

Review 2008 Key figures of the German Trade Fair Industry



Association of the
German Trade Fair Industry
www.auma-fairs.com

Trade Fairs in Germany



Economic impact based on a multiplier analysis



Trade Fairs in Germany 2008



Development of the 153 international / national events in comparison to the respective previous events



Trade Fairs in Germany 2008



Development of the 153 international / national events in comparison to the respective previous events

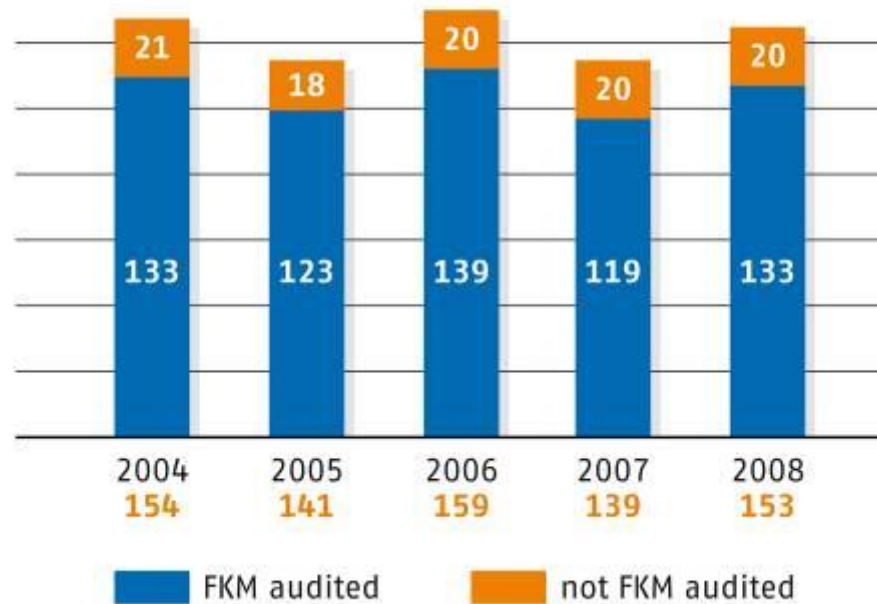
	Number of events	Total	Exhibitors Domestic	Exhibitors Foreign	Visitors Total	Rented space Total
Total	153	+1.9%	+2.1%	+1.8%	+3.5%	+4.2%
Investment goods trade fairs	87	+5.3%	+4.7%	+6.1%	+6.8%	+9.3%
Consumer goods fairs directed to trade visitors	44	-2.8%	-2.3%	-3.1%	-6.6%	-2.4%
Consumer goods fairs directed to the public	18	-0.8%	-1.5%	+0.2%	+2.3%	+1.7%
Trade fairs presenting services	4	+1.9%	+0.3%	+2.5%	-2.5%	-0.2%

Trade Fairs in Germany



Number of events

AUMA category international and national events

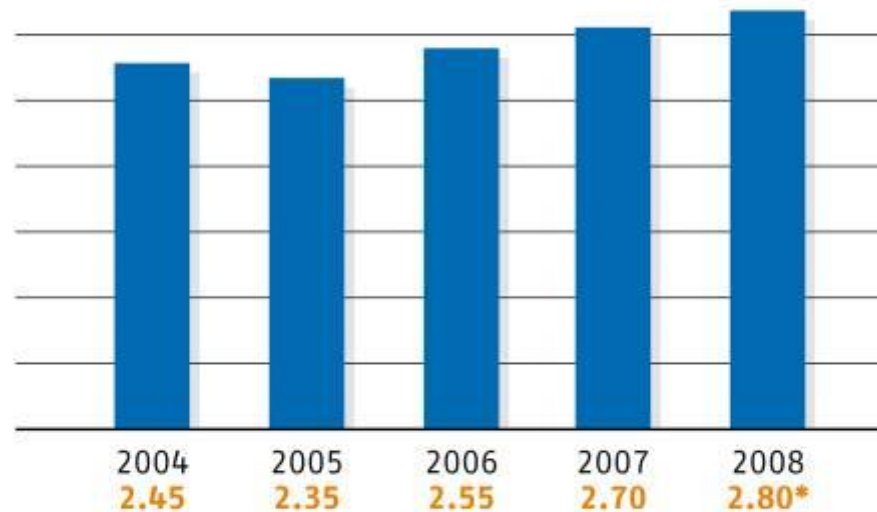


Trade Fairs in Germany



Turnover of trade fair organisers (€ bn)

