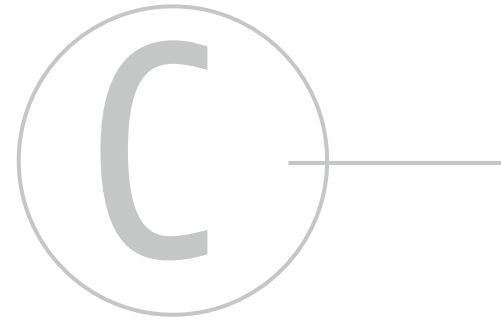


# 2018



## AUMA German Trade Fair Industry | Review





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**AUMA**

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We would like to thank the exhibition companies  
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Further photos: see page 88

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O U T L O O K





# OUTLOOK

## Walter Mennekes, AUMA Chairman\*

What is the future for the exhibition industry? Will it be characterised by upheaval? Will it gradually become less important? Will there even be a new surge in growth? As strange as it might sound, all three of these trends can be seen simultaneously. On balance, however, there is a slight growth.

There are several industry and service sectors that have seen dramatic change, whether in terms of technology and public perception such as the automotive sector, or in terms of distribution channels and the expansion into virtually all industries, such as the IT sector. In some cases, this is having a considerable impact on the relevant trade fairs, which also makes it necessary to devise new event formats. In some consumer goods sectors, there has also been a significant increase in online trade in the B2B area, having a corresponding, although not resounding, effect on the trade fair industry. There are also sectors with stable trade fair results, or even clear growth, from logistics to additive manufacturing. In light of this spectrum, trade fair organisers need to find customised, future-oriented solutions and not rely on would-be silver bullets.

In any case, I would caution against proclaiming »festivalisation« as the new trend in trade fairs. This will function especially well if the trade fair is only a relatively small part of an overall event.



However, exhibitions of all kinds, even B2B trade fairs, will become more emotionally charged, if they aren't already. After all, trade fairs where products can be tested and where the visitor becomes part of the experience have already anticipated this trend to a certain extent. However, the ultimate aim is for any restructuring to create business value for the majority of the exhibitors and visitors, since it is they who finance the whole thing. And digitisation? It helps us to make trade fairs and participating in trade fairs more efficient. Studies also show that there will be no decline in the demand for face-to-face communication. After all, this forms the basis for initiating and maintaining long-term business relationships.

\* until 28 May, 2019

For product presentations, too: the fascination with what is real suggests that the trade fair model will continue to function in the long-term. The »Made in Germany« brand, which stands for excellent quality at fair prices, and »Trade Fairs Made in Germany« are a perfect complement to one another. Exhibitors profit from this in many regards: firstly, it allows small and medium-sized enterprises, in particular, to access global trade fairs right on their doorstep in Germany. This also encompasses the successful funding programme for young, innovative companies, under the motto »Innovation made in Germany«. The joint participations in foreign trade fairs organised by the Federal Government are also of central importance. The 'Made in Germany' brand is an excellent selling point, especially in remote or developing markets. It therefore needs to be further maintained, including through political support.



The sector is deeply concerned with the effect that the rise in protectionism could have on trade fairs. Even though no substantial consequences were apparent in 2018, even announcements to this effect cause uncertainty and negative consequences for the economy – often enough also in the country of origin. We can therefore only appeal to the Federal Government and the EU to clearly emphasise the mutual dependency of the countries in question during negotiations.

**Walter Mennekes**  
AUMA Chairman  
until 28. May, 2019





EXHIBITIONS IN GERMANY

G



# EXHIBITIONS IN GERMANY

## Overview

The slower economic growth in Germany and increasing uncertainties in foreign trade only had a limited impact on economic activity in the German trade fair sector in 2018. There was once again growth in exhibitor numbers and stand space.

**SUMMARY FOR 2018** □ Especially foreign exhibitors and visitors continue to focus strongly on trade fairs in Germany. The 178 international and national trade fairs recorded on average 2% more exhibitors and also 2% more stand space in 2018, compared to each of the previous events. Although these figures are slightly below the extremely strong results of the previous year (exhibitors +3.7%, stand space +3.1%), they confirm a positive trend in the already well utilised instrument of trade fairs. Visitor numbers once again remained stable at a high level.



2%

more exhibitors in 2018  
is the ninth positive  
result in a row

## THE TRENDS FOR INDIVIDUAL TRADE FAIR TYPES

- Capital goods trade fairs: slightly more exhibitors and relatively good growth in stand space with a slight increase in visitor numbers.
- Consumer goods trade fairs: slight growth in exhibitor numbers with a minimal decline in stand space, but relatively large decline in visitors.
- Public/consumer exhibitions: more exhibitors, but slightly less stand space; slight increase in visitor numbers on average.
- Service trade fairs: marked increase in exhibitors with simultaneous reduction in stand space and slightly fewer visitors.

## Trade Fairs in Germany 2018

The 178 international / national events  
in comparison to the respective previous events (in %)

	Number of events	Exhibitors	Stand space	Visitors
Total	178	+2.0	+2.0	+0.1
Investment goods fairs	108	+1.8	+3.9	+1.0
Consumer goods fairs directed to trade visitors	42	+2.0	-0.5	-3.8
Consumer goods fairs directed to the public	19	+2.3	-0.6	+1.4
Trade fairs presenting services	9	+3.7	-3.2	-2.4

© AUMA

The foreign exhibitors were responsible only for the growth in participations in German trade fairs. Their number grew by 4.4% (2017: 6.3%) – a remarkable result in light of the additional tariffs that have been discussed and imposed and the associated lack of clarity regarding the further development of international trade. For domestic exhibitors, a slight decline of 1.3% was once again recorded after a stable result in 2017. This should not be overemphasised. It does show, however, that young companies are not automatically finding their way to the medium of trade fairs, but need to be won over with convincing arguments. The stable visitor numbers are also due to the interested parties from abroad rather than at home. An increase of over 3% from abroad is contrasted by a slight decline in visitors from Germany. It should be noted here, however, that fewer people does not automatically mean fewer companies.

In principle, however, the acceptance of trade fairs is very high in Germany. The increasingly strong digital media have also not made any significant changes to this. The AUMA MesseTrend exhibitor survey from November 2018 clearly revealed the aspects in which trade fairs are superior to digital formats:

99% of the exhibitors consider face-to-face contact and the possibility of direct networking to be a major plus of trade fairs. 95% see it as an advantage that their companies can provide immediate advice to the – potential – customers at trade fairs through employees with a wide variety of skills.



Trade Fairs in Germany 2018

Total result

	Number of events	Exhibitors	Stand space in sq. m.	Visitors
Total	350	250,924	8,780,966	15,538,800
International / national trade fairs	178	194,815	7,130,830	9,572,767
Regional exhibitions	172	56,109	1,650,136	5,966,033

© AUMA

The possibility of authentically presenting products by targeting all of the senses is seen by 82% of the companies surveyed as a significant advantage of trade fairs compared to digital formats. Closely connected with this is the fact that almost 50% of the exhibitors consider it important that products can be tested at trade fairs without an obligation to buy. Finally, 60% see a lasting positive effect on their own companies when it is possible to offer the visitor experiences at trade fairs.



#### **DIGITISATION MAKES TRADE FAIRS MORE EFFICIENT □**

Digital tools make it possible to extend and lengthen the duration of the impact of trade fairs: online portals operated throughout the year allow contact between suppliers and customers within a sector for a wide variety of purposes, from appointments to e-commerce and feedback on the quality of innovations. Streaming channels offer clear information on the trade fair offerings well beyond the duration of the trade fair. This helps trade fairs, in particular, for sectors strongly characterised by online trade.



On the other hand, the use of digital tools also has its natural limits. After all, visitors come primarily for the live experience. Augmented or Virtual Reality can play a targeted support role, for example when it comes to processes that are difficult or impossible to display on the exhibition stand. However, if such displays were at the centre of the trade fair presentation, visitors might think that they do not need to travel to the trade fair.

At the same time, trade fairs are turning into real job fairs. Around 40% of exhibitors with sales of more than 125 million euros already pursue the aim of recruitment. Especially medium-sized companies which are not based in conurbations see particular opportunities here to talk to potential new employees and provide insight into their product portfolio, as well as their corporate image in general.

Following provisional calculations in 2018, for the first time the sales of German exhibition organisers exceeded the 4 billion euro mark, even though there was not a particularly strong programme of trade fairs domestically in 2018. However, the revenue from other business segments such as congresses, catering and exhibitor services continues to increase.

There is also a considerable increase in sales from dedicated foreign trade fairs. In 2018, sales are expected to be around 3.8 billion euros owing to the considerably weaker trade fair programme due to the regular exhibition cycle.

**FORECAST FOR 2019** □ For the 166 international and national exhibitions in 2019, AUMA once again expects a modest increase in exhibitors and stable visitor numbers. There is especially uncertainty surrounding the further trends in automotive exhibitions.

An AUMA survey of the exhibition organisers as part of the analysis carried out by the German Economic Institute in December 2018 also revealed trends towards optimism in the sector. According to the survey, the majority of German exhibition companies expect higher sales in 2019 compared to the previous year, despite the fact that the trade fair programme is somewhat smaller this year. The number of people employed by the organiser is also expected to increase.

”The sales  
of German  
exhibition organisers  
reached **4 billion euros**  
for the first time  
in 2018,”



## AUMA MesseTrend 2019

The acceptance of trade fairs in B2B marketing is unwavering: more than a quarter (29%) of exhibiting German companies want to invest more money in participating in trade fairs in Germany and abroad in 2019 and 2020. 56% are planning the same level of expenditure and only 15% are planning to spend less.

These results were revealed by AUMA MesseTrend 2019, a survey of 500 exhibitors by TNS Emnid. On average, the companies want to increase their trade fair budgets for the next two years by 3% compared to 2017/2018. The number of trade fair participations by German companies will remain largely stable. In the next two years, there are set to be a total of 8.6 participations on average; in 2017 and 2018 the total figure was 8.8. The slight decline relates to trade fairs in Germany: 5.2 participations are planned in Germany (5.4); the number of participations abroad remains unchanged at 3.4. The fraction of the total communication budgets of the exhibiting companies spent on trade fairs reached 47% – one of the highest values ever.

On average, the German exhibitors define more than eight different objectives they focus on when participating in a trade fair. The five most important are cultivating contacts with regular customers (mentioned by 90% of exhibitors), raising awareness of companies and products (89%), winning new customers (89%), presenting new products and services (82%) and improving the image of the company or the brands (83%). However, trade fairs

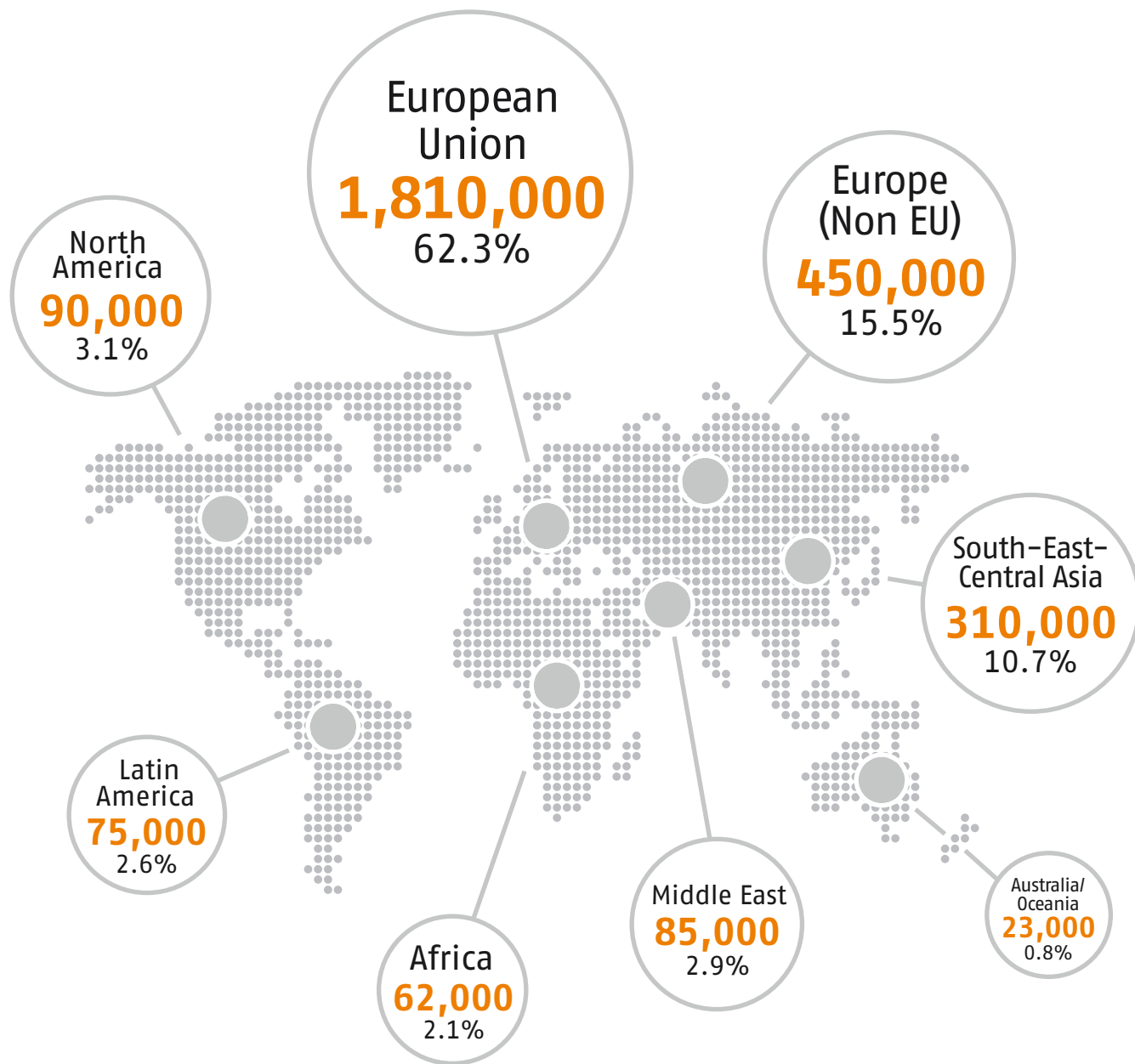
are also still important for concluding sales and contracts, both during the trade fair and in after fair business (67%). The objective of recruiting new employees has become more important: whereas only 15% of the exhibitors mentioned this objective in 2012, this has already increased to 23% in the current survey. Larger exhibitors make particularly intensive use of trade fairs for this objective: 41% of the companies with sales of more than 125 million euros use trade fairs for recruiting.



