



German Trade Fair Industry | Review 2010



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Publisher:

AUMA

Association of the German
Trade Fair Industry

Littenstrasse 9
10179 Berlin
Phone +49 30 24000-0
Fax +49 30 24000-330
info@auma.de
www.auma.de

Layout / Production:
CCL, Berlin

Photos:

Cover photo:

2010 ADAM award winners:

Philips, Light+ Building 2010 © FAMAB

We would like to thank the exhibition
companies and FAMAB for providing us with
pictures of trade fairs and exhibition centers.

Further photos: page 92

Printing:

Königsdruck – Printmedien und
digitale Dienste GmbH, Berlin

Printed in the
Federal Republic of Germany 2011

ISSN: 1430-8983



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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 13, 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





Outlook

Developments over the past two years have shown that serious economic decline impacts on trade fairs. However, they have managed to keep their place among the various marketing options, despite economically uncertain times. Even in an increasingly virtual world, one could say that trade fairs, as “genuine” events, have a very good chance of retaining their role as a fundamentally important communication instrument.

An instrument that occupies 40 % of the marketing budgets in the B2B sector might well have become a victim of wide-ranging economic cuts. It is true that in the short term companies have reduced their trade fair spending, but in many cases exhibitors have focused on continuity and have merely streamlined their costs. According to the industry associations' latest findings, in 2009/2010 companies in the machinery industry, electrical engineering and electronics sectors spent practically the same share of the marketing budgets on trade fairs as they did two to three years ago.

Transporting emotions with three-dimensional marketing ■ Despite the growing impact of online media the specific qualities that characterize trade fairs continue to be appreciated. Clearly, the main features of a trade fair, those of establishing quality business contacts at a personal level and of providing a real-life product experience, remain in demand. It is telling that in surveys forecasting the future, multi-sensory marketing plays a prominent role. What easier place to exercise this than at trade fairs? Here especially, the limitations of so-called web fairs, which are reportedly always on the verge of a breakthrough, have become evident. They enable down-to-earth, two-dimensional interaction which no doubt plays an important role in conducting business. They may indeed be able to employ a variety of “traditional” forms of communication, but they can only hint at replicating the interaction that takes place at a trade fair. As such, three-dimensional trade fair marketing takes over where other instruments, online media included, cease to function.



Re-evaluation of the message conveyed by trade fair statistics ■ During the recent economic crisis trade fairs demonstrated their ability to remain functional in spite of a difficult economic climate, even in times when exhibitor and visitor numbers went into double-digit decline. This makes it all the more clear that fluctuations in trade fair statistics in the order of single-digit percentages give no indication of any changes in a trade fair's importance. Experienced exhibitors are justifiably less concerned by such trends than external observers. When a trade fair which is normally attended by 100,000 people registers an increase or a drop of 5,000 visitors, this has no noticeable influence on whether exhibitors take part or not. A change in the type of visitor attending a certain fair has a far greater impact on a company's success. As such, the industry needs to discuss what indicators, besides attendance, are capable of defining the quality of a trade fair.

Good prospects for German trade fairs abroad ■

Following the economic crisis there was a rapid resurgence in business among German trade fair organisers abroad, in particular in the number of trade fairs held. The recovery in 2010 already more than compensated for the decline in 2009, and currently an increase of 10 % is expected in 2011. This shows that foreign exhibitors and visitors alike clearly place great trust in the quality of German trade fairs abroad. Thus with the economic crisis now over, opportunities exist for gaining further ground in the markets abroad. What is more, despite intense promotional efforts it appears that limitations exist in terms of the levels of international participation that domestic trade fairs are able to attract.





For several years, at an average of somewhat over 50 %, the proportion of foreign exhibitors has remained relatively stable, with the corresponding figure for trade visitors at 30 %. By international comparison these figures are outstanding. This is another reason why establishing further trade fairs abroad is a strategy for the future.

Because in many emerging countries there is now a substantial volume of additional demand for European products that can only be partially satisfied by German trade fairs.

Overall international situation increasingly difficult ■ The political situation will also be among the factors deciding the future of the international trade fair industry. The financial problems experienced by several states have impacted on local economies and trade fair industries, not however on the trade fairs of other countries, and they appear unlikely to do so.

In the medium term, the political upheavals in North Africa may offer a chance to boost the market economies and trade fair industries of these countries. On the other hand, military conflicts, in Libya for example, could well have a negative influence on business relations and trading in the entire region.





However, developments such as these require a detailed and systematic evaluation of the possible consequences for the trade fair industry. It was for this reason too that AUMA commissioned further work on the analysis of trade fair industry scenarios in 2020, which was completed in 2007. Furthermore, five years ago no one could have foreseen the current boom in social media communications and their effect on trade fairs as a marketing instrument. Parts of this study are now being updated. Its findings will be more differentiated and will contain details according to individual trade fair category. The results will be available in spring 2012.



Trade Fairs and Exhibitions in Germany





Trade Fairs and Exhibitions in Germany

Overview

Quicker than expected, the German economy has emerged from the economic downturn in 2009. The trade fair industry has benefited from the situation and at the same time has significantly stimulated this recovery.

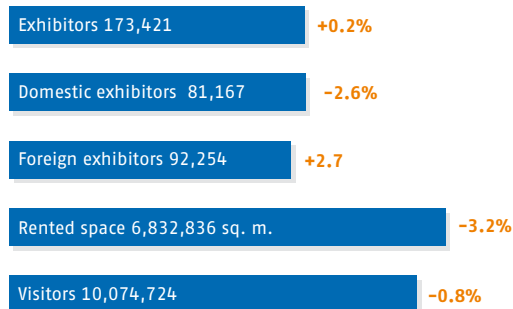
Industrial production was to a large extent responsible for revitalizing the economy. Key industries, including the machinery industry, electrical engineering and the automotive industry registered such high increases in orders and production that they were soon back to pre-crisis levels. This has had a stabilizing effect on income and employment, while some other less industrialized countries, which are supposedly more advanced, continue to await a recovery. German industry's role as the driving force behind the economy has also helped stabilize German trade fairs. This has had the effect of cushioning the drastic cost-cutting measures implemented by exhibitors in 2009, so that in 2010, despite a renewed decline in some areas, compared with other marketing instruments, German trade fairs fared relatively well. The beginning of 2011 was characterized by a substantial growth in exhibitor and visitor numbers.



*SMM, Hamburg
(Hamburg Messe und
Congress GmbH)*

Trade Fairs in Germany 2010

The 157 international / national events in comparison to the respective previous events



2010 review ■ In 2010, international trade fairs held in Germany were slow to recover from the serious decline they experienced during the economic crisis in 2009. The cost-cutting measures which exhibitors had decided upon in 2009 were too drastic, so that compared with corresponding events in previous years the amount of rented space went down by another 3.2 %. At 0.2 %, there was at least a marginal rise in exhibitors at the 157 international trade fairs which took place. Remarkably, attendance by German exhibitors fell by 2.6 %, although even in 2009 it had fallen by “only” 3.5 %. It appears that a number of exhibitors, who initially continued to participate as always, reduced their trade fair commitments very late, shortly before the economic recovery. One positive aspect was the relatively rapid return of many foreign exhibitors who had previously withdrawn from trade fairs during 2009. Following a 5.0 % drop in 2009, international participation grew by 2.7 %, an impressive vote of confidence for international trade fairs

in Germany and their organisers. In 2010, averaging -0.8 %, visitor attendance was almost back to normal. A year earlier, with losses of 8.4 %, trade fairs had borne the full brunt of visitor decline.

As in previous years, the winners in 2010 were trade fairs representing the energy and logistics sector. Trade fairs with a focus on health matters also reported above-average growth, as did leisure exhibitions. However, in 2010 a number of investment goods trade fairs which take place at longer intervals continued to feel the after-effects of the recession, particularly during the first six months.

Trend among individual trade fair categories ■ Among the individual trade fair categories, consumer goods trade fairs were responsible for the relatively stable trend in the German trade fair industry in 2010. On average, the 19 consumer goods trade fairs whose main audience was the general public reported growth in all areas.



Compared with corresponding events in previous years, exhibitor numbers rose by 2.6 %, and the amount of exhibition space rented out increased by 0.3 %. Visitor attendance even grew by 5.4 %. A year earlier this trade fair category had suffered the largest losses. Clearly, exhibitors and visitors at these trade fairs react rapidly to economic change, both in a positive and negative sense. Thus this event category was able to directly benefit from the general upturn in the economy. The 46 consumer goods events for trade visitors reported a 0.9 % drop in exhibitors and even a 4.6 % decline in stand space, while average visitor attendance remained stable. This was probably due to the relatively good economic mood among consumers during the first six months of 2010.

Trade fairs for capital goods, which until 2008 had been the driving force behind the German trade fair industry, reported growth only in exhibitor numbers (0.4 %). At the 88 trade fairs which took place the amount of exhibition space rented out sank yet again, by more than 3 %, and visitor attendance even fell by 4.4 %. As trade fairs for capital goods only take place every two to three years, the strong economic recovery of the capital goods industry is unlikely to be reflected by trade fair statistics before 2011 and 2012.

The relatively small group of trade fairs representing the services sector has to date been unable to recover from the losses experienced in 2009. This category consists mainly of trade fairs representing tourism, as well as the financial, marketing and software industries. Following an already relatively sharp decline the previous year, in 2010 exhibitor attendance fell yet again, by 2.3 %. The amount of space fell by 1.8 %, visitor numbers even dropped by 6 %.

Trade Fairs in Germany 2010

The 157 international / national events in comparison to the respective previous events

	Number of events	Total	Exhibitors Domestic	Foreign	Visitors Total	Rented space Total
Total	157	+0.2%	-2.6%	+2.7%	-0.8%	-3.2%
Investment goods trade fairs	86	+0.4%	-2.4%	+3.7%	-4.4%	-3.3%
Consumer goods fairs directed to trade visitors	46	-0.9%	-4.2%	+0.8%	+0.1%	-4.6%
Consumer goods fairs directed to the public	19	+2.6%	+0.6%	+5.4%	+5.4%	+0.3%
Trade fairs presenting services	6	-2.3%	-10.0%	+1.8%	-6.0%	-1.8%

*Small specialized trade fairs
now analysed for the first time*

For the first time AUMA has analysed the results of specialized trade fairs, which are classed in a separate category. Covering a net exhibition space of max 4,000 m², these trade fairs exhibit highly specialized products and attract trade visitors from all parts of Germany. In 2010 the 16 trade fairs belonging to this category reported a 1.1 % increase in exhibitors and 10.1 % more visitors. By contrast, the amount of rented space, which on average covers a net area of only 2,000 m², fell by 5 %. However, there is noticeable growth in this area of the trade fair market, with 26 specialized trade fairs already scheduled for 2011.



*bauma, Munich
(Messe Muenchen GmbH)*

Regardless of the slow improvement in exhibitor and visitor numbers, at many trade fairs there was a great deal of satisfaction expressed regarding customer contacts and business results. More than ever, and in particular from the visitor's point of view, the question of whether or not to take part is the one that needs to be asked. In 2010, trade fairs already reflected the early stages of economic recovery in numerous sectors and themselves gave a significant boost to companies concluding business at home and abroad.

The 157 international trade fairs which took place in 2010 were attended by 173,421 exhibitors, of whom 81,167 came from Germany and 92,254 from abroad. These companies rented stand space covering 6,832,836 m². 10,074,724 visitors attended these events. Furthermore, the 145 regional exhibitions for which AUMA keeps records reported a figure of 47,470 exhibitors who rented 1,339,499 m² of stand space. Visitor attendance here was 5,754,925. For the first time AUMA collected separate data on specialized national trade fairs. The figures for the 16 trade fairs belonging to this category were as follows: 2,100 exhibitors, 60,000 visitors and 30,000 m² of rented space. Overall, AUMA recorded 318 events attended by 226,000 exhibitors, with 16.3 million visitors and 8.3 million m² of rented space.



Following a sharp downturn in 2009, German trade fair organisers' turnover rose significantly again. Preliminary results indicate that a figure of EUR 2.9 billion, equivalent to the mark reached in 2008, will be achieved in 2010. This was due mainly to a busy trade fair schedule in 2010, a resurgence in business abroad, and an increase in additional services offered.

Turnover returns to pre-crisis levels

Forecast for 2010 ■ During the first quarter of 2011 the figures for exhibitor and visitor attendance at international trade fairs showed a marked improvement, with the volume of rented space now also appearing to be stable. Clearly, exhibitors have adjusted their trade fair plans to accommodate the widespread increase in orders. Accordingly, AUMA expects the industry's key figures to reflect relatively strong growth throughout, with increases in exhibitor and visitor attendance in the order of 2 to 4 %. The amount of exhibition space rented out is expected to remain stable.

Overall figures for 2011 will be lower than the results for the previous year, as less trade fairs are scheduled to take place. AUMA expects around 158,000 exhibitors and 9.2 million visitors to attend the 137 events taking place this year, and rented stand space to reach 5.8 million m².

AUMA_MesseTrend 2011

According to AUMA_MesseTrend 2011, a representative survey by TNS Emnid which polled 500 companies who exhibit at trade fairs whose main audiences are trade visitors, in 2011/2012 27 % of German exhibitors intend to increase their trade fair spending, while only 16% have planned cuts.

AUMA_MesseTrend 2011 also shows that budget increases are mostly confined to larger companies. A third of companies with a turnover in excess of EUR 50 million intend to spend more on trade fairs, whereas only a quarter of smaller companies plan to do so. Furthermore, significantly more companies exhibiting capital goods (32 %) intend to increase their trade fair budget than exhibitors of consumer goods



*CPD, Duesseldorf
(IGEDO – Company)*

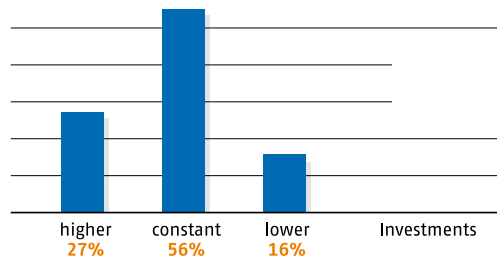
(23 %). At the same time, 17 % of smaller companies plan to reduce their trade fair budget by one-tenth. And they want to be in control of costs when sales recover after the lean period during the last recession.

Of the exhibitors aiming to increase their trade fair budget almost 50 % plan larger stands, 42 % want to invest more in stand construction, and 26 % intend to take part in extra trade fairs. Additional spending benefits core trade fair business, that is to say trade fair organisers and the trade fair construction sector. Relatively few exhibitors plan to spend more on hotel and transport expenses.

