CEFA - Your Gateway to Central & South East Europe

CEFA Market Report

CEFA Market Report was produced by CBBS – Management Consulting & Business Building Company Ltd (Zagreb) on behalf of CEFA (Central European Fair Alliance)

Zagreb, December 2009
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Trade fairs and exhibitions in times of crisis

“Regardless of today’s global shifts, it is clearly recognized that trade fairs and exhibitions are still of prime importance to the economy – and in some cases they are even more important than ever before.

Especially in times of crisis, domestic and international economic partners need exhibition platforms to send positive signals to their strategic markets to launch innovative products, to discuss crisis-management measures and using this knowledge respond quickly, flexibly and correctly.

In these challenging times, it is more important than ever to focus on the quality of events and on improving the professionalism of our industry.”

Part of the Statement at the 76th UFI Congress, Zagreb, October, 2009
Dear CEFA colleague,

Promotion of the trade fairs and exhibitions as important marketing tool and business meeting platforms in Central and SE Europe (CEFA region and market) is one of CEFA’s top priorities.

This report consolidates data and useful statistical information for 2008 provided by CEFA members was prepared and compiled by CBBS Ltd in the second half of 2009.

The aim of CEFA Market Report 2009 is to provide the reliable insight to some key components of our industry in CEFA region and showing at the same time the strength of CEFA network and the size of CEFA market.

CEFA Market Report 2009 is the first joint summary of the facts and figures provided by CEFA members that can use these results to evaluate their individual position within the overall trade fair market in CEFA region.

This report will be good starting point for the future reports giving up to date information about the development of the trade fair markets in Central and SE Europe, the key trends and the main players of the industry.

This report gives overview of the bigger part of the trade fair market in 15 countries in Central and SE Europe (CEFA region) – Albania, Austria, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republik, Germany/Bavaria, Hungary, Italy/part of the Northern Italian region, Macedonia, Montenegro, Romania, Serbia, Slovakia and Slovenia.

Note: This report is based on CEFA member individual data provided and collected in the second half of 2009. The results presented in this report are therefore considered reliable. However they cannot be considered as 100% accurate or complete. CEFA and CBBS Ltd cannot be held responsible for errors or consequences arising from the use of the information provided in this report.
PART 1

1. About CEFA (Central European Fair Alliance)

1.1. About CEFA – general information

CEFA is an exhibition organizers network for intensive business contacts in Central and South East Europe. 
CEFA – (Central European Fair Alliance) was founded in January 1995 in order to make Central and South East Europe a stronger venue for trade fairs and exhibitions of international significance, and one which extends beyond mere physical borders 23 members have joined forces in CEFA. Trade fair organizers in Belgrade, Bolzano/Bozen, Bratislava, Bucharest, Budapest, Budva, Celje (Celjski Sejem, ICM), Graz, Klagenfurt, Munich (Messe München, Gesellschaft für Handwerksmessen), Novi Sad, Plovdiv, Pordenone, Prague, Sarajevo, Skopje, Sofia, Tirana, Vienna, Zagreb (Zagreb Fair, CBBS) and Tirana have decided to meet the process of European integration by working together more closely in the areas of marketing and public relations, exchanging know-how and participating in joint training activities.

The members of CEFA are the international trade fair companies fulfilling following criteria:

• All CEFA members are the members of UFI (Global Association of the Exhibition Industry, www.ufi.org), they all meet international quality standards in trade fair business

• They are coming from European region integrating the countries from the triangle Alps-Danube-Adria

• All CEFA members publish testified and reliable figures of their trade shows

1.2. Objective and mission of CEFA

CEFA - Your Gateway to Central & South East Europe

The objective of CEFA is to tackle new problems in an age of increased globalisation with future-oriented solutions. European unity has created a new market that offers new diversity, new opportunities and new sales potential in Central and South East Europe, CEFA makes a special contribution to European integration.