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



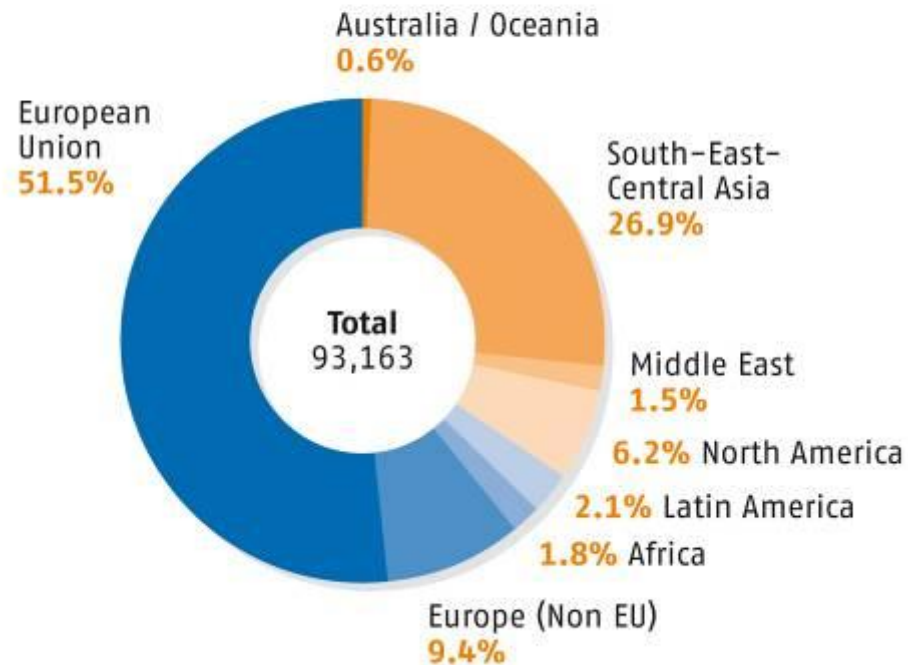
* preliminary

Trade Fairs in Germany 2008



Foreign exhibitors

AUMA category international and national events

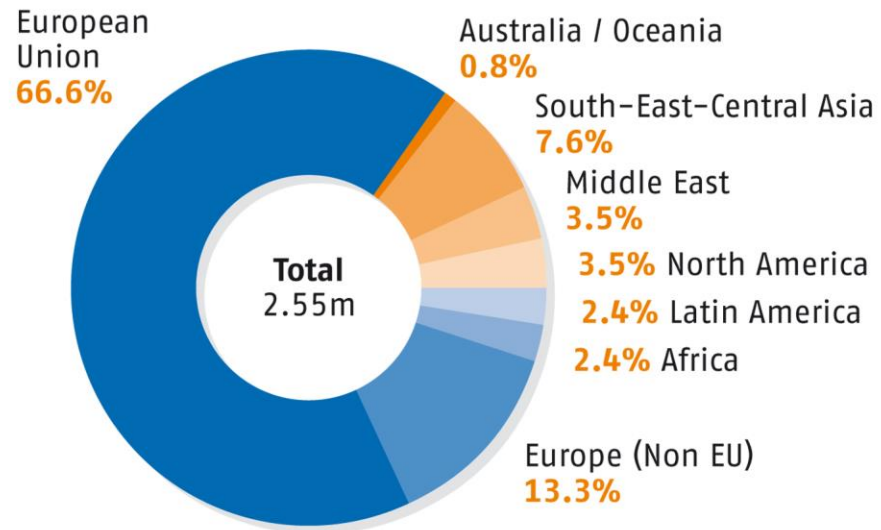


Trade Fairs in Germany 2008



Foreign visitors

AUMA category international and national events

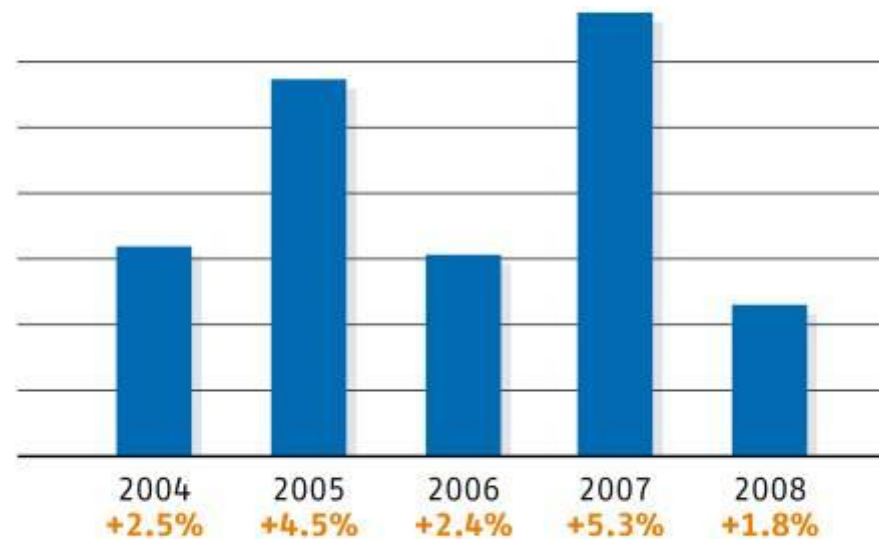


Trade Fairs in Germany



Number of foreign exhibitors

AUMA category international and national events



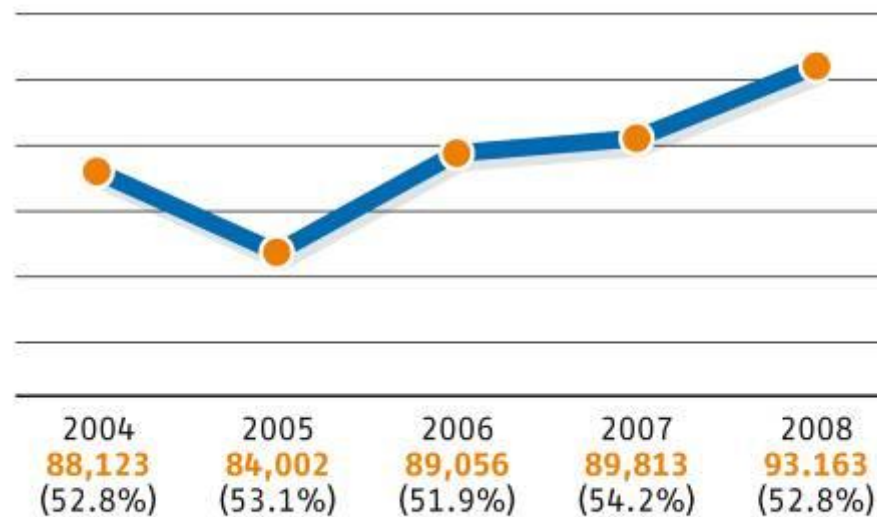
Development of one year's trade fairs
in comparison to the respective previous events