AUMA_MesseTrend 2011

Investments in participations

Compared to 2009/2010, ...% of German exhibition companies* are planning worldwide in the period 2010/2011:



Trade fair budget per company: 2011 + 2012: 346,400,- €

* representative survey conducted by TNS Emnid commissioned by AUMA among 500 companies, which exhibit at trade visitor-oriented fairs; October 2010; to 100 remaining percent: n.a.

Nearly two-thirds of those exhibitors who are planning to reduce their trade fair budget want to cancel their participation in individual trade fairs. Furthermore, companies who exhibit at numerous trade fairs intend to cut back on stand space. By contrast, they rarely see any need to reduce the quality of construction and staff on the stands.

Over the next two years 18 % of German exhibitors want to take part in more domestic trade fairs, and the same proportion in less. While this does not signal a boost in growth, the decline in participation levels among German exhibitors during the recession was relatively minor. It is becoming clear that exhibitors of consumer goods are pursuing a very consistent participation strategy. About three-quarters want to take part in the same number of trade fairs. The figure for trade fairs abroad is even at 83 %. This is probably due to innovation cycles and intervals between trade fairs being relatively short. Of those companies who exhibit capital goods only 60 % intend to take part in the same number of domestic trade fairs, while 70 % plan to maintain their participation levels abroad. Clearly exhibitors are more likely to try out new trade fairs at home. The risks are more manageable. As regards participation abroad, companies tend to focus on tried and tested events.



In all, three-quarters of German exhibitors intend to maintain the same level of participation in trade fairs abroad. 12 % aim to take part in more trade fairs, and the same percentage in less. Only a year ago the vast majority had planned to cut back their involvement abroad.

Among the various communication tools the role occupied by trade fairs remains constant, and the trend is positive. 84 % of exhibitors declared trade fairs to be an important or very important tool. Last year this figure was 83 %, two years ago it was 81 %. Clearly, neither the recession nor other communication tools have detracted from the significance of trade fairs. In terms of how communication tools are rated, only internet presence (89 %, and in principle a necessity) ranks ahead of trade fairs. This is followed by sales force, which 79 % of exhibitors consider to be important or very important, and direct mailshots at 54 %.



In the medium term trade fairs are clearly an accepted communication tool. More than two-thirds of exhibitors see trade fairs being just as important in five years time, 13 % more so and 15 % to a lesser extent. However, views vary significantly according to sector. Exhibitors of capital goods are optimistic about the overall importance of trade fairs. But only 15 % of companies who exhibit consumer goods think their importance will increase, and 25 % think it will decrease. One of the main tasks facing trade fair organisers is to work out new concepts with their customers and to commit exhibitors to making greater use of trade fairs as a communication tool.

*PSI, Duesseldorf
(Reed Exhibitions Germany)*

For more information:

AUMA_MesseTrend 2011 is available for download
► www.auma.de / English / Downloads & Publications

Foreign exhibitors: Italy now ranks only just ahead of China

Following the end of the global economic crisis participation by foreign exhibitors in German trade fairs rose again throughout. Numbers from Asia in particular, which in 2009 had suffered an abrupt decline, were back to high levels.



*Light + Building, Frankfurt
(Messe Frankfurt GmbH)*

Compared with corresponding events in previous years, exhibitor numbers from Southern, Eastern and Central Asia rose by almost 10 %. At 17 %, China reported a double-digit increase, indicating that over the long term the 4 % drop in 2009 was a one-time event. Following a previously sharp decline, participation from Hong Kong rose again by 10 %. India, which in 2009 had not suffered any losses, reported a 12 % increase. Other countries from this region, such as Singapore (+21 %), reported improved figures, whereas exhibitor numbers from Japan, South Korea, Taiwan and Thailand stagnated.

Participation from countries in the Middle East remained high. In addition to the United Arab Emirates (+8 %), Lebanon (44 %) and Syria (91 %) also reported strong gains, although in absolute terms their numbers were low. Nevertheless, export activities are clearly being intensified here. Israel remained the region with the largest number of exhibitors (500).

Compared with corresponding events in previous years, on average participation from countries of the EU remained the same. Italy, the country with the largest number of exhibitors at German trade fairs from abroad, reported slight losses, but remained marginally ahead of China. Together they represented 23 % of foreign participation in trade fairs at German venues.



France, Austria and Belgium all reported slight increases, while the UK and the Netherlands registered a minor decline. The number of exhibitors from Spain fell significantly, by 7 %. Among medium-sized countries, the Czech Republic (+12 %), Portugal (+18 %) and Romania (+14 %) were the strongest performers. The Baltic states, Lithuania (+73 %), Estonia (+150 %) and Latvia (+44 %), reported above-average gains.

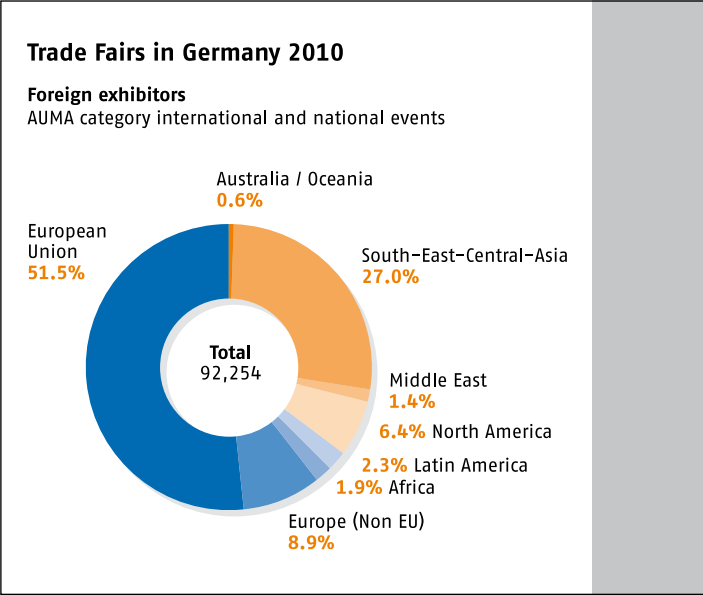
Among non-EU countries in Europe, most prominent were the growth rates for Croatia and Turkey, with figures of 20 % and 10 % respectively. Exhibitor numbers from Switzerland and Russia remained stable. For the first time, Turkish exhibitors took part in more than 100 German trade fairs.

Exhibitor numbers from North America remained stable. However, while Canada reported an 8 % rise, participation from the USA decreased. Compared with previous events, in 2010 numbers from South America's largest countries were higher throughout. Brazil reported a 10% increase in exhibitors, Argentina 30 % more and Mexico 40 % growth, while among the smaller countries there was a widespread drop in participation.

At 27 % overall, there was a significant rise in exhibitors from Australia and Oceania at German trade fairs, mainly because of Australia, which reported a 28 % increase and was represented at 72 trade fairs.

Participation from Africa rose by more than 10 %. There were 13 % more exhibitors from Egypt and 15 % more from South Africa. Each country was represented by more than 400 exhibitors and combined, they made up almost half of Africa as a whole. Otherwise, only Morocco and Tunisia reached figures of more than 100 exhibitors, with both countries reporting significant gains.

As in recent years, the country with the largest number of exhibitors at international trade fairs in Germany was Italy (10,902), closely followed by China (10,572). Next, a good distance behind, were France (5,462), the UK (5,255), the USA (5,084), and the Netherlands (5,001).



They were followed by Taiwan (3,989), Spain (3,888), Austria (3,738), Switzerland (3,475) and India (3,117). The country which took part in more trade fairs than any other was Switzerland, which was represented at 154 international trade fairs, ahead of the Netherlands and Austria (153 each), followed by Italy (150), France and the UK (149 each).

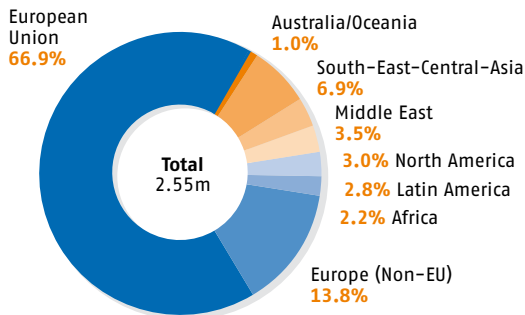
More than 2.5 million foreign visitors at German trade fairs in 2010

Around 2.55 million foreign visitors came to find out about products and services at German trade fairs in 2010, nearly as many as in 2008, when attendance reached a record 2.6 million.

Trade Fairs in Germany 2010

Foreign visitors

AUMA category international and national events



At 25.5 %, the ratio of international visitors to overall attendance was higher than ever before. These are the findings of a survey which was recently completed by the Association of the German Trade Fair Industry (AUMA). Despite the continuing strong growth of trade fairs in China, for example, the role of international trade fairs in Germany as globally important marketplaces has once again been confirmed. In particular, there was a sharp rise in visitors from non-European countries, who during the recession in 2009 came to Germany in lower numbers.

Overall, some 500,000 visitors were from overseas, representing nearly 20 % of the total of all visitors from abroad. Visitors from South-East-Central-Asia were particularly numerous (175,000). Furthermore, visitors from the Middle East numbered around 90,000, followed by 75,000 from North America, 70,000 from South America, 55,000 from Africa and 25,000 from Australia/Oceania. More and more visitors from South America regularly come to German trade fairs: Compared with 2006 there were 60 % more visitors in 2010.



2.15 million visitors came from Europe, of whom 1.7 million were from the EU and 350,000 from other European countries.

In 2010 the countries dominating the visitor statistics were the Netherlands (250,000), Austria (200,000) and Italy (180,000), followed by Switzerland (150,000), France (140,000), Belgium and the UK (120,000 each).

The non-European country with the highest number of visitors was the USA (60,000), followed by China (45,000) and India (40,000). It should be noted that large numbers of visitors from neighbouring countries were members of the general public, whereas audiences from abroad consisted almost entirely of trade visitors.



*anuga, Cologne
(Koelnmesse GmbH)*

Hall space capacities remain stable

At the beginning of 2011 there were 2,737,425 m² of hall space at German trade fair venues hosting fairs of at least national importance, 0.7 % less than on 1 January 2010.

This slight drop in figures was due to the demolition of individual halls which no longer meet contemporary requirements. In 2010 very little new hall space was added. A total of around EUR 60 million was invested in venues hosting international trade fairs, considerably less than in 2009, during which EUR 180 million was spent on expansion and modernization measures. Spending had already been in decline a year earlier, so that presumably the era of large investments has come to a halt. It appears that this will remain so over the next few years.

20,000 m² of hall space are to be added to venues hosting international trade fairs by 2013. A total of EUR 330 million is to be invested by 2016. Besides funding the construction of additional hall space, this money will be mainly spent on fully renovating congress venues, modernizing, renovating or converting existing halls, building new office buildings, creating parking areas, modernizing building services, and installing fire safety measures and visitor admission systems.

Regional events

In 2010, Germany's economic recovery clearly stimulated business at regional events more rapidly than at international trade fairs, and exhibitor numbers in this category rose sharply.

A total of 145 regional events took place in 2010 which, compared with corresponding events in previous years, reported 3.7 % more visitors. A year earlier, numbers had been down by 2.6 %. The main reason was probably that, with the economy showing signs of recovery, many companies made a snap decision to take part in more trade fairs, something they could relatively easily do at regional trade fairs where little advance notice is required.

At +0.2 %, as opposed to -4 % in 2009, there was a slight increase in the amount of exhibition space rented out. At -0.2 %, visitor attendance remained relatively stable (2009: -1.7 %). Altogether, 50,824 exhibitors took part in regional trade fairs, occupying stand space covering 1,432,699 m². Visitor attendance was 6,012,035. The statistics included trade fairs and exhibitions held in 2010 by organisers registered with AUMA and which were listed by AUMA as regional events.

*IFA, Berlin
(Messe Berlin GmbH)*

Looking at the various types of trade fair, the figures for the 74 consumer goods events for the general public achieved the best results. These trade fairs, whose focus is on hobbies, leisure activities, gardening and art, reported a 5.3 % increase in exhibitors and a 2.2 % rise in the amount of stand space rented out.





At 0.7 %, visitor attendance was only marginally below the figure for corresponding events in previous years. For the most part, the losses experienced in 2009 were offset.

Following a succession of rather weak performances in previous years, consumer exhibitions combining several sectors reported promising results. On average, the number of exhibitors at the 34 events which took place rose by 2.7 %, and visitor attendance grew by 0.6 %. However, the amount of space rented out fell by 2.2 %.

The 37 regional events for trade visitors were slow to recover from the heavy losses they had experienced in 2009. In 2010, exhibitor numbers rose by 1.5 %, but the amount of stand space rented out fell yet again, by 2.8 %, as did visitor attendance, by 1.7 %.

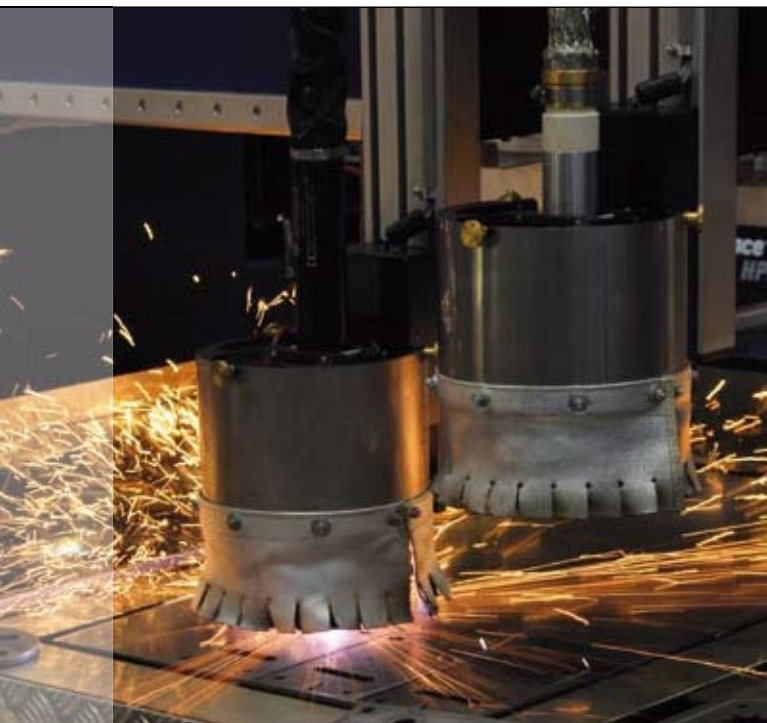


*JAGD & HUND
(Messe Westfalenhallen
Dortmund GmbH)*

Voluntary auditing of trade fair statistics

As of 2011, auditing undertaken by the Society for Voluntary Control of Fair and Exhibition Statistics constitutes certification, thereby underlining the role of FKM as a voluntary, customer-oriented auditing organization.

