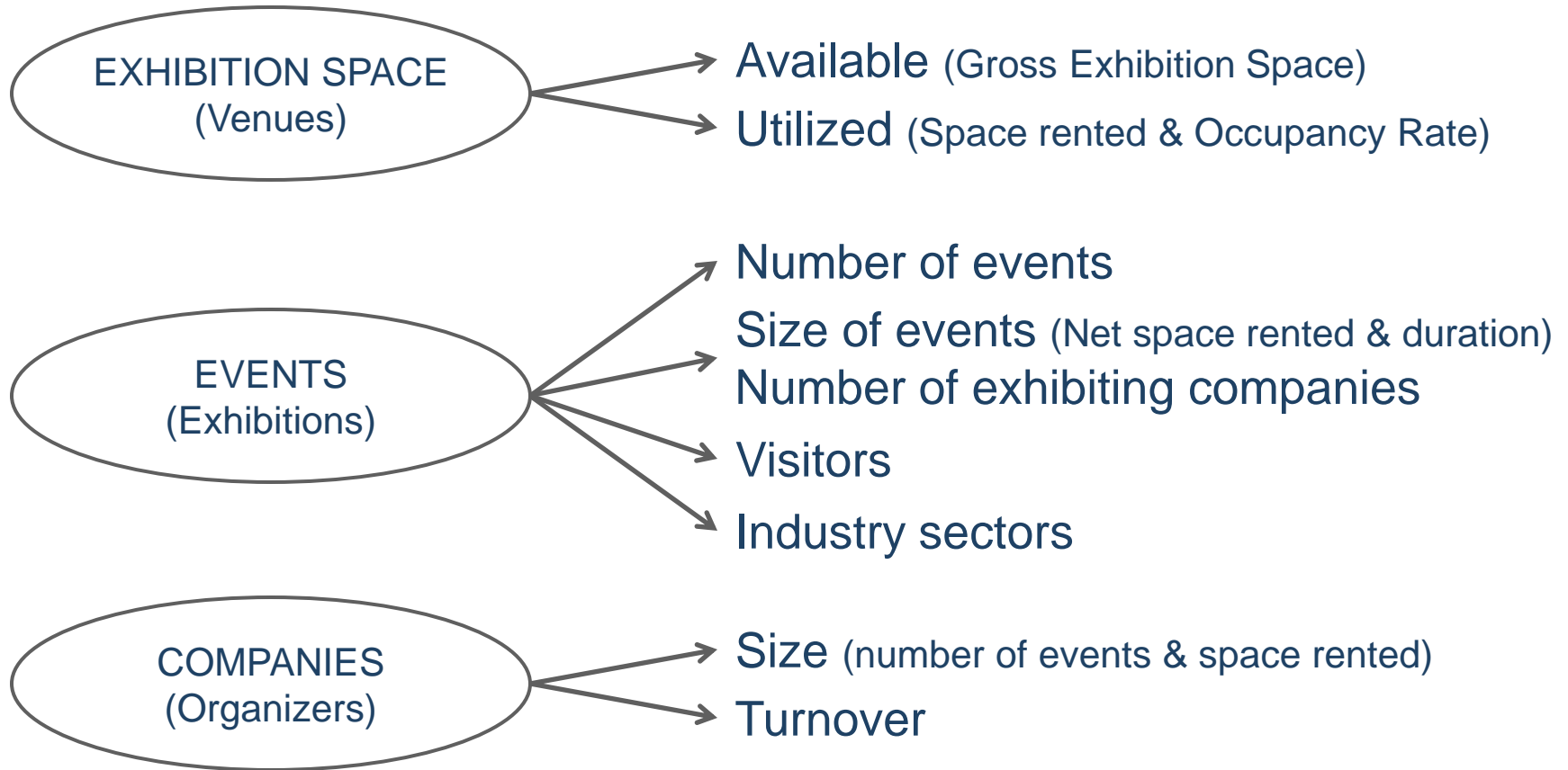


Global Exhibition Industry Statistics



STATISTICS: UFI's OBJECTIVE

Provide several sets of reliable data on the market and its trends, per region and industry sector



UFI RESEARCH PROJECTS

Global

World map of venues and future trends 2006-2010

(1st release in 2007 updated in 2011)

Global estimations on exhibitions

(last update in 2011 will be reviewed in 2013)

Delphi study on future trends

(released in 2011)

Regional

The Exhibition Industry in the **Middle-East & Africa** (2007)

The Trade Fair Industry in **Asia** (8th edition, 2012)

Euro Fair Statistics (4th edition by UFI, 2012)

UFI Members

UFI Member exhibition & venue activity

(2006-2011 trends released in 2012)

Barometer of the exhibition industry

(9th survey conducted in June 2012 Next survey in Dec. 2012)

CURRENT RESULTS

1. Exhibition space available

- World Map 2011 with trends since 2006 - *released in Dec. 2011*
- Trends 2006-2012 for UFI venues - *released in Dec. 2011*

2. Global estimates on Exhibitions

- Number of events, space rented, number of exhibitors and visitors - *released in Dec. 2011*
- Regional market shares with trends & 10 major national markets - *released in Dec. 2011*
- Trends in the net space rented in several major national markets - *released in Nov. 2012*
- Comparison between capacity and space rented - *released in Dec. 2011*
- Key metrics by business industry sector - *released in Nov. 2012*
- Trends 2006-2011 for UFI Members - *released in Nov. 2012*

3. Companies

- Specifics on UFI Member Organizers: size, internationality, growth (2006-2011) - *released in Nov. 2012*
- All companies: Expected turnover and Operating Profit - *released in July 2012*

1. EXHIBITION SPACE AVAILABLE GLOBALLY

(Venues with a minimum of 5,000 sqm indoor exhibition space)

Source UFI, Dec. 2011

	Number of venues	Total indoor exhibition space	
2011	1 197	32.6 million sqm	
Increase since 2006	+ 57	+ 3.4 million sqm (+12%)	+1.8 (54%): new venues +1.6 (46%): extensions

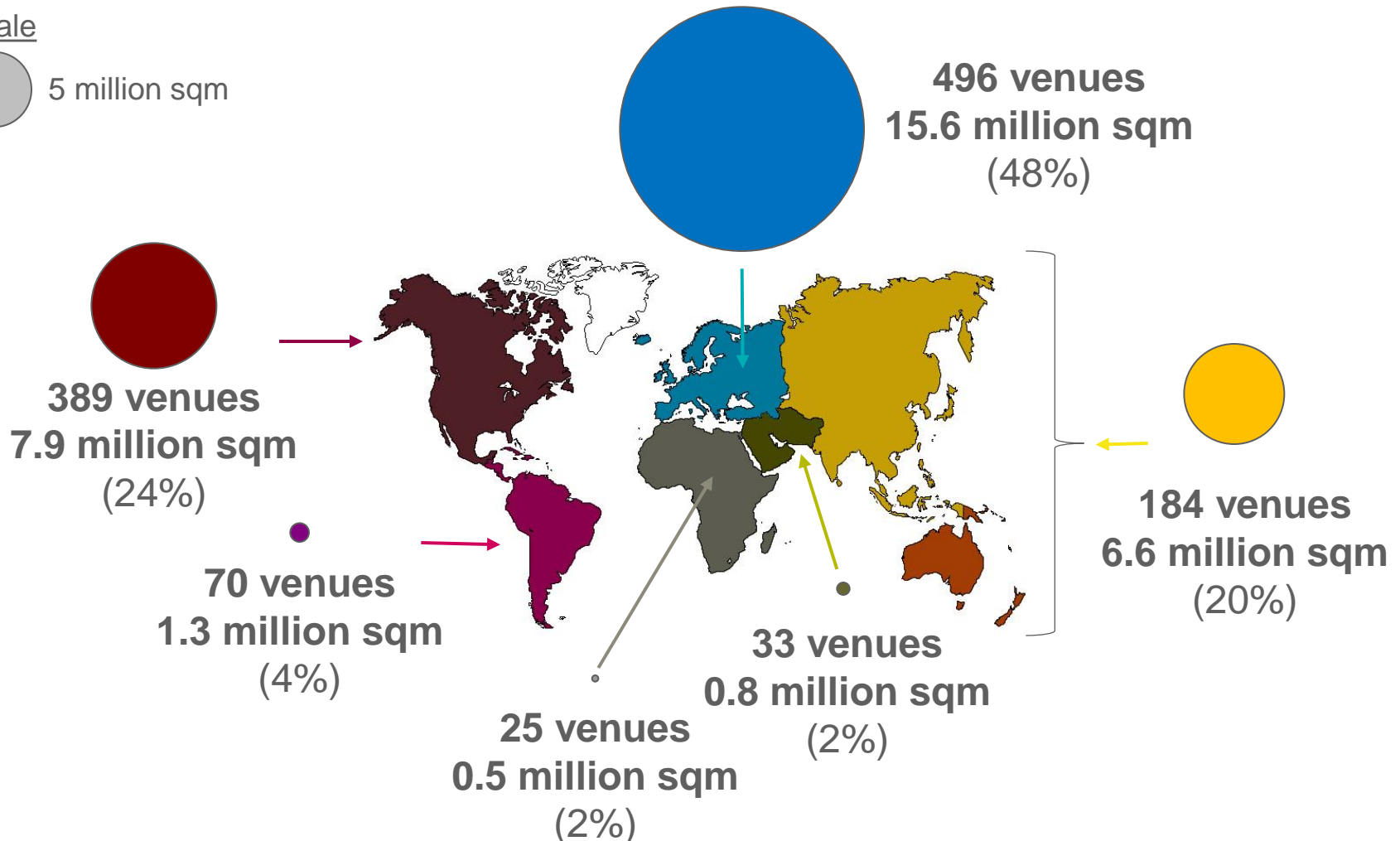
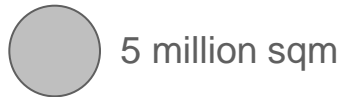
Average annual increase : +2.3%
 (against +3.1% per year anticipated in 2007 for the 2006-2010 period)

UFI World Map of Exhibition Venues

Regional indoor exhibition space available in 2011 (Venues with a minimum of 5,000 sqm indoor exhibition space)

Source UFI, Dec. 2011

Scale



UFI World Map of Exhibition Venues

National indoor exhibition space available in 2011

(Venues with a minimum of 5,000 sqm indoor exhibition space)