Former AUMA Chairman **Walter Mennekes** made the following comments regarding the results of Trade Fair Trend 2019: »Digital media help exhibitors and visitors to acquire information and establish contacts. Reliable, face-to-face contact between suppliers and customers, and product testing, will not be replaced by digital instruments. Money spent on trade fairs is therefore money well invested.«

**41%**

of companies with sales  
of more than  
125 m euros search  
for employees at  
trade fairs



**Trade Fairs in Germany**  
Origin of the 2.9 m visitors from abroad 2018



## Foreign visitors

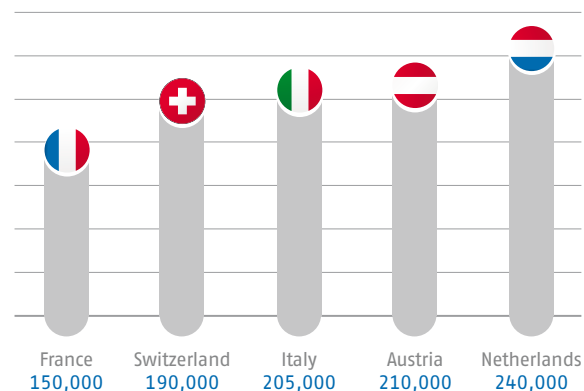
Around 30% of visitors to national and international trade fairs came from abroad in 2018. This once again matched the excellent result of last year.

Around 640,000 of the total of 2.9 million foreign visitors (22%) came from countries outside Europe. This very clearly underlines the role of the trade fair country Germany as a leading site for top international trade fairs. Nearly 400,000 interested parties travelled from Asia to Germany to gather knowledge at trade fairs and prepare for procurement transactions, as well as over 160,000 people from North and South America. The share from South-East-Central Asia exceeded 10% for the first time, while for the Near and Middle East the figure was 2.9%, for North America 3.1% and for Latin America 2.6%. The most significant country in Europe in terms of visitors was the Netherlands, with 240,000 interested parties, ahead of other EU countries and Switzerland.

The most important countries from the overseas regions were as follows: East Asia: China (110,000 visitors), Near/Middle East: Israel (30,000), North America: USA (70,000), Latin America: Brazil (21,000) and Africa: Egypt and South Africa (around 13,000 each).

### Trade Fairs in Germany 2018

The five most important visitor countries



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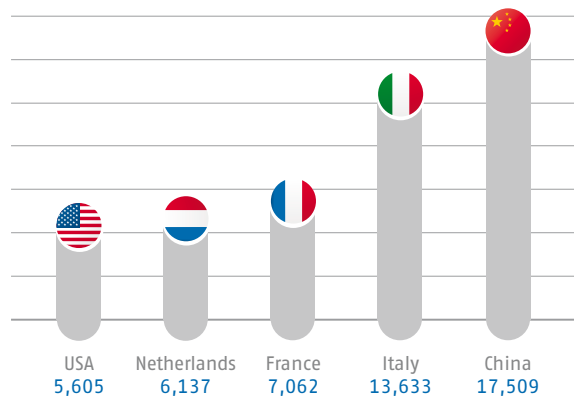
## More exhibitors from all continents

The 4.4% growth in the number of foreign exhibitors in 2018 had an extremely broad regional basis. Participations in German trade fairs increased from all continents and subcontinents.

In 2018, the top growth region was not Asia but Latin America (+16%), followed by Africa (+10%). The main reason for the strong position of Latin America was Mexico's role as a partner country for Hannover Messe 2018. It is especially for this reason that Mexico had a total of 502 exhibitors (+62%) compared to each of the previous events.

### Trade Fairs in Germany 2018

The five most important exhibiting countries



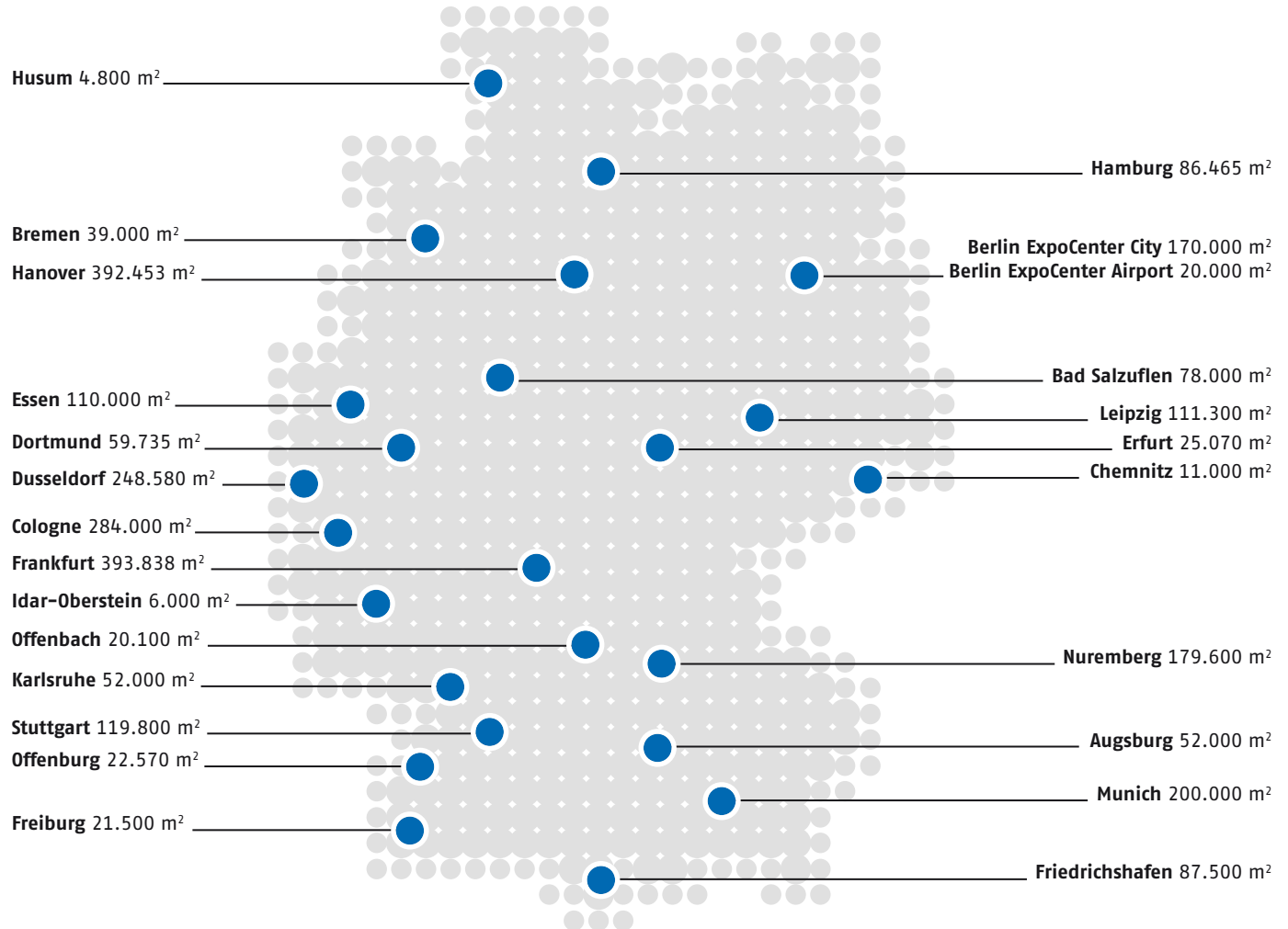
© AUMA

However, Colombia (+50%) and Chile (+19%) also showed strong growth, while Brazil only achieved +3% and Argentina fell by 14%. With a lead of 4,000 participations, the People's Republic of China was once again the most important exhibitor country, with growth of 7%. Some of the other countries in the 20 largest exhibitor countries also recorded considerable growth, such as Spain (+5%), Turkey (+10%), the Republic of Korea (+11%) and Hong Kong (+12%). Also worthy of note is the growth of 28% in Russian participations, +16% for Canada, which recorded over 1,000 exhibitors for the first time, and +43% for Ukraine.

Contrasted with this are countries with considerable declines, such as the United Kingdom at -5%. However, it is difficult to prove the role that the uncertainties surrounding the exit from the EU play in this. In addition, there was a fall of 8% for Hungary, of 6% for Sweden and of 16% for Tunisia.

The considerable increase in participations from Africa is based primarily on growth in the exhibitor countries that are the most important in any case: South Africa (+13%), Egypt (+10%) and Morocco (+9%). Apart from this, several countries in Central Africa had clearly started export initiatives. Among the continents and economic regions, apart from Latin America and Africa, the European non-EU countries (+11%), South, East and Central Asia and the Middle East (6% each) showed the strongest growth; the EU achieved +2%.





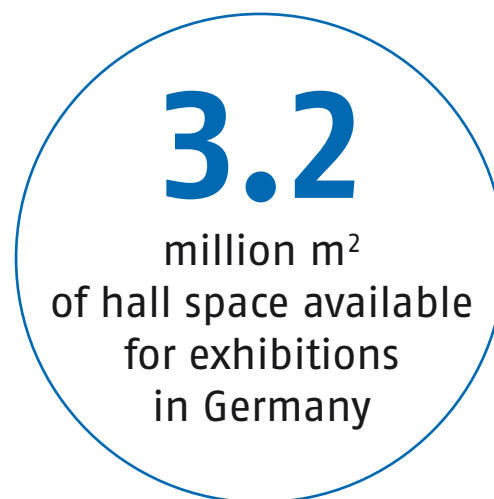
**Exhibition centres**  
with international / national  
relevance (gross hall capacities)

## Exhibition venues to invest over a billion euros by 2023

At the German exhibition venues of at least national importance, there was 2,795,311 m<sup>2</sup> of hall space available at the beginning of 2019; this is roughly 1.4% less in comparison to the previous year (2,835,922 m<sup>2</sup>). The primary reason for these investments is to modernise existing halls or replace old halls. This was revealed by an AUMA survey at the beginning of 2019.

The survey included 25 exhibition venues which held at least one exhibition that was classified by AUMA as a national or international event. The reason for the decline in hall space is that, even though new buildings were completed, capacities were also taken out of operation. In 2018, over 400 million euros was invested in the national exhibition venues. This money was spent, among other things, on constructing replacement buildings, expanding and modernising the halls, constructing new entrances to exhibition centres or reconfiguring them, and on converting the hall lighting to LED.

**LITTLE GROWTH IN HALL CAPACITIES BY 2023** □ By 2023, the intention is that the hall capacities should be expanded by 29,387 m<sup>2</sup> (+1%), and 22,558 m<sup>2</sup> of this will already be available over the course of 2019. From 2019 to 2023, more than a billion euros will be invested in total, primarily in replacement construction, refurbishment and modernisation of halls. According to a survey conducted by AUMA, exhibition venues of regional importance boasted gross hall space of more than 369,394 m<sup>2</sup> in 2019, which means that at present around 3.2 million m<sup>2</sup> of hall space is available for staging exhibitions in Germany.





” When deciding whether to participate in trade fairs, exhibitors base their decisions on emotional factors in very few cases. It is **hard data** on the quality of the trade fairs that counts. That is why we have the FKM in Germany.”

Klaus Dittrich, FKM Chairman

## FKM certification

FKM – the Society for Voluntary Control of Fair and Exhibition Statistics – certified the basic data, such as exhibitor, space and visitor figures, trade or private visitor surveys, at around 190 exhibitions in Germany in 2018.

For nearly 75% of all exhibitions analysed, structural data on visitors is available, which makes it easier for exhibitors to plan fairs and review their success. FKM, which is managed by AUMA, currently has 46 partners based in Germany and two foreign members. Current topics within FKM include the possibility of certifying foreign trade fairs arranged by German organisers, the relevance of tracking visitors for FKM and the intensification of communication. As a member of UFI – the Global Association of the Exhibition Industry, FKM is in close contact with similar organisations in other countries. At the meeting of the Associations’ Committee of the UFI in November 2018 in St. Petersburg, for instance, the attendees exchanged experiences regarding the provision of certified exhibition data. It is also involved in the UFI’s Euro Fair Statistics.

There have been very positive developments in the use of the FKM website, following a number of search engine optimisation measures. For instance, the number of users in the first quarter of 2019 has risen by over 50% compared to the previous year, and the number of page views by just under 20%. For more information of certified exhibition figures: see the FKM website ► [fkm.de](https://fkm.de)



LOBBYING AND LEGAL AFFAIRS





# LOBBYING AND LEGAL AFFAIRS

## Sustainability

Sustainability in the trade fair industry is a joint endeavour in the sector. That is why AUMA has been actively participating in the Sustainable Development Committee in the Global Association of the Exhibition Industry UFI since its creation.

AUMA is thus regularly represented on the jury for the UFI Sustainable Development Award. In 2018, prizes were awarded to companies that implement strong sustainability components in their performance. The entries received were very varied, ranging from a single exhibition stand designer to large, global exhibition organisers. UFI therefore decided to choose six winners in 2018 for their sustainable appearances in the fields of design, construction and implementation.

A new, international group of exhibition organisers and associations was also founded, which has set itself extremely ambitious targets for injecting more sustainability into the global trade fair industry. UFI has offered to act as the secretariat for this group. AUMA is also kept continually informed of further developments through its participation in the Sustainable Development Committee.

AUMA is also planning a new publication on sustainability in the trade fair country of Germany. AUMA has been a firm advocate for the environment since 1994. Even then, it published the brochure »The environmentally friendly trade fair« together with its members.



## Cases of fraud

It is becoming increasingly common for fraudsters to use the publicly available exhibitor lists for trade fairs to target exhibitors and send them dubious contract proposals.

The most prominent example of this is the provider of the International Fairs Directory, which operates out of Costa Rica and writes to exhibitors at trade fairs on a large scale in advance, asking them to check that a pre-completed data sheet is correct. Only in the small print does it state that, by returning the form, the exhibitor is obliged to pay 1,212 euros for the next three years. AUMA advises those concerned to wait the matter out, since allegedly existing claims have never yet been legally enforced.

In addition, AUMA is increasingly hearing of cases in which fraudsters offer visitor lists for upcoming trade fairs to exhibitors via email. Caution is also called for here. German trade fair organisers do not pass on visitor data to list brokers. Exhibitors can thus assume that such offers are regularly made with fraudulent intent, since the service promised cannot even be provided.