FKM has put together a communications concept which will most probably be implemented in autumn 2011, initially mainly within media published by FKM members. At the same time, since early 2011, organisers have been able to apply the simplified set of rules agreed upon in late 2009, which starting in 2012 will be mandatory for all members. Furthermore, in late 2010, FKM agreed to revise visitor breakdown questionnaires. Thus in future the origins of visitors from Germany will also be listed according to “Nielsen” regions.



*EuroBLECH, Hanover
(Mack Brooks Exhibitions Ltd.)*

In 2010, German organisers had auditing carried out on the exhibitor, space and visitor statistics of 230 domestic trade fairs and exhibitions. A total of 64 German trade fair organisers are now members of FKM. Three new members were added in 2010, five trade fair companies are no longer members. There was a decline in the number of foreign trade fairs audited by FKM, due to the situation in Russia's trade fair industry and the departure of a guest member, MVK Moscow. The two guest members from abroad, the Verona Trade Fair Company and the Hong Kong Trade Development Council, as well as two German organisers, had 18 trade fairs abroad audited.

Essentially, every FKM audit takes basic data on exhibitors, exhibitors' stand space and visitor attendance into account, in each case differentiating data according to domestic and foreign origin. For exhibitors taking part in trade fairs FKM's visitor breakdown statistics are even more important than the basic data, as they make it possible to pinpoint the groups they can specifically target at these events. Standard analyses for trade visitors and the general public are

available at around three-quarters of the events audited. These provide information on visitors' origins, branches of industry, decision-making authority and the duration of visitors' attendance. For businesses exhibiting at trade fairs these analyses are an important instrument for planning their participation, and a means of monitoring success. Visitor breakdown statistics also provide criteria for selecting trade fairs over other marketing instruments.

Transparency of international trade fairs ■ In collaboration with other European auditing companies FKM has published a brochure entitled Euro Fair Statistics, which contains the audited statistics of more than 2,000 events held in 2009. 20 countries took part. Since 2009 this brochure has been compiled by the Global Association of the Exhibition Industry (UFI). It was previously compiled by FKM.

For more information ► www.fkm.de



Congress business among AUMA members recovers

In 2010, following poor performances due to the economic crisis in 2009, business in supporting events at trade fair venues improved again.

There were a little over 6,000 B2B events accompanying trade fairs, about 2.5 % more than in 2009, however their number was still 12.5 % less than in 2008. Delegate attendance at these events rose even more sharply. At 700,000, the figure was around 19 % higher than the previous year. In general, there is a strong link between trade fairs and congresses. The number of independent B2B events rose by 15 %. However, visitor attendance fell by 13 %, to 1.43 million.

In 2011 the congress divisions at trade fair venues expect business in B2B events to mainly remain either steady or to marginally increase. No-one expects a significant decline in B2B business in 2011.

However, to a large extent congress hall space at trade fair venues is also used for other purposes, such as cultural, society, political and sporting events. In 2010 they numbered around 2,100, an increase of 27 %. By contrast, visitor numbers fell to around 5 million, more than 15 % below the figure for the previous year, due to individual large-scale events in 2009.





*K, Duesseldorf
(Messe Duesseldorf GmbH)*

Most congress companies at the trade fair venues do not confine their business operations to renting out space. Almost all of them also organize special events, provide technical services and catering, and offer a registration service for delegates.

Around three-quarters of the companies operating congress centres at trade venues assist with hotel arrangements. Demand for this service remains stable. The organisers of congresses and other events clearly put less emphasis on contracting work to their own service providers, relying increasingly instead on services provided by the venue operators.



Lobbying and legal aspects





Lobbying and legal aspects

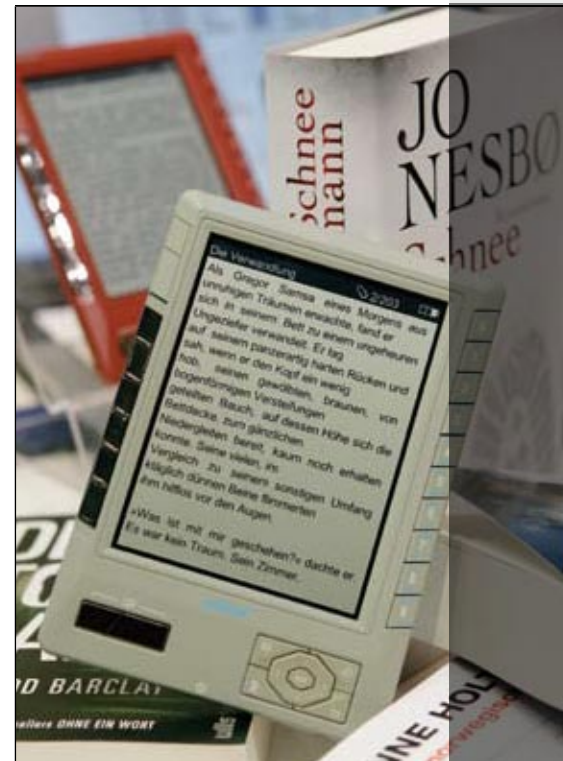
Shift in the tax liability regarding VAT

The regulations governing the introduction of a single VAT system in the European Union, as set out by the so-called VAT Directive, are the reason for the latest changes to German VAT law.

The aim is to guarantee that the manufacture and sale of items, and the provision of services purchased and sold for consumption in the European Union, will be subject to standardized taxation, regardless of how many sales steps are involved.

This change also affects the trade fair industry, domestic trade fairs as well as trade fairs abroad. Contrary to previous practice, whether or not services are provided to a company or to a non-corporate entity is now decisive in determining the place of taxation for services within the trade fair industry. The situation is made worse by certain services provided by trade fairs still being subject to various exceptions, so that in the end the burden of taxation may remain the responsibility of the provider of said services.

As a result, AUMA contacted the Federal Ministry of Finances at an early date and in particular pointed out the problems arising from non-uniform and divergent methods of taxation on services in the trade fair industry. AUMA initiated a discussion among its members which resulted in them adopting a firm common position. This made it possible to argue and represent the interests of the trade fair industry even more convincingly.



Frankfurt Book Fair



*Hannover Messe
(Deutsche Messe AG)*

As regards the foreign trade fair participation programme of Germany, AUMA was also able to draw the attention of the relevant authorities in various ministries to the question of how programme budget are affected by taxation. It was concluded that the VAT amendments would have no impact on the programme.

Consequently, AUMA was able to set out the conditions for a uniform application of tax law regarding trade fair services. As a result, it will be possible to incorporate providing stand space and certain extra services into a single services package.

Sustainability in the trade fair industry

The topic of sustainability, along with the three interrelated aspects of economic, ecological and social responsibility, continues to be a dominant factor in business.

Sustainability requires a joint effort by all those involved

The ongoing debate on how to define sustainability and who should be responsible also tends to involve discussing trade fairs in their role as regularly occurring large-scale events. In the case of trade fairs however, their frequently high levels of international attendance must be taken into account, so that where sustainability is concerned it is not possible to look at them merely from a local perspective. Furthermore, a large number of participants shape the trade fair market who have numerous tasks and responsibilities. Where sustainability is concerned, the focus should not be merely on the organisers or operators of exhibition halls. The success of an event also depends on the performance of service providers.



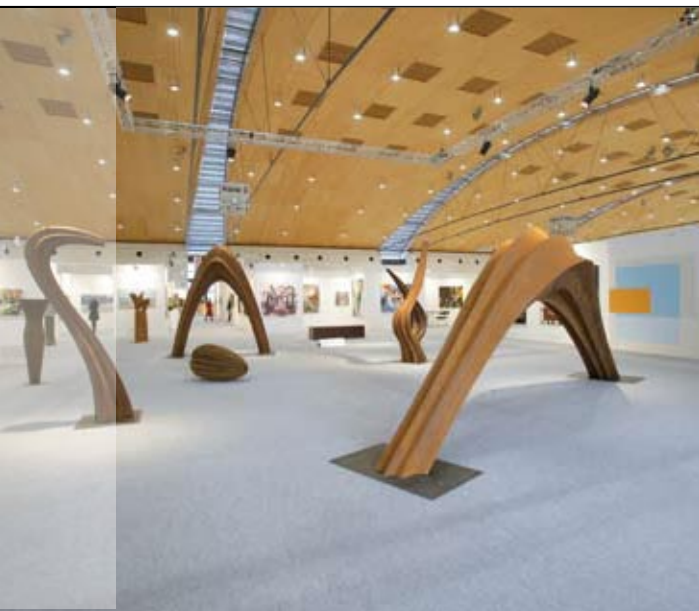
It is not least the exhibitor who attracts visitors, and without whose presence at a trade fair holding such an event would be impossible. Thus, the issue of sustainability can only be solved by a joint effort, and by taking an overall look at the responsibilities of all those involved in trade fairs.

The aim at trade fairs is also to establish business contacts in the most efficient way possible. At a trade fair attended by 100,000 visitors and 1,000 exhibitors one to two million meetings take place at the exhibition grounds during a few days. Thus trade fairs not only help companies to gain a foothold in markets and to establish themselves there, and as such are economically efficient. They are also ecologically efficient because they avoid the need for a vast number of individual business trips. Thus the overall cost of a trade fair is always in relation to what it avoids, which is an ecologically positive approach. Regardless of this fact, everyone can contribute. Exhibitors with their preparations and meetings can ensure maximum personal efficiency and sustainability on their part, as well as maximum personal efficiency and sustainability on the part of the entire trade fair. Service providers are offering more and more sustainable services, and step by step, exhibition grounds are installing ecologically compatible equipment.



Within the trade fair industry, sustainability must be seen as a joint effort and not as the selling point of individual participants. Where German trade fair venues are concerned, the aim must be to gradually include the issue of sustainability in a discussion on international business overall and to carefully change the overall conditions.

*SMT, Nuremberg (MESAGO
Messe Frankfurt GmbH)*



*art KARLSRUHE (Karlsruher
Messe- und Kongress-GmbH)*

These were the results of a sustainability workshop held by AUMA in the summer of 2010. A group of experts discussed the opportunities and risks for the trade fair industry. As in other sectors, within the trade fair industry sustainability must be understood as a process that allows all those involved to develop along with it. AUMA will assist its members in this process, and together with other associations such as German Convention Bureau (GCB), European Association of Event Centers (EVVC) and FAMAB – Association Direct Business Communication will help to formulate corresponding standards and industry conventions for the trade fair, congress and events industry. At the same time, AUMA is constantly monitoring national standardization efforts by DIN and those of ISO and UFI at international level. Thus AUMA was also present at a meeting of the Sustainable Development Committee of the Global Association of the Exhibition Industry (UFI) in Amsterdam.

Visas for trade fair participants

For Germany as a venue for international trade fairs it is essential that exhibitors and visitors from abroad are provided with visas by German embassies and consulates in a quick, efficient and friendly manner. In order to ensure this, and in order to underline the importance of German trade fairs for German business abroad, AUMA maintains close relations with the Foreign Ministry.

Thus, at the meeting of the AUMA Working Group on Legal Aspects and Administrative Matters two representatives of the Foreign Ministry were present as speakers. They commented in general on the visa issuing procedure of the Federal Republic of Germany's representatives abroad. Every year, German embassies and consulates issue some two million visas, 40 % of which are for business travel. 10 % of applications, mostly requests for family members to follow and not for business travel, are refused.



A visa for business travel is issued as a Schengen visa. Depending on the specific purpose of their visit, foreigners may travel within the Schengen group of countries for up to 90 days for a period of six months. When processing an application, the representation abroad checks the purpose of an applicant's visit, whether he can finance his trip, whether he has foreign health insurance, and whether he intends to return.

Applicants may not always need to appear in person

As a rule, applicants are required to appear in person at the representation abroad. In rare cases exceptions are made, for example if an applicant is reliably known to travel abroad often. However, since the introduction of new EU visa regulations in April 2010 future processing may be fast-tracked. Thus, the biometric fingerprints of applicants are to be stored with the visa office for a period of five years, during which time they will most probably no longer need to appear in person. One effect of the new visa regulations is that within the Schengen group of countries notification of a visa refusal will be standardized, with reasons given, and will be accompanied by information on an applicant's right to appeal.

In general, applications for visas take only a few days to process. For some nationals processing takes at least ten days, because it involves consulting various security agencies on a one-by-one basis. However, the Foreign Ministry and the Ministry of the Interior, the main authority responsible in legal matters regarding foreigners, aim to reduce the time this process takes.



*Stone+tec, Nuremberg
(NuernbergMesse GmbH)*

In order to further improve cooperation with the Foreign Ministry, AUMA carried out an extensive survey on the subject of visa issuing practices among trade fair companies' representations abroad. The findings were discussed at a meeting between AUMA and representatives of the Foreign Ministry, trade fair companies and DIHK. By implementing best practices in particular, the aim is to further streamline processing.

Unofficial exhibitor directories

As in recent years, exhibitors have been receiving mail from Expo Guide. Exhibitors are still being asked to check their company data for inclusion in the Expo Guide, and to fill in or amend details using an enclosed order form.

However, this is an internet-based directory service which charges fees and which is not associated with the relevant trade fair organisers in any way. The small print in the application form states that a directory entry over a period of three years costs an annual fee of EUR 1,181.

Numerous exhibitors concerned continue to contact AUMA for advice on what steps to take. An information sheet is available for download on the AUMA website which advises exhibitors on what steps to take. Among several items, this sheet contains a form letter which, as a precautionary measure, exhibitors concerned can use to withdraw and to call into question any mistakenly given declaration to have their names listed. AUMA's advice not to pay any invoices received from such companies has proved correct.



*Farbe, Munich (GHM Gesellschaft
für Handwerksmessen mbH)*



Round Table in Brussels

In February 2011 the eleventh AUMA Round Table took place at the DIHK in Brussels, attended by the representatives of German trade fairs responsible in EU matters. Items included the European External Action Service, the role of the European Parliament, EU funding programmes for trade fairs and questions concerning visas.

Dr. Gerhard Sabathil, the director of Strategy, Coordination and Analysis at the European Commission's Directorate General for Foreign Relations, spoke about the launch of the European External Action Service (EEAS). Set up in December 2010, the EEAS numbers some 1,600 diplomats and 2,000 other employees who work at a total of 140 EU representations around the world.

Elfriede Bierbrauer of the Policy Department of the European Parliament highlighted the growing influence of the European Parliament on European policies, including on trade policies. Thus the parliament has commissioned an external study on the Anti-Counterfeiting Trade Agreement (ACTA) which is due for release soon. Niels Schuster of EuropeAid spoke about the structure of EU development policy.

Dirk Vantyghem of Eurochambres spoke to the audience about EU funding programmes for trade fairs. Eurochambres manages the majority of these, such as East Invest, which arranges trade fair visits and B2B meetings at trade fairs. As with other programmes, AUMA will use its influence to ensure that the trade fairs selectors obtain data from the AUMA database. Dirk Vantyghem expects that when the current funding period expires in 2013 new funding programmes will turn their attention more in the direction of European enterprises. Current support focuses on companies from non-EU countries. However, he pointed out that in accordance with the EU treaty promoting trade is not the responsibility of the EU.