Source UFI, Dec. 2011

15 countries

account for 80%

of the global indoor exhibition space

	TOTAL (in sqm)	WORLD %
USA	6 712 342	21%
China	4 755 102	15%
Germany	3 377 821	10%
Italy	2 227 304	7%
France	2 094 554	6%
Spain	1 548 057	5%
The Netherlands	960 530	3%
Brazil	701 882	2%
United Kingdom	701 857	2%
Canada	684 175	2%
Russia	566 777	2%
Switzerland	500 570	2%
Belgium	448 265	1%
Turkey	433 904	1%
Mexico	431 761	1%

UFI World Map of Exhibition Venues

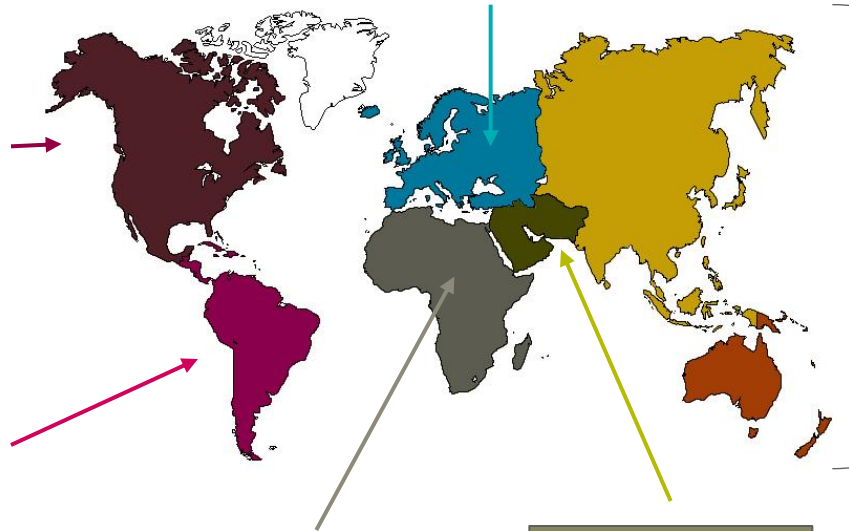
Number of venues by size (2011)

Source UFI, Dec. 2011

100,000 sqm and more
50,000 to 99,999 sqm
20,000 to 49,999 sqm
5,000 to 19,999 sqm

6
26
65
292

5
17
48



36
37
119
304

1
9
15

1
3
10
19

12
28
70
74

UFI World Map of Exhibition Venues

Venues with a minimum of 200,000 sqm of indoor exhibition in 2011

Source UFI, Dec. 2011

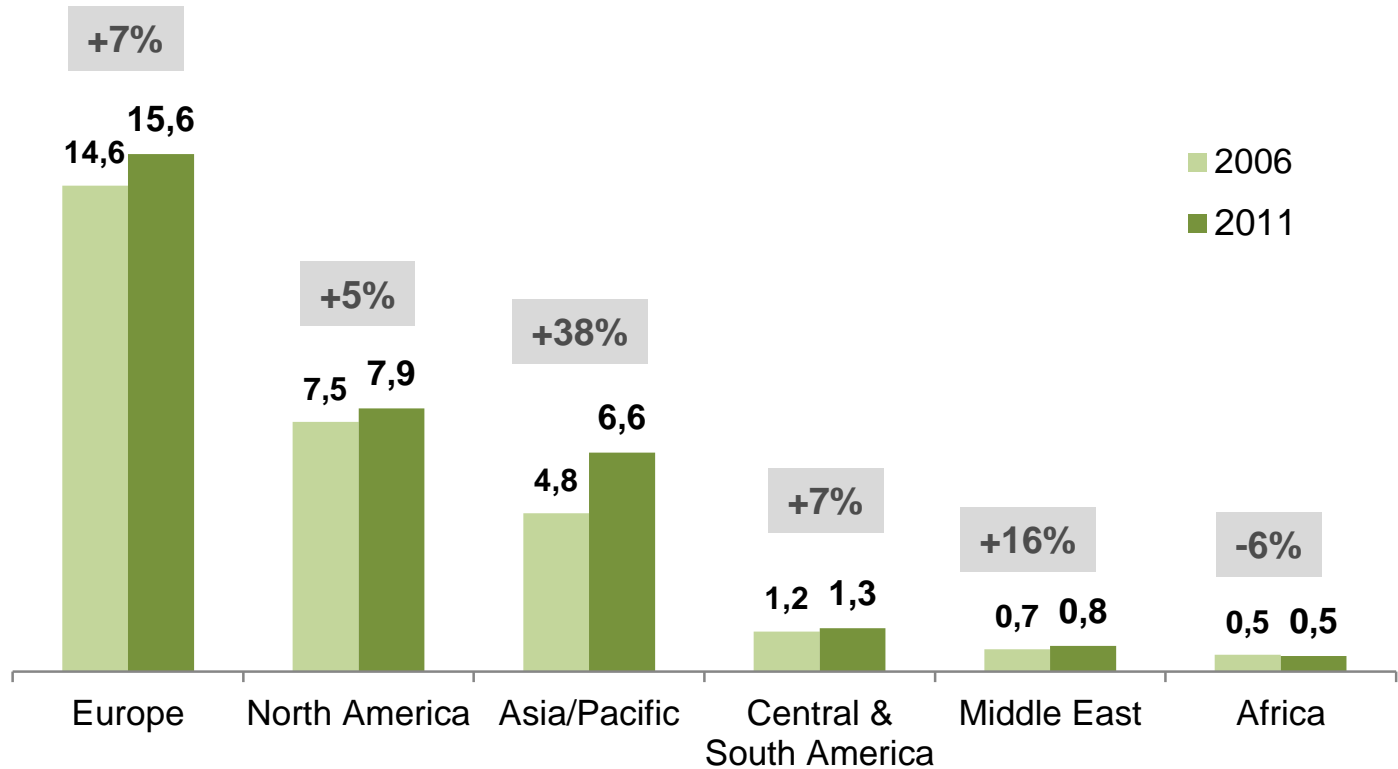
1. Messe Hannover	Hanover (Germany)	466 100
2. Messe Frankfurt	Frankfurt/Main (Germany)	345 697
3. Fiera Milano (Rho Pero)	Milano (Italy)	345 000
4. Pazhou Complex	Guangzhou (China)	338 000
5. Koelnmesse	Cologne (Germany)	284 000
6. Messe Duesseldorf	Duesseldorf (Germany)	262 704
7. Paris Nord Villepinte	Paris (France)	241 582
8. McCormick Place	Chicago (USA)	241 524
9. Feria Valencia	Valencia (Spain)	230 602
10. Porte de Versailles	Paris (France)	228 211
11. Crocus International	Moscow (Russia)	226 399
12. Fira de Barcelona: Gran Via venue	Barcelona (Spain)	205 000
13. BolognaFiere	Bologna (Italy)	200 000
14. Feria de Madrid / IFEMA	Madrid (Spain)	200 000
15. Shanghai New International Expo Centre	Shanghai (China)	200 000

UFI World Map of Exhibition Venues

Regional trends between 2006 and 2011

(Venues with a minimum of 5,000 sqm indoor exhibition space)

Source UFI, Dec. 2011



Market shares

in 2006

in 2011



UFI World Map of Exhibition Venues

Additional indoor exhibition space between 2006 and 2011 (Venues with a minimum of 5,000 sqm indoor exhibition space)

Source: UFI, Dec. 2011

The 15 countries

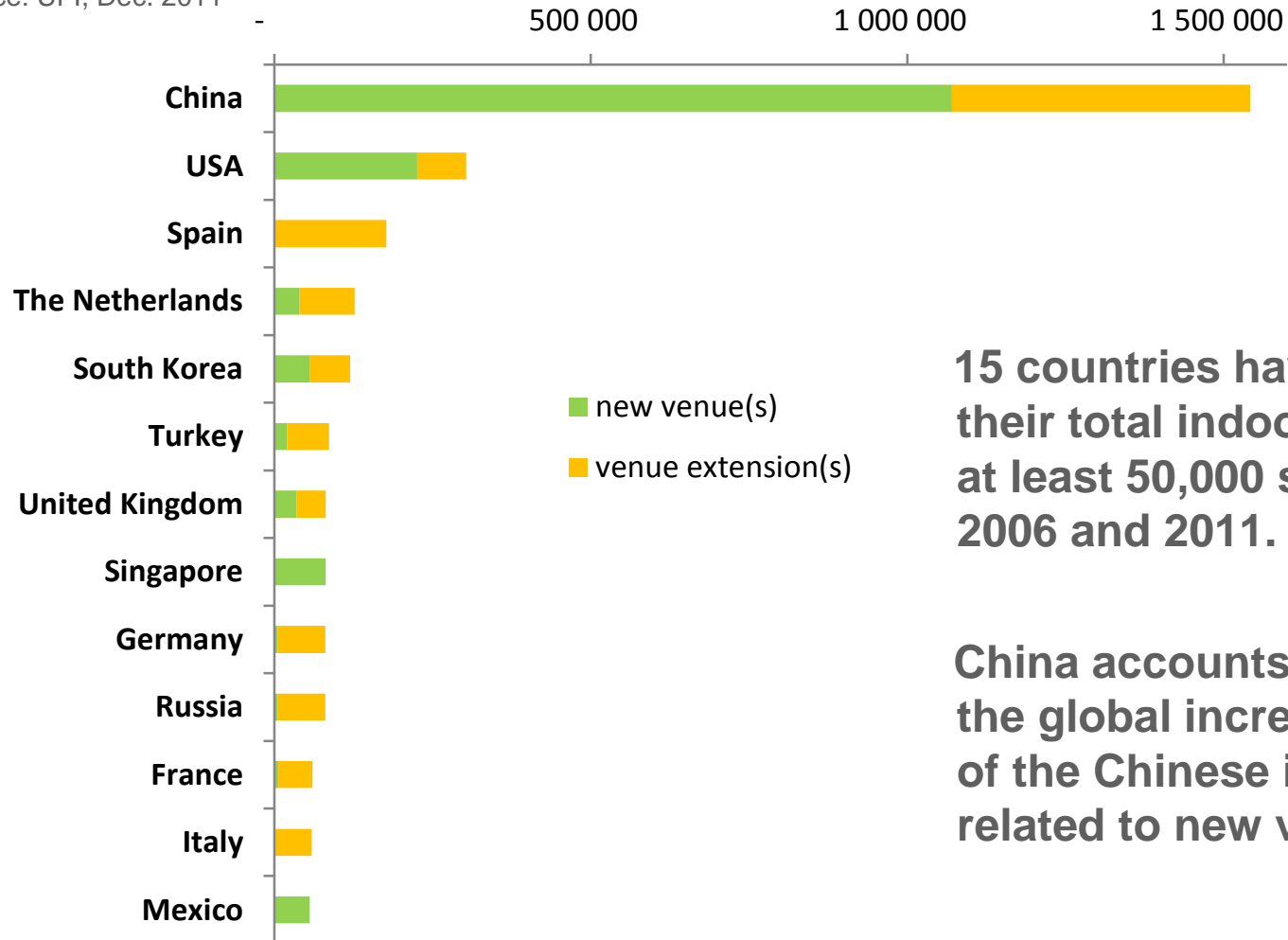
with the largest capacities account for 80% of the total increase of indoor exhibition space between 2006 and 2011