In any case, contact lists from list brokers are only of limited value. This is because Section 7 of the German Law Against Unfair Competition states that contact for advertising

purposes via email or telephone is in principle only permitted with the addressee's prior express consent. Lists of email addresses may therefore de facto not be used, since there is no specific declaration of consent from the addressees.





# Law compact

## Right of withdrawal at trade fairs



In a decision that confirmed the view already taken by the legislator and the courts in Germany, the European Court of Justice (ECJ) ruled that a stand at an exhibition constitutes 'business premises' if, in the light of all the factual circumstances and in particular the appearance of the stand and the information relayed on the premises of the fair itself, a consumer could reasonably assume that the trader in question is offering goods for sale there. Therefore, as long as the consumer cannot claim to be surprised to be offered goods for sale at the exhibition stand, there is also no right of withdrawal. The duration of the exhibition in question is not conclusive in that regard, according to the ECJ.

## Improvement of EU visa policy

In February 2019 EU Member States decided to modernise the EU's common visa policy. The aim is to make it easier for travellers to obtain a visa to enter Europe. AUMA has been working for many years to simplify the visa procedure for business travellers wishing to visit or exhibit at trade fairs in Germany. The trade fair industry is particularly pleased that the application period will be increased from 3 to 6 months. The facilitation of issuing multiple-entry visas and the renunciation of the principle of personal consultation will also help trade fair visitors, as this will save time and money for visa applications. Also AUMA carried out its annual survey of the foreign representatives of international trade fair companies regarding visa issuing practice. The AUMA has used the extensive information gained to draw the attention of ambassadors to problems and to ensure improvements.



## Representation of interests in other organisations

AUMA uses its membership in committees of national and international organisations to clarify the position of the German trade fair industry, but also to exchange information with representatives from other sectors and countries.

**UFI COMMITTEES** □ AUMA is represented on the Board of Directors of the Global Association of the Exhibition Industry UFI by its CEO, Dr Peter Neven, in his capacity as Vice Chairman of the Associations' Committee of the UFI. The European Chapter of the UFI, under the leadership of Gerald Böse, Koelnmesse, discusses among other things current topics for lobbying the European Commission and issues relating to data protection in the EU. Apart from AUMA, the certification organisation FKM, which is managed by AUMA, is also a member of the Associations' Committee of the UFI. The issues dealt with in 2018 related to security and sustainability. Some associations also referred to the fact that it is becoming increasingly difficult to collect complete data for national statistics. AUMA is also a member of the Sustainability Committee of the UFI. Central areas of focus for this committee in 2018 were best practice examples in sustainability projects and the Sustainability Award. Bettina Rosenbach, manager of training and further education at AUMA, is the Vice Chair of the Human Resources Management Committee of the UFI. In 2017, the central focus was on preparing for the Education Forum on HR Management, which took place in March 2018 in Kuala Lumpur.

**COOPERATION IN FOREIGN TRADE BODIES** □ AUMA represents the interests of the trade fair industry on the foreign trade advisory board of the Germany Trade and Invest (GTAI) agency and in the Chambers of Commerce Abroad working group of the Association of German Chambers of Industry and Commerce (DIHK), particularly regarding issues of promoting foreign trade. In addition, AUMA secures valuable information there in relation to issues of access to foreign markets, which it can incorporate into its global market monitoring and reporting. Furthermore, AUMA is involved in numerous committees for coordinating export promotion programs. Such programs for renewable energies, civil security technology or the health industry are advised annually with assistance from AUMA, along with delegation trip programmes as part of the strategic advisory council for market exploitation for SMEs.

AUMA is also a permanent guest on the federal/state committees for domestic and foreign trade fairs. On these committees, representatives of the ministries of economic affairs from the German states exchange ideas with the federal ministry twice a year in relation to funding programs and the general economic and legal framework for domestic and foreign markets. As the association for the trade fair industry, it puts forward topics and data from organisers and exhibitors.



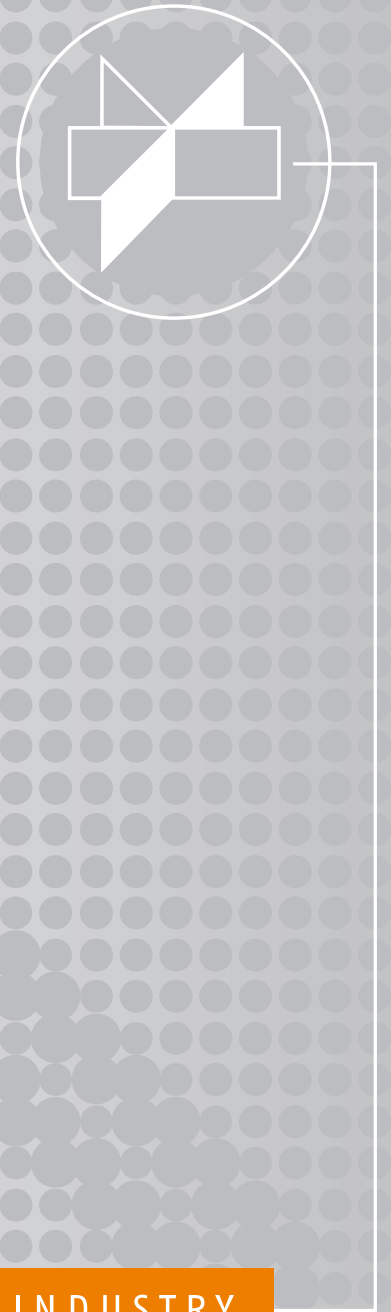
## AUMA office in Brussels

The main tasks of the AUMA office in Brussels, which is run in cooperation with the German Chamber of Industry and Commerce (DIHK), is to represent the interests of the German trade fair industry at the EU, to keep an eye on the Commission's activities that have an impact on trade fairs, and to organise the annual AUMA Round Table Brussels in collaboration with the AUMA management.

Around 20 representatives of German exhibition companies and representatives of umbrella organisations of German industry participated in the 19th AUMA Round Table Brussels at the end of January 2019. Representatives from the European Commission and the European External Action Service explained the European Union's sanctions policy regarding Iran and Russia. Florian Laudi, Brexit Team Leader at the Permanent Representation of the Federal Republic of Germany to the EU, gave an overview of Brexit and its possible consequences. Dr Günter Lambertz, head of DIHK at the Brussels office, informed the participants of current EU topics, particularly the European elections. Barbara Weizsäcker, General Secretary of the European Exhibition Industry Alliance (EEIA), presented the activities of the EEIA in 2018 and 2019. This organisation represents the interests of the Global Association of the Exhibition Industry UFI and of the European Major Exhibition Centres Association EMECA in Brussels. Finally, AUMA reported on the issues of scams, the ban on diesel and the posting of employees in France, among other things.

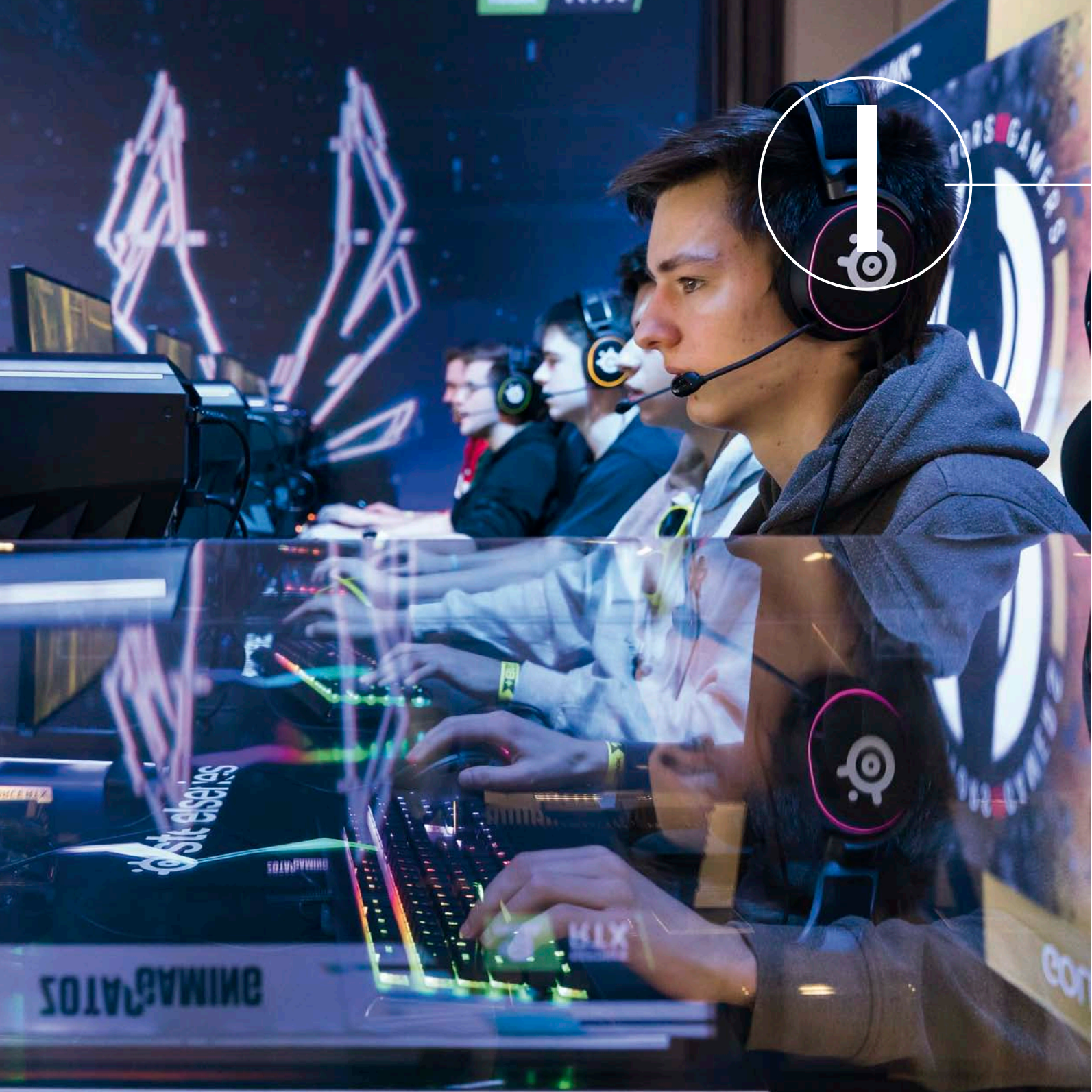


Left to right: Marco Springer and Dr. Peter Neven (AUMA), Alina Nedea (EU-Commission), Andrea Barbaria and Florin Nita (European External Action Service).



INSTITUTE OF THE GERMAN TRADE FAIR INDUSTRY



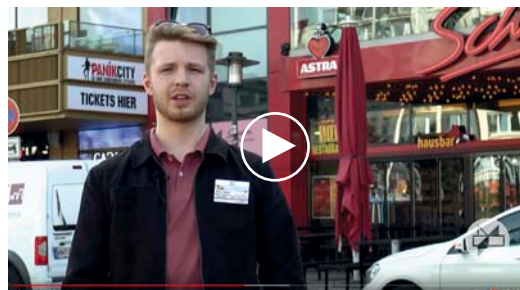


# INSTITUTE OF THE GERMAN TRADE FAIR INDUSTRY

## Education and knowledge...

...facts, service and advice covering all aspects of trade fairs: all this is provided with a comprehensive offering by the Institute of the German Trade Fair Industry and the German Trade Fair Library. On Global Exhibitions Day 2018, AUMA presented the training and development for the trade fair industry in Germany.

**TRAINING AND DEVELOPMENT FOR THE TRADE FAIR INDUSTRY** □ Young talent with enthusiasm for event management is in demand in the trade fair industry in Germany and globally. But how do you go about becoming an event manager, and what do the trainees themselves have to say about their training? For Global Exhibitions Day, a team from AUMA travelled to the MEET HAMBURG trainee conference in April 2018 to conduct interviews with trainees and present these interviews to specialists from all over the world in an English-language video. The aim was to provide insight into the German model of dual training. The MEET HAMBURG congress, which is organised and conducted for trainees by trainees as part of the curriculum, offered a vivid insight into the field of event management.



On 6 June 2018, Global Exhibitions Day, AUMA released the film, which has been watched over 6,500 times on YouTube and other social media. Global Exhibitions Day is an initiative of the Global Association of the Exhibition Industry UFI.

### Cooperation with universities 2018

- **Teaching commitments**  
at 16 universities and technical colleges
- **10 groups of visitors**  
from universities to the institute in Berlin

## Training and development

The German trade fair industry needs strong growth, also in the future. That is why AUMA is supporting and promoting training and development in the trade fair and events industry, whether this involves university education or dual training in a business and at vocational college.

### TRADE-FAIR RELATED COURSE CONTENT AT UNIVERSITIES □

Although trade fairs continue to be important for companies in their marketing, there are hardly any trade fair courses at German universities. The topic of trade fairs is usually offered under the subjects Events or Marketing. The range of courses is rather unclear overall. There are currently 70 courses in the field of events that include trade fairs, over 40 of which are at private universities and 27 at state-run universities. The 70 courses are divided into 58 bachelor's degrees and 12 master's degrees.

At ► [auma.de](http://auma.de), you can find information about universities offering trade fair topics, the course in question and the degree level.

Studies, graphics and presentation documents are available for download from the website ► [messewissenschaft.de](http://messewissenschaft.de).





○ *Even watersports experiences are possible in exhibition halls*

## Research

AUMA regularly awards research assignments focusing in particular on the objectives and behaviours of exhibitors and visitors. It coordinates matters closely with the Working Group on Trade Fair Transparency, which includes representatives of both exhibitors and exhibition organisers.

**AUMA MESSE TREND 2019** □ The twentieth round of the exhibitor survey was conducted in the autumn of 2018. This is an annual survey of German exhibiting companies, for which Kantar TNS asked 500 representatively selected companies about their current and future trade fair activities (for details on AUMA MesseTrend ► S. 17).

**WHAT MAKES A TRADE FAIR INTO AN EXPERIENCE?** □ People like trade fairs and people like experiences – we know this from various surveys. That was the starting point for a study that brought together both aspects. For the first time, the experience preferences of trade fair visitors were scientifically investigated. The Institute of the German Trade Fair Industry in AUMA and the ITB Berlin supported the Institute for Audience Research at the SRH University of Popular Arts (hdkp) in Berlin for the study »The trade fair experience – dimensions of the experiences, how they are perceived and suggestions for how to stage them«. Fourteen concrete recommendations were made on the basis of the findings, which allow trade fair creators to more precisely address the needs of their trade fair participants. The full study is available free of charge via AUMA (► auma.de).