*fish international, Bremen
(Messe Bremen)*



AUMA talked about its survey which examines the difficulties concerning the issuing of visas for visits to trade fairs in Germany. Members of German trade fair companies' representations abroad informed AUMA of the difficulties most frequently encountered in connection with the issuing of visas to representatives of companies visiting and exhibiting at trade fairs. These findings were discussed at a workshop in April 2011 at which members of the Foreign Ministry will also be present.

*AMI, Leipzig
(Leipziger Messe GmbH)*

The background of the slide features a repeating pattern of 3D cubes, creating a perspective effect. The cubes are arranged in a grid that recedes into the distance. A solid blue rectangle is positioned on the right side of the slide, containing the text.

Institute of the
German Trade
Fair Industry





Institute of the German Trade Fair Industry

Vocational training and advanced training

AUMA gives its full support to the vocational training and advanced training courses of public and private-owned providers. Supporting conferences for career starters in the event industry has also become a key issue. Furthermore, AUMA has launched a pilot project, which is a trade fair training course for new enterprises.

Training courses for vocational teachers at AUMA ■ In October 2010 40 teachers from all parts of Germany attended a two-day course in Berlin. Key topics included various types of contracts for events and different congresses, the factors determining the success of a congress, carbon-neutral participation in trade fairs, and developing an event concept. A panel discussion which included members of FAMAB took a critical look at education, and found that the contents of the curriculum needed to be more practically oriented, a move that can only take place under the aegis of the Federal Institute for Vocational Training and together with representatives of management and labour and experts with practical experience.



*agritechnica, Hanover
(DLG – German Agricultural
Society)*



EMO, Hanover
(VDW – German Machine Tool
Builders' Association)

University courses teaching trade fair related subjects ■

According to research carried out by AUMA, 45 universities and technical colleges in Germany offer in-depth courses dealing with trade fair related subjects. The courses and contact details of the relevant universities are listed on the AUMA website, where professors and lecturers can also find surveys, statistics and presentation material for direct use at teaching events. In the near future, one of the key aims of the institute at AUMA will be to ensure that trade fair topics become an integral part of general business courses.

AUMA university network ■

One of the principal aims of the Institute of the German Trade Fair Industry at AUMA is that of getting the subject of trade fairs onto school and university curricula and to establish even closer ties with universities. For this reason, in 2010 the institute once again organized numerous teaching events at universities and universities of applied sciences, and members of AUMA held lectures and seminars at more than 20 universities.

Groups of visitors from universities who came to visit AUMA were also offered guided tours of the German Trade Fair Library, which with its wide range of literature on trade fairs is an indispensable source of information, in particular to students. In addition to lectures, AUMA regularly compiles documentation and teaching material for universities which is used for seminars.



University projects on trade fairs in Wismar and Istanbul ■ Two trade fair projects co-organized by AUMA have now firmly established themselves at universities. During the winter term of 2010/2011, for the third time, a practical project conducted at the University of Wismar was successfully concluded with a presentation at the Ministry of Economics in Mecklenburg-West Pomerania.

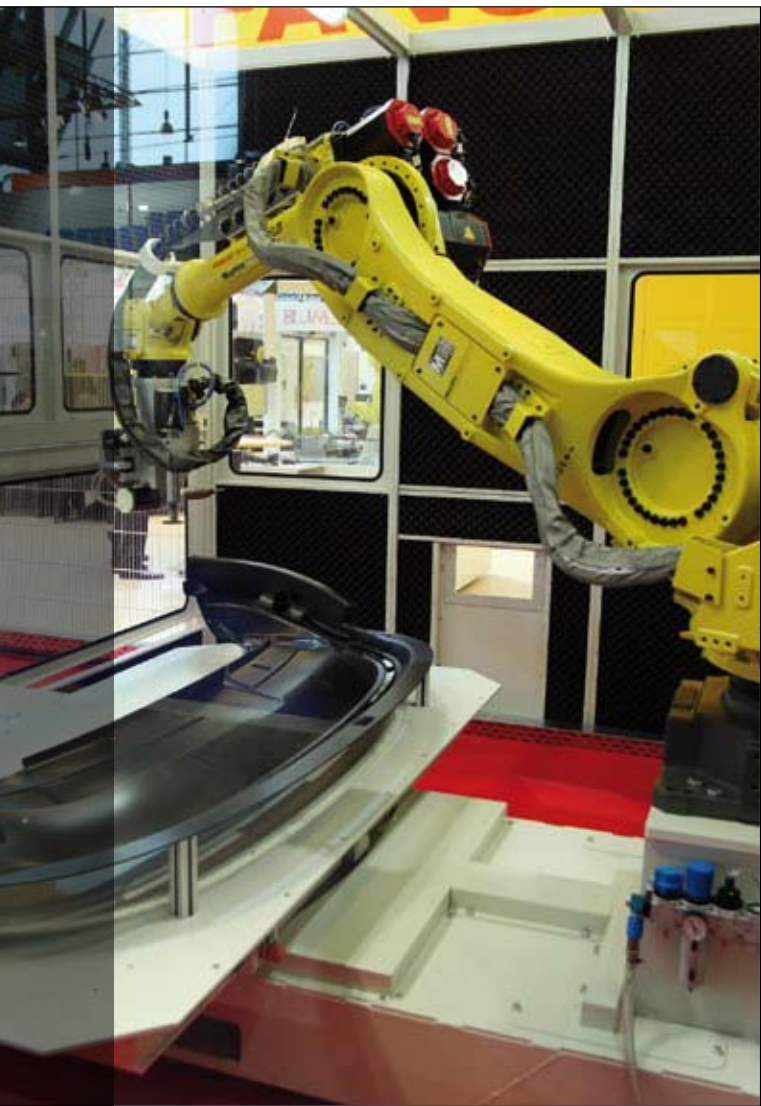
Students advise companies on planning for trade fairs

Over a period of one term, under the supervision of Prof. Dr. Christian Feuerhake, some 40 students attending seminars at the Faculties of Business Sciences and Design were taught specifically about trade fairs. Armed with this knowledge, they visited eight medium-sized companies in order to analyse their approach towards trade fairs and to develop innovative concepts for their future participation as exhibitors. The companies had little or no experience as exhibitors at trade fairs.

The success of the project resulted in it also being taken over by the University of Marmara in Istanbul. Turkish students developed concepts for six export-oriented companies which they can use to present their products and services at trade fairs in Germany. This is the second project since the start in 2011. Other universities in Austria and France aim to organize similar projects.



I.L.M. (Messe Offenbach GmbH)



*AMB, Stuttgart
(Landesmesse Stuttgart)*

Conferences for career starters in the events industry ■

For several years numerous events varying in size and focus have been taking place, where career starters in the event industry can exercise their skills at practical organization, planning, and at holding and following up events.

AUMA regularly sponsors, actively participates in, and acts as patron of four of these events by holding lectures, workshops and panel discussions. The conferences target trainees and students as well as agencies, service providers and teachers from the event industry.

Seminar Alliance of German Trade Fairs within AUMA

Founded in 2008, the Seminar Alliance of German Trade Fairs within AUMA now numbers 14 trade fair companies. They are Messe Berlin, Messe Düsseldorf, Messe Essen, Messe Frankfurt, Hamburg Messe und Congress, Karlsruhe Messen und Kongresse, Koelnmesse, Leipziger Messe, Messe München, NürnbergMesse, Reed Exhibitions Deutschland, Landesmesse Stuttgart, MCH Basel, and Reed Exhibitions Messe Wien.

AUMA has supported this alliance from the start, the industry publishers m + a Verlag and FAMAB are associated partners. Messe Frankfurt coordinates the planning and organization of the seminars.



The aim of the Seminar Alliance is to provide companies with up-to-date expert knowledge in order to assist them with every aspect of their trade fair participation and to supply them with new ideas to ensure a successful fair. The Seminar Alliance holds courses on trade fair related topics for persons from the exhibiting industry in all parts of Germany. The courses are always the same, regardless of where they are held. Exhibitors attend courses at the trade fair venue closest to where they live.

The programme of training courses has now been expanded, and currently includes six types of seminars held on 60 different dates. The topics are on professionally organizing trade fairs, monitoring the success of trade fairs, crash courses in stand construction and design, trade fairs as a sales and marketing instrument, press and media work at trade fairs and professional trade fair communications.

More information is available:

► www.seminarallianz.de



*OutDoor, Friedrichshafen
(Messe Friedrichshafen GmbH)*

Research

In 2011, in addition to publishing AUMA_MesseTrend, AUMA will conduct two other research projects on the future of the trade fair industry.



*IPM, Essen
(Messe Essen GmbH)*

The first project examines the future of trade fairs against the backdrop of a changing overall situation. The aim is to develop scenarios that will provide everyone in the trade fair industry with helpful suggestions on how to plan for the future. The second project will examine how B2C exhibitions must adapt in order to be successful in the future, and will include specialized exhibitions for the public as well as general events. AUMA is conducting this work in collaboration with the organisers' associations FAMA and IDFA. Both surveys will be carried out by the Department of Marketing Management of the Leipzig Graduate School of Management under the supervision of Prof. Dr. Manfred Kirchgeorg.

The annual exhibitor survey entitled "AUMA_MesseTrend" took place in autumn 2010 and was carried out for the twelfth time. As in previous years, TNS Emnid undertook a representative survey of 500 companies and questioned them on their plans for participation in trade fairs over the next two years (details ► p. 18).



German Trade Fair Library

As a public institution, the German Trade Fair Library in Berlin offers services to everyone looking for information on trade fair related topics. Students, teaching staff and those directly involved with trade fairs receive help in their search for relevant publications and for answers to questions on the subject of trade fairs. In close proximity to the specialist departments of AUMA and with staff to assist on hand, it offers visitors an opportunity to supplement their knowledge and to directly exchange information.

The German Trade Fair Library now has more than 7,300 titles in stock. In 2010, its principal users were students, undergraduates, researchers undertaking PhDs, and lecturers whose focus was on trade fairs and congresses. Consultants, journalists and employees with event organisers and trade fair service providers also visited the library and made research inquiries. In 2010 there were approximately 330 visitors to the library and around 600 research requests, which compared with 2009 represented a further increase in the library's use.

A constantly expanding collection of publications

The items stocked in the German Trade Fair Library comprise a constantly expanding collection of the latest trade fair literature as well as books, surveys and presentations, as well as rare or out-of-print publications, including several ones from bygone trade fair days. Frequent use is made of the newspaper archive, with a subject index for articles, and of the collection of scientific works. The library also has a selection of general literature on marketing, advertising, sales and foreign trade.

Users have access to all current and past publications by AUMA and FKM. These include surveys, documentations and statements as well as data from earlier years. The library also has a large collection of trade fair catalogues. It has three copying machines and three internet workplaces which visitors may use free of charge.





Due to the fact that the library offers personal services aimed at ensuring that visitors can make use of all publications at the library, borrowing options are extremely limited. However, it is possible to satisfy many external requests through the use of an external copying service, for which a charge is made.

Visitors may research information in the library catalogue over the internet, making it easy to peruse the titles in stock. Users can save time by preparing their visit online, enabling them to gain an overview of literature on their subject. It is also possible to search for titles in English, using English keywords, providing that users access the catalogue via the English-language pages of the AUMA website.

For more information:

► www.auma.de / English / Trade Fair Library



Trade fairs
abroad





Trade fairs abroad

The competitive situation around the world

In 2010 the global economy recovered from the shock of the 2008/2009 financial and economic crisis quicker than expected, with threshold countries experiencing a return to growth more rapidly than industrialized nations. However, the outlook for the global economy is not altogether positive. The possible risks range from the financial problems of individual states to political change, and to some extent military conflict in some of the Arab countries.

Additionally, the very high growth rates of some economies, such as those of China, India and Brazil, do not represent an altogether positive development. An overheating of the economy often leads to high inflation. Nevertheless, despite economic storm clouds appearing on the horizon, the IMF predicts sustained growth in 2011, observing that global economic growth in 2010 also boosted trade. Following the worst slump in Germany's foreign trade since the war, a 14.3 % decline in 2009, exports recovered by achieving 14.2 % growth in record time, higher than the global average of +12 %.

During the economic crisis German trade fair organisers continued to focus on expansion abroad, as in the medium term higher growth rates can be expected there than in Germany. In 2010 they held 226 events abroad, almost 9 % more than in 2009. In 2011 the trade fairs held by German organisers abroad are set to expand again.



*Germany's strongest competitor
for hosting trade fairs
is the USA*

For this reason AUMA closely monitors the trade fairs abroad held by other organisers which compete with international events in Germany. AUMA carried out a survey among all the organisers of international trade fairs in Germany requesting information on their nearest competitors abroad. Worldwide more than 370 events competing closely with German trade fairs were identified, 130 of which German organisers had not previously focused on five years ago.



*Moscone Center,
San Francisco*

In developed markets, the trade fairs which German organisers regard as relatively strong competitors are held in the USA (76 trade fairs), Italy (62) and France (60). After the UK (28 trade fairs), China (25) ranks fifth among major competing nations, ahead of Spain (21). They are followed by Switzerland and the Netherlands which hold 13 trade fairs each. Approximately two-thirds of competing trade fairs are held in Europe, the majority in countries of the EU. One in five competing trade fairs take place in the USA, one in seven in Asia.

The trade fairs abroad which German organisers frequently name as competitors are events for the food industry, for IT, communication technology, the automotive industry, the building engineering and building machinery industry, sports articles, and for the energy industry.

Despite serious international competition international trade fairs in Germany continue to be in the lead. An average trade fair abroad competing with an average international trade fair in Germany reported 71 % of the stand space, 81 % of exhibitors, and 80 % of the visitor attendance of its corresponding German counterpart. Accordingly, the average statistics for a hypothetical trade fair abroad competing with a German trade fair are as follows: stand space totalling 34,000 m², 870 exhibitors and 51,300 visitors. In this context it should be noted that in Germany 150 international trade fairs take place every year, whereas the above-mentioned competitors abroad represent a relatively small group of leading events in their respective countries.



Supporting German exhibitors abroad

In the aftermath of the economic crisis the foreign trade fair programme of the Federal Ministry of Economics played an important part in revitalizing German exports. Once again, assisting individual companies in their effort to take on difficult markets proved very worthwhile.

Summary of the 2010 foreign trade fair programme ■ In 2010, the trade fair programme supported exhibitors from 54 sectors. At 215 participations, the foreign trade fair programme recorded its lowest figures since 2003 (177). In 2010, the number of representations fell by 16, 6.9 % less than in 2009.