	2011 (in sqm)	Increase since 2006
USA	6 712 342	+ 5%
China	4 755 102	+ 48%
Germany	3 377 821	+ 2%
Italy	2 227 304	+ 3%
France	2 094 554	+ 3%
Spain	1 548 057	+ 13%
The Netherlands	960 530	+ 15%
Brazil	701 882	+ 6%
United Kingdom	701 857	+ 13%
Canada	684 175	+ 6%
Russia	566 777	+ 17%
Switzerland	500 570	+ 1%
Belgium	448 265	+ 1%
Turkey	433 904	+ 25%
Mexico	431 761	+ 15%

UFI World Map of Exhibition Venues

Additional indoor exhibition space between 2006 and 2011 (Venues with a minimum of 5,000 sqm indoor exhibition space)

Source: UFI, Dec. 2011



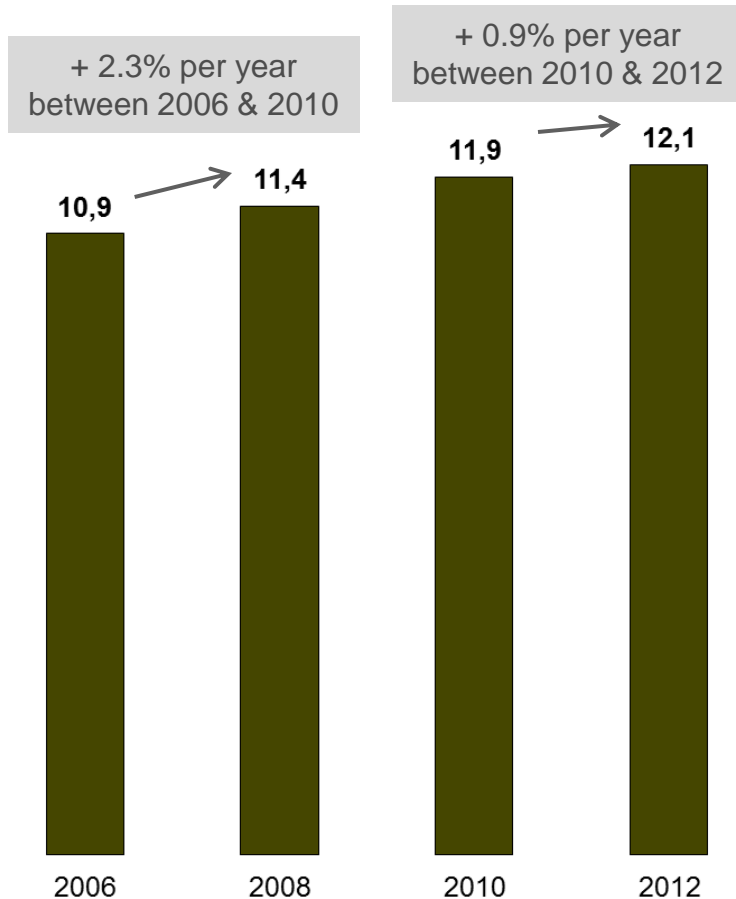
15 countries have increased their total indoor capacity by at least 50,000 sqm between 2006 and 2011.

China accounts for 46% of the global increase and 69% of the Chinese increase is related to new venues.

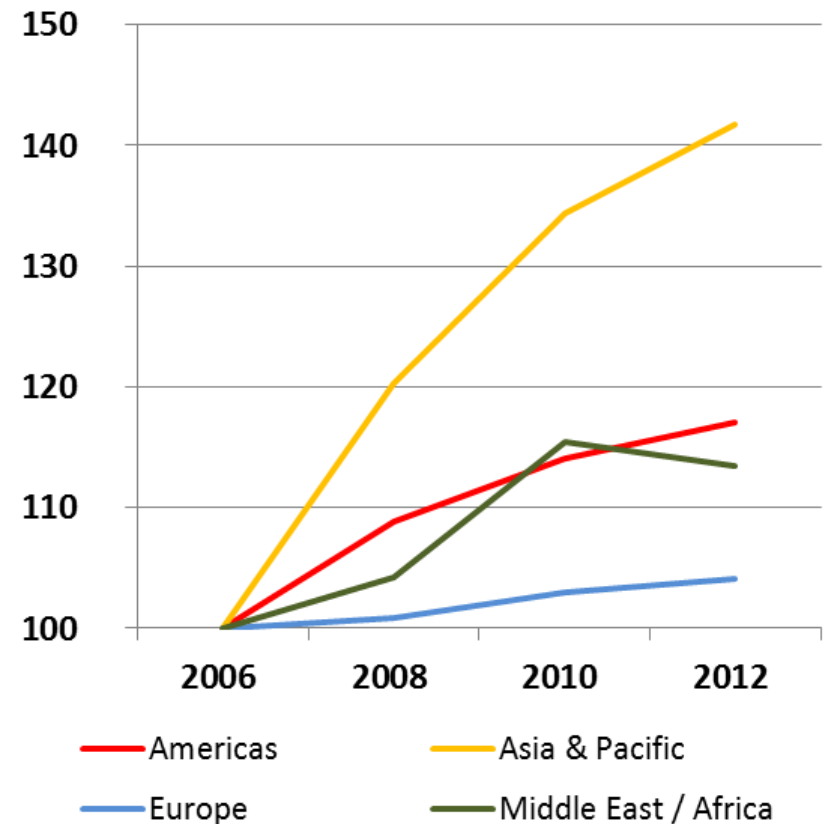
Trends 2006-2012 for all UFI venues (Source UFI, Dec. 2011)

Today, **UFI Members operate 211 venues worldwide**
(+12 since 2006)

Gross indoor exhibition space (in million sqm)



Increase of gross indoor exhibition space between 2006, 2010 & 2012 by region



2. GLOBAL ESTIMATES (Source UFI, Dec. 2011)

Minimum figures (based on events with a minimum of 500 sqm held in 2010)

A review of the global estimates will be conducted in 2013



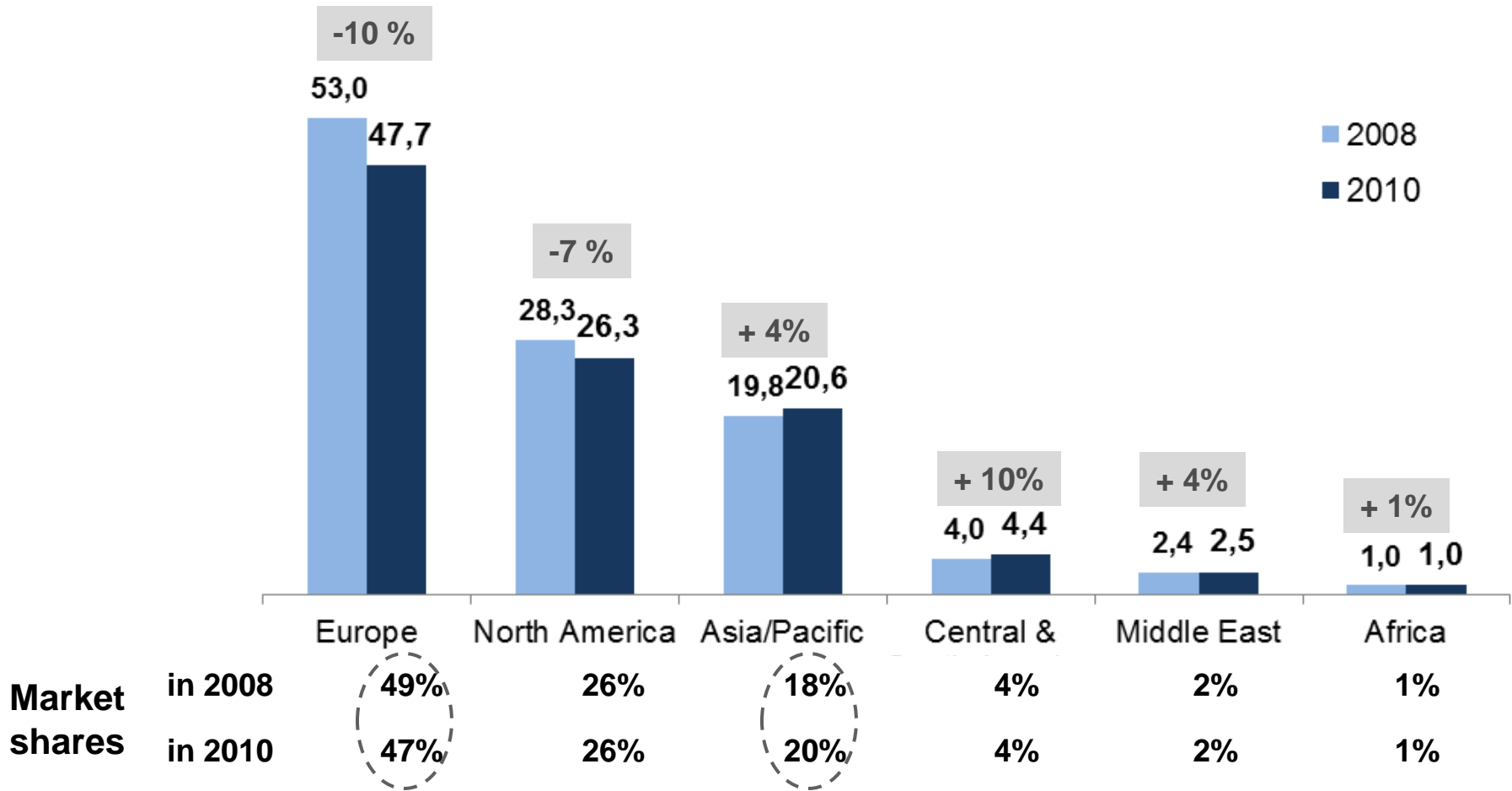
Approximately
30 700 Exhibitions
per year corresponding to
103 million sqm
of total net exhibition space
and where
2.8 million direct exhibiting companies welcomed
260 million visitors

Trends between 2008 and 2010 (Source UFI, Dec. 2011)

(estimations for events with a minimum of 500 sqm)

A review of the global estimates will be conducted in 2013

The total net exhibition space rented by organizers is estimated to have decreased from 109 million sqm to 103 million (-6%).



