



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)

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Table of Contents:

Introduction

Statement by Manfred Wutzlhofer, UFI President and CEFA Chairman	3
Welcome by CEFA and CBBS Ltd	4

PART 1

1. About CEFA	5
1.1. About CEFA – general information	5
1.2. Objective and mission of CEFA	5
1.3. Benefits of CEFA trade fairs	6
2. CEFA Members and Market – facts and figures in 2008	7
3. Economic outlook of Central and SE Europe (CEFA region) – facts and figures	10

PART 2 - Enclosures

Enclosure 1 - List of UFI Approved Events	13
Enclosure 2 - List of CEFA Members	22



Manfred Wutzlhofer, UFI President and CEFA Chairman

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.

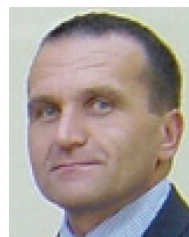
CEFA Market Report 2009 is the first joint summary of the facts and figures provided by CEFA members that can use these results to evaluate their individual position within the overall trade fair market in CEFA region.

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.



Franz Reisbeck, General Secretary



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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)

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

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

International Trade Fair for Gifts, Home Accessories, Design and Lifestyle Articles, Paper, Office and Stationery Goods, Tableware and Kitchen Accessories, Floristry, Handicraft Supplies, Art Products, Souvenirs, Toys and Tobacconists' Supplies

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 Pharmaceuticals

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

International Trade Fair for Environment and Waste Water and Waste Disposal: Water, Sewage, Refuse, Recycling

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+Massexpo**

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 apparatus

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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