

THE POLISH CHAMBER OF EXHIBITION INDUSTRY MONTHLY NEWSLETTER

Exhibitions in Poland in 2018 report. Exhibitions in Poland have a strong position in Europe. CENTREX and PCEI guarantee the credibility of Polish exhibition statistics

Poland's strong economic growth in 2017 (GDP - 4.8%) and in 2018 (GDP - 5.1%), continuously high exports (despite a slowdown in the development of the largest European economies, which are key markets for Poland and a decrease in their demand for Polish products in our leading export sectors), as well as strong internal demand, both in terms of investments and consumption (as a result of the inflow of EU funds and fiscal stimulation), are important factors determining the development of the Polish exhibition market. Naturally, the strategic location of Poland on the East-West trade route and the constantly modernized and expanded exhibition and conference infrastructure are also significant.



In 2018, the leading Polish exhibition organisers, monitored by Polish Chamber of Exhibition Industry and audited by CENTREX - the International Exhibition Statistics Union, organised over 200 exhibitions, with the participation of nearly 1.6 million visitors and over 27,000 exhibitors, who presented themselves on the exhibition space of nearly 900,000 sq.m. PCEI estimates that there are also about two hundred, mostly less significant trade fairs and exhibitions, organized in Poland, which are not audited according to the CENTREX international statistical standards, which were implemented over 10 years ago (in 2008), and which are evolving according to the needs of the global exhibition industry. Unfortunately, unknown or unvetted statistics of these exhibitions cannot be published in PCEI and CENTREX reports, which makes it impossible to present complete data on the Polish exhibition market.

The exhibition market in Poland is a small mature European market, whose situation is stable for many reasons. Not only due to the thriving economy and favourable geopolitical location, but also due to the fact that Polish exhibition organisers and operators of exhibition venues, as well as companies providing services of exhibition stand construction, transport and forwarding, as well as suppliers of many other services for exhibitions, follow the changing trends in the industry and the phenomena which underlie these changes, and adapt their venues, exhibition products and services to the changing needs and expectations of exhibition clients. Poland is the largest and the best organized exhibition market in Central and Eastern Europe, with the largest number of exhibition organizers and exhibition and conference centres, as well as the largest number of companies providing high quality exhibition services.

According to surveys by PCEI and CENTREX, in 2018, in comparison with the analogous year 2016, due to the 2-year cycle of organization of certain events and the fluctuation of trade fair organisers monitored in recent years, the number of audited exhibitions in Poland was lower by 5%. The number of exhibitors also decreased by about 5% as compared to 2016 (2016 - 28,896 exhibitors, 2018 - 27,381 exhibitors). Nevertheless, the amount of exhibition space contracted by exhibitors to present their offers increased by almost 3% (from 838,234 sq.m. in 2016 to 870,838 sq.m. in 2018). Interestingly, similar dynamics of the discussed two statistical parameters of exhibitions had already appeared a year before, which we showed when comparing the years 2017 and 2015.

Interesting quantitative changes took place in the last two years with reference to the participation of international exhibitors, i.e. foreign exhibitors and multinational exhibitors conducting business activity in more than one country (these are subsidiaries and branches of foreign companies with their registered offices in Poland, as well as foreign companies with their registered offices and branches abroad). The new way of presenting the dynamics of exhibitors' participation in exhibitions in Poland, adopted by PCEI at the suggestion of CENTREX, which takes into account domestic companies in the number of exhibitors and a new category - international companies (instead of foreign companies), allows for better observation of changes towards the growth of international importance of exhibitions in Poland. In 2016, as in previous years (in the period 2009-2016), there were fewer than 5 thousand international exhibitors at exhibitions in Poland and they constituted from 14.7% to 16.4% of the total number of exhibitors. This tendency changed in 2017. The CENTREX auditor confirmed that there was an increase in the number of international exhibitors in relation to the total number of exhibitors by almost 22% (5,853 exhibitors as compared to 26,645 exhibitors in total). In 2018, there was a further increase in the participation of international exhibitors - 6,240 international companies participated in exhibitions in Poland out of 27,381 exhibitors in total, which means their share was almost 23%.