Trade Fairs in Germany



Number of foreign exhibitors

AUMA category international and national events

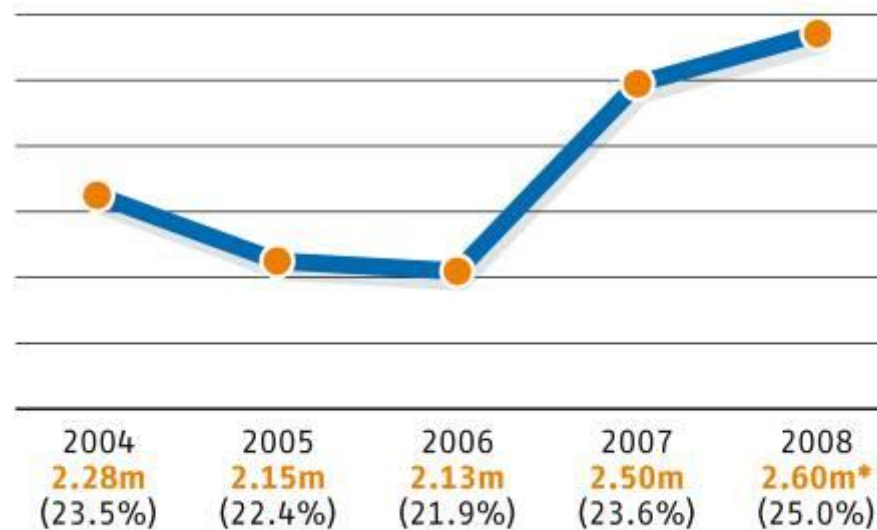


Trade Fairs in Germany



Number of foreign visitors

AUMA category international and national events



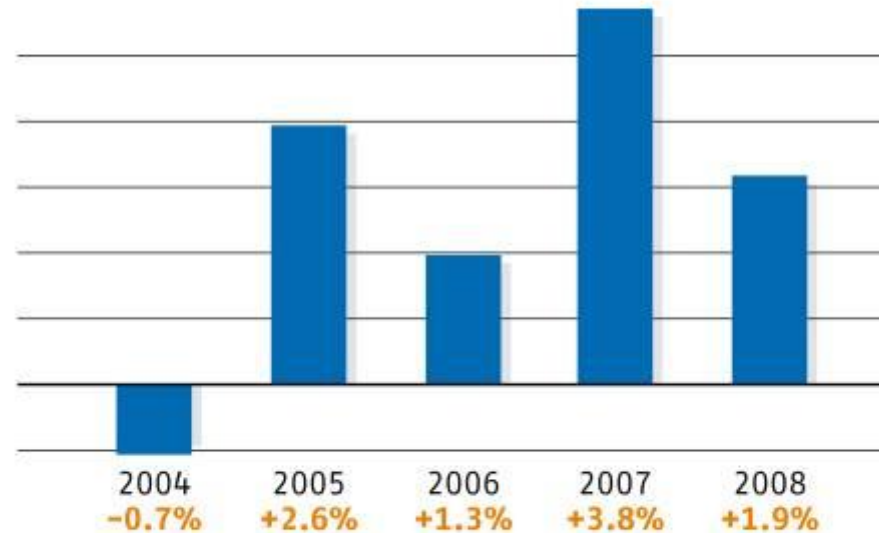
* preliminary

Trade Fairs in Germany



Numbers of exhibitors

AUMA category international and national events



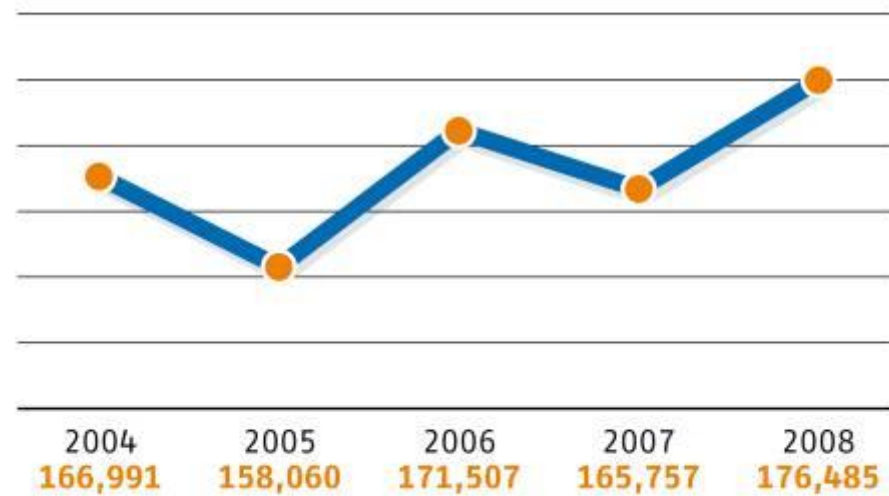
Development of one year's trade fairs
in comparison to the respective previous events

Trade Fairs in Germany



Number of exhibitors

AUMA category international and national events

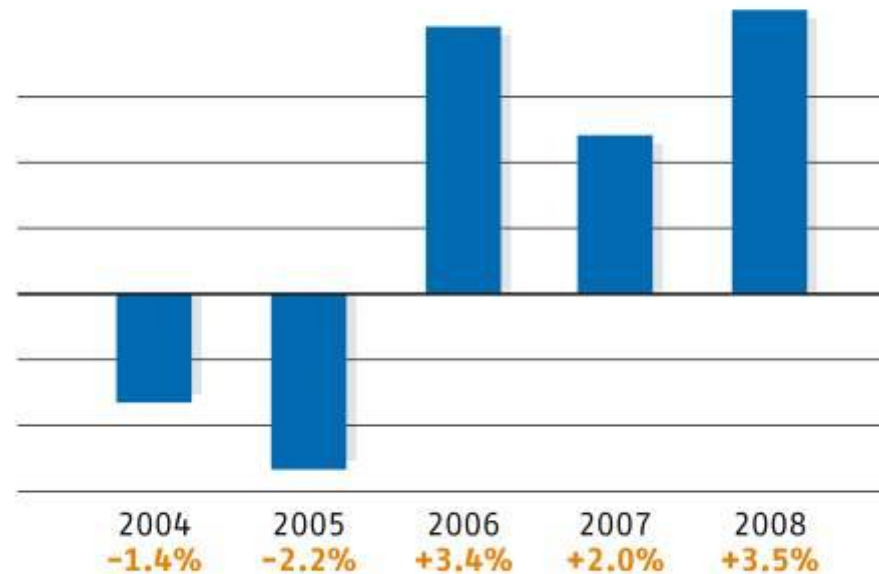


Trade Fairs in Germany



Number of visitors

AUMA category international and national events



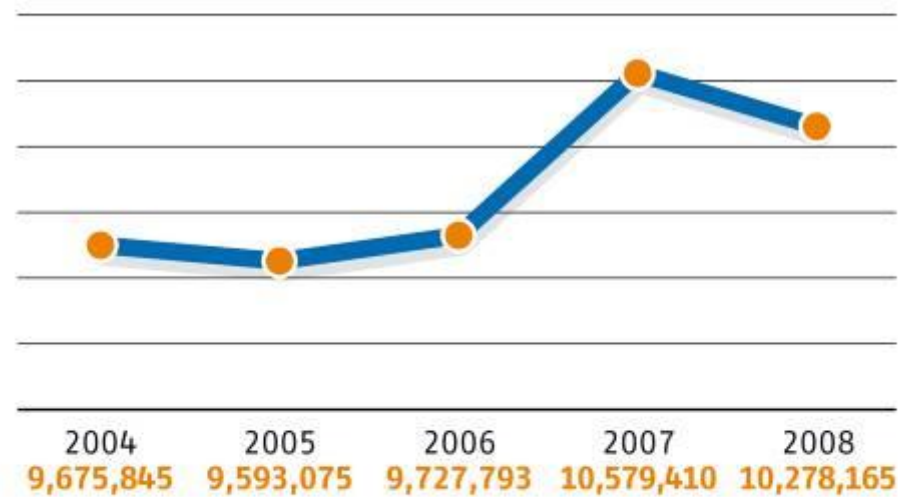
Development of one year's trade fairs
in comparison to the respective previous events