Global estimates: 10 major national markets

(Year 2010) Source: UFI, Dec. 2011

A review of the global estimates will be conducted in 2013

NET SPACE RENTED

(in million net sqm)

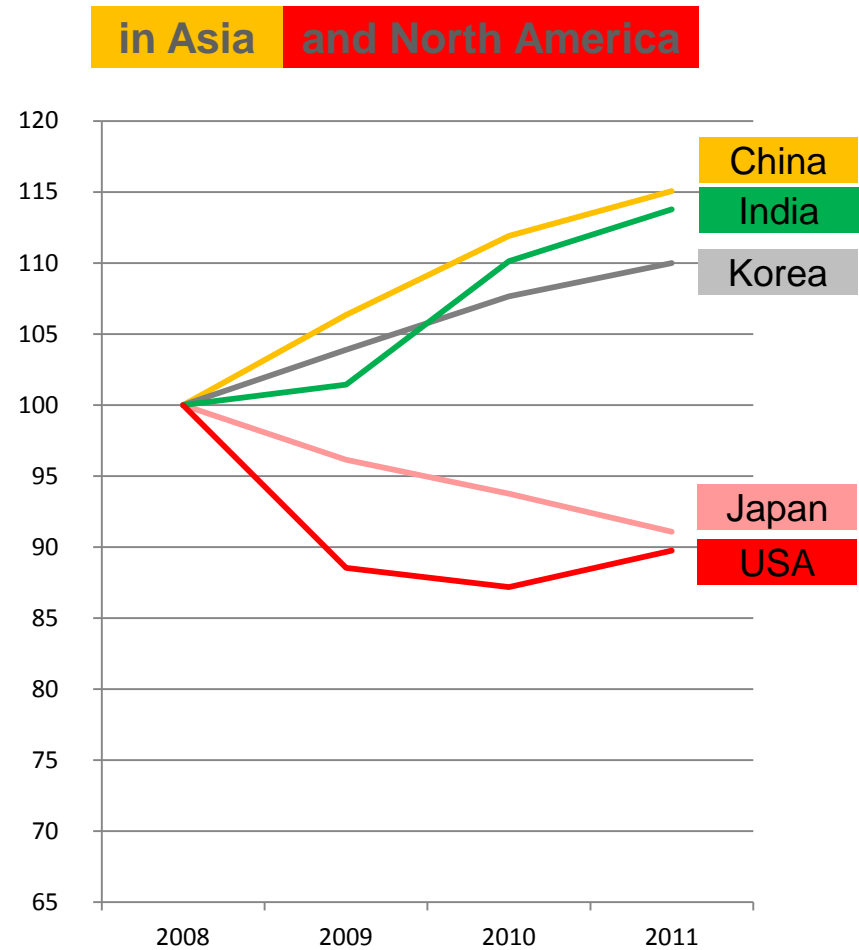
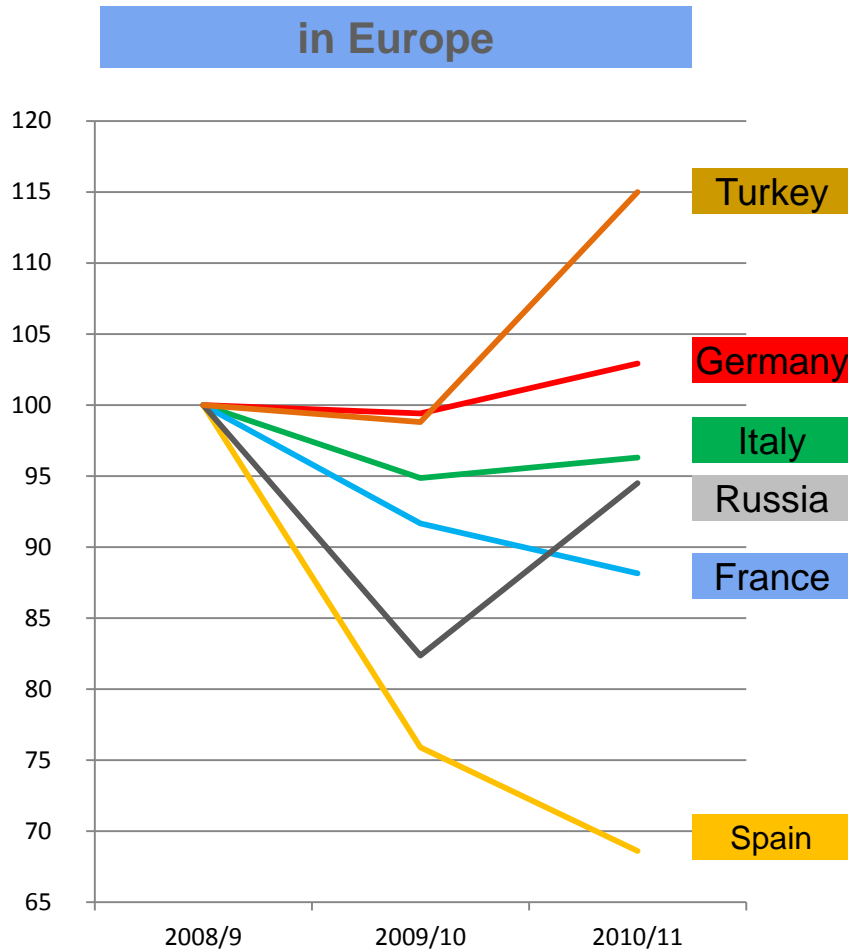
Trend since 2008

USA	23,3 (*)	- 7%
China	13,0	+ 6%
Germany	8,8	- 5%
Italy	6,2	- 5%
France	5,4	- 8%
Spain	3,5	- 24%
Japan	3,2	- 3%
UK	2,8	- 6%
Russia	2,6	- 13%
Brazil	2,6	+ 4%

(*): under review

Trends in the net space rented in several major national markets

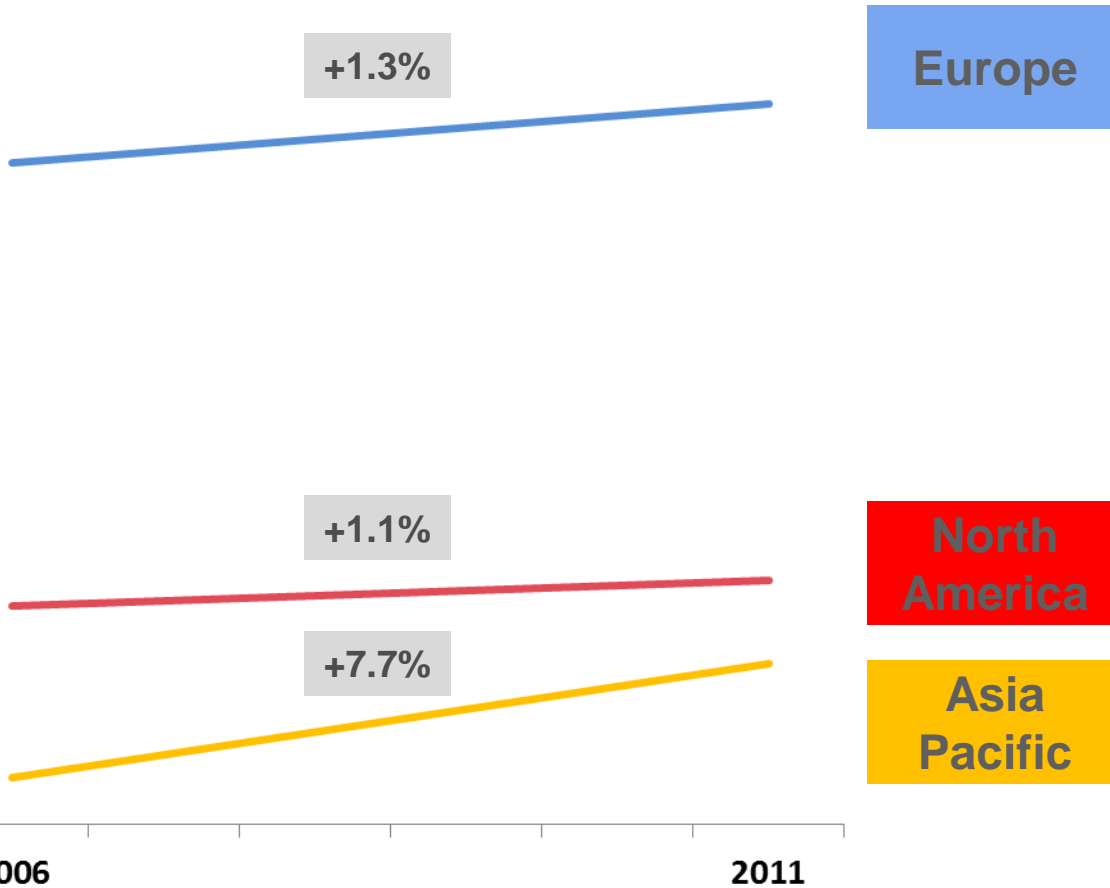
(in square meters - Source UFI Nov. 2012, except for North America: CEIR)