For a complete overview of the parameters of exhibitions in Poland in 2018, let's have a look at the statistical data in the visitors' category. The surveys by PCEI and CENTREX confirmed that last year the total number of visitors at exhibitors was 1,621,052 in total. The number of visitors at exhibitions in Poland has been growing for years. Compared to the analogous year 2016, the number of visitors increased by 5.3% in 2018. Between 2009 and 2018 the number of visitors at exhibitions in Poland increased by as much as 84%. This is the result of many efforts made by Polish exhibition companies, including high investment activity of professional exhibition organisers and operators of exhibition and conference venues, implementation of new business models and modern technologies supporting the participation of visitors in exhibitions, great emphasis on an interesting format and a good programme of exhibitions - both for professionals and for consumers - aimed at the general public. The fact that exhibitions are accompanied by a programme of conferences and lectures which cater for the needs of the older and younger generation of professionals, as well as the use of an entertainment element, are factors which nowadays determine to a large extent the attendance of visitors at exhibitions. The level of professionalism of the visitors at exhibitions is increasing, who among the most important goals indicate searching for information about new products and trends in a given industry, establishing contacts in the industry and education, as well as concluding contracts.

The popularity of exhibitions addressed to consumers and exhibitions in a mixed formula, i.e. addressed both to professionals in particular industries and to end users of a given offer, is constantly growing. This phenomenon is a confirmation of the trend that is clearly visible all over the world. The largest number of such exhibitions are events related to recreation, hobbies and entertainment (exhibitions for gaming and e-sport enthusiasts have become fashionable), tourism, consumer electronics, as well as social and educational fairs. The number of exhibitions directed exclusively for business (B2B) has slightly decreased, but the quality of these exhibitions, which proved their value, is at the world's highest level.

Most exhibitions in Poland are held in exhibition centres in Poznań, Kielce, Kraków, Warsaw and Lublin. The undisputed market leaders in terms of exhibition organizers and operators of exhibition and conference venues are Poznań International Fair and Kielce Trade Fairs, which organise the biggest number of trade fairs and exhibitions per year and host the largest number of exhibitors and visitors. The third place goes to Targi w Krakowie, which report that thanks to the new Expo Krakow pavilion, in recent years they have doubled the number of exhibitors in several industries.

Directory Scams: Expoguide, International Fairs Directory

10.08.2019 National and international exhibition industry organizations, including Polish Chamber of Exhibition Industry, UFI – the Global Association of the Exhibition Industry, AUMA – The Association of the German Trade Fair Industry and many others, for many years have been registering complaints from scammed exhibitors who contact the organizations in matters regarding unofficial exhibitor directories and guides offered by Expoguide, International Fairs Directory etc.

The mentioned illegal activities cause great damage and ruin the reputation of the exhibition industry, therefore it is necessary to inform exhibitors about the danger associated with the consequences of the described fraudulent actions and unprofessional activities.

To protect interests of exhibitors - the participants of trade fairs and exhibitions in Poland and abroad, Polish Chamber of Exhibition Industry for many years has been informing the Customers about ongoing activities of publishers of the above mentioned unofficial exhibitor directories, targeting exhibitors in the run up to trade fairs, offering them entries in unofficial sub-standard online directories. It is crucial that all companies exhibiting as well as trade fair and exhibition organizers are made aware of this. The sheer scale and systematic way in which these publishers attack exhibitors and organizers of trade fairs and exhibitions, and, at the same time, the credibility of the exhibition industry, is outrageous.

For more information, please visit <https://polfair.pl/expo-guide-nadal-atakuje/> <https://www.ufi.org/industry-resources/warning-construct-data/>

Certificates “Exhibition recommended by PCEI” and “Company recommended by PCEI”

21.08.2019. At the last meeting in August, the Board of Polish Chamber of Exhibition Industry awarded the quality certificates “Exhibition recommended by PCEI” and “Company recommended by PCEI”. “Exhibition recommended by Polish Chamber of Exhibition Industry” is an important quality certificate for exhibitions organized by PCEI members. In order to obtain the certificate, the exhibition organizer must meet the conditions specified in the regulations.