### EXHIBITION ARE OF HIGH ECONOMIC IMPORTANCE □

The Ifo Institute for Economic Research in Munich has for the third time investigated the economic importance of exhibitions in Germany, on behalf of AUMA. According to this, exhibitions in Germany generate production effects of 28 billion euros annually. This leads to an employment effect of 231,000 full-time jobs (► S. 79). Apart from this, 4.5 billion euros of tax receipts of the Federal Government, states and municipalities can be attributed to the holding of exhibitions. Compared to the last investigation of this type nine years ago, the production effects today are 20% higher. According to the study results, the exhibitors invested 9.6 billion euros in their exhibitions participations in an average exhibitions year during the period from 2014 to 2017. The visitors to German exhibitions spend 4.7 billion euros in an average exhibitions year. This study is also available free of charge via AUMA (► auma.de).

**STUDIES IN 2019** □ The AUMA Trade Fair Trend, the only long-term study into the behaviour of exhibiting companies in Germany, will be carried out for the twenty-first time. Exhibitors in the Federal Government's foreign trade fair programme will also be surveyed regarding their experiences with the programme. The Customer Journey of Trade Fair Visitors project will study how and why visitors come to trade fairs, which touchpoints are important here and how trade fair organisers and exhibitors can satisfy the resulting wishes and needs of their customers in an even more targeted way.





○ Students of HMKW – University of Applied Science for Media, Communication and Economics, Berlin at AUMA

”AUMA offers the most extensive collection of German-language literature on trade fairs, congresses and events.”

## German Trade Fair Library

The German Trade Fair Library assists students, teachers and other interested parties in searching for suitable publications covering all aspects of live communication. It boasts the most extensive collection of German-language literature on the topics of trade fairs, congresses and events.

With its specialist expertise, the library is also available for information requests and advice. The library comprises approx. 10,000 media units, including more than 960 academic theses and dissertations. It is used mainly by students and lecturers engaged in the study of the trade fair and events industry, but also by consultants, journalists and employees of organisers and trade fair service providers. As in 2017, in 2018 there were a total of 280 visits, and 550 research enquiries were answered. The number of loans by mail was 370. The close cooperation with other university libraries also opens up new user groups.

The works comprise more recent specialist literature such as books, studies, magazine articles and academic papers. In addition, the library contains a selection of general literature on marketing, advertising, distribution and foreign trade. The collection is completed by an extensive collection of antiquarian books containing titles from the history of trade fairs.

The offering of the Institute of the German Trade Fair Industry can be easily found by visiting  
► [messewissenschaft.de](https://messewissenschaft.de) and ► [deutsche-messebibliothek.de](https://deutsche-messebibliothek.de)  
and of course ► [auma.de](https://auma.de).



EXHIBITIONS ABROAD





# EXHIBITIONS **A**BROAD

## Overview

In nearly all regions of the world, the exhibition industry is characterised by an optimistic prevailing mood. This is also reflected by surveys of organisers carried out by the Global Association of the Exhibition Industry UFI.

Halfway through 2018, around 70% of event organisers worldwide expected increased sales for 2018 and the first six months of 2019. In Europe, as many as 80% of exhibition organisers had positive sales expectations for the first six months of 2019, while 60% of their colleagues in Africa and the Near and Middle East expected sales to increase. In many cases, this trend also mirrors the macroeconomic situation. According to calculations by the International Monetary Fund (IMF), the world economy grew by 3.7% in 2018. This was also helped by the economic stimulus from the USA, among other things. In the future, however, the protectionist measures on the part of the USA could have a negative impact on the world economy. In the emerging and developing countries, China (6.6%) and India (7.3%) also recorded very good rates of growth in 2018. By contrast, growth rates in the developed countries, apart from the USA (+2.9%) were noticeably more subdued, such as around 1.5% in France and the UK or just under 1% in Japan.

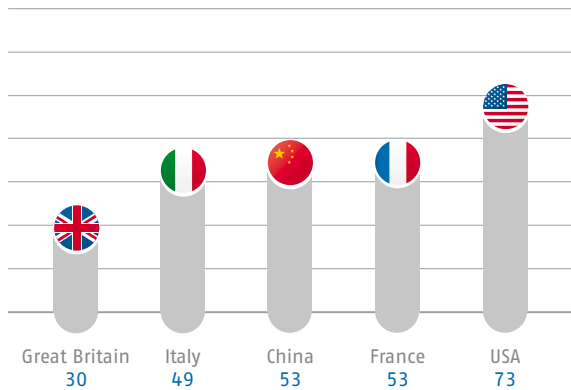
Accordingly, in addition to the traditional European markets, German exporters also have their sights set on many countries and regions outside of Europe. That is also reflected in the internationalisation strategies of German exhibition organisers. AUMA is therefore monitoring the development of foreign trade fairs that compete with international events held in Germany particularly closely. At regular intervals, it asks all of the organisers of international trade fairs in Germany about their most significant foreign competitors. Most recently in 2015, for more than 80% of the international trade fairs held in Germany, around 400 particularly relevant rival trade fairs were identified around the world. The German exhibition organisers view their most significant competitors as being in the developed markets and in China.

International  
trade fairs in Germany  
have around  
**400**  
relevant competitors  
worldwide



## Foreign Trade Fairs

Number of competitors to international trade fairs in Germany (period 2014 to 2017)



© AUMA


\* Survey among German organisers;  
a maximum of three competing events

### MAIN COMPETITORS FOR GERMAN TRADE FAIRS IN EUROPE

□ The rival trade fairs are essentially concentrated on three continents: 56% take place in Europe, primarily in EU member states. 19% are held in North America, exclusively in the USA, and almost one in four of the trade fairs (24%) in Asia. Despite strong international competition, the international trade fairs in Germany consolidated their leading position during the 2014 to 2017 cycle.

Compared to trade fairs in Germany, the rival trade fairs abroad recorded on average 73% of the net space, 76% of the exhibitors and 76% of the visitors. It should be noted here that the segment of international trade fairs in Germany covers around 170 events each year. The foreign competitors mentioned, by contrast, belong to a relatively small leading group in each country.



 *Milano Congressi, Mailand*



**43%**

of German exhibiting  
companies are also  
represented at foreign  
trade fairs

## General conditions for German trade fair activities abroad

The German economy has proved its export strength even in times characterised by an increasingly uncertain global economic situation and the introduction of additional tariffs by the USA, although it was not possible to achieve the previous growth rates.

In 2018, Germany exported goods worth 1,318 billion euros (+3.0% in comparison to 2017) and imported 1,090 billion euros worth of goods (+5.7% in comparison to 2017). Goods worth 779 billion euros (+3.8% in comparison to 2017) were exported to and goods worth 623 billion euros (+6.3% in comparison to 2017) were imported from the Member States of the European Union. The European Union thus remains the most important foreign trade region for the German economy. The trade in goods with countries outside the European Union also increased compared to 2017. Goods worth 539.2 billion euros (+1.9%) were delivered to and goods worth 467 billion euros (+5.0%) were imported from third countries.

On average, German companies participated in 8.8 trade fairs in the past two years: 5.4 of which were in Germany and 3.4 abroad. Over a third (36%) of the companies selected exhibition venues in Europe in 2017/2018 and 24% selected trade fairs overseas. This was revealed by AUMA Trade Fair Trend 2019, a representative survey (TNS Emnid) of 500 German exhibiting companies. While small and medium-sized enterprises tend to participate in trade fairs in Germany, 62% of the companies with sales of more than 125 million euros are also represented at trade fairs abroad.



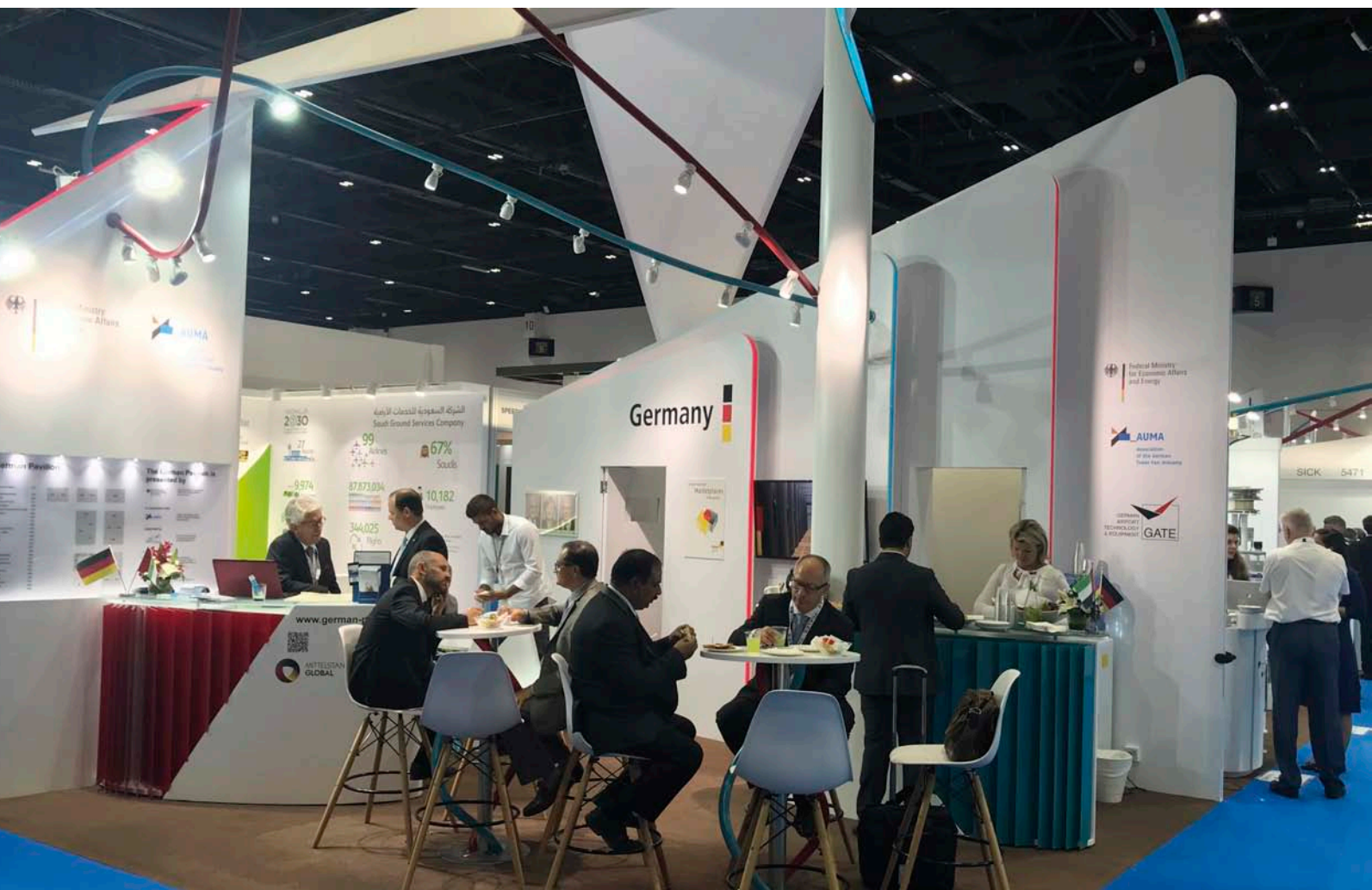
### German-Pavilion.com

The internet portal links to the individual websites for the joint participations of German companies abroad as part of the Foreign Trade Fair Programmes of the Federal Ministry for Economic Affairs and Energy (BMWi) and Federal Ministry of Food and Agriculture (BMEL).

German-pavilion.com makes it easier to get in contact with the respective exhibiting companies at **around 90%** of all foreign trade fair participations organised by the Federal Government.

Each year the around **230 websites** record some 30 million page views, 80% of which are from abroad.







## Support for German exhibitors abroad

In recent years, there has been a further increase in the willingness of German companies to also present themselves abroad in addition to their trade fair involvement in Germany. The Foreign Trade Fair Programme of the Federal Ministry for Economic Affairs and Energy supports small and medium-sized enterprises by arranging joint participations, primarily outside of the European Union.

**FOREIGN TRADE FAIR PROGRAMME 2018** □ In 2018, a budget of 44 million euros was spent to deliver 231 participations (2017: 226) as part of the Foreign Trade Fair Programme of the Federal Ministry for Economic Affairs and Energy.

The participations took place in a total of 43 countries (2017: 42). The most participations were carried out in South-East-Central Asia with 100 German Pavilions (43.3 %). 36 (15.6%) of the participations still took place in the Near and Middle East. The most participations per country were organised in China (49) and Russia (27), followed by the USA with 22 and the United Arab Emirates with 21.

Support from the Foreign Trade Fair Programme enabled 5,698 exhibitors (2017: 5,842) to participate in trade fairs in 2018. There was also a slight decrease in the average size of participations.



The reason for this, in particular, is that a series of trade fairs were included in the programme for the first time, and the corresponding German Pavilions tended to have a small starting volume. The majority of exhibitors participated in South-East-Central Asia (2,471), in the Near and Middle East (1,069) and the European countries outside of the European Union (991). These were followed by North America (635) and Latin America (241).

Participations in trade fairs in Russia are still only allowed in the Foreign Trade Fair Programme following a separate review by the BMWi to determine compatibility with sanctions. The participations that have been registered for 2019 also include the “German High Tech in Metal Working” industrial exhibition for companies from the machine tool and metalworking industries at the Metalex trade fair in November 2019 in Bangkok.



#### PROGRAMME FOR FOOD AND AGRICULTURE □

The Federal Ministry of Food and Agriculture (BMEL) supports German exhibitors from the areas of agricultural production and the food industry. AUMA works closely together with the ministry and the respective industry associations in coordinating the programme.

In 2018, the ministry participated in 34 foreign trade fairs; these included 13 participations in South-East-Central Asia and six in the European countries outside the European Union, as well as five in the Near and Middle East. 664 exhibitors took part. (2017: 612 exhibitors).

## Foreign exhibitions arranged by German organisers

A total of 15 AUMA and FAMA members organised 321 exhibitions worldwide in 2018. The concepts were based on the standards of leading international trade fairs in Germany, with regional modifications. Accordingly, trade fairs are grouped together under the seal of quality GTQ – German Trade Fair Quality Abroad.