In 2009, at an average German Pavilion hosting company representations, exhibitors numbered around 28 and the amount of rented space was 468 m². Last year, the figures were 29 and 538 m² respectively. Thus on average stand sizes rose by one square metre, from 17 m² to 18 m².

Most German Pavilions (92) were organized in Southern, Eastern and Central Asia which, compared with 2009, were the only regions to report growth. The rankings remained the same, and in order of representations were as follows: 55 German pavilions in non-EU countries Europe (minus 10), 23 in the Middle East (minus 6), and 19 in North America (minus 1). As in 2009, pavilions were organized in 38 countries, 20 of which hosted only one representation.

The programme's main focus was on China, where participation figures reached 51 (including 6 from Hong Kong), Russia (43), as well as on the United Arab Emirates (UAE) and the USA, where there were 19 joint stands each. At 14 representations, German companies' interest in the Indian market remained consistently high.



German Pavilions online ■ The internet portal www.german-pavilion.com, which links to the individual pages of joint participations, makes it even easier to get in touch with companies involved with the German Pavilion. In 2010, this feature of the foreign trade fair programme offered access to close to 180 participations. Companies exhibiting at trade fairs made use of this feature even more so than in previous years. Around 19 % of visitors to the portal were from Germany. In recent years, the percentage of visitors from outside Germany has risen substantially, with the largest share coming from China (11 %). Close to 7 % of visitors live in Russia and 6 % in the USA. 6 % of visitors to the portal are from India.



Foreign trade fair programme for food and agriculture ■ The Federal Ministry for Consumer Protection, Food and Agriculture (BMELV) supports German companies exhibiting farming products. In 2010 the ministry took part in 32 trade fairs.

2011 foreign trade fair programme ■ In 2011 the foreign trade fair programme of the Federal Ministry of Economics and Technology planned representations at more than 250 trade fairs, for which funds amounting to EUR 42.5 million were made available. Once again, China (including 7 representations in Hong Kong) is the principal target of German Pavilions (50). Russia ranks next, with 48 joint participations.

The programme scheduled 21 representations for the United Arab Emirates and the USA respectively. 18 representations were due to be organized in India, underlining the importance of the Indian market in that region of the world. In 2011, 37 trade fairs were included in the programme for the first time.



Trade fairs abroad held by German organisers

In 2010, trade fairs held by German organisers abroad recovered from the economic crisis. There were 226 trade fairs, a record figure, whose concepts mirrored the standards of leading international events in Germany. In 2009, 211 trade fairs had previously taken place.

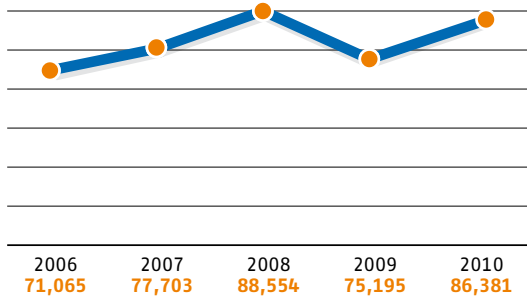
At these events, held under the slogan of “German Trade Fair Quality Abroad” (GTQ), the organisers rented out more than 2 million m² (2009: 1.7 million m²), which came close to the record set in 2008 (2.1 million m²). Exhibitor numbers were almost back to pre-crisis levels. In 2010 around 86,000 companies exhibited their products and services, as compared with 75,200 in 2009. Once again, visitor attendance exceeded the 5 million mark (5.3 million). Several well-attended consumer trade fairs were missing from the 2010 calendar, so that visitor attendance was unable to quite match the previous year’s figures (5.5 million).

Last year, without exception, the trade fairs with the highest number of exhibitors took place in China, with Auto-mechanika Shanghai heading the list (3,115 exhibitors). More than 2,000 exhibitors attended Intertextile Shanghai Apparel Fabrics (2,471), China International Hardware Show powered by PRACTICAL WORLD (2,300), CHINA-PLAS (2,169) and Auto China (2,100). The fairs with the highest visitor numbers were two motor shows: Auto China in Shanghai (785,000) and the Chengdu Motor Show (456,000). The Abu Dhabi International Book Fair (236,000), Bauma China in Shanghai (155,000), and CeBIT Bilisim Eurasia in Istanbul (131,000) also attracted keen visitor interest.

Last year, the China market increased its lead even further. German trade fair companies rented out close to 1.3 million m² of stand space. More than 42,000 exhibitors and 2.8 million visitors attended 74 trade fairs, making 2010 the most successful year for trade fair business in China to date.

Trade Fairs Abroad by German Organisers*

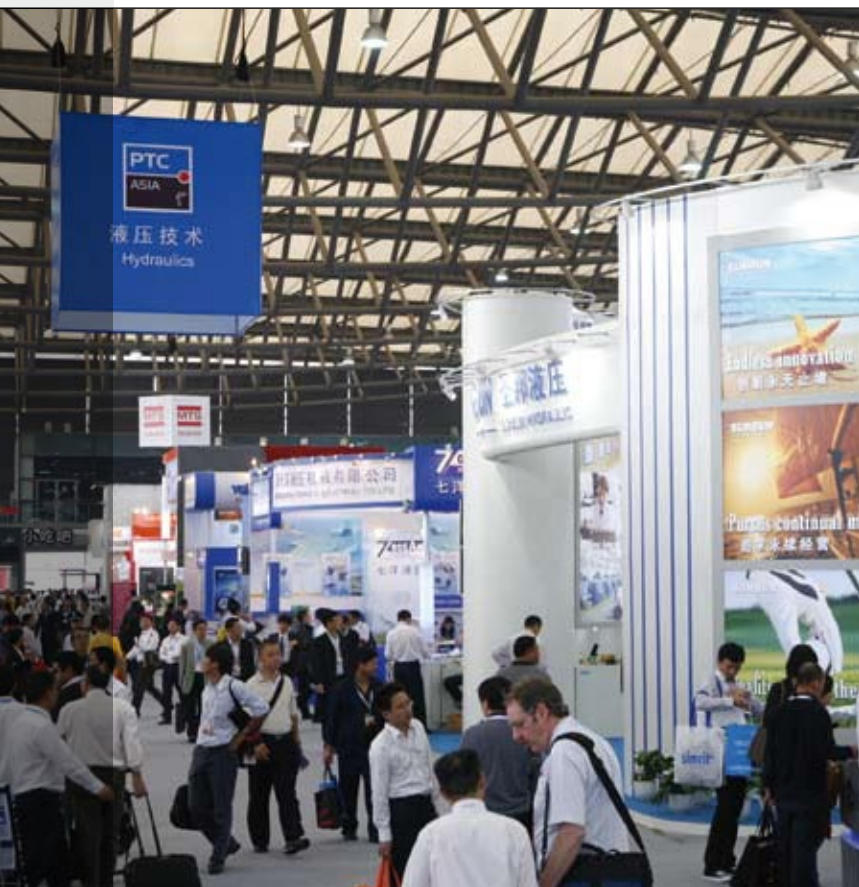
Number of exhibitors



* AUMA members

Despite the recession interest in Russia remains high

In 2009, the Russian trade fair market was among the hardest hit by the recession, reporting losses of between 10 and 20 % for trade fairs held by German organisers. In 2010 the market showed signs of recovery, although figures were not back to pre-crisis levels. German organisers' interest in Russia remains high, and the number of trade fairs held there last year set a new record. More than 14,200 companies occupying 360,000 m² of stand space exhibited their products and services at 35 trade fairs. Visitor attendance totalled approximately 540,000.



In India the positive trend of recent years continued in 2010. The number of trade fairs held rose to 27. In a year in which Plastindia, India's largest GTQ trade fair, did not take place, over 3,600 exhibitors rented exhibition space totalling more than 52,000 m². Visitor attendance was 95,000. Mumbai has become the main venue for German trade fairs in India.

In 2010, for the first time, more trade fairs held by German organisers abroad took place in Turkey than in the United Arab Emirates. Hosting 14 trade fairs, Turkey moved up the table and is now the fourth most important venue for GTQ trade fairs. More than 5,400 companies occupied stand space totalling 200,000 m². 480,000 visitors came to see the events.

The United Arab Emirates appear to have experienced the full force of the economic crisis in 2010. Less than 4,500 companies attended a mere 13 trade fairs, occupying 63,000 m² of stand space, equalling a low last recorded four years ago.



In 2011, 19 members of AUMA intend to hold 261 trade fairs in every part of the world, more trade fairs than ever before. For German trade fair organisers the most important countries are China (72 trade fairs) and Russia (37). In India the strong upwards trend continues, and this country will be hosting 32 GTQ trade fairs. 20 trade fairs are to take place in the United Arab Emirates, 18 in Turkey and 14 in Brazil. Among cities, Shanghai (33 trade fairs), Moscow (30), Mumbai and Dubai (18 each), Istanbul (15) and Beijing (13) top the list.

*Shanghai New International
Exhibition Center*

Every autumn AUMA publishes the information brochure entitled "German Trade Fair Quality Abroad" in German and English which contains trade fair dates and organisers' contact details. AUMA's internet database provides a special list of trade fairs bearing the GTQ seal of approval. Full information on German organisers' involvement abroad and on GTQ trade fairs is directly available from the website at ► www.gtq.de.

Germany at EXPO 2010

From May 1 to 31 October 2010, four million out of a total of 73 million visitors to EXPO 2010 in Shanghai showed their interest in German economy and culture by coming to see the German Pavilion.

It was not only the exhibition and the architecture of “balancity” which advertised Germany as an attractive, exciting, and innovative country. Visitors responding to an official survey were also keen to stress the informative and entertaining nature of the German pavilion.



The EXPO holders honoured the organisers of the German Pavilion for their highly successful interpretation of the slogan “a better city, a better life” by presenting them with the Golden Award. The German representation came first among a group of 19 candidates, who also constructed their own pavilions, which occupied a maximum of 6,000 square metres. The Silver Award went to Russia and the Bronze Award to France. In all, the Chinese offices of EXPO presented 33 awards.

The Stuttgart-based agency Milla & Partner was responsible for the exhibition concept of the German Pavilion, Schmidhuber + Kaindl GmbH from Munich for the architecture, and the German construction com-

pany Nüssli built the pavilion. Koelnmesse International GmbH was responsible for organizing and operating it. In February 2007 the Federal Ministry of Economics and Technology had tasked the Cologne-based company with setting up and running the German Pavilion.



The total cost of the EXPO 2010 German Pavilion project in Shanghai amounted to EUR 50 million, the sum allocated by the federal government's budget. Construction had been estimated to cost EUR 30 million, with running costs estimated at EUR 20 million.



AUMA delegation visited EXPO 2010 ■ From 11 to 15 October 2010, headed by AUMA's managing director Dr. Peter Neven, members of federal and State ministries, trade fair companies, organisers and service providers travelled to EXPO in Shanghai. The highlight was a visit to the German Pavilion. The delegation was received by MR Dietmar Schmitz, the general commissioner of the German Pavilion and the representative of the Federal Ministry of Economics and Technology.



The programme included a visit to the special show entitled German Living, part of Interior Lifestyle China, which took place from 13 to 16 October 2010. Federal Minister of Economics Rainer Brüderle also attended the opening of the fair.

EXPO 2012 ■ Following the conclusion of EXPO 2010 in Shanghai, the largest to date, the next Expo is just around the corner. From 12 May to 12 August 2012 in Yeosu, a coastal town in South Korea, a “minor” Expo will be taking place. This was agreed upon by the Bureau International des Expositions in Paris on 26 November 2007. Other candidates were Tangier in Morocco and Wrocław in Poland.

More than 100 nations, international organizations and companies are invited to submit their ideas on “The Living Ocean and Coast” in the shape of exhibits, presentations and numerous events. Hamburg Messe and Congress GmbH will be responsible for organizing the German Pavilion.



Marketing,
media and
events





Marketing, media and events

Marketing German trade fairs

Taking as its slogan “Trade Fairs Made in Germany”, AUMA supports the marketing efforts of German trade fair organisers abroad, in order to position Germany as the world’s number one venue for trade fairs and to further increase the international appeal of German trade fairs among exhibitors and visitors.

Advertising and posters ■ The poster series entitled “Trade Fairs Made in Germany – Marketplaces of the World” is widely used to good effect on the joint participations of German companies abroad, supported by the Federal Ministry of Economics. The posters are also displayed at foreign agencies providing information on German trade fairs, German chambers of commerce abroad, and at German diplomatic representations. The posters are available with captions in five languages: German, English, Chinese, Spanish, and now also in Russian.

Brochure “Trade Fairs Made in Germany” ■ This directory contains dates, categories of products and services, and the statistics of international trade fairs. Basic data on Germany as a trade fair venue rounds off the information in this booklet. It highlights the advantages of trade fair venues in Germany, i.e. their international appeal, the organisers’ professional approach, and the excellent infrastructure.

115,000 copies of this brochure are circulated in German, English, Spanish and French. Furthermore, in collaboration with chambers of commerce abroad and other partners, more than 40,000 copies are printed in Arabic, Chinese, Greek, Korean, Persian, Portuguese (for Brazil), and in Russian. There is also a Japanese version, available as an online database at www.fairs-germany.jp, as well as an additional information flyer.



Posters for the joint participations of German companies abroad, available in five languages

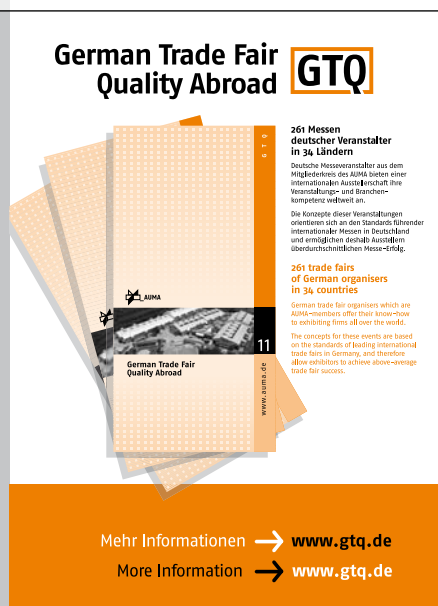
More than 600 opinion-formers in over 140 countries disseminate these brochures, among them German embassies, foreign chambers of commerce and the local offices representing German trade fairs abroad. They provide information to interested audiences, for example at events. Furthermore, anyone interested may obtain the brochure from any of the 250 information stands which are organized annually and represent the federal government's foreign trade fair programme.

Promoting German Trade Fair Quality Abroad – GTQ ■ AUMA released a series of promotional measures to accompany the publication of the calendar entitled “German Trade Fair Quality Abroad “. The calendar provides an overview of next year's trade fairs held by German organisers abroad. Once again, the emphasis was on advertising. Publications targeting German companies whose focus is on exports to Eastern Europe and Asia were selected.