The certificate for the next 3 editions was awarded to 11 exhibitions organized by Targi w Krakowie:

1. DENTAMED - Lower Silesian Dental Fair in Wrocław,
2. INNOFORM - International Cooperative Trade Fair for the Tool and Processing Industry,
3. ENOEXPO - International Wine Fair in Krakow,
4. HORECA - International Fair of Hotel and Catering Equipment,
5. KOMPOZYT EXPO - International Trade Fair of Materials, Technologies and Composite Products,
6. KRAKDENT - International Dental Fair in Krakow,
7. MAINTENANCE - International Trade Fair for Maintenance, Planning and Production Optimisation,
8. International Book Fair in Krakow,
9. MOTO SHOW in Krakow,
10. PACKAGING INNOVATIONS - International Innovation Fair,
11. SYMAS - International Trade Fair for Processing, Storage and Transport of Bulk and Powder Materials.

The “Company recommended by PCEI” certificate for a period of 3 years, confirming the high quality of provided services, was awarded to World Expo International from Bydgoszcz - the organizer of participation in exhibitions abroad.

MTP Group to build Polish Pavilion at EXPO 2020 in Dubai!

The works connected with the construction of the Polish Pavilion at EXPO Dubai 2020 will start soon. A consortium of Polish companies - the MTP Group (Poznan International Fair) and FM Aldentro - will be responsible for developing this architectural showpiece of our country. The Polish Pavilion will be the main arena for the presentation of Poland during EXPO 2020 in Dubai. The main topics recommended by the organisers - sustainable development and mobility – have been broadened by Poland in three thematic areas: Technology, International Cooperation and Nature. The motto of the Polish Pavilion is: “Creativity inspired by nature”.



Photo: MTP Group - www.mtp.pl

The decision to entrust the task related to the construction of the pavilion - Poland's showpiece at EXPO 2020 in Dubai - to the Consortium of the MTP Group and FM Aldentro is a confirmation of the unique competence of both companies and their very high position among the organizers of the most important international events. The MTP Group has been involved in the organization of the COP climate summit in Poland for the UN on three occasions - said Tomasz Kobierski, Vice-Chairman of the Board of the MTP Group.

The MTP Group, a member of Polish Chamber of Exhibition Industry, is a leader among exhibition organisers in Poland and Central and Eastern Europe. Apart from world-renowned exhibitions for business, it organises congresses, conferences, cultural and sporting events, including mega-events, which annually attract over a million visitors from all over the world. Apart from the UN conference, the MTP Group also coordinated the organization of some central meetings during the Polish Presidency of the European Union Council and the first ever Polish National Assembly to take place outside Warsaw.

The contract for “the design, construction, technical maintenance and dismantling of the Polish Pavilion at EXPO 2020 in Dubai, United Arab Emirates” covers three phases, including, among others, preparation of the design documentation for the Polish Pavilion, obtaining building permits and Organizer's permits, construction of the Polish Pavilion together with installations, finishing works on the interior of the building and the exposition, ongoing technical maintenance of the building and the exposition, as well as dismantling of the Polish Pavilion after the end of EXPO 2020 in Dubai.

The Polish Pavilion is a multithreaded story about Polish nature, creativity and innovation. The competition for the concept design of the Polish Pavilion and the internal exposition for EXPO 2020 in Dubai was won by the Warsaw-based WXCA Studio. The architecture of the Pavilion clearly refers to the motto of mobility. It creates an open, upwards growing modular structure that invites visitors to relax in the shadow of a large roof and contemplation of the installation floating above their heads - a kinetic sculpture depicting a flock of flying birds.

The diversity of natural environment, variety of landscape and the strategic location in the heart of Europe make Poland the most important habitat for European migratory birds. The invitation of the visitors to join this journey and take a closer look at the abundance of Polish avifauna is an opportunity to develop an intriguing, multithreaded story not only about the beauty of the Polish nature, but above all about international exchange, mobility, export of ideas and technological thought. Poland will be presented as a strong centre of cooperation, which offers sustainable, environmentally friendly and nature-inspired technologies to the world through the development of science.