37 of the 321 trade fairs received the GTQ label for the first time in 2018, including 16 first-time events. Apart from a few exceptions, the remaining trade fairs relate to the acquisition of successful foreign trade fairs by German exhibition companies. The number of GTQ trade fairs held each year peaked at 321 trade fairs. This is more GTQ trade fairs than in any other year before (2014: 303 GTQ trade fairs).

The number of exhibitors did not only increase significantly in absolute numbers. On average, the number of exhibitors per trade fair increased from 425 to 462 represented companies. Visitor numbers fell below the nine-million mark again, since fewer and less intense consumer exhibitions are held in even-numbered years. The result from 2016 was clearly exceeded, with an increase of around 750,000.

A comparison with the previous events in each case reveals growth in visitor numbers of 2.5%. The five GTQ events that attracted the most visitors included three automotive exhibitions, one construction fair in China and a trade fair for the plastics industry in India.

**CHINA IS THE MOST IMPORTANT TARGET MARKET** □ The number of trade fairs organised primarily by German exhibition organisers in China has remained at a consistently high level for several years (2018: 91 trade fairs). This represents 28% of all trade fairs organised by German organisers abroad. Ten of the fifteen organisers arranged trade fairs in China in 2018. The country once again played host to the six trade fairs that attracted the most exhibitors. The size of an average GTQ trade fair in China is significantly above the overall level for all GTQ trade fairs, which is reflected in the shares of the usual trade fair KPIs. The US economic interventions regarding Iran have significantly dampened the interest in Iran. Although there were still 6 GTQ trade fairs in Iran, these showed a significant decline of around one-third in exhibitor numbers. Four GTQ trade fairs are planned in Iran for 2019.

In 2018, the Ministry for Economic Affairs and Energy (BMWi) and the Federal Ministry of Food and Agriculture (BMEL) participated in 86 GTQ trade fairs. Of these, 72 were attended by the BMWi and 14 by BMEL. Currently, 327 foreign trade fairs arranged by German organisers have been announced for 2019.



**CAMPUS  
GERMANY**



**ملتقى ألمانيا**  
EXPO 2020 DUBAI





## World Expositions

**EXPO DUBAI 2020** □ »Connecting Minds, Creating the Future« is the motto for the large World Exposition to be held in Dubai next year. Approximately 25 million visitors are expected, around 70% of them from abroad, at a venue covering 438 hectares. The Federal Republic of Germany will be participating in the subject area of »Sustainability« with a pavilion under the title of CAMPUS GERMANY. This will focus on education, an important topic within the region. The German Pavilion will be a welcoming place for knowledge, research and meetings: the exhibits will showcase German innovations and solutions for resource and environment protection in an entertaining, surprising, tactile and digital way. The consortium consisting of the agency facts & fiction from Cologne, the architecture firm LAVA from Berlin and the Swiss construction company ADUNIC has been acquired for the design and architecture of the German Pavilion. The organisation and operation of the World Exposition will be under the responsibility of Koelnmesse, which already managed the pavilion at the EXPO in Shanghai in 2010. Just like the 2022 football world cup in Qatar, EXPO Dubai will be held during the cooler time of the year: from 20 October 2020 to 10 April 2021. The German Day at EXPO 2020 will be 23 February 2021.

**EXPO ARGENTINA 2023** □ In 2023, an EXPO will for the first time be held in Latin America. In November 2017, the Argentinian capital Buenos Aires was chosen to host a »small« World Exposition. The guiding theme will be »Science, Innovation, Art and Creativity for Human Development. Creative Industries in Digital Convergence.« Many nations and organisations will participate in the small EXPO which will be held over an area of around 25 hectares from 15 January to 15 April 2023. The organiser of the event expects 6 million visitors.



**LARGE WORLD EXPO 2025 IN OSAKA** □ The Japanese city of Osaka in the Kansai region will be holding EXPO 2025 from 3 May to 3 November. This decision was made in November 2018 by the members of the Bureau of International Expositions (BIE) in Paris following a drawn-out bidding procedure. With the guiding theme »Designing Future Society for Our Lives«, Osaka was able to see off rival Yekaterinburg with a total of 92 out of 153 votes. Osaka will thus become the host of a large World Exposition for the second time since 1970. 28 million visitors are expected, with around 15% coming from abroad. Large World Expositions are held every five years for a period of six months. The next large World Exposition will take place from 20 October 2020 to 10 April 2021 in Dubai.



MARKETING, MEDIA AND EVENTS





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# MARKETING, MEDIA AND EVENTS

## Marketing for German trade fairs

In addition to the international marketing carried out by German exhibition organisers, AUMA advertises the international trade fair country of Germany on a global basis under the slogan »Trade Fairs Made in Germany« and the trade fairs arranged by German organisers abroad under the label GTQ (German Trade Fair Quality Abroad).

PROMOTIONAL FILM «TRADE FAIRS MADE IN GERMANY» □ Germany is a globally leading country for trade fairs in the heart of Europe, with the best infrastructure and ideal conditions for presenting innovations. At trade fairs, where people meet and engage in conversation, new ideas are created and economic sectors are given a crucial boost. These are the messages of the promotional film »Trade Fairs Made in Germany«.

### Schedule Messen Made in Germany

- **150,000** copies worldwide
- **11 languages** Arabic, Chinese, German, English, French, Greek, Korean, Brazilian Portuguese, Russian, Turkish and Spanish
- Targeted distribution to around **500 multipliers** such as German Chambers of Commerce Abroad and Diplomatic Missions
- Used at all **joint stands** of the Federal Government's official Foreign Trade Fair Programme



The film is two minutes and thirty seconds long and is available in ten language versions: Arabic, Chinese, German, English, French, Korean, Brazilian Portuguese, Russian, Spanish, Turkish. It is primarily available for the information agencies for German trade fairs abroad. The film has been accessed more than 8,500 times (downloaded from the website and viewed on YouTube) since it was released in the autumn of 2016.

**ADVERTISING AND POSTER MOTIF** □ The ‘Trade Fairs Made in Germany – Marketplaces of the World’ posters have been used to great success as part of the joint participations of German companies abroad offered by the Federal Ministry for Economic Affairs as part of the Foreign Trade Fair Programme. The motifs are also used at the information agencies for trade fairs in Germany abroad, such as Chambers of Commerce Abroad and German diplomatic missions.



○ The promotional film »Trade Fairs Made in Germany« has so far been viewed more than 8,500 times.

The advertising and poster motif is available in five languages: German, Chinese, English, Russian and Spanish.

#### INFORMATION FOR CHAMBERS OF COMMERCE ABROAD

**AND EMBASSIES** □ The demand for detailed information was once again high; more than 200 enquiries by German Chambers of Commerce Abroad and Diplomatic Missions were answered in 2018. In the limelight were specific evaluations of statistics from foreign exhibitors and visitors to the international trade fairs in Germany.

The number of links to the information offered by AUMA, specifically to the trade fair database in four languages, remained high: roughly 250 institutions around the world have links on their websites to [auma.de](http://auma.de), for example German Embassies and Consulates General as well as German Chambers of Commerce Abroad.

**GERMAN TRADE FAIR QUALITY ABROAD – GTQ** □ Apart from advertising Germany as the country of international trade fairs, AUMA also provides information on the trade fairs arranged by German organisers abroad. The publication of the GTQ calendar was accompanied by a series of promotional measures. There was a focus on placing advertisements. Editorials were also used to intensify promotion of the topic.



**German Trade Fair Quality Abroad GTQ**

**2019** 

**AUMA German Trade Fair Quality Abroad**

**Mehr als 310 Messen deutscher Veranstalter in 36 Ländern\***

Deutsche Messeveranstalter aus dem Mitgliederkreis des AUMA bieten internationalen Ausstellern weltweit ihre Veranstaltungs- und Branchenkompetenz.

Die Konzepte dieser Veranstaltungen orientieren sich an den Standards führender internationaler Messen in Deutschland und ermöglichen deshalb Ausstellern überdurchschnittlichen Messe-Erfolg.

**More than 310 trade fairs of German organisers in 36 countries\***

German trade fair organisers which are AUMA members offer their know-how to exhibiting firms all over the world.

The concepts for these events are based on the standards of leading international trade fairs in Germany, and therefore allow exhibitors to achieve above-average trade fair success.

\*Messedaten gedruckt jährlich im 4. Quartal  
Trade fair data printed annually in the 4<sup>th</sup> quarter

**Mehr Informationen → [gtq.de](http://gtq.de)**

**More Information → [gtq.de](http://gtq.de)**

## Generic marketing for trade fairs

No other marketing instrument offers so many opportunities for engaging in face-to-face dialogue: this is the message of the campaign »Success through Trade Fairs«.

The marketing campaign targets managers and marketing decision-makers in small and medium-sized enterprises in Germany.

The package of measures covered by the cross-media campaign includes advertisements in national daily newspapers and business media, banner ads on business portals and taking an information stand to various marketing events for small and medium-sized enterprises throughout Germany.

**FOCUS ON FACE-TO-FACE MEETINGS** □ Apart from print and online advertising, face-to-face meetings were once again at the heart of the campaign: at a total of 12 events oriented towards medium-sized enterprises, a campaign stand offered the opportunity to exchange ideas on the strengths on trade fairs in the digital age and the variety of aims that can be achieved by participating in trade fairs. The offering ranged from a mobile charging station via a fruit bar and ice cream chest to sponsoring the WiFi, and the eye-catching stands reached around 6,000 participants from medium-sized enterprises in a direct and personal way.

In 2018, the campaign generated a total of more than 3 million contact opportunities in the core target group of German small and medium-sized enterprises.



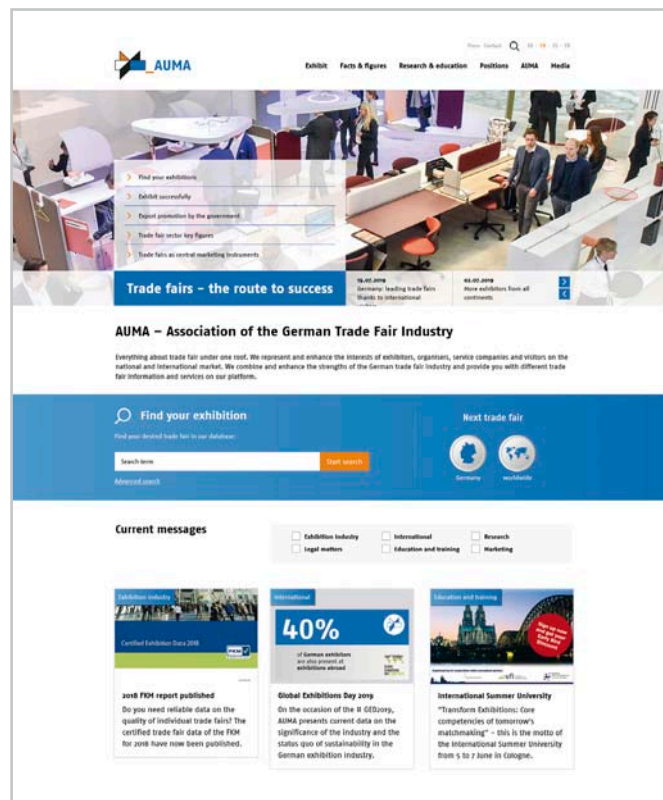


## Web services

AUMA's website was completely redesigned in 2018. It focuses on visual user navigation and emotional target group appeal under the slogan »Success through Trade Fairs«.

**EXHIBITION DATA** □ The main content of the internet offering is exhibition data and information for exhibitors – the AUMA database is clearly visible in a central location directly on the home page. All of the trade fairs in Germany and abroad can be searched for here via a joint search screen. The user can find 5,000 dates in the AUMA exhibition database, as well as key figures for up to three previous events in many cases. Most of the exhibitions in Germany also feature FKM-certified information about the visitor structure. Specific indexes and categories make it easier to search for dates, for example for international trade fairs in Germany or trade fairs in a special region listed in the Foreign Trade Fair Programme.

The AUMA exhibition database also provides around 5,000 addresses of organisers, service providers, authorities and organisations and audit companies for exhibition figures in Germany and abroad.



” Now mobile-compatible:  
AUMA exhibition database  
in four languages and further  
information on exhibitions ”

**BASIC EXHIBITION KNOWLEDGE** □ »Successful exhibiting« – exhibiting companies can find all of the relevant information for their participation under this heading: from planning trade fairs to building stands, via promoting Trade Fair Benefit Check. The ABC of trade fairs is completed by legal notices regarding copyright, contract law, tax issues, visas and data protection. Under the heading »Facts & Figures«, the website provides a unique source of information on the trade fair country of Germany and the German exhibition industry. This section also offers 23 profiles of foreign exhibition markets. The »Research & Education« section describes AUMA's strong commitment to trade fair research and in training and development in the exhibition sector. All training and development opportunities in the sector, including contact details, are listed here for school leavers and prospective students: all job profiles, from events management assistant to exhibition manager.



The AUMA website contains a completely new section: »Positions«. The exhibition industry is closely interwoven with macroeconomic, political and social developments. AUMA therefore takes a standpoint on numerous topics of economic, but also social relevance in our time: business start-ups, innovations, digitisation, export promotion, SME promotion and sustainability.

Other new services include a modern news section for the media, a publications section and an overview of the structure and organisation of AUMA with its members, tasks and contact details. The website is also available in four languages: in addition to the wide variety of offerings in German and English, there are also basic offerings in French and Spanish.

**EXHIBITION INSIGHTS** □ The AUMA blog offers insights into the exhibition industry. AUMA representatives report on experiences when visiting exhibitions and comment on current developments. 40 pieces were published last year.

## AUMA on Social Media

### AUMA Blog and Instagram

We share impressions from the world of exhibitions, often obtained by us in person, on our blog and on the photo-sharing platform Instagram.

### Facebook and YouTube

We share pieces about the exhibition industry, including from the media and our members, on YouTube (AUMA – The German trade fair industry channel) and Facebook (Trade fair industry channel). The issues of training and development and trade fairs as a profession are the focus of the AUMA Trade Fair Institute channel on Facebook.

### Twitter, LinkedIn and XING

Users can subscribe to visitor information and tips for exhibitors on our profiles on Twitter, LinkedIn and XING. We also publish information on exhibition dates on Twitter.

### B2B platforms of the exhibiting industry

On the industry platforms IndustryArena and induux, we regularly provide information about trade fairs as a marketing tool and funding programs.

## Communication for the exhibition industry

Trade fairs are indispensable in the marketing mix for companies. However, trade fairs also have significant macroeconomic importance. AUMA's communications in its 111th year of existence focused on these key messages.