Promotional film – “Trade Fairs Made in Germany” ■ Situated at the heart of Europe, Germany is the world's number one venue for trade fairs, and boasts an outstanding infrastructure and ideal conditions for presenting innovations. Trade fairs are where people meet and talk. They are the source of new ideas and where various branches of industry receive a decisive boost. These are the messages of the promotional film entitled “Trade Fairs Made in Germany”.

The film is two minutes and 30 seconds in length and is available as a DVD in 9 languages: in Chinese, English, French, German, Japanese, Russian, Spanish, as well as European and Brazilian versions of Portuguese.

The film is available mainly from agencies providing information on German trade fairs abroad, including from German chambers of commerce abroad, the foreign representatives of German trade fairs abroad, and from German diplomatic representations.





Promoting participation in trade fairs

Trade fairs provide companies with a comprehensive overview of the market. They showcase product innovations and are the place where decision-makers meet. This is the message conveyed by AUMA's most recent advertising in dailies and business magazines, which continues the image campaign promoting participation in trade fairs that began in 2007.

In particular it targets small and medium-sized companies, with the aim of motivating those who do not exhibit at trade fairs to take part in them. It does so by filling in information gaps on the advantages of participating in trade fairs. Furthermore, the campaign motivates opinion-formers at agencies to increase their efforts to advise customers accordingly.

The first part of the brochure "Trade fairs – an Exhibitors' Guide" has been updated. Interested readers can find out more about Germany's leading role as a venue for trade fairs and why trade fairs are an important marketing instrument. "Trade fairs – an Exhibitors' Guide – part 2" is new. This sets out a brief 10-point guide to planning successful participation in trade fairs. Each brochure can be downloaded from www.erfolgmessen.de.

CD-ROM "Messe fit. Ready for Trade Fairs" ■ The updated version of the CD-ROM entitled "Messe fit. Ready for Trade Fairs" presents all aspects of taking part in trade fairs and offers exhibitors important help on how to plan their successful participation. The CD-ROM mainly contains tips on how to participate successfully in trade fairs, along with basic information on Germany as a venue for trade fairs. Other important contents are revised versions of parts 1 and 2 of the brochure entitled "Successful Participation in Trade Fairs", as well as the "Trade Fair Benefit Check".

The CD-ROM is available free of charge from AUMA. Updated annually since 2003, the total number of copies distributed has now reached 40,000.



Online activities

Whether you are at your PC or on the move, AUMA's database provides users with online trade fair information which is updated on a daily basis. Industry news and practical tips on participation in trade fairs in Germany and abroad round off this service.

Last year AUMA added some new services to its website at www.auma.de. As of 2010 all trade fair data is available as an app for iPhones. Overall, the website registered close to three million page views last year and 600,000 visits. Two-thirds of visits focused on the new trade fair database, available in four languages. It provides information on dates, services, exhibitor and attendance figures at trade fairs in Germany and abroad, helping interested exhibitors and visitors with decision-making on whether to attend. AUMA provides extensive data on more than 5,000 events in Germany and abroad as well as on individual countries and regions. The database also contains around 5,000 addresses of event organisers, service providers, public authorities, trade fair organizations and auditing companies in Germany and abroad.

Website information available in four languages ■

Exhibitors and visitors from all over the world can find information on trade fairs in Germany and abroad in German, English, French and Spanish. Foreign users can prepare in detail ahead of their visit to a fair. Companies from Germany can select the right trade fair in the country in question before they take on the local market.

Tips for exhibitors round off the database service ■

In addition to trade fair data the AUMA website also offers tips on preparing for trade fairs at home and abroad.

Checklists and online guides make it easy to get started in the world of trade fairs. The Trade Fair Benefit Check program for calculating and evaluating trade fair participation can be downloaded online. As an additional service all publications are available as a PDF file from the download section of the website.





PR work

Through numerous publications and media contacts AUMA provides the public with information on the trade fair industry and the benefits of participation, thus helping to create a greater awareness of trade fairs and of Germany as a venue for events.

The newsletters entitled AUMA_Compact, AUMA_Institute – Research & Education for the Trade Fair Industry and AUMA_Europe – Report from Brussels target various audiences with information on trade fair topics.

In collaboration with the publishers local global, AUMA released the publication entitled “Exhibition Market Latin America 2011/2012”. This book offers practical tips on successful participation in trade fairs as well as an overview of economic developments in selected countries in South America. AUMA contributed articles about trade fair markets, about support for German exhibitors attending trade fairs in this region, and provided tips for exhibiting at trade fairs in South America, as well as lists of trade fairs.

Over the course of the year AUMA published 21 press releases providing information on developments in the trade fair industry and on new publications. Trade publications and dailies published reports and interviews with representatives of AUMA. Thus members of various media conducted interviews with the AUMA chairman Hans-Joachim Boekstegers and with AUMA’s managing director Dr. Peter Neven. Three national dailies regularly publish a monthly feature on trade fairs dealing with a cross section of industry topics.

Deutsche Welle produced a film about the AUMA chairman Hans-Joachim Boekstegers, which also documented his role as head of the packaging machine manufacturer Multivac.

AUMA held three press conferences enabling the press to meet directly with the association’s chief executives. The 2009 Annual Review was presented on 17 June along with an initial forecast for the trade indus-



try in 2010. At the autumn press conference on 30 November the topics were the release of AUMA Trade Fair Trends in 2011 and the preliminary results of the trade fair industry in 2010.

"AUMA_MesseTreff 2010" at Station Berlin

On 16 June 2010, more than 400 representatives of the trade fair industry, ministries and the media came to the meeting entitled "AUMA_MesseTreff 2010" at Station Berlin.

In his opening address, the AUMA chairman Hans-Joachim Boekstegers praised Manfred Wutzlhofer, the former CEO of Messe München, who was presented with the golden AUMA medal for long-standing services as deputy chairman of AUMA.

During the event, Dr. Bernd Weber of the Life & Brain Center in Bonn spoke about "Neuroeconomics – can brain research improve our understanding of business decisions?".



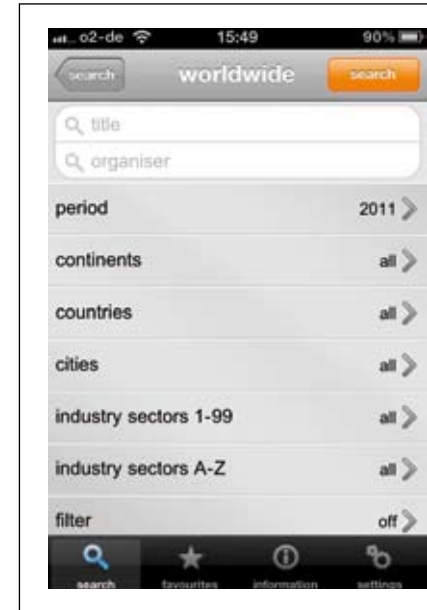


MyFairs – the trade fair information organiser for iPhones

As of 2010, AUMA trade fair data is also available as an app for iPhones, which lets users find trade fairs worldwide, organize data on the move, and plan their personal schedules.

MyFairs lets users find out about trade fairs worldwide while they are on the move. This mobile application accesses information from AUMA's trade fair database, which is updated daily. Users can obtain core data on every trade fair, such as dates, venues, organisers and project addresses, as well as exhibitor numbers, visitor attendance and the amount of space rented out for every trade fair in Germany, and for many events abroad.

MyFairs is available in German and English and is available from app stores at only EUR 4.99. More information on the MyFairs iPhone app can be found on the website at ► www.myfairs.auma.de, which has been specially set up for this purpose.



Participation in international congresses

UFI Congress in Singapore ■ From 10 to 13 November 2010 the 77th congress of the Global Association of the Exhibition Industry (UFI) took place in Singapore. 475 trade fair professionals from 50 countries took part in the annual meeting, among them Dr. Peter Neven, AUMA's managing director, and Marco Spinger, the head of the Global Markets Division. SACEOS was responsible for organizing the international congress which was held at the recently opened trade fair and congress centre Marina Bay Sands.



*Marina Bay Sands
in Singapore was the venue
of the 77th congress of UFI*

Numerous meetings of committees also took place at the congress, including those of the regional chapters and of the Associations' Committee. Germany is on this committee and is represented by Dr. Peter Neven, who is its deputy chairman. Andrés López Valderrama of AFIDA Asociación Internacional de Ferias de América was elected as the committee's new chairman.

UFI represents more than 550 member organizations in 84 countries around the world. Close to 900 international trade fairs are held under the UFI label. Since 2009, UFI has gained 23 new members.

International Trade Fair Seminar in St. Gallen ■ Taking as its slogan "Emotions and Experiences", the 42nd International Trade Fair Seminar took place in St. Gallen/Switzerland from 27 to 29 June 2010. The seminar was organized by IDFA, the association representing

German medium-sized exhibition venues and the Austrian and Swiss trade fair associations. AUMA was represented by managing director Dr. Peter Neven and directors Harald Kötter and Marco Springer.

Annual meeting of CENTREX in Plovdiv ■ The impact of the economic crisis on the trade fair industry and the prospects for the trade fair industry in Central Europe were the key topics at the annual meeting of the Central European Trade Fair Organization (CENTREX), which was hosted by the trade fair company in Plovdiv. Around 20 representatives of trade fairs from eight countries took part in this annual meeting. AUMA was represented by Natalja Wings.

2010 trade fair congress in India ■ On 4 and 5 June 2010 the trade fair congress Expo Summit took place in New Delhi, which was attended by more than 150 delegates, including Marco Springer, the head of AUMA's Global Markets Division. One of the topics discussed was the situation regarding exhibition grounds in India, in particular future development of the infrastructure with the help of private investors.



Other topics included India's trade fair market in the context of Southern and South-East Asia and the impact of the global economic crisis. In his speech, quoting examples of best practices, Marco Spinger presented the strategy of the German trade fair industry for broadening its international appeal.



Meeting of CEFCO in Hangzhou ■ From 13 to 15 January 2011, under the slogan of “New Visions for the Trade Fair Industry”, and attended by some 600 trade fair professionals from China and the local region, the China Expo Forum for International Cooperation (CEFCO) took place in Hangzhou in eastern China. Associations and organisers from Germany, the USA, the UK and the Netherlands which hold trade fairs in China were also represented. The congress was coorganized by the China Council for the Promotion of International Trade (CCPIT), the Global Association of the Exhibition Industry (UFI), and the American trade fair associations IAEE and SISO. AUMA was represented by Marco Spinger, the head of the Global Markets Division.



Marco Spinger, head of AUMA's Global Markets Division, welcomed the participants of the CEFCO congress.

AUMA media for international customers

Information on the trade fair industry and AUMA

■ AUMA Review – the German Trade Fair Industry

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

■ AUMA Statement – The German Trade Fair Industry

Facts, functions, outlook. Forth revised edition, July 2011.

■ Portrait: AUMA – Serving the trade fair industry

Information on AUMA's responsibilities, its organisation and members. Published in 2011 in German and English.





■ Promotional film – “Trade fairs Made in Germany”

A promotional film highlighting the strong aspects of trade fairs as a marketing instrument and the specific qualities and effectiveness of German trade fairs. The DVD is 2 minutes and 30 seconds long and offers a choice of languages: Chinese, English, French, German, Japanese, Portuguese, Russian and Spanish.

■ AUMA Online

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

Available at ► www.auma-messen.de.

■ The AUMA Trade Fair Guide for Germany

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

■ Trade Fairs Made in Germany, 2011/2012

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

■ German Trade Fair Quality Abroad

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



Information on preparing for trade fairs

■ Messe fit. Ready for Trade Fairs

This CD-ROM presents all aspects of taking part in trade fairs and offers exhibitors important tips on how to plan successful participation in trade fairs. The third, fully revised version contains the Trade Fair Benefit Check and instructional videos on how to use the software. Version 3.3 in German and English, released in February 2011.

■ Trade Fair Benefit Check

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

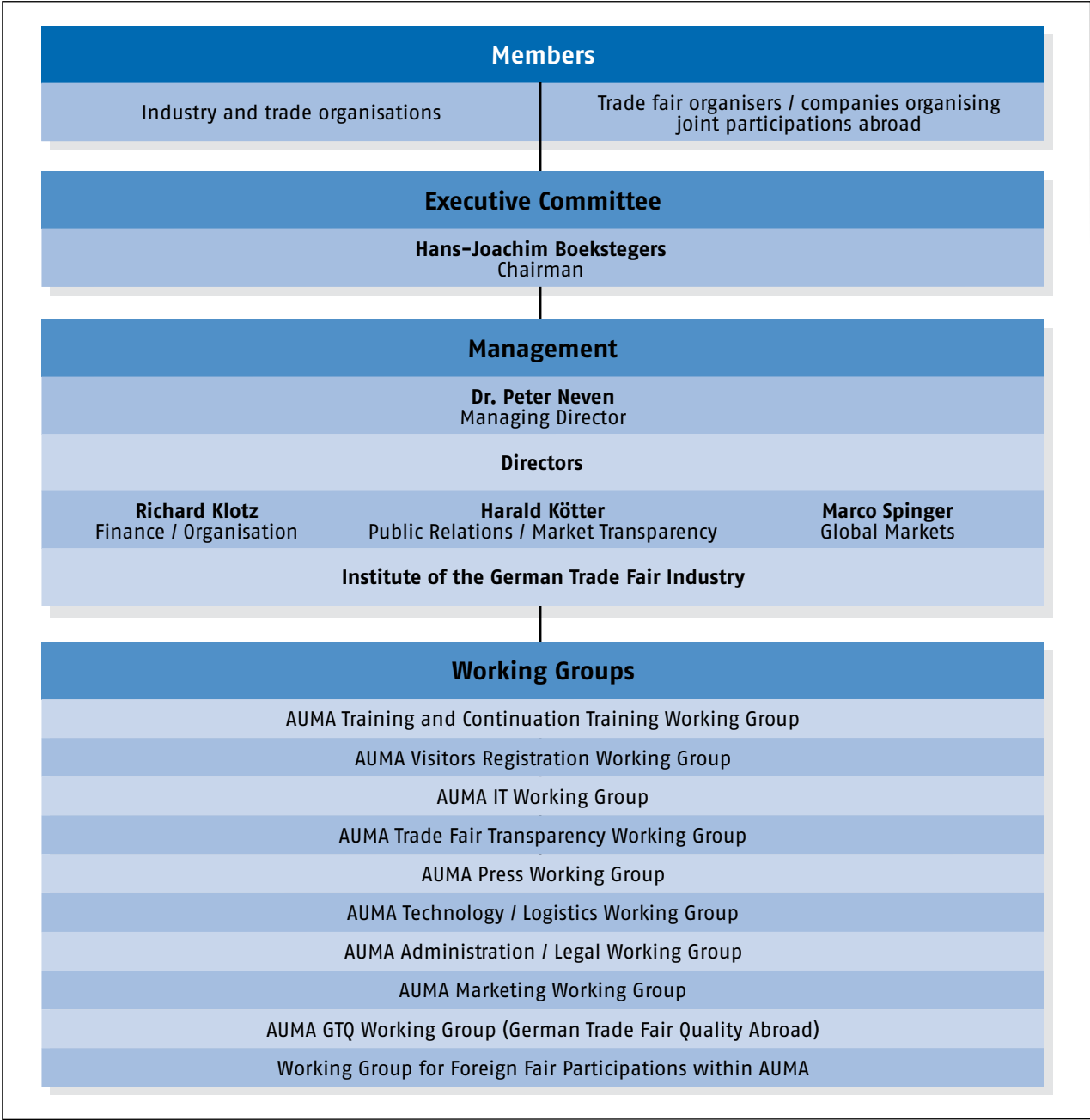
Other AUMA publications are available at