23. UFI Global Barometer survey: Slowing global economic growth impacts exhibition industry worldwide, but overall positive outlook remains

30.08.2019. UFI, the Global Association for the Exhibition Industry, has released the latest edition of its flagship Global Barometer research, which takes the pulse of the industry. One of the key findings is a weaker first half of 2019 in terms of revenue growth compared to 2018, but there is still an overall positive trend for the year in relation to revenue.

With regard to operating profit, 80% of companies maintained a good level of performance in 2018, and more than 40% of companies from all regions declared an increase of more than 10% compared to 2017. However, the prospects for 2019 are currently lower globally, in line with the worldwide slowdown of economic growth.

Results also indicate that the top business issue within the industry remains the “State of the national/regional economy” (selected by 24% of all respondents), ahead of “Competition within the industry” and “Global economic developments” (each selected by 19%). The barometer also includes a section on the state of digital conversion within the industry.

The results show a “Digitisation Implementation Index” of 27, indicating that the commitment towards digitisation is not wholly spread. “Exhibitions mirror markets – therefore a slowdown in global economic growth also affects the exhibition industry, as this latest edition of our UFI Global Barometer shows. But the data also proves that exhibitions are not just resilient, but show a consistently strong performance and growth opportunities in many core markets around the world,” says Kai Hattendorf, UFI Managing Director/CEO.

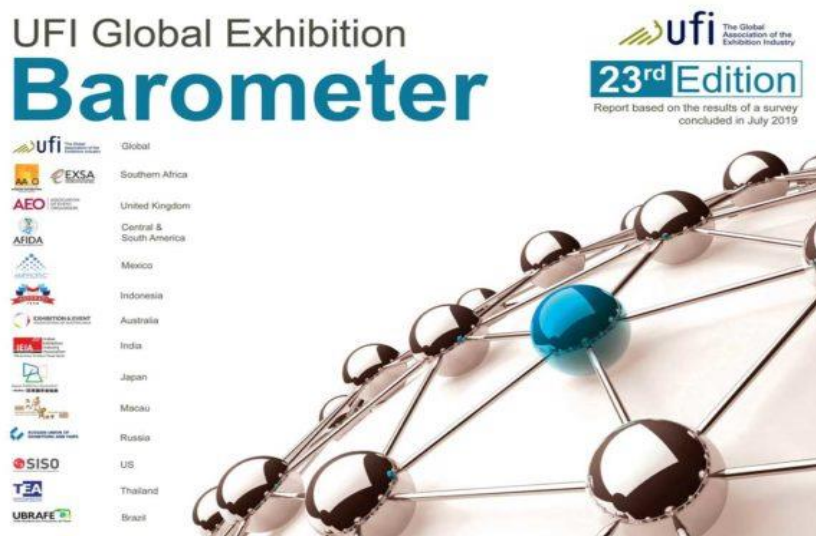


photo: www.ufi.org

Size and scope This latest edition of UFI’s bi-annual industry survey was concluded in July 2019 and includes data from a record 322 companies in 57 countries and regions. The study delivers outlooks and analysis for 16 countries and regions: Argentina (for the first time), Australia, Brazil, China, Germany, India, Indonesia, Italy, Japan, Macau, Mexico, Russia, South Africa, Thailand, the UK and the US. In addition, four aggregated regional zones have been analysed.

Economic developments While a majority of companies in all regions – with the exception of Middle East/Africa – expect an increase in gross turnover for the two halves of 2019 and the first half of 2020, the first half of 2019 appears to be weaker compared to recent years. However, current forecasts for the second half of 2019 and the first half of 2020 show a return to robust levels. Eight of the surveyed countries and regions have, for all three periods surveyed, a majority of companies declaring turnover increases. These are Australia, Brazil, Italy, Japan, South Africa, Thailand, the UK and the US. For the second half of 2019 and the first half of 2020, this is also the case for India, Indonesia, Germany, Macau and Russia.

In terms of operating profit, 80% of companies maintained a good level of performance in 2018, with around 40-50% declaring an increase of more than 10% compared to 2017. The highest proportion of companies declaring such an increase in 2018 are located in Brazil, Germany, Italy, Mexico, the UK and the US. For 2019, only Europe has, on average, a higher proportion of companies expecting an increase of more than 10% of their operating profit compared to 2018. In all other regions, the share of companies projecting this decreases from 2018 to 2019. The highest proportions of companies declaring such an increase in 2018 are located in Russia (71%), the UK (55%), India (53%) and the US (45%).