CEFA’s mission is to become the high-quality gateways to business in the growing markets of Central and South East Europe, turning them into hubs for spreading contacts and contracts throughout the region, contributing to European integration as well.
1.3. Benefits of CEFA trade fairs

Importance of the international trade fair business and CEFA network:

- national economy’s meeting points,
- market and entrepreneurship platforms, especially important for SMEs
- showing innovation, latest developments and new trends,
- facilitating the access to the markets across the region
- bringing additional jobs, income and business opportunities to Central and South East Europe (second benefits)
- promoting regions, cities, people and lifestyle in the Central and South East Europe (third benefits)

All trade fair participants, i.e. exhibitors and visitors alike, also profit from CEFA:

- Efficient access to international markets
- Comprehensive information about all 23 member companies
- Tapping regional markets
- Greater sales potential for exhibitors
- Broader range of exhibits for visitors
2. CEFA Market – facts and figures

2.1. CEFA region – countries and cities

CEFA region and market have:

- **Countries** - 15 countries, i.e. 9 EU countries and 6 neighbors of EU.
- **Cities network** – CEFA members are coming from 21 city from Central and SE Europe, 11 of them are capitals of its countries.
- **Population** - 110 million inhabitants or cca 1,6 % of global population. If comparing the population on the World list of countries by population CEFA market would be rated on 11th place, between Japan with 127 million inhabitants and Mexico with 108 million inhabitants.
- **Area** - 1 140 000 km² or cca 0,76 % of total global area, if comparing the area in CEFA region with the countries on the World list of countries by area, CEFA region would be set on 26th place together with Colombia.
- **GDP per capita** (sorted by their gross domestic product (GDP) at purchasing power parity (PPP) per capita, World Bank) – average GDP per capita is cca 20 000 USA $, the highest in Austria with 39 887 USA $.
- **GDP growth** – in 2009 there was decrease in the most of CEFA countries, the highest negative rates were in Romania - 8 % and Hungary - 6,5 %. The estimation of GDP growth for 2010 is showing recovery of the economy and growth of GDP between 0 – 1,5 % for most of the countries.
2.2. CEFA Members and Market - facts and figures in 2008

1. Total infrastructure of CEFA Members in m²:
   • 1 037 800 m² indoor space
   • 1 116 000 m² outdoor space

For the organization of the international and national trade fairs and the exhibitions CEFA members venues are offering some 2,15 million m² indoor and outdoor space. Seven CEFA members offer more than 100 000 m², seven others between 50 000 – 100 000 m² and seven have a capacity up to 50 000 m².

CEFA members keep at a rough estimate some 70 – 80 % of the total trade fair infrastructure in Central and SE Europe, i.e. CEFA region.

2. Number of events organized by CEFA members in 2008
   445 events

CEFA members in 2008 organized 445 own events, in average they organize 20 events every year.

3. Sold space in CEFA members events in 2008
   2 950 742 m²

Ten CEFA members sold more than 100 000 m², seven others between 50 000 – 100 000 m² and five members sold up to 50 000 m².

There is an estimation that CEFA members keep some 50 – 60 % of the total sold space in the events in Central and SE Europe, i.e. CEFA region.

4. Number of exhibitors in CEFA members events in 2008
   116 090 exhibitors

5. Number of visitors in CEFA members events in 2008
   9 326 605 visitors

Statistically all the events of CEFA members were visited by almost every 12th inhabitant living in CEFA countries (cca 110 million inhabitants living in CEFA region) or we can say that every year population of one country like Sweden, is visiting trade fairs organized by CEFA members.

6. Number of UFI approved events
   75 events

CEFA members are also members of UFI, and they are organizing several UFI approved events every year. At the moment 75 events of CEFA members are approved by UFI showing the importance and high international quality standards they have to meet. The list of all UFI approved events is included as a part of CEFA Market Report as well.
7. Turnover of CEFA members

490 million EUR

CEFA members have a yearly turnover of 490 million EUR. Ten CEFA members had in 2008 annual turnover of 10 million EUR or more.

Activity and turnover of CEFA members create overall economic production, i.e. second benefits for CEFA region, that can be estimated as some 4 - 5 billion EUR in 2008.

This is an amount of the statistically proven income/spendings in CEFA cities and surrounding areas, by visitors and exhibitors (hotels, shopping, travelling, services...).

2.3. Outlook for 2009/2010

Overall, CEFA members anticipated decline in all the figures 2009 between 5 – 20 %, depending on the country and the national economy situation.

Developments around the world and in CEFA region, in 2009 had shown, that the leading trade fairs, were in relatively good health but by contrast, numerous second-tier and third-tier events had experienced difficulties, the similar can apply for the most of the CEFA members.

According to the results of UFI’s third Global Economic Crisis Barometer Survey we found out that the majority of the exhibition industry has been impacted by this economic downturn and that UFI members estimate that 2010 will bring first signs of recovery, however one part of the of the companies believe that the industry will still suffer in 2010 and expect to recover in 2011.
3. Economic outlook of Central and SE Europe (CEFA region)

3.1. Emerging Market of Today

According to the economic experts, the region of SEE with Croatia, Albania, Bosnia and Herzegovina, Bulgaria, Romania, Serbia, Montenegro and Macedonia is besides China, India, Brasil and Russia the most successful emerging market worldwide.