Apart from their main function of bringing together supply and demand in specific sectors, trade fairs have significant macroeconomic importance. This was the key message of AUMA's external communications in 2018.

For example, to mark »Global Exhibitions Day«, AUMA published statements on the impact of German exhibitions on the economy as a whole – online and on social media. Global Exhibitions Day focused in particular on career paths and career opportunities in the exhibition industry. AUMA also published a video on YouTube in which young trainees in the sector talked about their training and professional experiences.

### For digital trade fair preparation

#### Trade Fair Benefit Check

- Software for calculating the costs and benefits of trade fair participation
- educational videos: Trade Fair Benefit Check trainer

#### Toolbox

- For trade fair novices and professionals, but also for consultants/agencies
- Messe fit: 10 steps guiding you through all the phases of trade fair preparation and debriefing
- Trade fair plan: Personal trade fair plan with possibilities for comparing different trade fairs
- incl. Trade Fair Benefit Check and educational videos

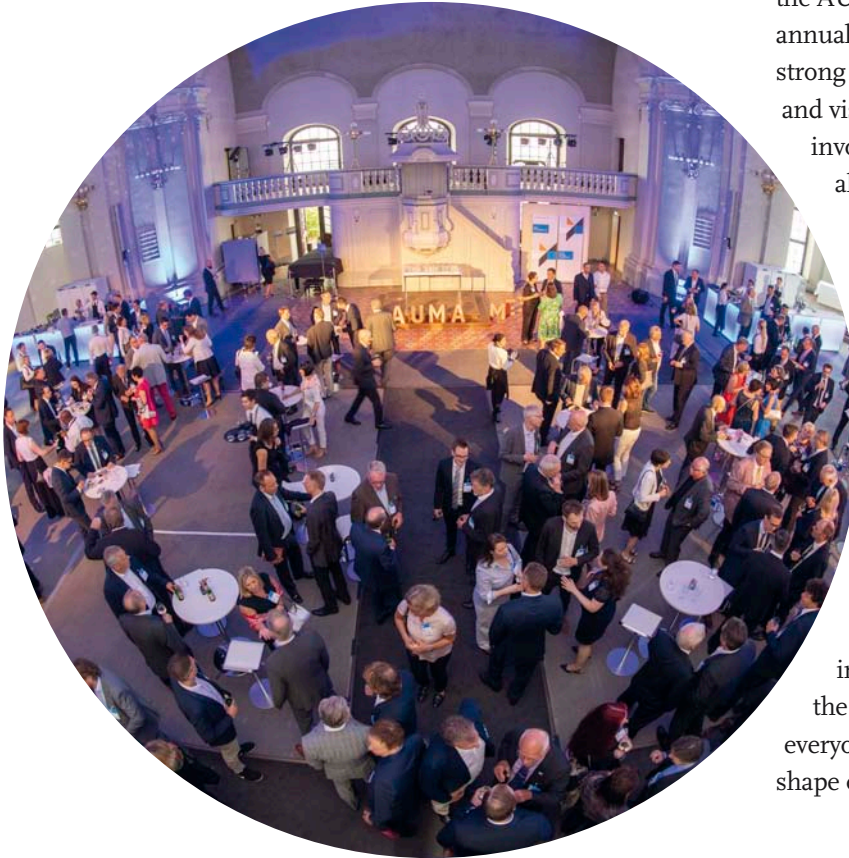


## AUMA Trade Fair Meeting 2018: Exhibition industry celebrated Global Exhibitions Day

Over 400 guests came to the French Cathedral at the Gendarmenmarkt in Berlin for the Trade Fair Meeting 2018. Together with business partners, colleagues and business associates, they celebrated the successful exhibition year of 2017 on 5 June and the global campaign day for the exhibition sector – Global Exhibitions Day – on 6 June.



AUMA and UFI celebrated the Global Exhibitions Day 2018 in Berlin: (left to right) Kai Hattendorf, UFI Managing Director, Gerald Böse, Chairman of the UFI European Chapter, Walter Mennekes, AUMA Chairman, and AUMA CEO Dr. Peter Neven



»In the 111th year since AUMA was founded, the trade fair sector is in a very good shape« – these were the words that the AUMA Chairman, Walter Mennekes, used to open the annual meeting of the exhibition industry. Exhibitions are strong pillars of the German economy: each year, exhibitors and visitors spend around 14.5 billion euros on their involvement in Germany. The macroeconomic benefit is also impressive: 28 billion euros of production effects and 231,000 jobs are based on exhibitions.

The around 400 guests at the AUMA Trade Fair Meeting 2018 were representatives of organisers, exhibiting companies and their service providers, associations, ministries and the government, and media. On the occasion of Global Exhibitions Day, Walter Mennekes welcomed the Managing Director of the Global Association of the Exhibition Industry UFI, Kai Hattendorf, and the Chairman of the European Chapter of the UFI, Gerald Böse. Together, the representatives of the international and German exhibition industry opened the Global Exhibitions Day celebrations, and invited everyone to help themselves to the cake pop tart in the shape of the Global Exhibition Day logo.

## Participation in exhibition congresses

Every year, exhibition experts meet at congresses and conferences around the world to discuss developments in the industry, exchange ideas and establish networks.

AUMA is usually in attendance and represents the German exhibition industry here.

**UFI GLOBAL CONGRESS IN ST. PETERSBURG** □ Under the motto »The Dynamics of Transition«, the congress of the Global Association of the Exhibition Industry UFI took place from 31 October to 2 November 2018 in St. Petersburg. 450 experts from around the world took part. The presentations and discussion panels dealt with current challenges for the exhibition sector, new trade fair formats, business models and the role of women in exhibition management. AUMA was represented by managing director Dr Peter Neven, division heads Harald Kötter and Marco Springer and Russia advisor Natalja Wings.



UFI-Trio: (left to right) Mary Larkin (Diversified Communications, Portland), President Craig Newman (Johannesburg Expo Centre) and Dr. Andreas Gruchow (Deutsche Messe AG, Hannover)

**IAEE ANNUAL CONFERENCE AND EXPO! EXPO! IN NEW ORLEANS** □ The annual conference of the US exhibition association IAEE took place together with the exhibition and congress show 'Expo! Expo!' from 11 to 13 December 2018 in New Orleans. Around 2,300 interested parties took part, primarily from North American industry associations, but exhibition associations from 26 countries were also represented. Marco Spinger, Head of the Global Markets Division, took part on behalf of AUMA.

**50TH INTERNATIONAL TRADE FAIR SEMINAR IN HAMBURG** □ The future of work and the future of Europe were at the heart of the anniversary event of the International Trade Fair Seminar, which took place from 23 to 26 June at Hamburg Messe. More than 100 experts from Germany, Austria and Switzerland came to gather knowledge on interdisciplinary themes, from the future of work to tariff policy. The representatives from AUMA were managing director Dr Peter Neven, division head Harald Kötter and marketing advisor Sylvia Kanitz.

**UFI EUROPEAN CONFERENCE IN VERONA** □ Over 220 delegates from 35 countries attended the European Conference of the Global Association of the Exhibition Industry UFI from 15 to 17 May 2018 in Verona. Representing AUMA were managing director Dr Peter Neven and AUMA division heads Harald Kötter and Marco Spinger.





*Prof. Christian Mikunda explained the dramatic composition of the Kap Europa conference center in Frankfurt to the FAMA congress participants*

Speakers and delegates discussed the changes that are needed to create future-proof exhibition which follow the new patterns of consumer behaviour. In workshops, the participants focused on action scenarios relating to security at events and on the digitisation of business processes.

INTERNATIONAL SUMMER UNIVERSITY □ »Engine of Change – Unleash Digital Potential to Drive Innovation and Sales« – this was the motto of the International Summer University 2018 (ISU) in Cologne from 4 to 6 July 2018, attended by around 60 young exhibition specialists from ten countries. Lectures, workshops and best practice examples focused on various aspects of digitisation. AUMA was represented by Bettina Rosenbach, manager of training and further education and deputy chair of the UFI Human Resources Committee.





ORGANISATION

*Vollsortiment*  
**BESTÜCKTE  
FRÄSER**

**HOLZBAU & B.**  
**TIMBER CONSTR.**  
**BUILDING COMPON.**

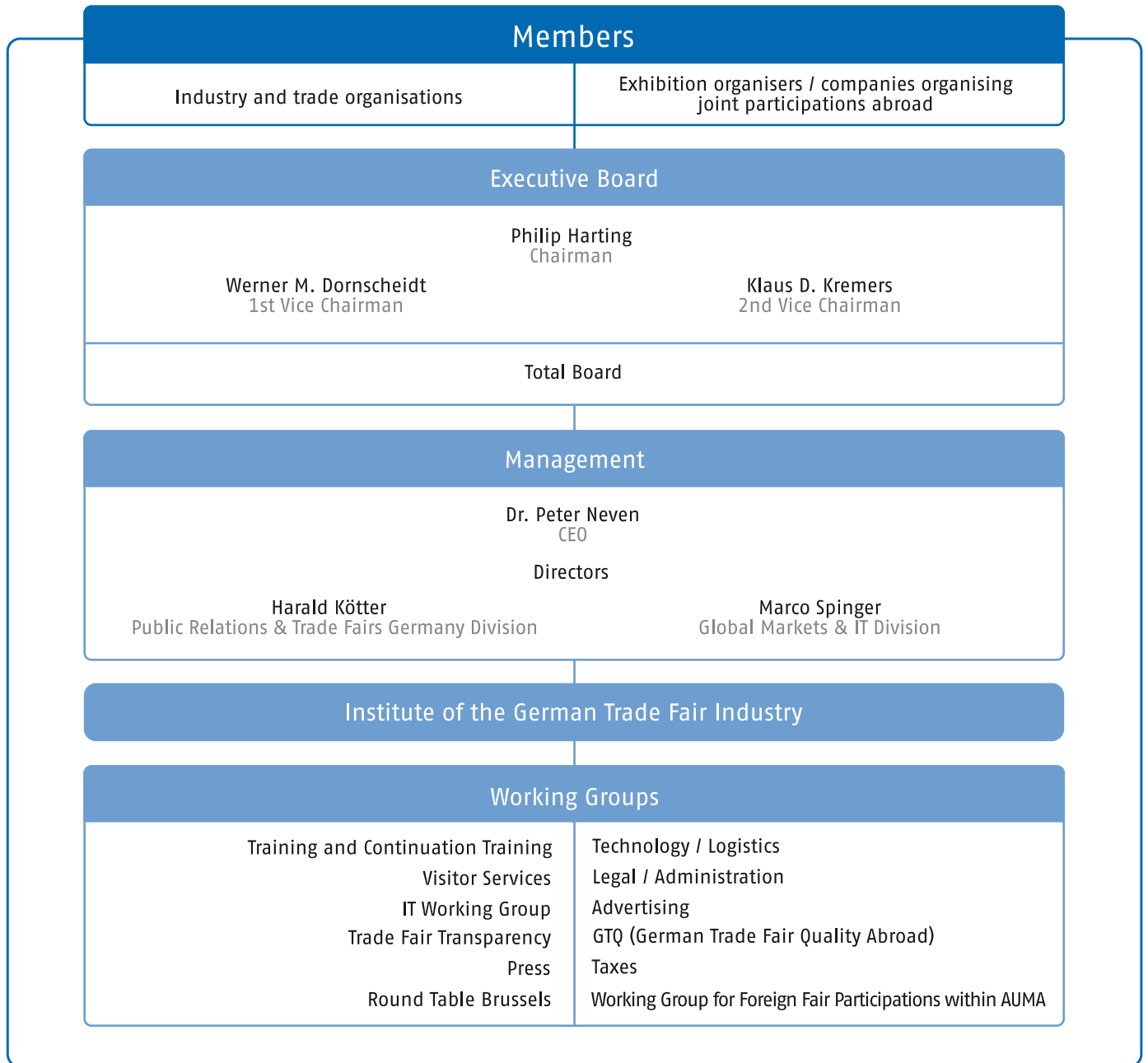
Diamant Werkzeugprogramm von Letz. intelligent  
gesetzt. die wirtschaftliche Lösung.

# ORGANISATION

## Members and bodies of AUMA

In accordance with AUMA's role as the association for the entire German exhibition industry, its members are on the one hand exhibition organisers and companies which implement participations in trade fairs abroad. On the other hand, there are the umbrella organisations and trade associations from German industry which represent exhibitors and trade visitors. Then there are also associations of service providers. AUMA currently has 74 members. In 2018, the Association of German Railway Industries e.V. joined.

The bodies of AUMA are the general meeting, executive board and management. The executive board consists of no more than 22 representatives of the exhibitor and visitor industries and of exhibition companies. The chair and second deputy chair belong to the exhibiting industry, while the first deputy chair is from an exhibition company. AUMA offers working groups for its members. They serve to exchange ideas, give recommendations and prepare for decisions made by other bodies.





