nuremberg	170,000	50,000
Berlin – ExpoCenter City	158,000**	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,)	29,225	
Saarbrücken	24,600	27,400
Offenburg	22,570	37,877
Freiburg	21,500	80,000
Offenbach	21,000	
Berlin – ExpoCenter Airport	20,000	57,000
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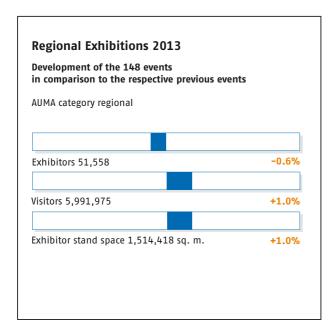
- \* Locations with at least one event
- according to AUMA category international and national events
- \*\* As of May 2014 capacity expansion to 170,000 sq. m.



## Regional exhibitions

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

More than 50,000 exhibitors meet around 6 million visitors at these events each year. Special trade fairs, which were previously included in this category, have been treated separately since 2010.



### Foreign trade fair programme

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

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

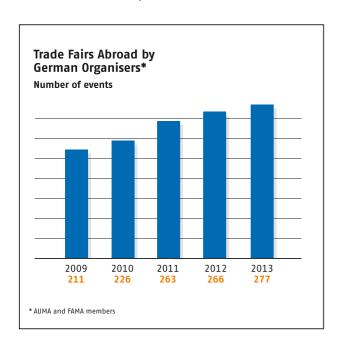


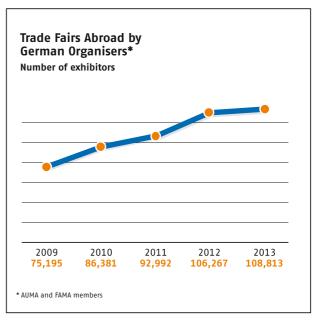


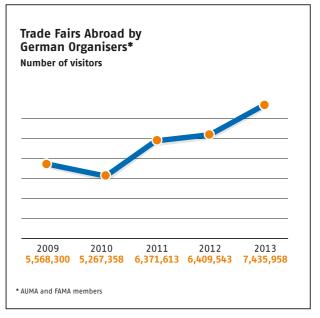


## Foreign trade fairs with German organisers

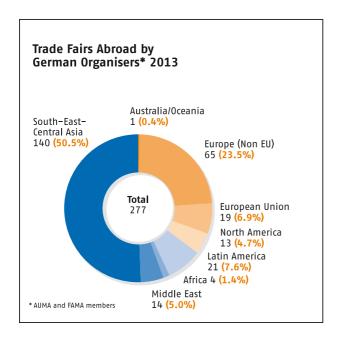
The trade fair companies organised in AUMA and FAMA hold around 270 of their own events each year in important foreign growth regions – particularly in Asia, North and South America and Eastern Europe. It is largely leading trade fair concepts that have been tried and tested in Germany that are transferred to selected foreign markets. There have been increases in all the key performance indicators of trade fairs abroad held by German organisers since the decrease caused by the crisis three years ago. This trend is likely to continue in the next few years.





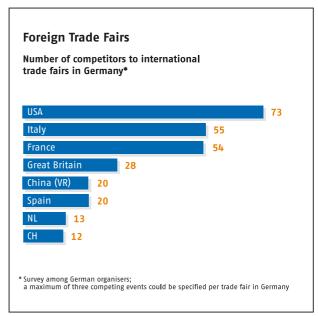


More than 50 % of the exhibitors organised abroad by German companies took place in South-East-Central-Asia. But also Europe, especially Russia, plays a substantial role here.



# German trade fairs in the global competition

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





#### **Exhibition Centres Worldwide 2014**

#### **Exhibition capacities**

gross in sq. m.

Location	Hall	
Hannover Exhibition Center	448,900	
Frankfurt/Main Exhibition Center	358,913	
Fiera Milano	345,000	
China Import & Export Fair Complex Guangzhou	340,000	
Cologne Exhibition Center	284,000	
Duesseldorf Exhibition Center	262,407	
Paris-Nord Villepinte	242,582	
McCormick Place Chicago	241,549	
Fira Barcelona – Gran Vía	240,000	
Feria Valencia	230,837	
Paris Porte de Versailles	227,380	
Crocus Expo IEC Moskau	226,399	
Chongqing International Expo Centre	204,000	
The NEC Birmingham	201,634	
BolognaFiere	200,000	
IFEMA Feria de Madrid	200,000	
SNIEC Shanghai	200,000	
Orange County Convention Center Orlando	190,875	
Las Vegas Convention Center	184,456	
Munich Exhibition Center	180,000	
Nuremberg Exhibition Center	170,000	
Berlin ExpoCenter City	158,000	
Veronafiere	151,536	
Wuhan International Expo Center	150,000	
Messe Basel	141,000	
IMPACT Muang Thong Thani Bangkok	140,000	

Location	Hall
VVC Moskau	132,720
Georgia World Congress Center Atlanta	130,112
BVV Veletrhy Brno	121,314
Reliant Park Houston	120,402
Fiera del Levante Bari	120,000
Yiwu International Expo Center	120,000
Fiera Roma	118,910
Fira Barcelona – Montjuic	115,211
Brussels Expo	114,445
EUREXPO Lyon	114,275
Leipzig Exhibition Center	111,300
Essen Exhibition Center	110,000
Singapore Expo	109,187
Rimini Fiera	109,000
KINTEX Goyang/Seoul	108,049
BEC Bilbao Exhibition Centre	108,000
Palexpo Genf	108,000
Poznan International Fair	107,654
New China International Exhibition Center Beijing	106,800
Messe Stuttgart	105,200
Shenyang International Exhibition Center	105,200
Shenzhen Convention & Exhibition Center	105,000
Ernest N. Morial Convention Center New Orleans	102,230
ExCeL London	100,000
Fiere di Parma	100,000
Jaarbeurs Utrecht	100,000

Status: 1.1.2014

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 ▶ auma.de, also for download.

### **Pictures**

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p. 16	Messe Düsseldorf GmbH/Constanze Tillmann
p. 17	Koelnmesse GmbH/RUKO
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