The new accession to the EU of together 12 new members from Central, Eastern and Southern Europe (in 2004 and 2007) is bringing the new opportunities to enlarged Europe to become more competitive and to develop Single European Market.

The positive impact of the following elements is directly connected with the results of the exhibition industry:

- Sustainability of the economy, market liberalization and competition framework
- Privatization, development of the entrepreneurship and foreign investments
- Socio-ecological development level, increase of the standard of living, and economic wealth
- The countries in Central and South East Europe are target of many companies from Western Europe in terms of cooperation, investments and trade, especially Germany, Italy and Austria
- Success of the political stabilization process
- Start of the several reforms in the process of joining or approaching to EU. Croatia is EU candidate country with the possibility to enter until 2012, for the other countries in SE Europe the governments of the EU Member States, coming together in the European Council, have agreed to extend the EU perspective to countries in South East Europe - the former Yugoslav Republic of Macedonia, Albania, Bosnia and Herzegovina, Montenegro, Serbia and Turkey.
3.2. CEFA Region – facts and figures (Central and SE European countries, including Bavaria and Italian regions, Alto Adige/South Tyrol - Trentino and Friuli - Venezia – Giulia)

<table>
<thead>
<tr>
<th>Country</th>
<th>Size (km²)</th>
<th>Inhabitants</th>
<th>Capital</th>
<th>Inhabitants Capital</th>
</tr>
</thead>
<tbody>
<tr>
<td>Albania</td>
<td>28,748</td>
<td>3,072,000</td>
<td>Tirana</td>
<td>427,000</td>
</tr>
<tr>
<td>Austria</td>
<td>83,781</td>
<td>8,033,000</td>
<td>Vienna</td>
<td>1,550,000</td>
</tr>
<tr>
<td>Bosnia and Herzegovina</td>
<td>207,600</td>
<td>9,905,000</td>
<td>Sarajevo</td>
<td>581,000</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>110,994</td>
<td>7,918,000</td>
<td>Sofia</td>
<td>1,096,000</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>78,866</td>
<td>10,206,000</td>
<td>Prague</td>
<td>1,160,000</td>
</tr>
<tr>
<td>Croatia</td>
<td>56,542</td>
<td>4,442,000</td>
<td>Zagreb</td>
<td>800,000</td>
</tr>
<tr>
<td>Hungary</td>
<td>93,000</td>
<td>10,171,000</td>
<td>Budapest</td>
<td>1,725,000</td>
</tr>
<tr>
<td>Macedonia</td>
<td>25,713</td>
<td>2,048,000</td>
<td>Skopje</td>
<td>452,000</td>
</tr>
<tr>
<td>Romania</td>
<td>238,391</td>
<td>21,698,000</td>
<td>Bucharest</td>
<td>1,922,000</td>
</tr>
<tr>
<td>Slovenia</td>
<td>20,273</td>
<td>1,996,000</td>
<td>Ljubljana</td>
<td>260,000</td>
</tr>
<tr>
<td>Slovakia</td>
<td>49,035</td>
<td>5,370,000</td>
<td>Bratislava</td>
<td>428,000</td>
</tr>
<tr>
<td>Serbia</td>
<td>88,235</td>
<td>10,035,000</td>
<td>Belgrade</td>
<td>1,285,000</td>
</tr>
<tr>
<td>Montenegro</td>
<td>13,938</td>
<td>630,548</td>
<td>Podgorica</td>
<td>140,000</td>
</tr>
<tr>
<td><strong>13 countries</strong></td>
<td><strong>1,050,000</strong></td>
<td><strong>95 millions</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Besides Central and SE European countries CEFA region has 2 additional EU member states included, so we have to complete CEFA figures with the data for Bavaria (CEFA members are Messe Munich and GHM from Munich) i.e. with 70 549 km² and 12 440 000 inhabitants) and Northern Italian region Alto Adige/South Tyrol - Trentino and Friuli - Venezia - Giulia (CEFA members are Fiera Bolzano and Fiera Pordenone) with some 2 130 000 inhabitants, to have the facts and figures of CEFA market and network.
Sources of the data for the CEFA Market Report

1. CEFA Market Research Questionnaire with the additional data provided by CEFA members
2. UFI database
3. CENTREX report 2008
4. AUMA and FKM database
5. Special reports about Czech and Slovak Republik Trade Fair Market
6. Estimation, when no data found in any of the sources