Trade Fairs in Germany



Number of visitors

AUMA category international and national events

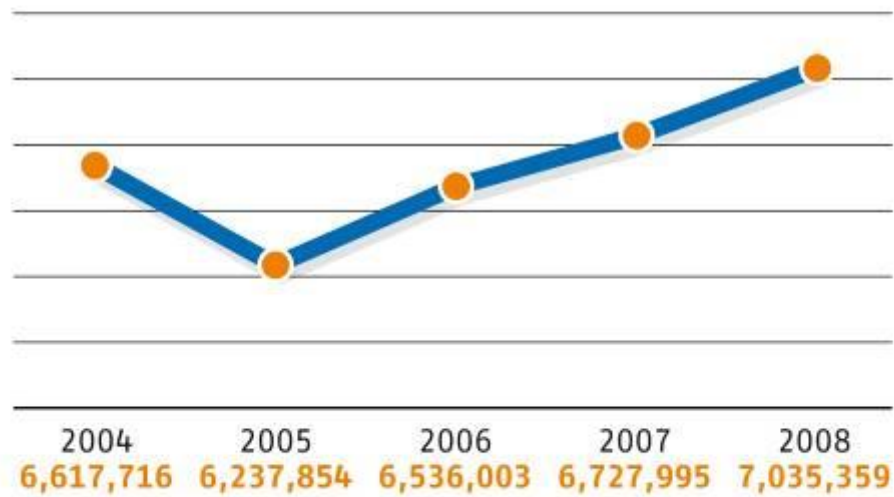


Trade Fairs in Germany



Rented space in m²

AUMA category international and national events

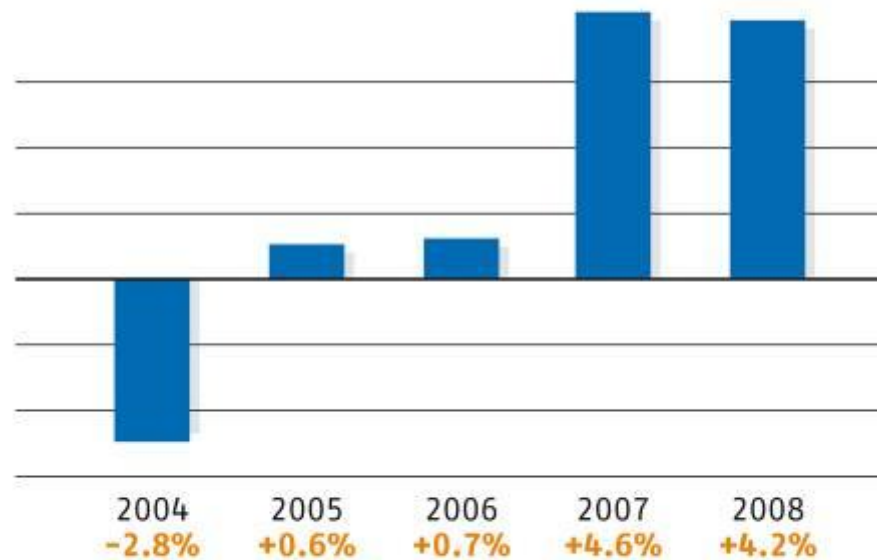


Trade Fairs in Germany



Rented space in m²

AUMA category international and national events

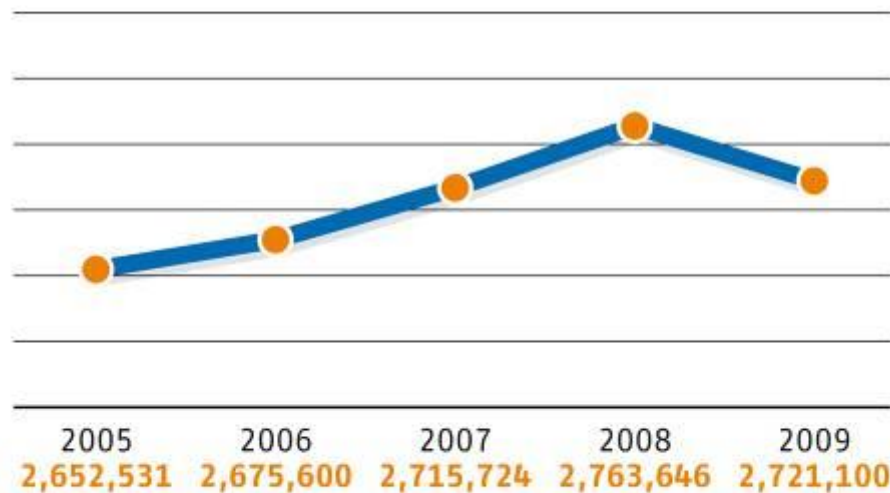


Development of one year's trade fairs
in comparison to the respective previous events

Trade Fairs in Germany



Hall capacities in m²
(each 1st January)



Trade fair centres with at least one event
according to AUMA category international and national events

Trade Fairs in Germany 2009



Exhibition capacities*
gross in m²

Location	Halls	Outdoor
Hanover	495 265	58 070
Frankfurt/M.	321 754	96 078
Cologne	284 000	100 000
Düsseldorf	263 888	43 000
Munich (New Exh. Center)	180 000	360 000
Berlin	160 000	100 000
Nuremberg	160 000	
Essen	110 000	20 000
Stuttgart	105 200	40 000
Leipzig	101 200	69 998
Hamburg	86 574	10 000
Friedrichshafen	69 700	11 800
Bad Salzuflen	65 195	4 000
Dortmund	59 235	
Karlsruhe (New Exh. Center)	52 000	10 000
Augsburg	51 000	10 000
Bremen	39 000	100 000
Munich (M, O, C.)	30 000	
Saarbrücken	24 519	27 400
Freiburg	21 500	80 000
Offenburg	22 570	37 877
Offenbach	18 500	400