## Members ► Industry and trade organisations

### **Association for Integrated Brand Experiences (FAMAB)**

Rheda-Wiedenbrück ► [www.famab.de](http://www.famab.de)

### **Association of German Chambers of Commerce and Industry (DIHK)**

Berlin ► [www.dihk.de](http://www.dihk.de)

### **Association of German Lock and Fittings Manufacturers (FVSB)**

Velbert ► [www.fvsb.de](http://www.fvsb.de)

### **Association of German Tool Manufacturers (FWI)**

Remscheid ► [www.werkzeug.org](http://www.werkzeug.org)

### **Association of the German Dental Industry (VDDI)**

Cologne ► [www.vddi.de](http://www.vddi.de)

### **Caravaning Informations GmbH (CIG)**

Frankfurt am Main ► [www.civd.de](http://www.civd.de)

### **Central Committee for German Agriculture**

Berlin ► [www.landwirtschaftskammern.de](http://www.landwirtschaftskammern.de)

### **Confederation of the German Textile and Fashion Industry**

Berlin ► [www.textil-mode.de](http://www.textil-mode.de)

### **Didacta Verband e.V. – Association of the German Education Industry**

Darmstadt ► [www.didacta.de](http://www.didacta.de)

### **European Association of Event Centres (EVVC)**

Frankfurt am Main ► [www.evvc.org](http://www.evvc.org)

### **Federal Association for Information Technology, Telecommunications and New Media (bitkom)**

Berlin ► [www.bitkom.org](http://www.bitkom.org)

### **Federation of German Food and Drink Industries (BVE)**

Berlin ► [www.bve-online.de](http://www.bve-online.de)

### **Federation of German Heating Industry (BDH)**

Cologne ► [www.bdh-koeln.de](http://www.bdh-koeln.de)

### **Federation of German Industries (BDI)**

Berlin ► [www.bdi.eu](http://www.bdi.eu)

### **Federation of German Wholesale, Foreign Trade and Services (BGA)**

Berlin ► [www.bga.de](http://www.bga.de)

### **German Aerospace Industries Association (BDLI)**

Berlin ► [www.bdli.de](http://www.bdli.de)

### **German Airport Technology & Equipment (GATE)**

Hamburg ► [www.gate-alliance.de](http://www.gate-alliance.de)

### **German Association for Water, Wastewater and Waste (DWA)**

Hennef ► [www.de.dwa.de](http://www.de.dwa.de)

### **German Association of Manufacturers and Importers of Automobile Service Equipment (ASA)**

Germering ► [www.asa-verband.de](http://www.asa-verband.de)

## Members ► Industry and trade organisations

**German Boat and Shipbuilding Association (DBSV)**  
Hamburg ► [www.dbsv.de](http://www.dbsv.de)

**German Chemical Industry Association (VCI)**  
Frankfurt am Main ► [www.vci.de](http://www.vci.de)

**German Confederation of Skilled Crafts (ZDH)**  
Berlin ► [www.zdh.de](http://www.zdh.de)

**German Cosmetic, Toiletry, Perfumery  
and Detergent Association (IKW)**  
Frankfurt am Main ► [www.ikw.org](http://www.ikw.org)

**German Electrical and Electronic Manufacturers'  
Association (ZVEI)**  
Frankfurt am Main ► [www.zvei.org](http://www.zvei.org)

**German Hotels and Restaurants  
Association (DEHOGA)**  
Berlin ► [www.dehoga-bundesverband.de](http://www.dehoga-bundesverband.de)

**German Industry Association for Coin-operated  
Amusement and Vending Machines (VDAl)**  
Berlin ► [www.vdai.de](http://www.vdai.de)

**German Machine Tool Builders' Association (VDW)**  
Frankfurt am Main ► [www.vdw.de](http://www.vdw.de)

**German Mechanical Engineering Industry  
Association (VDMA)**  
Frankfurt am Main ► [www.vdma.org](http://www.vdma.org)

**German Railway Association (VDB)**  
Berlin ► [www.bahnindustrie.info](http://www.bahnindustrie.info)

**German Retail Association (HDE)**  
Berlin ► [www.einzelhandel.de](http://www.einzelhandel.de)

**German Shipbuilding and Ocean Industries  
Association (VSM)**  
Hamburg ► [www.vsm.de](http://www.vsm.de)

**German Steel Federation**  
Dusseldorf ► [www.stahl-online.de](http://www.stahl-online.de)

**German Sweets e.V.**  
Bonn ► [www.germansweets.de](http://www.germansweets.de)

**German Winegrowers' Association (DWV)**  
Bonn ► [www.dwv-online.de](http://www.dwv-online.de)

**IFWexpo Heidelberg GmbH**  
Heidelberg ► [www.ifw-expo.de](http://www.ifw-expo.de)

**Industrial Association of Cutlery /  
Flatware Manufacturers (IVSH)**  
Solingen ► [www.ivsh.de](http://www.ivsh.de)

**International Exhibition Logistics Association (IELA)**  
Geneva ► [www.iela.org](http://www.iela.org)

**Main Association of the German Wood Industry**  
Bad Honnef ► [www.holzindustrie.de](http://www.holzindustrie.de)

**SPECTARIS – German Hightech Industry Association**  
Berlin ► [www.spectaris.de](http://www.spectaris.de)

Status: 1st July 2019

## Members ► Trade fair organisers

**asfc atelier scherer fair consulting gmbh**

Fürth ► [www.asfc.de](http://www.asfc.de)

**Association of German Trade Fair Organisers  
and Exhibition Venues (IDFA)**

Stuttgart ► [www.idfa.de](http://www.idfa.de)

**Association of Major German Exhibition  
Organisers (GDG)**

Berlin

**Balland Messe-Service GmbH**

Cologne ► [www.balland-messe.de](http://www.balland-messe.de)

**DEGA-EXPOTEAM GmbH & Co. Ausstellungs KG**

Ohlstadt ► [www.dega-expoteam.de](http://www.dega-expoteam.de)

**Deutsche Messe AG**

Hanover ► [www.messe.de](http://www.messe.de)

**ECM Expo & Conference Management GmbH**

Berlin ► [www.ecm-berlin.de](http://www.ecm-berlin.de)

**expotec gmbh**

Berlin ► [www.expotecgmbh.de](http://www.expotecgmbh.de)

**Frankfurter Buchmesse GmbH**

Frankfurt am Main ► [www.buchmesse.de](http://www.buchmesse.de)

**GHM Gesellschaft für Handwerksmessen mbH**

Munich ► [www.ghm.de](http://www.ghm.de)

**Hamburg Messe und Congress GmbH**

Hamburg ► [www.hamburg-messe.de](http://www.hamburg-messe.de)

**IEC-Berlin Inter Expo Consult GmbH & Co. KG**

Berlin ► [www.iecberlin.de](http://www.iecberlin.de)

**IFWexpo Heidelberg GmbH**

Heidelberg ► [www.ifw-expo.de](http://www.ifw-expo.de)

**IMAG GmbH**

Munich ► [www.imag.de](http://www.imag.de)

**Karlsruher Messe- und Kongress GmbH**

Karlsruhe ► [www.messe-karlsruhe.de](http://www.messe-karlsruhe.de)

**Koelnmesse GmbH**

Cologne ► [www.koelnmesse.com](http://www.koelnmesse.com)

**Landesmesse Stuttgart GmbH**

Stuttgart ► [www.messe-stuttgart.de](http://www.messe-stuttgart.de)

**Leipziger Messe GmbH**

Leipzig ► [www.leipziger-messe.com](http://www.leipziger-messe.com)

**Leipziger Messe International GmbH (LMI)**

Leipzig ► [www.lm-international.com](http://www.lm-international.com)

**M3B GmbH**

Bremen ► [www.m3b-bremen.de](http://www.m3b-bremen.de)

## Members ► Trade fair organisers

### **Mack Brooks Exhibitions Ltd**

St. Albans ► [www.mackbrooks.com](http://www.mackbrooks.com)

### **MCO Marketing Communication Organisation GmbH**

Dusseldorf ► [www.mco-online.com](http://www.mco-online.com)

### **Mesago Messe Frankfurt GmbH**

Stuttgart ► [www.mesago.de](http://www.mesago.de)

### **Messe Berlin GmbH**

Berlin ► [www.messe-berlin.de](http://www.messe-berlin.de)

### **Messe Dortmund GmbH**

Dortmund ► [www.westfalahallen.de](http://www.westfalahallen.de)

### **Messe Düsseldorf GmbH**

Dusseldorf ► [www.messe-duesseldorf.com](http://www.messe-duesseldorf.com)

### **Messe Essen GmbH**

Essen ► [www.messe-essen.de](http://www.messe-essen.de)

### **Messe Frankfurt GmbH**

Frankfurt am Main ► [www.messefrankfurt.com](http://www.messefrankfurt.com)

### **Messe Friedrichshafen GmbH**

Friedrichshafen ► [www.messe-friedrichshafen.com](http://www.messe-friedrichshafen.com)

### **Messe München GmbH**

Munich ► [www.messe-muenchen.de](http://www.messe-muenchen.de)

### **Messe Offenbach GmbH**

Offenbach ► [www.messe-offenbach.de](http://www.messe-offenbach.de)

### **NürnbergMesse Group**

Nuremberg ► [www.nuernbergmesse.de](http://www.nuernbergmesse.de)

### **Reed Exhibitions Deutschland GmbH**

Dusseldorf ► [www.reedexpo.de](http://www.reedexpo.de)

### **Special Association for Fairs and Exhibitions (FAMA)**

Obertraubling ► [www.fama.de](http://www.fama.de)

### **Spielwarenmesse eG**

Nuremberg ► [www.spielwarenmesse-eg.de](http://www.spielwarenmesse-eg.de)

### **WZF – Service Company for the Pet Industry**

Wiesbaden ► [www.zzf.de](http://www.zzf.de)





KEY INDICATORS OF THE EXHIBITION INDUSTRY



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# KEY INDICATORS OF THE EXHIBITION INDUSTRY

## Macroeconomic importance

The trade fair industry is one of the leading service sectors of German industry; it also has significant positive effects on numerous other service and industrial sectors.

### The German Exhibition Industry

#### Economic impact

based on a multiplier analysis\*

Average trade fair year (period 2014 to 2017)

Exhibitor  
spending  
€ 9.6 bn

Visitor  
spending  
€ 4.7 bn

Direct Expenses  
**€ 14.5 bn**

Investments by  
the exhibition  
centres  
€ 0.2 bn

Production effects

**€ 28 bn**

Employment effects

**231,000**

**Full-time jobs**

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\* ifo Institut, AUMA, 2018

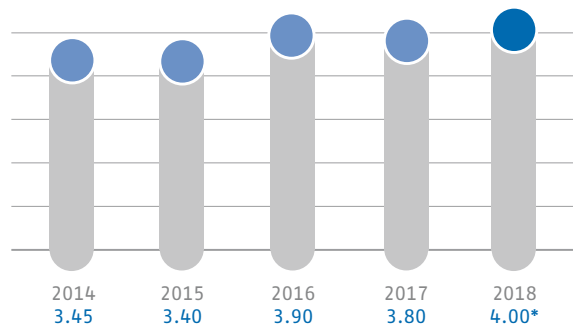
## Revenue

The level of revenues of German exhibition organisers is growing at a regular pace – apart from fluctuations caused by the trade fair schedule in different years. The companies also have great weight internationally: five of the world's ten largest exhibition companies in terms of revenues are based in Germany.

### The German Exhibition Industry

#### Revenue of Exhibition Companies (€ billion)

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



© AUMA

\* preliminary

### Revenue of Exhibition Companies\*

worldwide (more than Euro 100 m)

	2018	2017	2016
Reed Exhibitions (GB)	1,351.9	1,264.0	1,277.4
Informa (GB) ****	1,318.9	631.1	358.3
Messe Frankfurt (D)	718.1	669.1	647.0
GL events (F)	477.0	481.9	452.6
MCH Group (CH)	463.9	421.8	410.0
Messe München (D)	417.9	332.6	428.1
UBM plc (GB) *****	415.8	979.0	830.6
Comexposium (F)	366.0	264.0	277.0
Messe Berlin (D)	352.1	284.0	309.4
Koelnmesse (D)	337.4	357.9	274.0
Emerald Expositions (USA)	332.6	285.2	305.9
NürnbergMesse (D)	315.1	205.5	288.0
Deutsche Messe (D)	309.7	356.4	302.3
Messe Düsseldorf (D)	294.0	367.0	442.8
Fiera Milano (I)	247.2	271.3	221.0
PSPA TOPCO Limited [Clarion Events] (GB)	242.3	171.1	182.8
HKTDC (HK) **	240.0	254.1	237.6

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	2018	2017	2016
Fira Barcelona (E)	210.0	187.6	165.0
ITE Group (GB)	197.2	173.2	155.8
NEC Group, Birmingham (GB)	184.6	182.9	170.2
Tokyo Big Sight (JP)	184.5	157.1	178.0
Landesmesse Stuttgart (D)	178.0	131.0	158.5
BolognaFiere (I)	170.8	126.0	132.4
VIPARIS (F) ***	167.0	146.0	165.0
IEG Italian Exhibition Group (I)	159.7	130.7	124.8
Artexis Group Easyfairs Group SA/NV (B)	157.1	160.1	114.9
Amsterdam RAI (NL)	152.3	123.3	120.2
Svenska Mässan Göteborg (S)	139.2	126.6	131.0
IFEMA Madrid (E)	138.5	118.1	105.6
SNIEC Shanghai New Int. Expo Centre (CN)	134.8	127.5	121.1
dmg :: events (GB)	130.9	131.8	122.6
Jaarbeurs Utrecht (NL)	124.4	115.7	111.1
Tarsus Group (GB)	110.6	132.5	79.8
Hamburg Messe + Congress (D)	104.3	72.8	110.9

\* If possible, without revenue in business areas outside the exhibition and congress sector. \*\* Exhibitions and missions \*\*\* Net Operating Income  
\*\*\*\* Informa Global exhibitions incl. UBM for the post acquisition period \*\*\*\*\* before acquisition by Informa only





## International / national trade fairs

When it comes to hosting international trade fairs, Germany is the world's number one venue. Of the globally leading trade fairs in individual sectors, almost two-thirds of them take place in Germany.

Despite a worsening economic climate, the international and national trade fairs have grown once again compared to their respective previous events, with only visitor numbers remaining steady. The position of the trade fairs among media competition also remains stable.

### Trade Fairs in Germany 2018

The 178 international / national events in comparison to the respective previous events

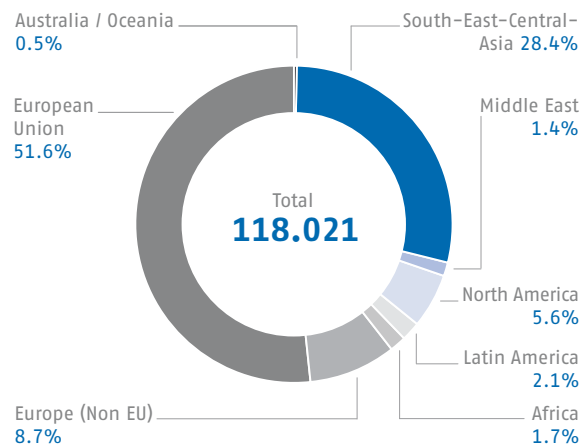


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### Trade Fairs in Germany 2018

#### Foreign exhibitors

AUMA category international and national events

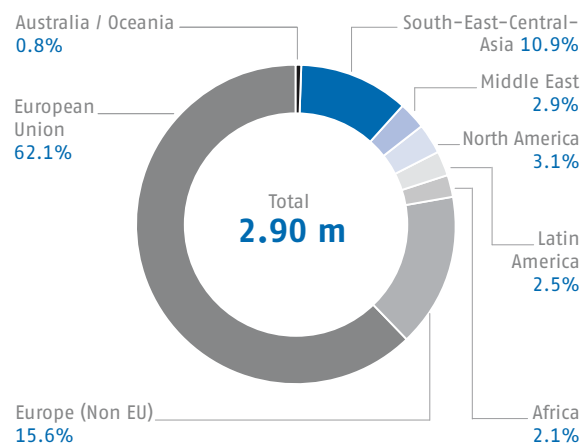


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### Trade Fairs in Germany 2018

#### Foreign visitors

AUMA category international and national events



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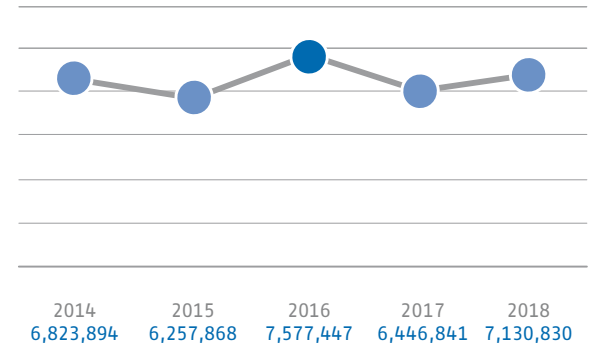
## Performance in 2018

The exhibitors and stand space once again grew considerably, primarily due to the schedule. Visitor numbers have settled within a relatively narrow range, apart from years which are exceptional owing to the schedule of trade fairs, such as 2016.