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PART 2

Enclosure 1

UFI Approved Events organized by CEFA members

AUSTRIA - 8 events

BWS
International Trade Fair for Woodworking Processing, Fittings, Carpenter Supplies and Joinery Requirements, together with: EISENWAREN ÖSTERREICH, International Trade Fair for Tools, Ironware, Do-It-Yourself and Security Systems
Organizing company: Reed Exhibitions Messe Salzburg

Creativ
Organizing company: Reed Exhibitions Messe Salzburg

GAST Klagenfurt
International Trade Fair for Gastronomy and Tourism
Organizing company: Klagenfurter Messe

Internationale Holzmesse Klagenfurt/International Timber Fair Klagenfurt
Organizing company: Klagenfurter Messe

Klagenfurter Herbstmesse
International Capital and Consumer Goods Fair
Organizing company: Klagenfurter Messe

LebensartGraz
Organizing company: Messe Congress Graz
Tracht & Country Classics Salzburg
International Fashion Trade Fair for Tracht and Country House Style
Organizing company: Reed Exhibitions Messe Salzburg

Vinova
Vienna Wine Fair
Organizing company: Reed Exhibitions Messe Wien

BOSNIA and HERZEGOVINA - 1 event

PLAGRAM
International Plastics and Rubber Fair
Organizing company: Centre Skenderija Sarajevo

BULGARIA - 7 events

AGRA
International Agricultural Exhibition
Organizing company: International Fair Plovdiv

FOODTECH
International Exhibition of Food Products and Technologies
Organizing company: International Fair Plovdiv

International Consumer Goods and Technologies Fair
Organizing company: International Fair Plovdiv

International Technical Fair
Organizing company: International Fair Plovdiv

Medicus, Dento, Galenia
International Exhibition of Medicine, Dentistry and Pharmaceutics
Organizing company: International Fair Plovdiv

PrintCom
International Exhibition of Printing Communications
Organizing company: International Fair Plovdiv
Vinaria
International Exhibition on Vine-Growing and Wine-Producing
Organizing company: International Fair Plovdiv

CROATIA - 13 events

Ambienta
International Furniture, Interior Decoration and Supporting Industry Fair
Organizing company: Zagreb Fair

Anticorrosion
International Fair of Material Protection and Industrial Finishing
Organizing company: Zagreb Fair

BIAM
International Machine Tool and Tools Fair
Organizing company: Zagreb Fair

Fashion & Leisure
International Textile and Supporting Industries Fair
Organizing company: Zagreb Fair

Hotel & Gastrotech
International Fair of Gastronomy, Hotel and Hospitality Equipment and Catering
Organizing company: Zagreb Fair

InterGrafika
International Printing and Paper Industry Fair
Organizing company: Zagreb Fair

InterKlima
International Fair of Heating, Cooling, Air Conditioning and Drinking Water Treatment
Organizing company: Zagreb Fair

Medicine and Technology
International Fair of Medical, Laboratory and Dental Equipment and Pharmacy
Organizing company: Zagreb Fair
Zagreb Sport & Boat Show
Organizing company: Zagreb Fair

TEGRA
International Building Fair
Organizing company: Zagreb Fair

Welding
International Welding and Anticorrosion Fair
Organizing company: Zagreb Fair

Zagreb Auto Show
International Exhibition of Automobiles and Supporting Industries
Organizing company: Zagreb Fair

Zagreb International Autumn Fair
Organizing company: Zagreb Fair

CZECH REPUBLIC - 2 events

Pragomedica-Pragofarma-Pragooptic-Pragolabora
International Fair of Medical Diagnostics and Therapy, Pharmaceutical Products, Optical and Laboratory Technologies, Devices and Equipment
Organizing company: Incheba Expo Praha Ltd.

Pragoregula
International Fair of Measuring, Regulation and Automation Technology
Organizing company: Incheba Expo Praha Ltd.