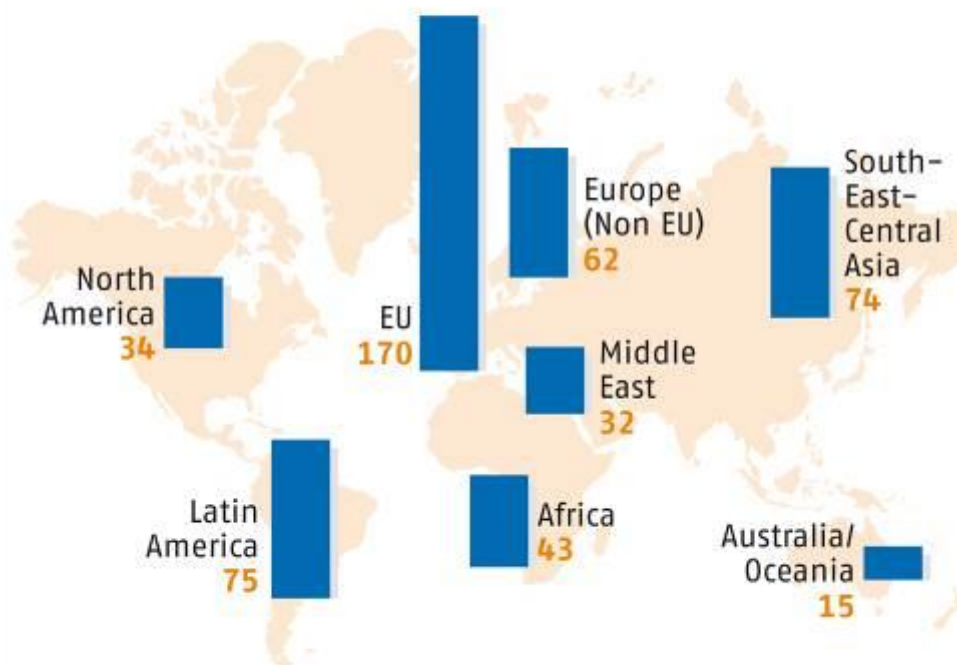
Status: 1.1.2009

* Locations with at least one event
according to AUMA category international and national events