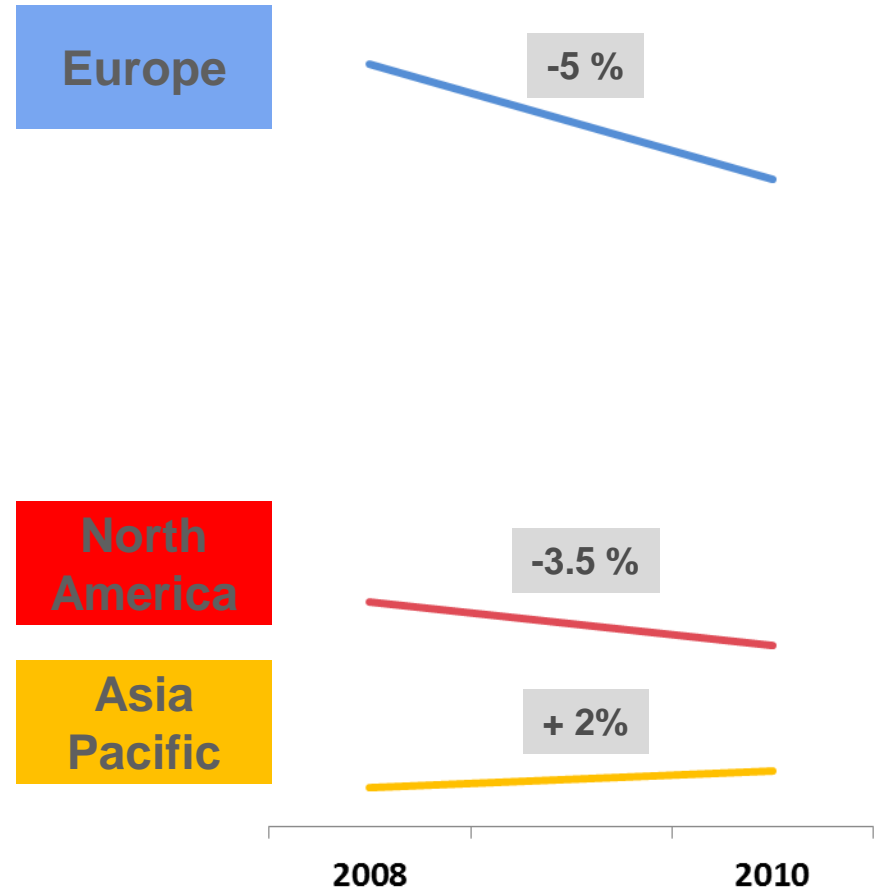
Comparison between capacity and space rented

(Source UFI, Dec. 2011)

Venue indoor exhibition space between 2006 and 2011



Net space rented by organizers between 2008 and 2010



Insight into key metrics (Source UFI, Nov. 2012)

➤ different sources

	NORTH AMERICA	CENTRAL & SOUTH AMERICA	EUROPE	ASIA / PACIFIC
Source	CEIR Census & Index	AFIDA	Euro Fair Statistics (UFI)	UFI / BSG report
Scope	B-B (and mixed) only	Provided by Members	Audited events (only) 25 countries (only) All types (B-B, B-C, both)	B-B (and mixed) only
Estimated share of the total regional market (in % of the net space rented)	n.a.	n.a.	45%	72%
Size of the sample (year of reference)	Around 500 exhibitions (every year)	1 339 exhibitions (2011)	2 296 exhibitions 22,8 millions sqm (average 2010/2011)	1 869 exhibitions 15,7 millions sqm (average 2010/2011)
Reported metrics:	(Index)			
- Net space rented	YES	-	YES	YES
- Duration	-	-	YES	-
- Exhibitors	YES	-	YES	-
- Visitors	YES	-	YES	-
- Turnover	YES	-	-	YES
- Industry sector	YES	YES	YES	YES
- Forecast	YES	-	-	-
- Link with economy	YES	-	-	-

Insight into key metrics (Source UFI, Nov. 2012)

➤ regional results

	NORTH AMERICA	EUROPE	ASIA / PACIFIC
Source (Year of reference)	CEIR Census (2009)	Euro Fair Statistics (UFI) (average 2010/2011)	UFI/BSG report (average 2010/2011)
Average size per event (in net sqm)	5 162 sqm	7 607 sqm (B-C) 7 550 sqm (mixed) 13 952 sqm (B-B)	8 413 sqm
Average duration per event		6,9 days (B-C) 5,3 days (mixed) 4,6 days (B-B)	
Average booth size	24 sqm	37 sqm (between 36 and 38 depending on type)	
Average number of visits	6 815 visits	35 631 (B-C) 32 846 (mixed) 17 575 (B-B)	
Average turnover per show	1,2 million US \$		2,0 million US \$

Insight into key metrics (Source UFI, Nov. 2012)

➤ Top industry sectors: sqm rented - nr. of exhibitions

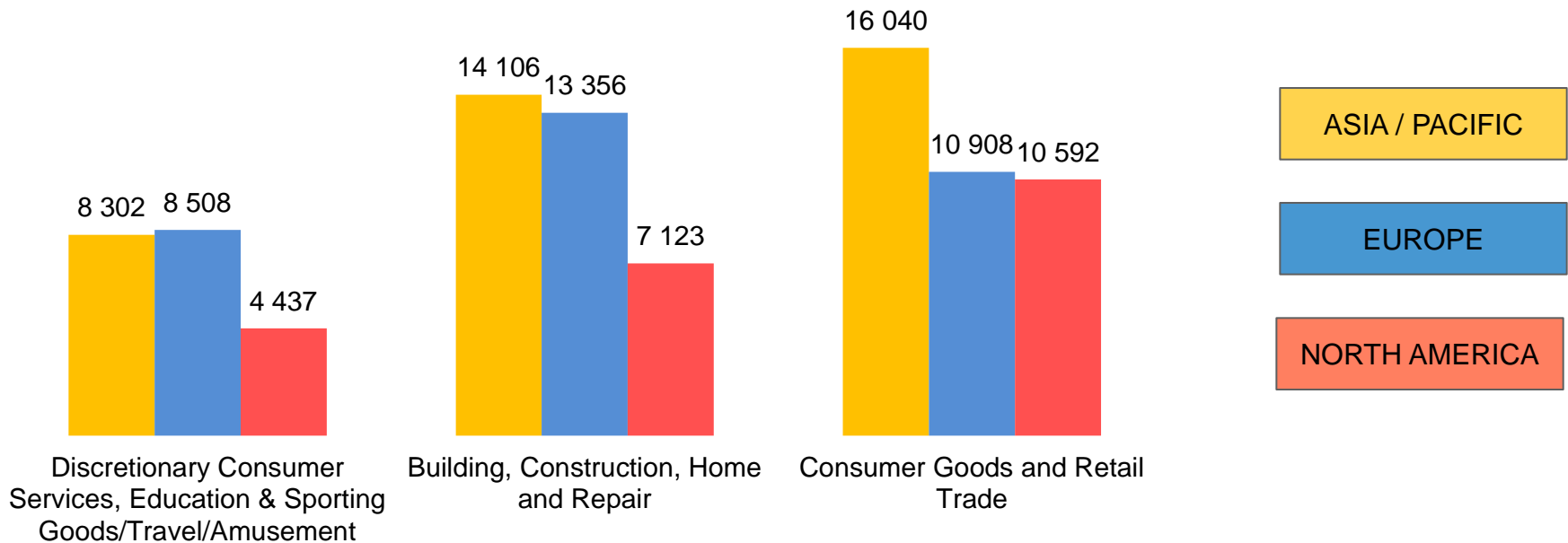
(Average 2010/11 – data from UFI Euro Fair Statistics (Europe), UFI/BSG (Asia/Pacific), CEIR Index (North America), AFIDA (Central & South America))

	EUROPE	ASIA / PACIFIC	NORTH AMERICA	CENTRAL & SOUTH AMERICA
Discretionary Consumer Services, Education & Sporting Goods/Travel/Amusement	1 (20%) – 1 (24%)	3 (14%) – 2 (14%)	1 (16%) – 1 (18%)	n.a. – 1 (28%)
Building, Construction, Home and Repair	2 (18%) – 3 (14%)	2 (16%) – 5 (9%)	9 (6%) – 9 (4%)	n.a. – 5 (8%)
Consumer Goods and Retail Trade	3 (17%) – 2 (16%)	1 (19%) – 4 (10%)	2 (15%) – 6 (7%)	n.a. – 2 (14%)
Industrial/Heavy Machinery and Finished	4 (11%) – 4 (9%)	4 (14%) – 1 (18%)	7 (8%) – 7 (5%)	n.a. – 4 (11%)
Transportation	5 (9%) – 8 (6%)	6 (7%) – 7 (7%)	8 (6%) – 8 (5%)	n.a. – 8 (5%)
Agriculture/Forestry/Fishery & Energy/Oil/Gas/Chemistry	6 (9%) – 5 (8%)	9 (3%) – 9 (5%)	3 (14%) – 4 (10%)	n.a. – 3 (12%)
Food and Beverage, Hospitality	7 (6%) – 6 (7%)	7 (6%) – 6 (9%)	10 (4%) – 11 (3%)	n.a. – 7 (6%)
Electronics, Components, IT and Telecommunications	8 (4%) – 10 (3%)	5 (11%) – 3 (11%)	6 (8%) – 5 (9%)	n.a. – 10 (3%)
Medical and Health Care	9 (3%) – 9 (5%)	8 (5%) – 8 (7%)	4 (11%) – 3 (17%)	n.a. – 9 (3%)
Business Services & Financial/Legal/Real Estate	10 (3%) – 7 (7%)	10 (3%) – 10 (5%)	5 (11%) – 2 (17%)	n.a. – 6 (8%)
Security, Fire Safety, Defense	11 (1%) – 11 (1%)	11 (2%) – 11 (4%)	11 (3%) – 10 (4%)	n.a. – 11 (1%)
ALL SECTORS	(100%) – (100%)	(100%) – (100%)	(100%) – (100%)	(100%) – (100%)

Insight into key metrics (Source UFI, Nov. 2012)

➤ Average size in 2010/11 for the top 3 industry sectors (in both Asia & Europe)