### Trade Fairs in Germany

Exhibitor stand space in sq. m.

AUMA category international and national events

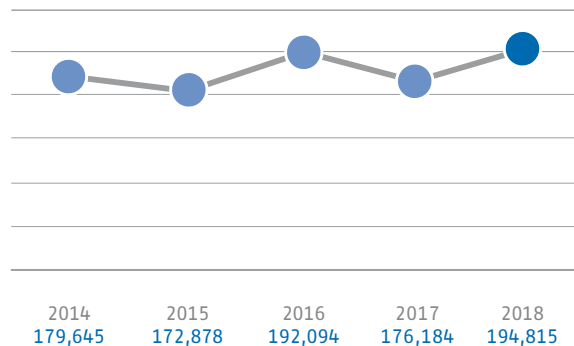


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### Trade Fairs in Germany

Number of Exhibitors

AUMA category international and national events

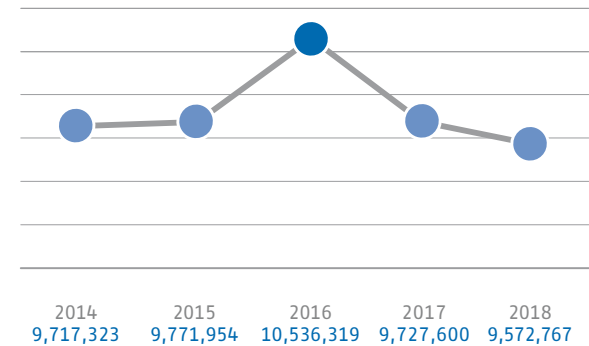


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### Trade Fairs in Germany

Number of visitors

AUMA category international and national events



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## Hall capacities

At 25 German exhibition venues, just under 2.8 million m<sup>2</sup> of hall space is available for staging international or national trade fairs. Ten venues have a hall capacity of more than 100,000 m<sup>2</sup>, and five more have more than 50,000 m<sup>2</sup> of hall space. In the coming years, there will only be slight increases in hall capacity.

### Trade Fairs in Germany 2019

Exhibition capacities\*  
gross in sq. m.

Location	Halls	Outdoor
Frankfurt/M	393,838	59,506
Hanover	392,453	58,000
Cologne	284,000	100,000
Dusseldorf	248,580	43,000
Munich (Exh. Center)	200,000	414,000
Nuremberg	179,600	50,000
Berlin ExpoCenter City	170,000	157,000
Stuttgart	119,800	40,000
Leipzig	111,300	70,000
Essen	110,000	20,000
Friedrichshafen	87,500	35,500
Hamburg	86,465	10,000
Bad Salzungen	78,000	

Location	Halls	Outdoor
Dortmund	59,735	
Karlsruhe	52,000	62,000
Augsburg	52,000	10,000
Bremen	39,000	100,000
Erfurt	25,070	21,600
Offenburg	22,570	37,877
Freiburg	21,500	81,000
Offenbach	20,100	
Berlin ExpoCenter Airport	20,000	57,000
Chemnitz (Exh. Center)	11,000	8,000
Idar-Oberstein	6,000	1,000
Husum	4,800	70,000

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\* Locations with at least one event according to AUMA category international and national events / Status: 1.1.2019

## reg Regional exhibitions

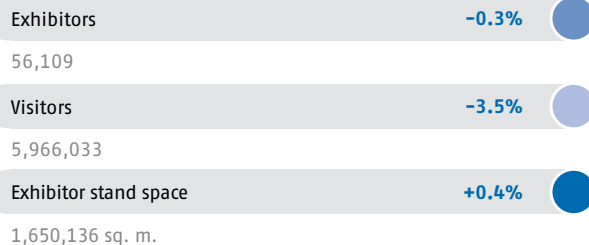
The international trade fairs are supplemented by a close network of exhibitions for trade visitors and consumers with a regional catchment area in terms of visitors.

Over 55,000 exhibitors and around 6 million visitors congregate at these events every year.

### Regional Exhibitions 2018

Development of the 172 events  
in comparison to the respective previous events

AUMA category regional



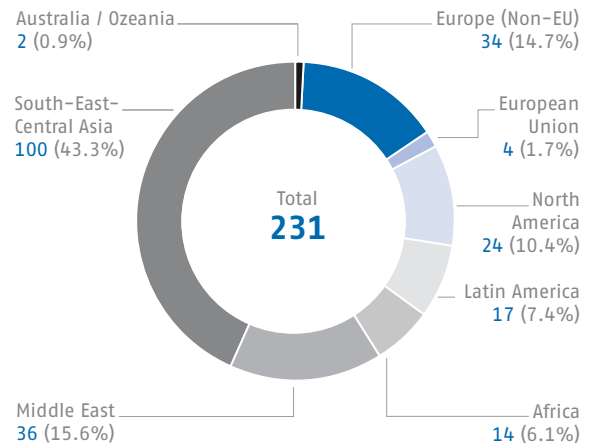
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## AMP Foreign Trade Fair Programme

In addition to its participations in trade fairs in Germany, German industry is increasingly using foreign trade fairs for its export marketing. Particularly for small and medium-sized enterprises, the Foreign Trade Fair Programme of the Federal Ministry for Economic Affairs and Energy is a key tool for this.

### German Foreign Trade Fair Programme

German Pavilions by the Federal Ministry  
for Economic Affairs and Energy 2018



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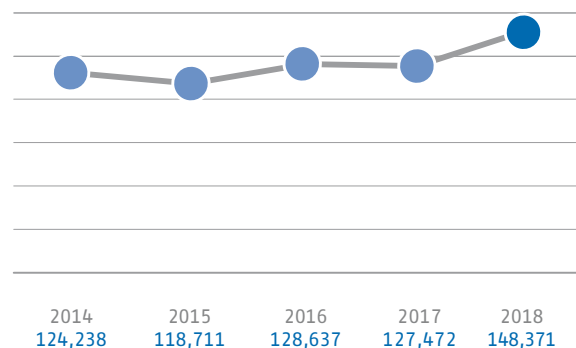


## GTQ Foreign trade fairs arranged by German organisers

Each year, the German exhibition companies that are organised within AUMA and FAMA arrange over 300 events of their own in important foreign growth regions – in particular in Asia, North and South America and Eastern Europe. This involves the transfer of leading trade fair concepts, which have been shown to work well mainly in Germany, to selected foreign markets. Apart from fluctuations in the number of visitors caused by scheduling, the figures for the foreign trade fairs arranged by German organisers are increasing at a fairly regular pace. This trend is set to continue in the coming years.

### Trade Fairs Abroad by German Organisers\*

Number of exhibitors

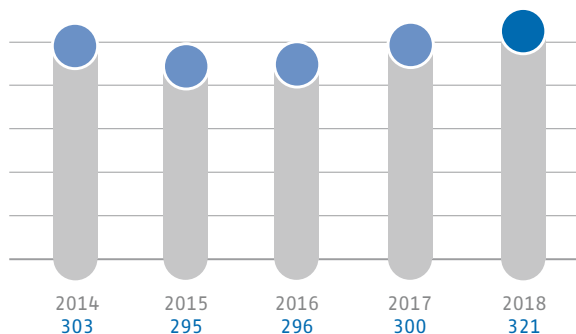


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\* AUMA and FAMA members

### Trade Fairs Abroad by German Organisers\*

Number of events

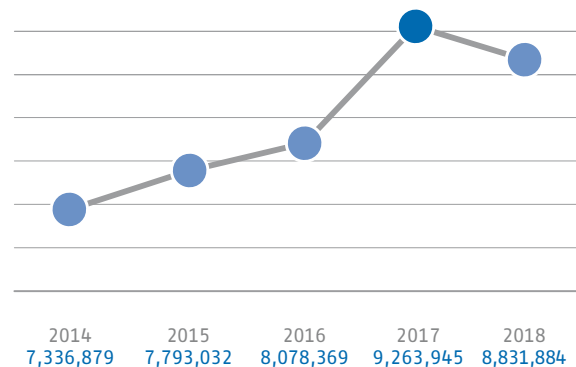


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\* AUMA and FAMA members

### Trade Fairs Abroad by German Organisers\*

Number of visitors

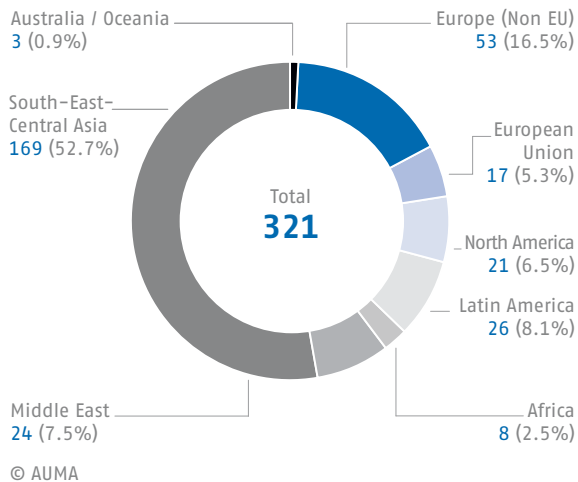


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\* AUMA and FAMA members

## Trade Fairs Abroad by German Organisers\*

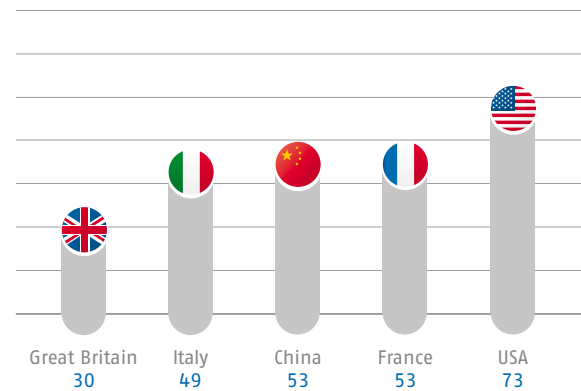
### German Trade Fair Quality Abroad 2018



\* AUMA and FAMA members

## Foreign Trade Fairs

Number of competitors to international trade fairs in Germany (period 2014 to 2017)



© AUMA

\* Survey among German organisers; a maximum of three competing events

German organisers arrange most of their foreign trade fairs in South-East-Central Asia, followed by the European Non-EU countries.

The most 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.

## German exhibition venues in an international ranking

Four of the world's ten largest exhibition venues are located in Germany. Around the world there are 61 exhibition venues offering at least 100,000 m<sup>2</sup> of hall space, with 25 of them outside of Europe, and 13 of these in China. Of the 36 venues in Europe, 30 are located in Western Europe and six in Central and Eastern Europe.

## Exhibition Centres Worldwide 2019

Exhibition capacities\*  
gross in sq. m.

Location	Hall	Location	Hall
National Exhib. and Convention Center (NECC) Shanghai	400,000	Fiere di Parma	135,000
Frankfurt/Main Messegelände	393,838	Georgia World Congress Center Atlanta	130,112
Hannover Messegelände	392,453	EUREXPO Lyon	130,000
Fiera Milano	345,000	Rimini Fiera	129,000
China Import & Export Fair Complex Guangzhou	338,000	NRG Park (formerly Reliant Park Houston)	120,402
Kunming Dianchi International Conv. & Exh. Center	300,000	Yiwu International Expo Center	120,000
Köln Messegelände	284,000	Kentucky Expo Center	120,000
Crocus Expo IEC Moskau	254,960	Tüyap Istanbul Fair	120,000
Düsseldorf Messegelände	248,580	Messe Stuttgart	119,800
Paris-Nord Villepinte	242,082	Dubai International Convention & Exhibition Centre	118,996
McCormick Place Chicago	241,549	Fiera Roma	118,910
Fira Barcelona – Gran Vía	240,000	Brussels Expo	114,445
Feria Valencia	230,837	Leipzig Messegelände	111,300
Paris expo Porte de Versailles VIPARIS	219,759	BVV Veletrhy Brno	110,921
Messe München	200,000	Essen Messegelände	110,000
Chongqing International Expo Centre	200,000	Poznan International Fair	110,000
BolognaFiere	200,000	New Int. Conv. & Exp. Center, Chengdu Century City	110,000
IFEMA Feria de Madrid	200,000	KINTEX Goyang/Seoul	108,556
SNIEC Shanghai	200,000	New China Int. Exhibition Center (NCIEC) Beijing	106,800
Qingdao World Expo City	200,000	Palexpo Genf	106,000
Orange County Convention Center Orlando	195,096	Shenyang International Exhibition Center (SYIEC)	105,600
The NEC Birmingham	186,000	EXPOCENTRE Moscow	105,000
Las Vegas Convention Center	180,290	Shenzhen Convention & Exhibition Center (SZCEC)	105,000
Nürnberg Messezentrum	179,600	Ernest N. Morial Convention Center New Orleans	102,230
Berlin ExpoCenter City	170,000	Kentucky Exposition Center, Louisville	102,193
Veronafiere	151,536	Singapore Expo	101,624
BEC Bilbao Exhibition Centre	150,000	ExCeL London	100,000
Wuhan International Expo Center	150,000	Royal Dutch Jaarbeurs Exh. & Conv. Centre Utrecht	100,000
Ptak Warsaw Expo	143,000	Changchun Int. Conference & Exhibition Center	100,000
Messe Basel	141,000	Suzhou International Expo Center	100,000
IMPACT Muang Thong Thani Bangkok	140,000		

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