Trade Fairs in Germany 2008



Information offices abroad



Regional and Specialized Trade Fairs and Exhibitions 2008



Development of the 174 events
in comparison to the respective previous events

AUMA category regional / special

Exhibitors 52,071

-2.3%

Visitors 6,445,427

-2.4%

Rented space 1,489,975 m²

-1.6%

Regional and Specialized Trade Fairs and Exhibitions



Number of events

AUMA category regional / special

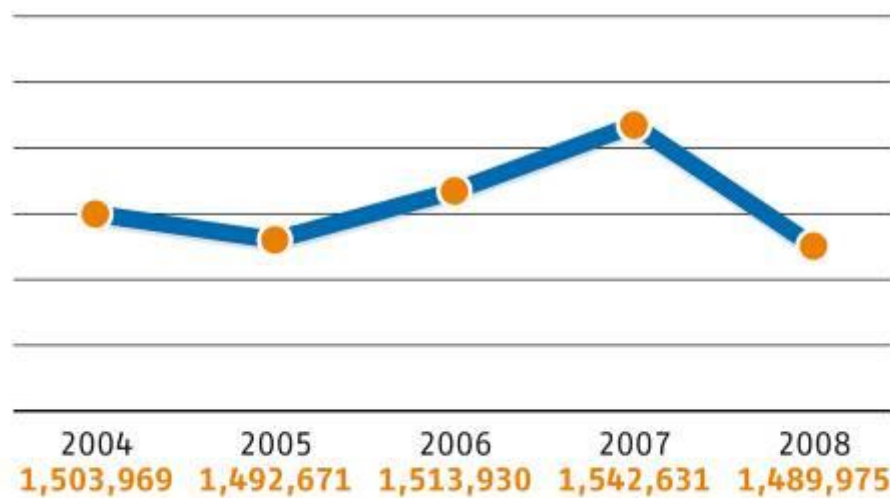


Regional and Specialized Trade Fairs and Exhibitions



Rented space in m²

AUMA category regional / special

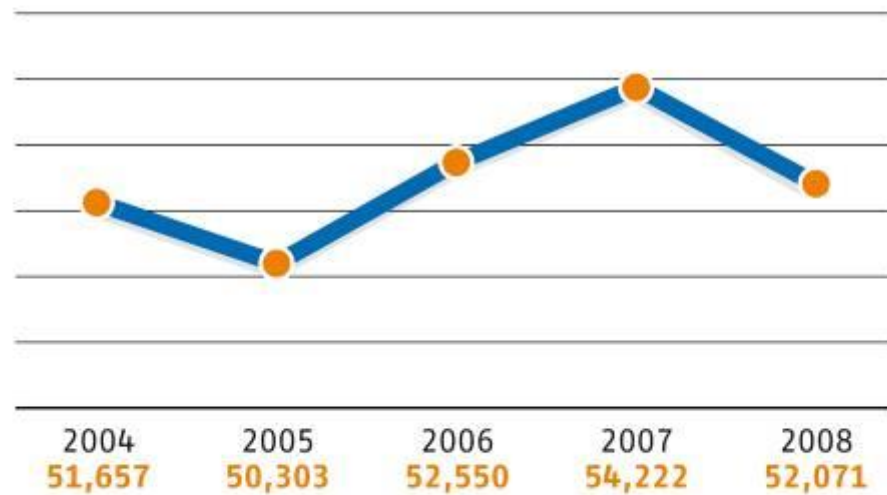


Regional and Specialized Trade Fairs and Exhibitions



Number of exhibitors

AUMA category regional / special

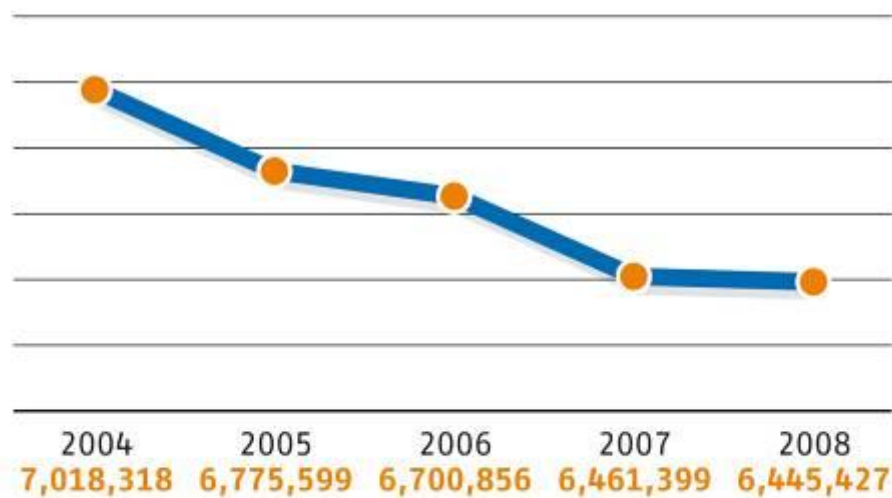


Regional and Specialized Trade Fairs and Exhibitions



Number of visitors

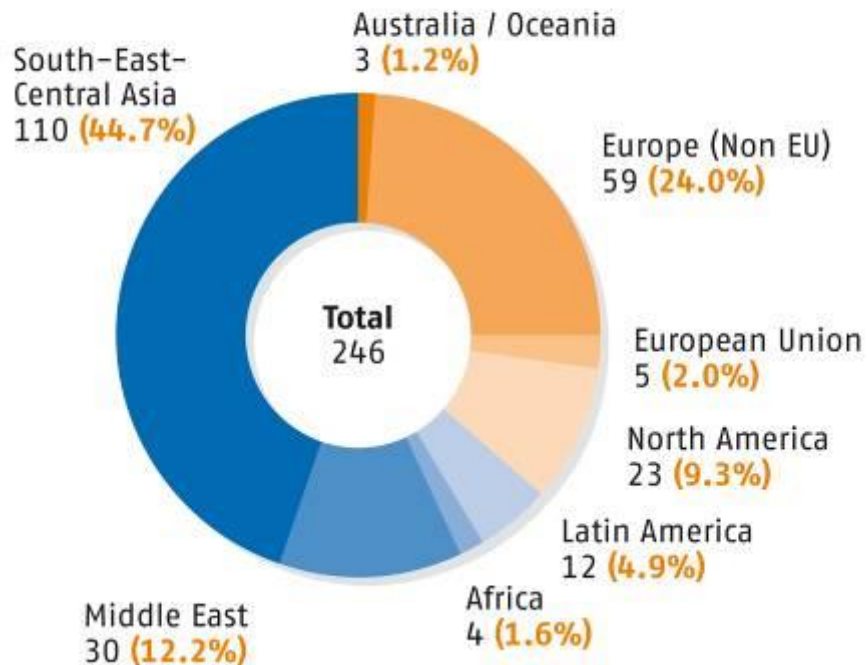
AUMA category regional / special



German Foreign Trade Fair Programme 2008



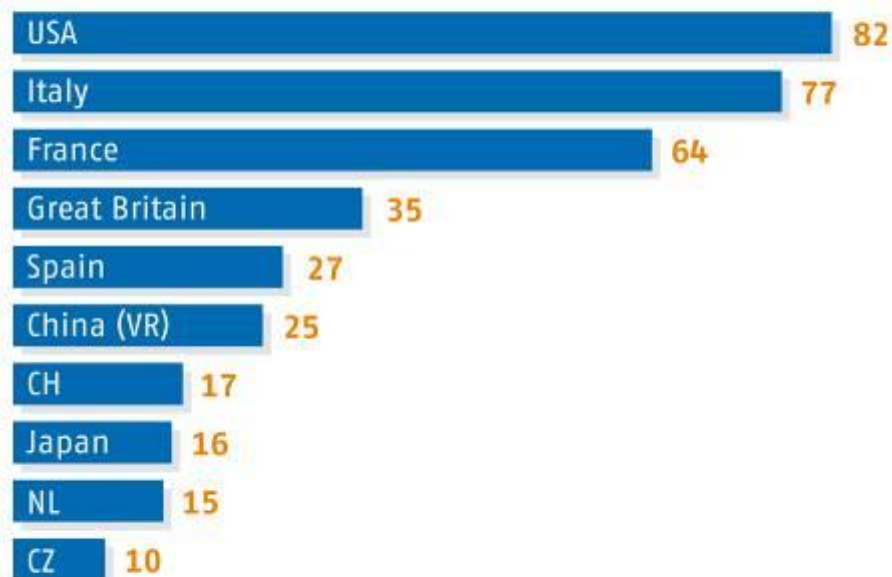
Participations by the Federal Ministry of
Economics and Technology



Foreign Trade Fairs

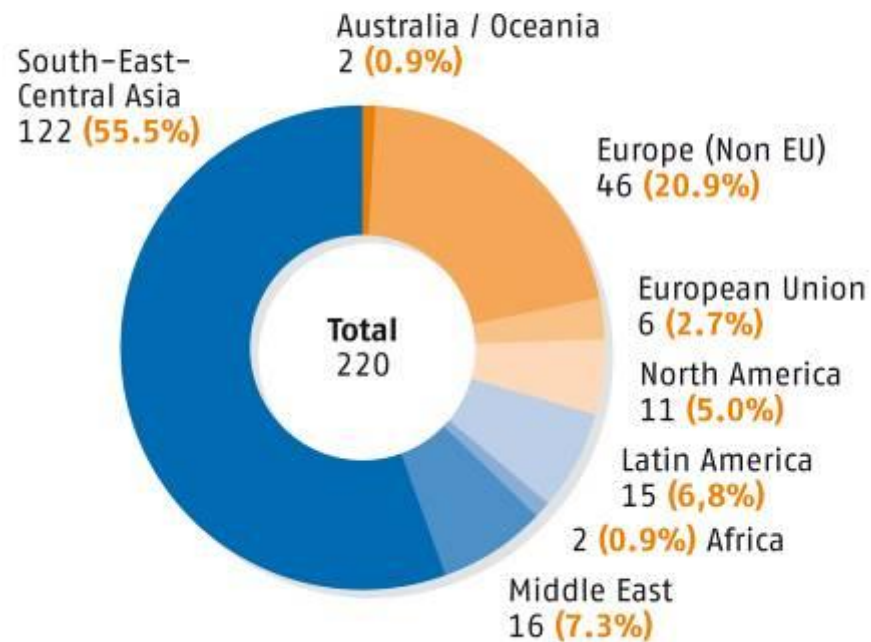


Number of competitors to international trade fairs in Germany*



* Survey among German organisers;
a maximum of three competing events could be specified per trade fair in Germany