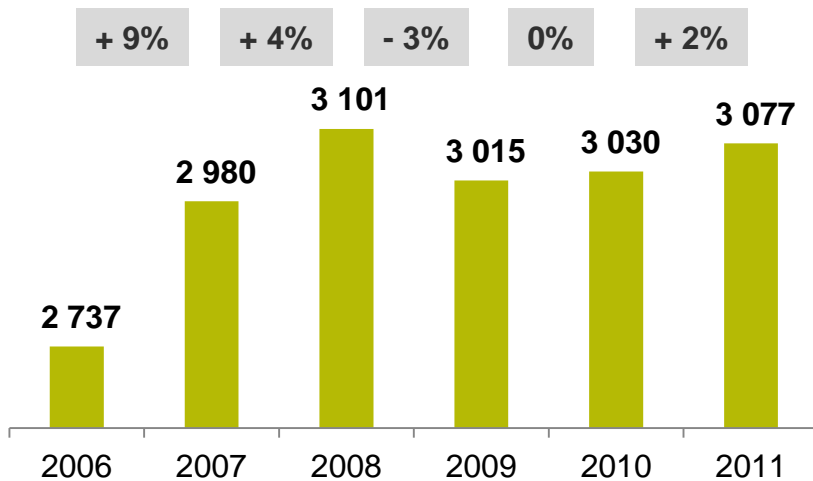
(Average 2010/11 in sqm – sources: UFI Euro Fair Statistics (Europe), UFI/BSG (Asia/Pacific), CEIR Index (North America), AFIDA (Central & South America))



Exhibitions organized by UFI Organizers (Source UFI, Nov. 2012)

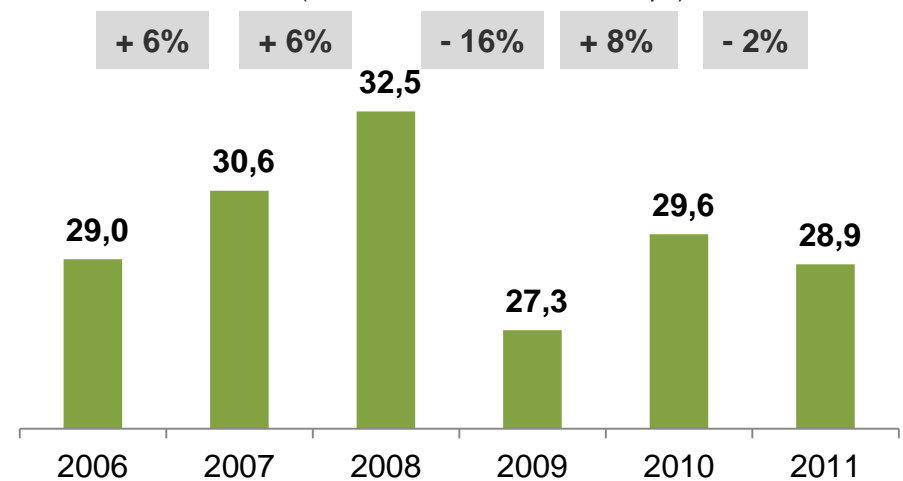
Based on the data collected among 174 organizing companies (and their subsidiaries)

Number of Exhibitions

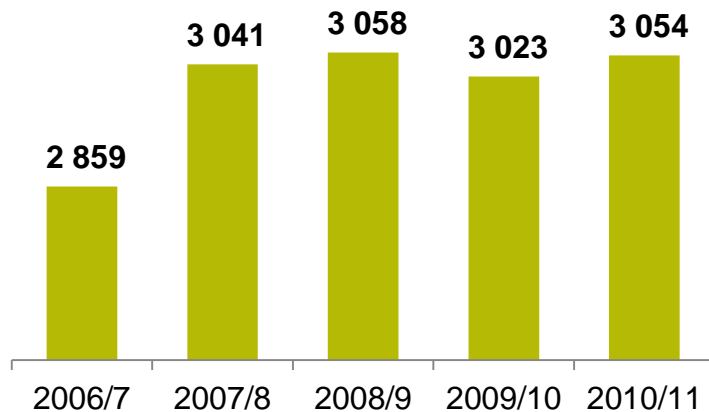


Total net space rented

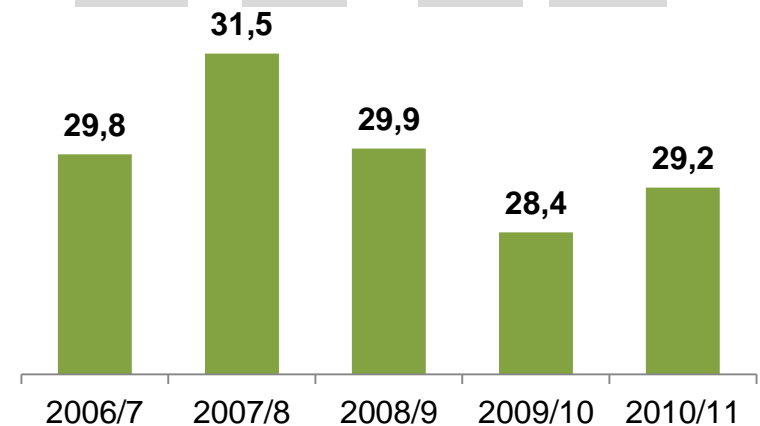
(indoor + outdoor, in million sqm)



+ 6% + 1% - 1% + 1%



+ 6% - 5% - 5% + 3%

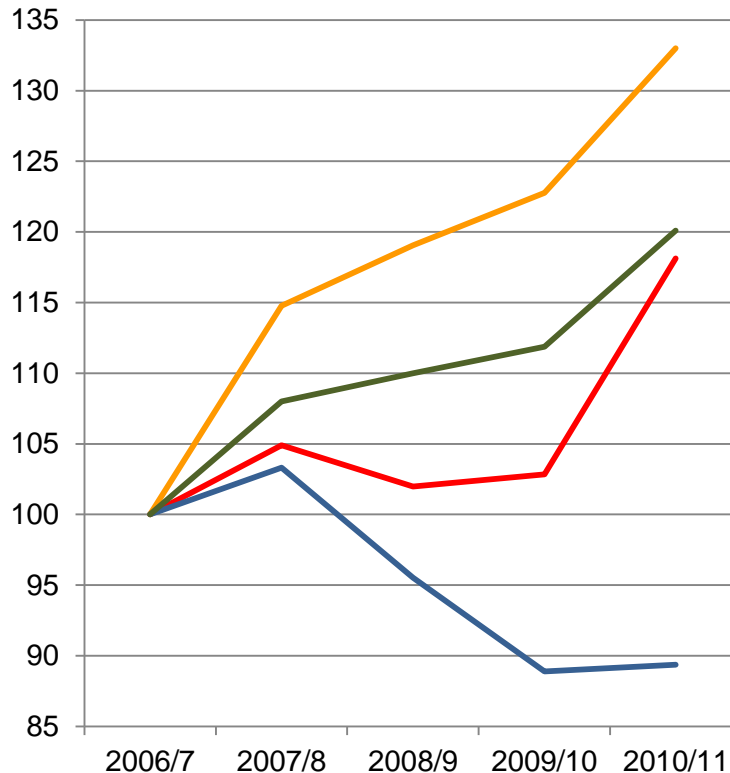


Exhibitions organized by UFI Organizers (Source UFI, Nov. 2012)

Based on the data collected among 174 organizing companies (and their subsidiaries)

➤ Breakdown by event location

Trend in total net space rented



Highest growth rates among the largest markets for UFI organizers in each region

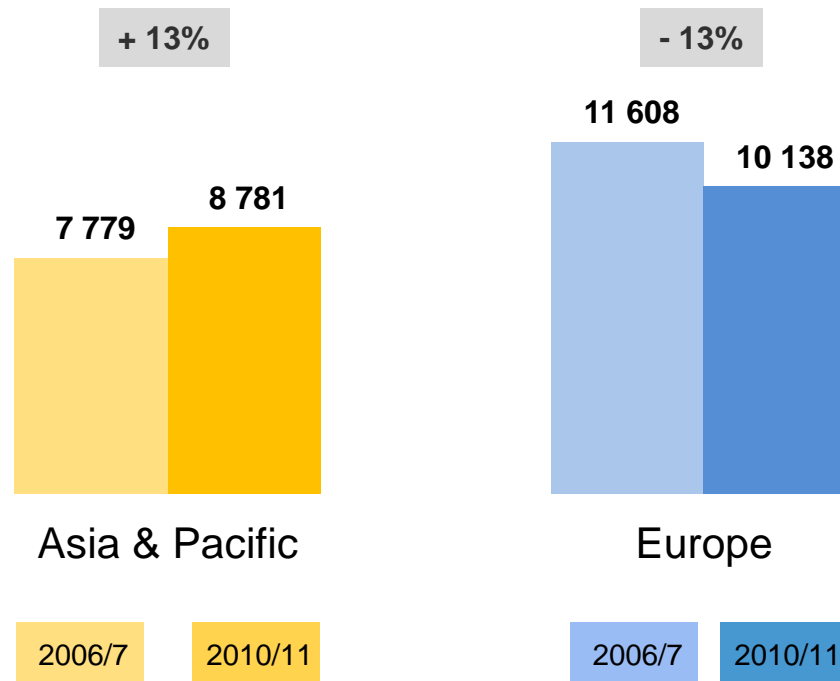
ASIA / PACIFIC	China: +56%
MIDDLE EAST & AFRICA	Iran: +49%
AMERICAS	Brazil: +180%
EUROPE	Germany: +4%

Exhibitions organized by UFI Organizers (Source UFI, Nov. 2012)

Based on the data collected among 174 organizing companies (and their subsidiaries)

➤ Exhibition average size

Net space rented in sqm (indoor + outdoor)



3. COMPANIES

Annual number of exhibitions and net space rented

by UFI Organizers (average 2010/11) - Source UFI, Nov. 2012

Based on the data collected among 174 organizing companies (and their subsidiaries)