► www.auma.de / English / Downloads & Publications



Organisation





Members	
Industry and trade organisations	Trade fair organisers / companies organising joint participations abroad
<ul style="list-style-type: none"> □ Association of German Chambers of Industry and Commerce (DIHK), Berlin □ Association of German Dental Manufacturers (VDDI), Cologne □ Association of the German Tool Manufacturers (FWI), Remscheid □ Association of International Motor Vehicle Manufacturers (VDIK), Bad Homburg □ Association of the Steel and Metal Processing Industry (WSM), Duesseldorf □ Caravaning Informations GmbH (CIG), Frankfurt / Main □ Central Committee for German Agriculture (ZDL), Berlin □ Confederation of the German Textile and Fashion Industry, Berlin □ Didacta Verband – Education Commerce Lobby, Darmstadt □ European Association of Event Centres (EVC), Bad Homburg □ Federal Association of German Galleries and Editions (BVDG), Berlin □ Federation of German Food and Drink Industries (BVE), Berlin □ Federation of German Heating Industry (BDH), Cologne □ Federation of German Industries (BDI), Berlin □ Federation of German Wholesale and Foreign Trade (BGA), Berlin □ Federation of the Manufacturers of High-grade Consumer Goods (IVSH), Solingen □ German Association of Direct Business Communications (FAMAB), Rheda-Wiedenbrueck □ 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 Information Technology, Telecommunications and New Media (BITKOM), Berlin □ German Association for Water, Wastewater and Waste (DWA), Hennef □ German Boat and Shipbuilders Association (DBSV), Hamburg □ German Chemical Industry Association (VCI), Berlin □ German Confederation of Skilled Crafts (ZDH), Berlin □ German Cosmetic, Toiletry, Perfumery and Detergent Association (IKW), Frankfurt / Main □ German Electrical and Electronics Manufacturers Association (ZVEI), Frankfurt / Main □ German Engineering Federation (VDMA), Frankfurt / Main □ German Federation of the Wood and Plastics Processing Industries (HDH), Bad Honnef □ German Hotels and Restaurants Association (DEHOGA), Berlin □ German Industry Association for Coin-operated Amusement and Vending Machines (VDAI), Berlin □ German Industry Association for Optical, Medical and Mechatronical Technologies (SPECTARIS), Berlin □ German Machine Tool Builders' Association (VDW), Frankfurt / Main □ German Retail Federation (HDE), Berlin □ German Shipbuilding and Ocean Industries Association (VSM), Hamburg □ German Sweets e.V., Bonn □ German Winegrowers' Association (DWW), Bonn □ IELA – International Exhibition Logistics Association – German Chapter, Kelsterbach □ National Association of German Commercial Agencies and Distribution (CDH), Berlin □ Steel Information Centre, Duesseldorf 	<ul style="list-style-type: none"> □ asfc atelier scherer fair consulting GmbH, Fuerth □ Balland Messe-Service GmbH, Cologne □ DEGA-EXPOTTEAM GmbH & Co. KG, Obersoecherling □ Deutsche Messe AG, Hanover □ expotec GmbH – Agency for Marketing & Communications, Berlin □ FAMA – Special Association for Fairs and Exhibitions, Erfurt □ Frankfurt Book Fair, Frankfurt / Main □ GDG-Association of Major German Exhibition Organisers, Hanover □ GHM – Gesellschaft fuer Handwerksmessen mbH, Munich □ Hamburg Messe und Congress GmbH, Hamburg □ Hannover-Messe International GmbH, Hanover □ IDFA – Pool of German Trade Fair Organisations and Exhibition Cities, Essen □ IFWexpo Heidelberg GmbH, Heidelberg □ IGEDO Company GmbH & Co. KG, Duesseldorf □ IMAG – Internationaler Messe- und Ausstellungsdiens GmbH, Munich □ INTER EXPO CONSULT GmbH, Berlin □ 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, Duesseldorf □ Mesago Messe Frankfurt GmbH, Stuttgart □ Messe Berlin GmbH, Berlin □ Messe Duesseldorf GmbH, Duesseldorf □ Messe Essen GmbH, Essen □ Messe Frankfurt GmbH, Frankfurt / Main □ Messe Friedrichshafen GmbH, Friedrichshafen □ Messe Muenchen GmbH, Munich □ Messe Offenbach GmbH, Offenbach □ Messe Westfalenhallen Dortmund GmbH, Dortmund □ NuernbergMesse GmbH, Nuremberg □ Reed Exhibitions Deutschland GmbH, Duesseldorf □ Saarmesse GmbH, Saarbruecken □ Spielwarenmesse – International Toy Fair, Nuremberg □ the fair agency gmbh, Munich □ WFB Bremen Economic Development, Bremen

Status: 31st August 2011



Key indicators of the trade fair industry





Macro-economic significance

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

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

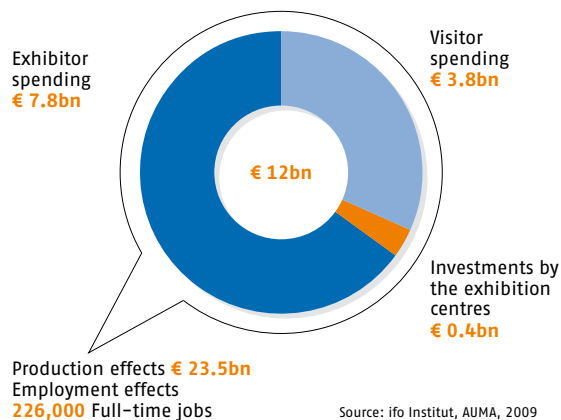
(€ million)

	2010	2009	2008
Reed Exhibitions (GB)	811.0	715.0	891.0
GL events (F)	727.2	581.4	605.7
Messe Frankfurt (D)	448.3	423.8	440.2
United Business Media (GB)	360.0	324.5	324.6
Messe Düsseldorf (D)	335.0	255.5	496.4
Messe München (D)	301.8	215.2	243.3
VIPARIS (F)	299.1	285.3	300.4
MCH Group (CH)	294.4	190.9	222.2
Fiera Milano (I)	248.4	297.1	306.5
Koelnmesse (D)	237.0	229.0	191.7
Messe Berlin (D)	217.4	157.5	199.6
Deutsche Messe (D)	212.0	222.0	241.8
Comexposium (F)	208.0	195.7	226.0
Nürnberg Messe (D)	204.8	132.7	153.2
Tokyo Big Sight (JP)	184.5	157.5	195.1
Jaarbeurs Utrecht (NL)	155.5	152.0	145.7
HKTDG (HK)	138.4	99.6	99.0
ITE Group (GB)	132.2	128.3	123.3
dmg events (GB)	128.7	192.4	226.2
Nielsen Business Media (USA)	125.5	125.6	171.8
Amsterdam RAI (NL)	125.0	108.2	119.9
Informa (GB)	124.7	100.8	92.3
NEC Birmingham (GB)	123.2	139.0	160.0
IFEMA Madrid (E)	n.a.	116.5	186.6
Messe Stuttgart (D)	110.0	80.0	118.0
BolognaFiere (I)	109.7	105.0	134.0
Fira Barcelona (E)	101.0	116.1	121.2

Trade Fairs in Germany

Economic impact based on a multiplier analysis

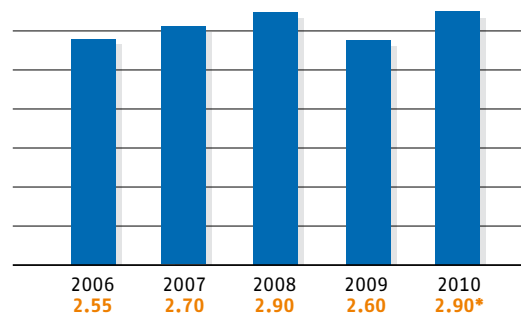
Average trade fair year (period 2005 to 2008)



Trade Fairs in Germany

Turnover of trade fair organisers (€ billion)

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



* preliminary

International / national trade fairs

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

Compared to the crisis year of 2009, the key figures of the 2010 exhibitions increased substantially and have nearly reached the 2008 level. Mainly, this was the result of significantly more trade fairs taking place in 2010.

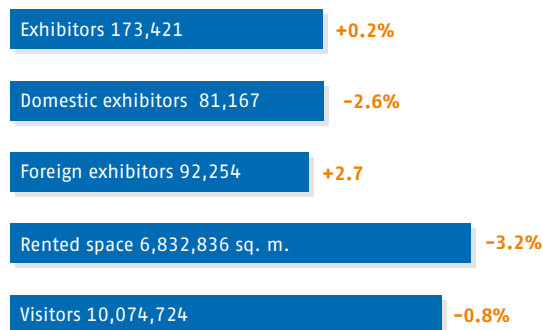
Trade Fairs in Germany 2010

The 157 international / national events in comparison to the respective previous events

	Number of events	Total	Exhibitors Domestic	Foreign	Visitors Total	Rented space Total
Total	157	+0.2%	-2.6%	+2.7%	-0.8%	-3.2%
Investment goods trade fairs	86	+0.4%	-2.4%	+3.7%	-4.4%	-3.3%
Consumer goods fairs directed to trade visitors	46	-0.9%	-4.2%	+0.8%	+0.1%	-4.6%
Consumer goods fairs directed to the public	19	+2.6%	+0.6%	+5.4%	+5.4%	+0.3%
Trade fairs presenting services	6	-2.3%	-10.0%	+1.8%	-6.0%	-1.8%

Trade Fairs in Germany 2010

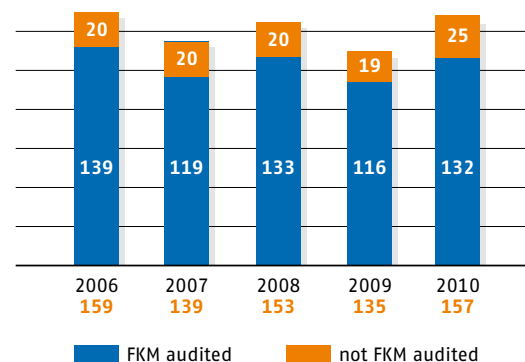
The 157 international / national events in comparison to the respective previous events



Trade Fairs in Germany

Number of events

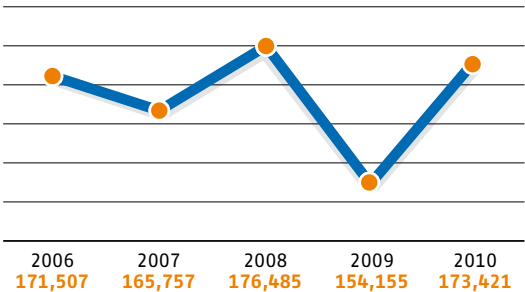
AUMA category international and national events





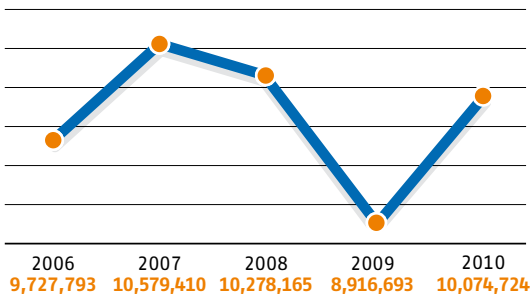
Trade Fairs in Germany

Number of exhibitors
AUMA category international and national events



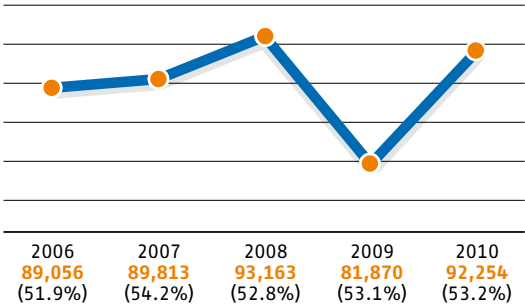
Trade Fairs in Germany

Number of visitors
AUMA category international and national events



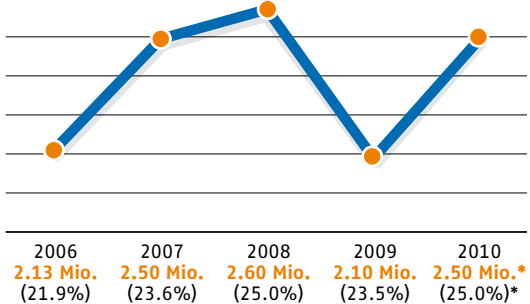
Trade Fairs in Germany

Number of foreign exhibitors
AUMA category international and national events



Trade Fairs in Germany

Number of foreign visitors
AUMA category international and national events

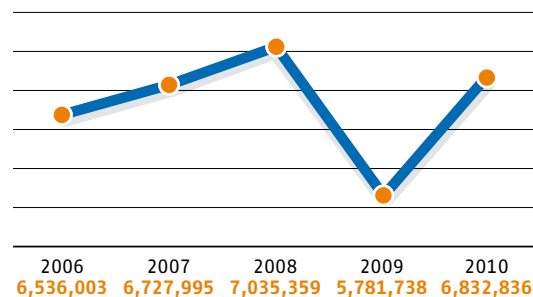


* preliminary

Trade Fairs in Germany

Rented space in sq. m.

AUMA category international and national events



At 22 exhibition grounds in Germany the hall space available for holding international trade fairs and exhibitions totals nearly 2.75 million square metres.

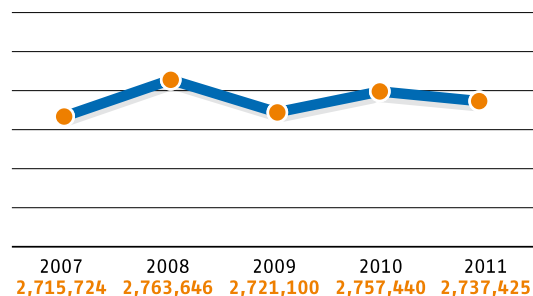
At ten exhibition grounds hall space exceeds 100,000 square metres. At five others hall space exceeds 50,000 square metres.