Trade Fairs Abroad by German Organisers* 2008

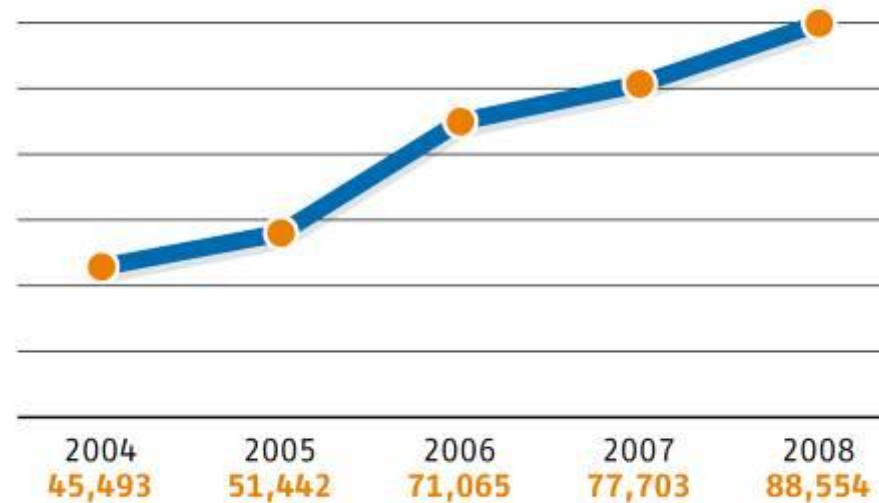


* AUMA members

Trade Fairs Abroad by German Organisers*



Number of exhibitors

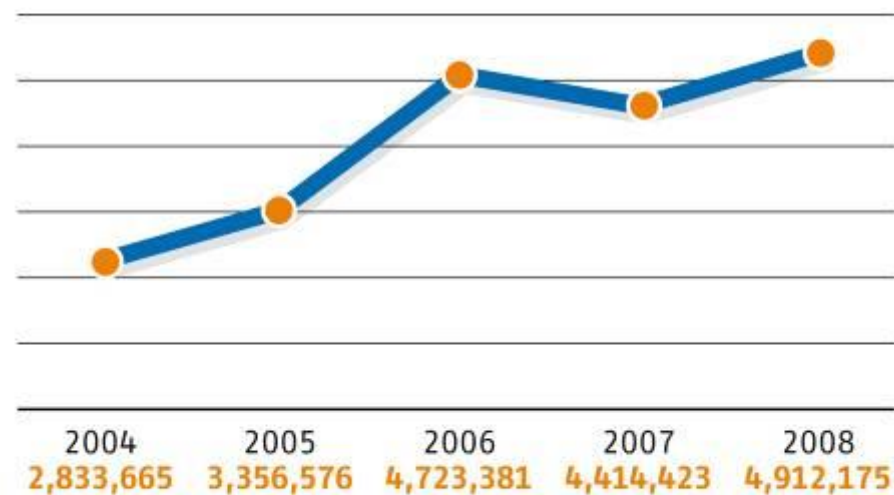


* AUMA members

Trade Fairs Abroad by German Organisers*



Number of visitors

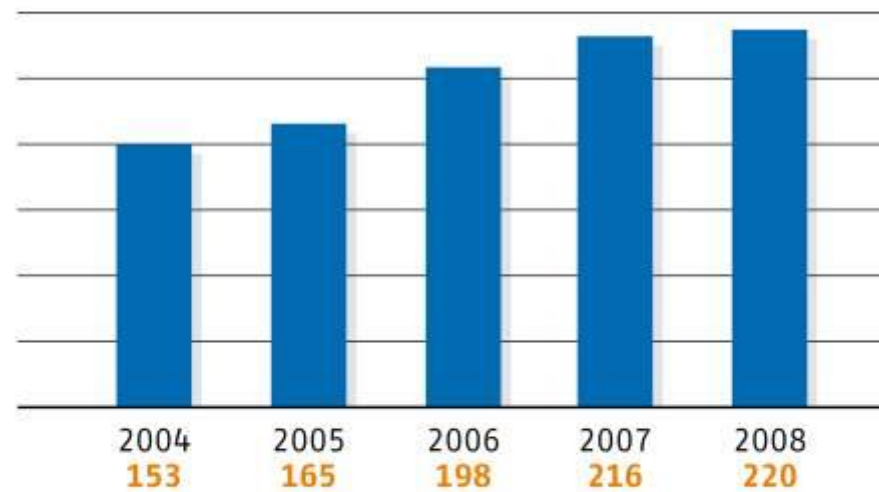


* AUMA members

Trade Fairs Abroad by German Organisers*



Number of events



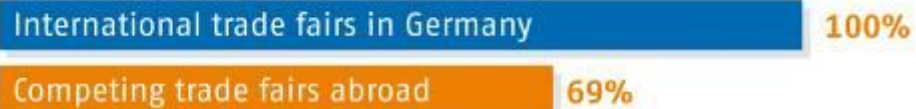
* AUMA members

Foreign Trade Fairs

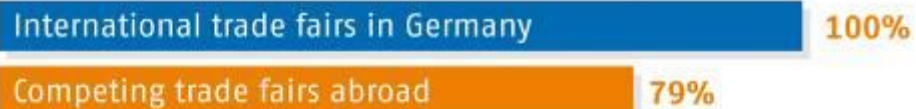


Average size of competitors to international trade fairs in Germany 2007

Rented space



Exhibitors



Visitors



Exhibition Centres Worldwide 2009



Exhibition capacities*
gross in m²

Location	Halls
Hanover Exhibition grounds	495 265
Fiera Milano	345 000
China Import & Export Fair Complex Guangzhou	340 000
Frankfurt/Main Messegelände	321 754
Cologne Exhibition grounds	284 000
Düsseldorf Exhibition grounds	263 888
McCormick Place Chicago	248 141
Feria Valencia	230 837
Paris Expo Porte de Versailles	227 380
Crocus Expo IEC Moskau	216 320
Paris-Nord Villepinte	206 000
NEC Birmingham	201 634
BolognaFiere	200 000
Fira Barcelona Gran Vía	200 000
IFEMA Feria de Madrid, Parque Ferial Juan Carlos I	200 000
Orange County Convention Center Orlando	190 875
Las Vegas Convention Center	184 456
Munich (New Exhibition Center)	180 000
Messezentrum Basel	162 000
Berlin Exhibition grounds	160 000
Nuremberg Exhibition grounds	160 000
IMPACT Bangkok	140 000
Georgia World Congress Center Atlanta	130 112
SNIEC Shanghai	126 500
Veronafiere	122 000
Fiera del Levante Bari	120 000
Reliant Park Houston	118 680
Fiera Roma	118 300
Fira Barcelona Montjuic	115 211
Fiera Milano City	115 000
Brussels Expo	114 445
BVV Brno	113 544
MTP Poznan	113 100
Essen Exhibition grounds	110 000
Nanjing International Expo Center	110 000
Eurexpo Lyon	109 000
Rimini Fiera	109 000
Bilbao Exhibition Centre	108 000
VVC Moskau	108 000
New China International Exhibition Center Beijing	106 800
New Stuttgart Trade Fair Center	105 200
SZCEC Shenzhen Convention & Exhibition Center	105 000
Geneva Palexpo	102 470
Ernest N. Morial Convention Center New Orleans	102 230
Leipzig Exhibition grounds	101 200
Fiere di Parma	100 000
Singapore Expo	100 000
Jaarbeurs Utrecht	100 000

Status: 1.1.2009

Turnover of Trade Fair Organisers worldwide (more than Euro 100 million)



(€ m)