➤ Large diversity

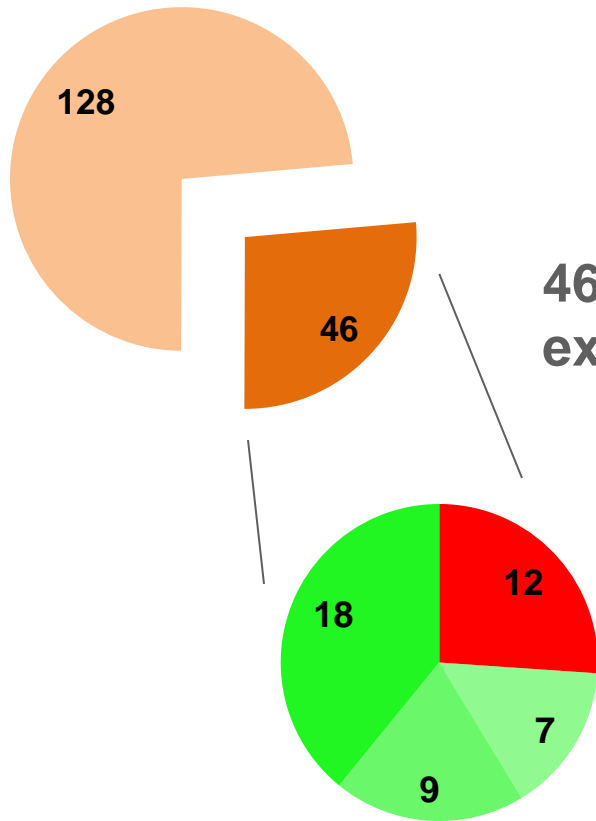
Number of companies	Total annual net space rented (Indoor + Outdoor)	Average annual number of exhibitions organized				Market share in terms of net space rented
		1 every year or every 2 years	2 to 9	10 to 49	50 and more	
87	less than 50 000 sqm	24	44	19		7%
53	50 000 to 199 999 sqm	5	21	26	1	18%
21	200 000 to 499 999 sqm			18	3	22%
13	500 000 and more			5	8	53%
174		29	65	68	12	100%

Internationalization of UFI Organizers

Number of exhibitions organized abroad

(average 2010/11 and trend since 2006/7) - Source UFI, Nov. 2012

Based on the data collected among 178 organizing companies (and their subsidiaries)



46 companies (26%) organized at least one exhibition outside their own country in 2010/11

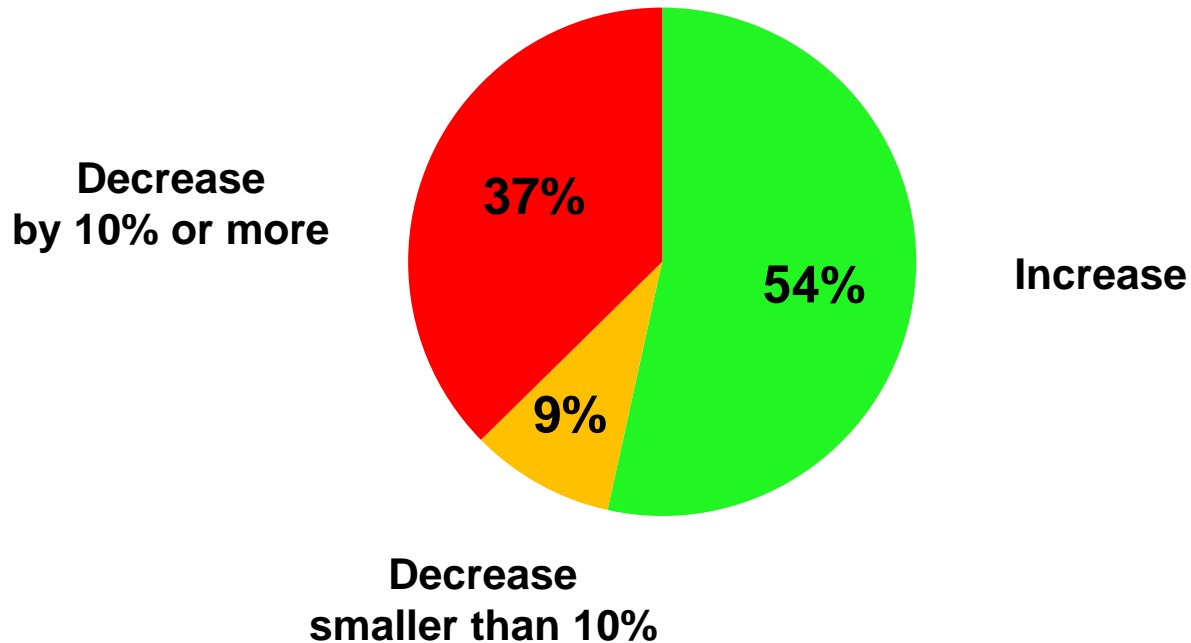
- **12 (26%) organize less than in 2006/7**
- **7 (15%) organize the same number than in 2006/7**
- **9 (20%) were not organizing any in 2006/7**
- **18 (39%) organized more than in 2006/7**

Trends for UFI Organizers

Total space rented between 2006/7 & 2010/11 (Source UFI, Nov. 2012)

Based on the data collected among 174 organizing companies (and their subsidiaries)

Growth in net space rented between 2006/7 and 2010/11 by UFI member organizers

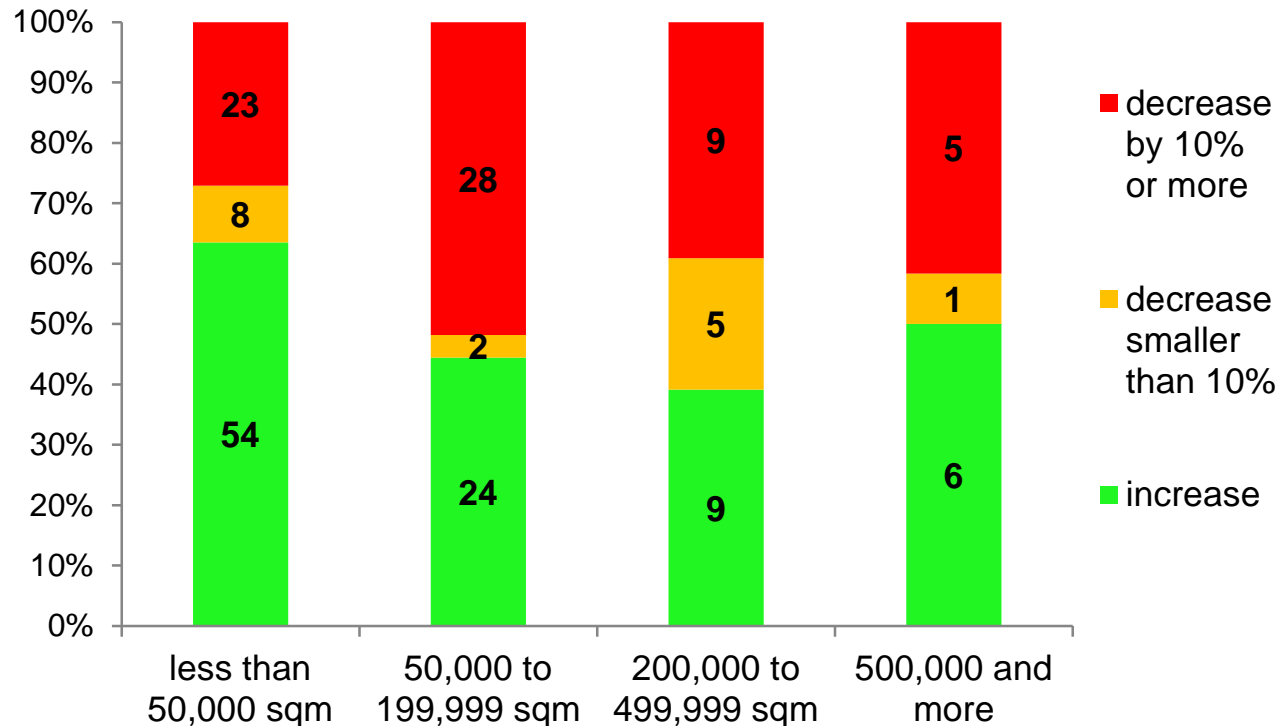


Trends for UFI Organizers

Total space rented between 2006/7 & 2010/11 (Source UFI, Nov. 2012)

Based on the data collected among 174 organizing companies (and their subsidiaries)

Growth in net space rented between 2006/7 and 2010/11 at company level, in relation to their volume of activity in 2006/7



(NB. This trend does not show the M&A within UFI Membership)