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

Trade Fairs in Germany

Hall capacities in sq. m.

(each 1st January)



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

Trade Fairs in Germany 2010

Exhibition capacities*

gross in sq. m.

Location	Halls	Outdoor
Hanover	466 765	58 070
Frankfurt/M.	355 678	96 078
Cologne	284 000	100 000
Düsseldorf	262 704	43 000
Munich (New Exh. Center)	180 000	360 000
Berlin	160 000	100 000
Nuremberg	160 000	50 000
Essen	110 000	20 000
Stuttgart	105 200	40 000
Leipzig	101 200	69 998
Hamburg	86 465	10 000
Friedrichshafen	86 200	15 160
Bad Salzungen	65 195	4 000
Dortmund	59 235	
Karlsruhe (New Exh. Center)	52 000	10 000
Augsburg	48 000	10 000
Bremen	39 000	100 000
Munich (M, O, C.)	29 113	
Saarbrücken	24 600	27 400
Freiburg	21 500	80 000
Offenburg	22 570	37 877
Offenbach	18 000	400

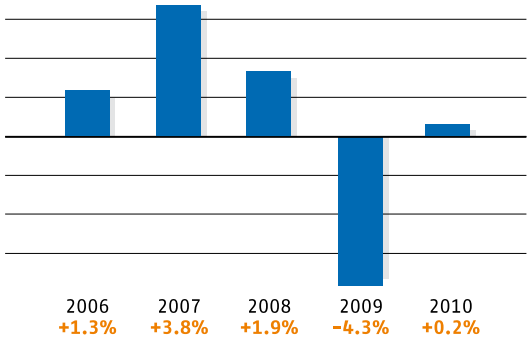
Status: 1.1.2011

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



Trade Fairs in Germany

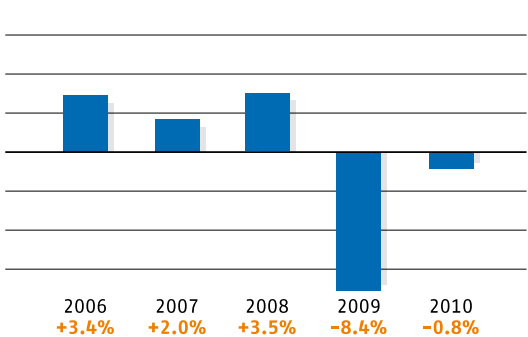
Numbers of exhibitors
AUMA category international and national events



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

Trade Fairs in Germany

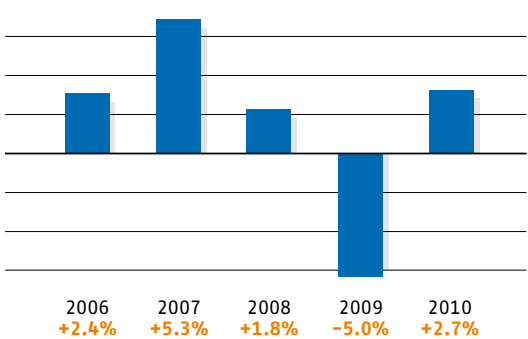
Number of visitors
AUMA category international and national events



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

Trade Fairs in Germany

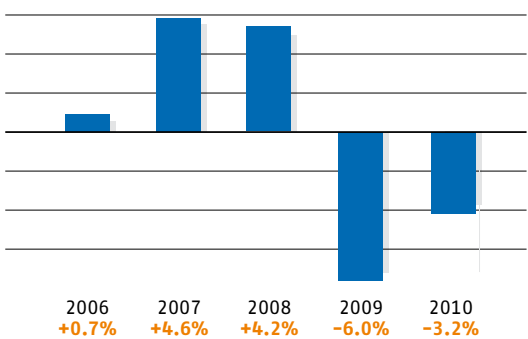
Number of foreign exhibitors
AUMA category international and national events



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

Trade Fairs in Germany

Rented space in sq. m.
AUMA category international and national events

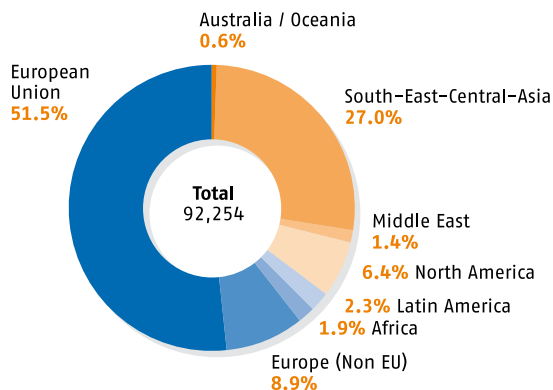


Development of one year's trade fairs
in comparison to the respective previous events

Trade Fairs in Germany 2010

Foreign exhibitors

AUMA category international and national events



Regional and specialized events

International trade fairs are augmented by a large number of regional trade fairs and consumer exhibitions as well as small events for specialized industries.

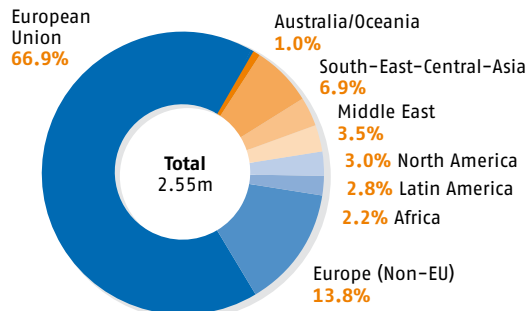
Annually around 50,000 exhibitors and 6 million visitors attend these events.

Beginning from 2010 small events for specialized industries are observed separately. For more information about this type of events see ► p. 16.

Trade Fairs in Germany 2010

Foreign visitors

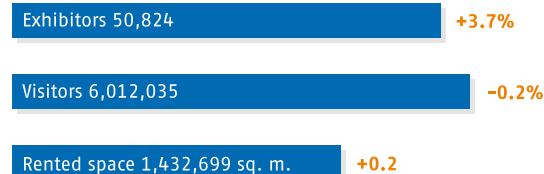
AUMA category international and national events



Regional Trade Fairs and Exhibitions 2010

Development of the 145 events in comparison to the respective previous events

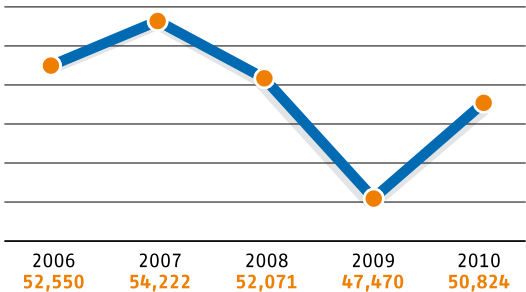
AUMA category regional





Regional Trade Fairs and Exhibitions

Number of exhibitors
AUMA category regional



* until 2009 including specialized trade fairs

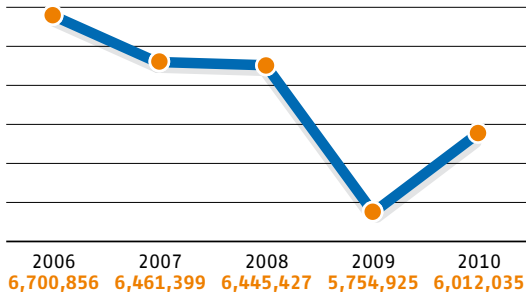
Trade fairs abroad held by German organisers

Annually, German organisers belonging to AUMA hold approximately 220 trade fairs in important growth regions abroad, in particular in Asia, North and South America and Eastern Europe.

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

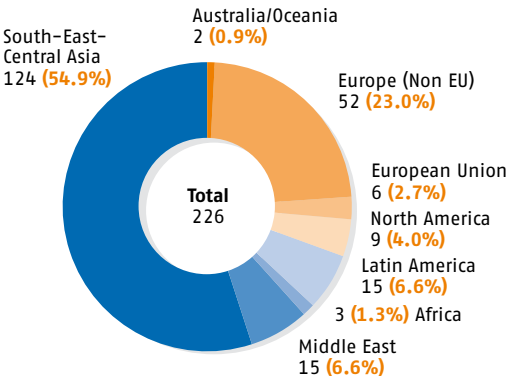
Regional Trade Fairs and Exhibitions

Number of visitors
AUMA category regional



* until 2009 including specialized trade fairs

Trade Fairs Abroad by German Organisers* 2010

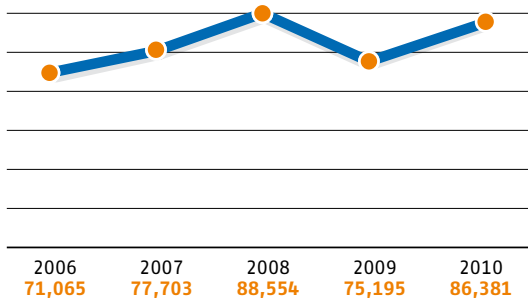


* AUMA members

The number of trade fairs abroad held by German organisers has risen once again after a smaller programme in 2009 caused by the economic crisis. Also, the number of exhibitors grew substantially. Most likely, this trend will continue in the next years.

Trade Fairs Abroad by German Organisers*

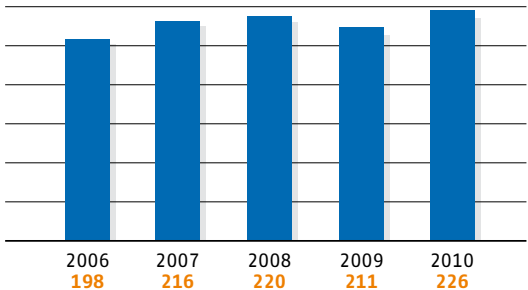
Number of exhibitors



* AUMA members

Trade Fairs Abroad by German Organisers*

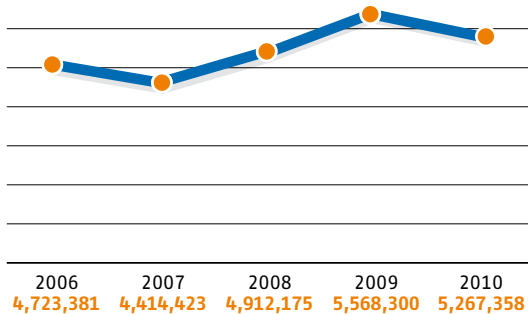
Number of events



* AUMA members

Trade Fairs Abroad by German Organisers*

Number of visitors



* AUMA members



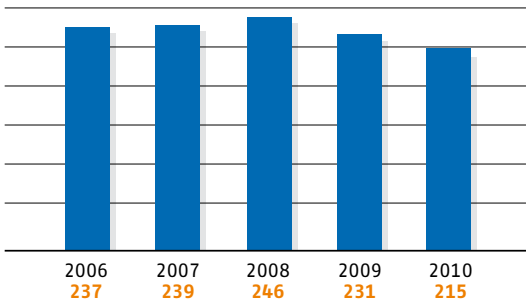
Foreign trade fair programme

In addition to taking part in events at home German industry also makes widespread use of trade fairs abroad to promote export trade. Particularly for small and medium-sized enterprises the foreign trade fair programme of the Federal Ministry of Economics and Technology represents an important marketing instrument.

In 2010, the number of participations was stable; the space occupied increased substantially.

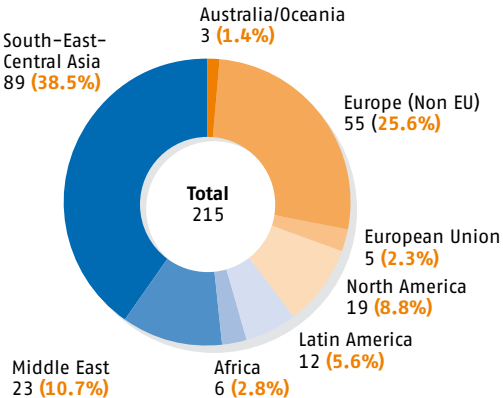
German Foreign Trade Fair Programme

Number of events
Participations by the Federal Ministry of Economics and Technology



German Foreign Trade Fair Programme 2010

Participations by the Federal Ministry of Economics and Technology



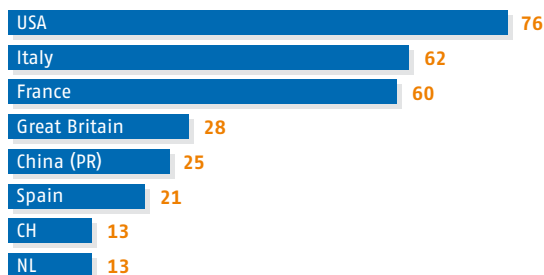
German trade fairs in the global competition

Four of the world's six largest exhibition grounds are in Germany. Worldwide there are 49 trade fairs where hall space exceeds 100,000 square metres. 14 of these are not in Europe. Of this number six are in China. 31 of the 35 exhibition grounds occupying more than 100,000 square metres are in Western Europe, four are in Central and Eastern Europe.

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.

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

Exhibition Centres Worldwide 2011

Exhibition capacities
gross in sq. m.

Location	Halls
Hanover Exhibition grounds	466 765
Frankfurt/Main Exhibition grounds	355 678
Fiera Milano	345 000
China Import & Export Fair Complex Guangzhou	340 000
Cologne Exhibition grounds	284 000
Düsseldorf Exhibition grounds	262 704
McCormick Place Chicago	248 141
Paris-Nord Villepinte	242 582
Feria Valencia	230 837
Paris Porte de Versailles	227 380
Crocus Expo IEC Moskau	226 399
The NEC Birmingham	201 634
Fira Barcelona Gran Vía	200 000
BolognaFiere	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 Muang Thong Thani Bangkok	140 000
VVC Moskau	132 700
Georgia World Congress Center Atlanta	130 112
SNIEC Shanghai	126 500
Veronafiere	122 000
Fiera del Levante Bari	120 000
BVV Brno	119 281
Fiera Roma	118 910
Reliant Park Houston	118 680
Fira Barcelona Montjuic	115 211
Brussels Expo	114 445
MTP Poznan	113 100
Essen Exhibition grounds	110 000
Nanjing International Expo Center	110 000
Rimini Fiera	109 000
Bilbao Exhibition Centre	108 000
New China International Exhibition Center Beijing	106 800
Stuttgart Exhibition grounds	105 200
Shenyang International Exhibition Center	105 200
Shenzhen Convention & Exhibition Center	105 000
Geneva Palexpo	102 470
Ernest N. Morial Convention Center New Orleans	102 230
Leipzig Exhibition grounds	101 200
Eurexpo Lyon	100 775
ExCeL London	100 000
Fiere di Parma	100 000
Singapore Expo	100 000
Jaarbeurs Utrecht	100 000

Status: 1.1.2011