	2007	2006	2005
Reed Exhibitions (GB)	842,0	767,0	688,0
GL Events (F)	633,5	495,7	434,2
Messe Frankfurt (D)	423,6	406,1	379,0
Messe Düsseldorf (D)	354,2	304,0	316,0
Informa (GB)	318,7	351,9	208,9
Fiera Milano (I)	302,5	375,0	261,7
Messe München (D)	299,4	212,4	223,4
Deutsche Messe (D)	286,0	235,0	304,0
United Business Media (GB)	245,9	252,1	255,2
dmg world media (GB)	229,6	241,5	221,8
MCH Group (CH)	216,5	135,5	140,5
NEC Birmingham (GB)	201,0	188,5	199,5
Koelnmesse (D)	200,6	216,0	181,7
Nielsen Business Media (USA)	n.a.	n.a.	177,0
EMAP Communications (GB)	173,6	157,3	131,5
IFEMA Madrid (E)	170,6	170,9	146,7
Comexpo (F)	n.a.	n.a.	160,0
Messe Berlin (D)	144,4	168,2	131,9
Paris Expo (F)	141,9	155,2	139,9
ITE Group (GB)	138,9	122,8	114,8
RAI Amsterdam (NL)	133,3	115,7	107,5
Fira Barcelona (E)	129,6	103,0	103,7
BolognaFiere (I)	128,5	119,0	120,0
Nürnberg Messe (D)	125,0	125,7	96,1
Jaarbeurs Utrecht (NL)	108,5	103,1	92,4
HKTDC (HK)	107,9	107,0	97,7
Advanstar Communications (USA)	n.a.	107,9	95,7

AUMA_MesseTrend 2009



Development of trade fair participations

Compared to 2007/2008 ...% of the German exhibiting companies* are planning worldwide in the period 2009/2010:



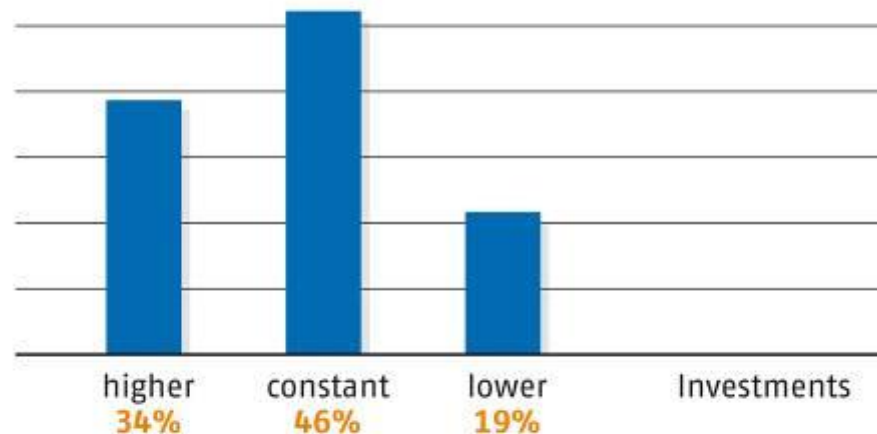
* representative survey by TNS Emnid commissioned by AUMA
among 500 companies, which exhibit at trade visitor-oriented fairs;
October 2008; to 100 remaining percent: n.a.

AUMA_MesseTrend 2009



Investments in participations

Compared to 2007/2008, ...% of German exhibition companies* are planning worldwide in the period 2009/2010:



Trade fair budget	2007 + 2008:	383,700,- €	+ 0.7%
per company:	2009 + 2010:	386,400,- €	

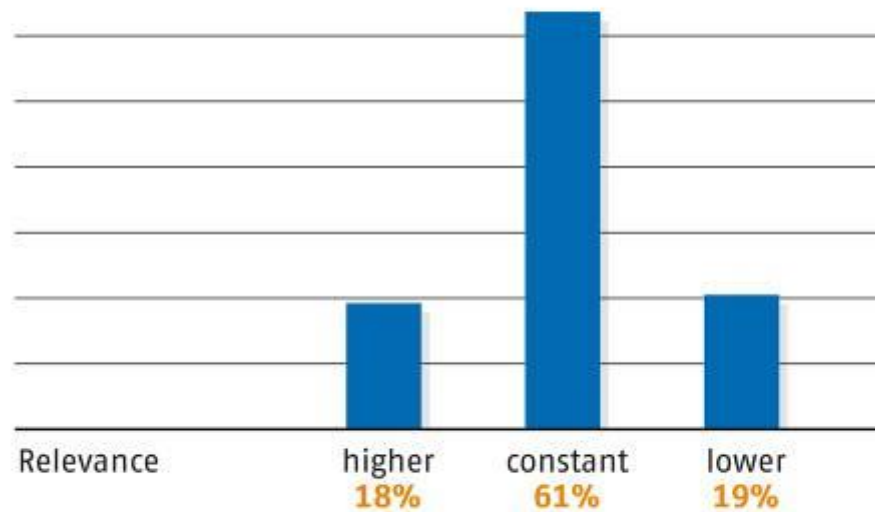
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AUMA_MesseTrend 2009



Future relevance of trade fairs

...% of German exhibiting companies*
expect for trade fairs in the next 5 years:



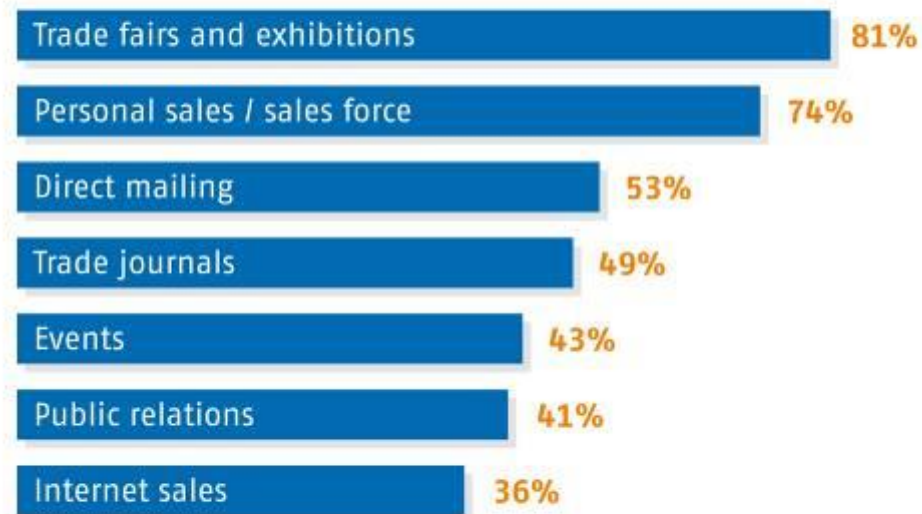
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AUMA_MesseTrend 2009



Trade fairs in the communication mix

In b-to-b communication ...% of the German exhibiting companies* regard as very important or important:



* representative survey conducted by TNS Emnid commissioned by AUMA among 500 companies, which exhibit at trade visitor-oriented fairs; October 2008