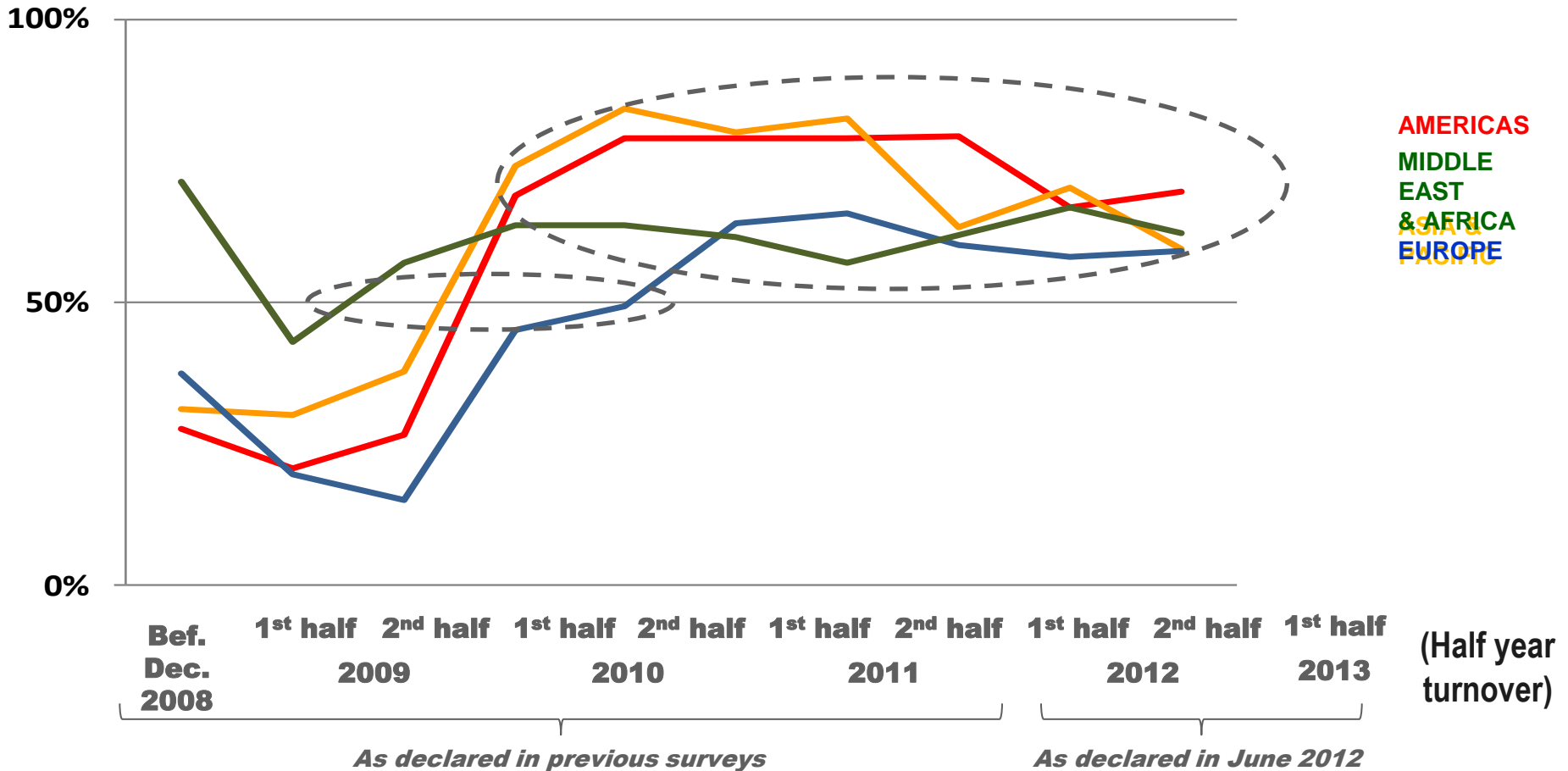
UFI Global Exhibition Barometer

- Survey conducted among UFI, SISO (USA), AFIDA (Central and South America) & EXSA (Southern Africa) Members
- 9th survey was conducted in June 2012
- 10th survey is ran in December 2012

UFI Global Exhibition Barometer

(last results, released in July 2012)

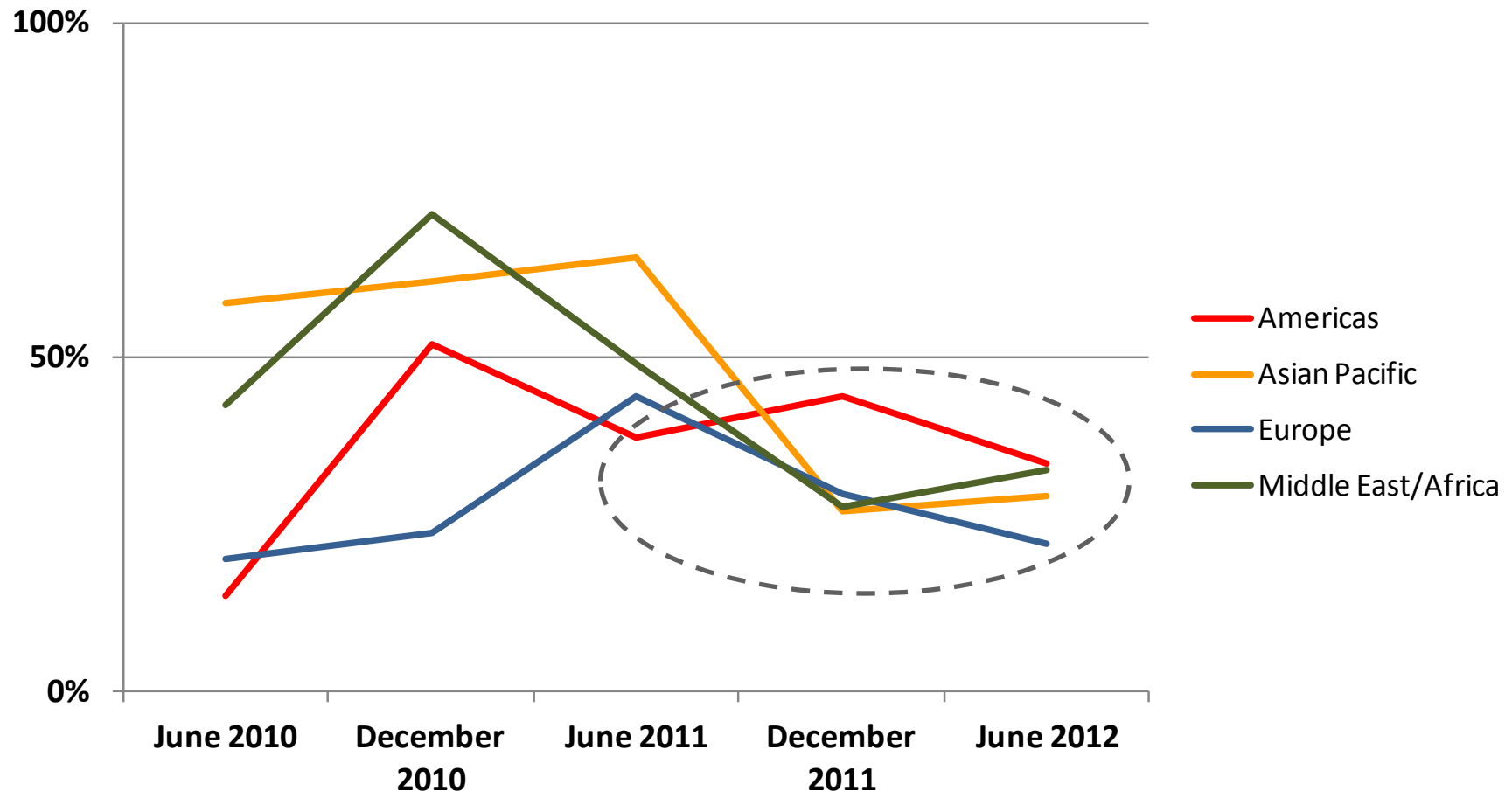
% of companies declaring an **increase of their turnover** when compared to the same period the year before (regardless of possible biennial effects)



UFI Global Exhibition Barometer

(last results, released in July 2012)

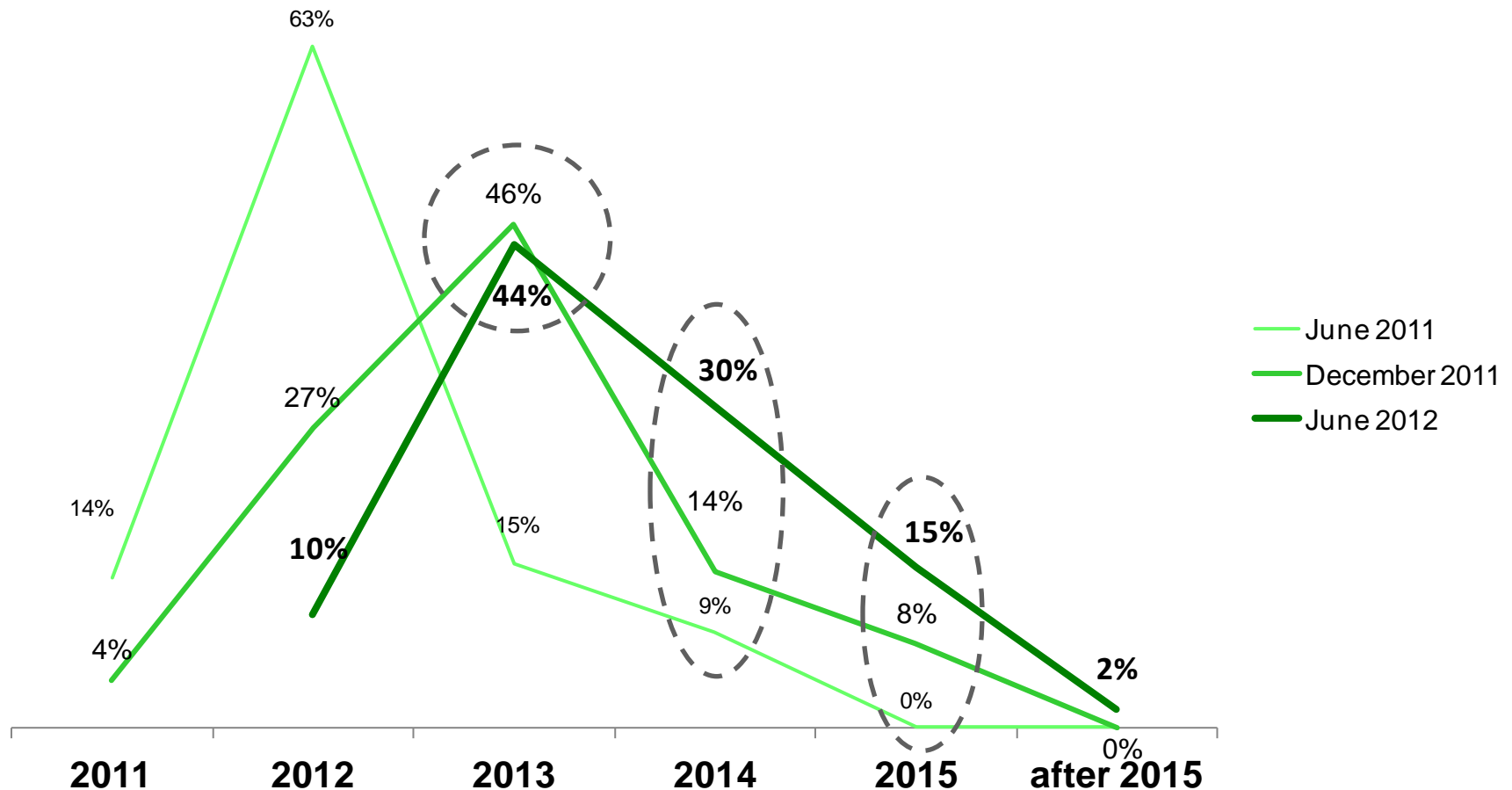
% of companies declaring – in the last 5 surveys - that the impact of the “economic crisis” on their exhibition business is now over



UFI Global Exhibition Barometer

(last results, released in July 2012)

Anticipated ending year of the impact of the “economic crisis” as declared in the last 3 surveys by those who consider that it is not yet over



THANK YOU!

*This presentation is freely downloadable
at www.ufi.org*

*For any questions,
please contact Christian (research@ufi.org)*