GERMANY/BAVARIA - 20 events

Analytica
International Trade Fair and Analytica Conference for Analysis, Biotechnology, Diagnostics and Laboratory Technology
Organizing company: Messe München GmbH
AUTOMATICA
Organizing company: Messe München GmbH

Bau
International Trade Fair for Building Materials, Building Systems, Building Renovation
Organizing company: Messe München GmbH

Baucon Asia
International Trade Fair for Building Materials, Building Services, Prefabricated Parts, Construction Technology, Construction Equipment and Building Material Machinery
Organizing company: Messe München GmbH

Bauma
International Trade Fair for Construction Machinery, Building Material Machines, Construction Vehicles and Equipment
Organizing company: Messe München GmbH

bauma China
Organizing company: Messe München GmbH

C-B-R
as of 2009: f.re.e - Freizeit, Reisen, Erholung
Organizing company: Messe München GmbH

Ceramitec
International Trade Fair for Machinery, Equipment, Plant, Processes and Raw Materials for Ceramics and Powder Metallurgy
Organizing company: Messe München GmbH

Drinktec
World Fair for Beverage and Liquid Food Technology
Organizing company: Messe München GmbH

Electronica
International Trade Fair for Components and Assemblies in Electronics
Organizing company: Messe München GmbH

Expo Real
International Commercial Property Exposition
Organizing company: Messe München GmbH
Golf Europe
International Trade Fair for Golf
Organizing company: Messe München GmbH

Ifat
Organizing company: Messe München GmbH

Inhorgenta Europe
International Trade Fair for Watches, Clocks, Jewellery, Precious Stones, Pearls, Silverware and their Manufacturing Equipment
Organizing company: Messe München GmbH

Interforst
International Trade Fair for Forestry and Forest Technology with Scientific Conferences and Special Shows
Organizing company: Messe München GmbH

Ispo
International Trade Fair for Sports Equipment and Fashion
Organizing company: Messe München GmbH

Laser - World of Photonics
International Trade Fair and International Congress for Innovative and Applied Laser Technology and Opto-electronics
Organizing company: Messe München GmbH

Productronica
International Trade Fair for Electronics Production
Organizing company: Messe München GmbH

Systems
International Trade Fair for Information Technology and Telecommunications
Organizing company: Messe München GmbH

Transport Logistic
International Trade Fair for Logistics, Telematics, Freight and Passenger Transport
Organizing company: Messe München GmbH
HUNGARY - 6 events

Agro+Mashexpo
International Agriculture and Agricultural Machinery Exhibition
Organizing company: Hungexpo

Chemexpo
International Chemical and Plastic Industry Exhibition
Organizing company: Hungexpo

Construma
International Building Trade Exhibition
Organizing company: Hungexpo

Foodapest
International Food, Drink and Food Processing Industry Trade Fair
Organizing company: Hungexpo

Industria
International Industry Trade Fair
Organizing company: Hungexpo

Mach-Tech
International Trade Exhibition of Machine Manufacturing and Welding Technology
Organizing company: Hungexpo

ITALY - 1 event

Internationale Herbstmesse
International Autumn Trade Fair
Organizing company: Fiera Bolzano SpA/Messe Bozen AG

MACEDONIA - 2 events

International Skopje Trade Fair
Organizing company: Skopje Fair
TEHNOMA
International Ferrous and Non-Ferrous Metallurgy, Electronics, Non-Metals and Construction Fair
Organizing company: Skopje Fair

MONTENEGRO - 1 event

International Food Fair
Organizing company: Adriatic Fair - Jadranski Sajam Budva

ROMANIA - 4 events

BIFE-TIMB
Organizing company: Romexpo S.A.

Indagra
Organizing company: Romexpo S.A.

Rommedica - Rompharma – Romoptik
International Exhibition of Medical Equipment and Instruments - Medicine for Human & Veterinary Applications - Optical Equipment and apparata
Organizing company: Romexpo S.A.

TIB
Technical International Fair Bucharest
Organizing company: Romexpo S.A.

SERBIA - 6 events

International Agricultural Fair
Organizing company: Novi Sad Fair

International Building Trade Fair
Organizing company: Belgrade Fair

International Fair for Hunting, Fishing, Sport and Tourism
Organizing company: Novi Sad Fair
International Fair of Food and Beverages  
Organizing company: Novi Sad Fair

International Fair of Furniture, Equipment & Interior Decoration  
Organizing company: Belgrade Fair

International Fair of Technique and Technical Achievements  
Organizing company: Belgrade Fair

UNIJATEX  
Fair of Textile, Clothing, Accessories and Equipment  
Organizing company: Belgrade Fair

SLOVAKIA - 3 events

Coneco  
Organizing company: Incheba Expo Bratislava Plc.

Incheba  
International Chemical Trade Fair  
Organizing company: Incheba Expo Bratislava Plc.

SlovMedica  
International Fair for Medical Engineering for Diagnosis and Therapy  
Organizing company: Incheba Expo Bratislava Plc.
Part 2

Enclosure 2

List of CEFA Members

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