Top business issues When asked about the most important issues for their business in the coming year, companies remain concerned about the following four topics: “State of the economy in home market” (24% in the current survey, down 1% compared to six months ago), “Competition within the industry” (19%, unchanged), “Global economic developments” (19%, down 1%) and “Internal challenges” (16%, up 1%).

Digitisation Results show that the majority of companies are responding to the accelerating process of digitisation within the exhibition industry. The “Digitisation Implementation Index”, which measures progress towards a state of “full digitisation”, is at 27 globally. China, Germany, India, Indonesia, Italy, Mexico, the UK and the US are identified as the exhibition markets that are currently most advanced in terms of digital transformation.

Background The 23rd Global Barometer survey, conducted in June and July 2019, provides insights from 322 companies in 57 countries and regions. It was conducted in collaboration with 14 UFI Associations Members: AAXO (The Association of African Exhibition Organizers) and EXSA (Exhibition and Events Association of Southern Africa) in South Africa, AEO (Association of Event Organisers) in the UK, AFIDA (Asociación Internacional de Ferias de América) representing Central and South America, AMPROFEC (Asociación Mexicana de Profesionales de Ferias y Exposiciones y Convenciones) in Mexico, EEAA (The Exhibition and Event Association of Australasia) in Australia, IECA (Indonesia Exhibition Companies Association) in Indonesia, IEIA (Indian Exhibition Industry Association) in India, JEXA (Japan Exhibition Association) in Japan, MFTA (Macau Fair Trade Association) in Macau, RUEF (The Russian Union of Exhibitions and Fairs) in Russia, SISO (Society of Independent Show Organizers) in the US, TEA (Thai Exhibition Association) in Thailand and UBRAFE (União Brasileira dos Promotores Feiras) in Brazil.

“In-depth research of this kind is the result of a trusted collaboration in the global UFI community,” says Christian Druart, UFI Research Manager and Secretary of the UFI Associations’ Committee. “This has allowed us to grow the number of market profiles even further, and we are pleased to welcome RUEF – The Russian Union of Exhibitions and Fairs – to the network participating in the barometer.”

In line with UFI’s objective to provide vital data and best practices to the entire exhibition industry, the full results can be downloaded at www.ufi.org/research. The next UFI Global Barometer survey will be conducted in December 2019.

About Polish Chamber of Exhibition Industry

Polish Chamber of Exhibition Industry, established in 1993, is the only national organization - an economic chamber which associates companies which conduct economic activities in the exhibition sector. Members of Polish Chamber of Exhibition Industry represent all the participants of the exhibition market. They are above all: exhibition organizers, trade fair and conference venue operators, companies which offer services of design, construction and furnishing of exhibition stands, exhibition transport and forwarding companies, organizers of participation of Polish companies in exhibitions abroad and representatives of foreign exhibitions in Poland. The Chamber also associates companies from the field of advertising and marketing, the media, catering and hospitality. In 2018 Polish Chamber of Exhibition Industry celebrates its 25th anniversary. It is also the 25th anniversary of the self-government of entrepreneurs in the exhibition industry in Poland.

Four basic areas covered by the program of Polish Chamber of Exhibition Industry operations are: lobbying, actions for the integration of the exhibition environment, promotion of exhibitions - widely understood - including publishing operations, education in trade fair marketing and promoting ethical business actions in the sector, as well as actions aimed at sustainable development.

The mission of Polish Chamber of Exhibition Industry is to: serve as a multifunctional platform of cooperation for all participants of the exhibition industry, develop effective structure of lobbying actions for the benefit of the Polish exhibition sector, promote participation in trade fairs and exhibitions as an effective element of marketing and communication strategy of businesses, act for the benefit of increasing standards of trade fair services offered its members, including for the benefit of reliable, transparent exhibition statistics, offer the participants of the exhibition market opportunities of exhibition education and business, act for the benefit of integration of its members and their identification with the environment, and work out the motivation to act together and such a culture of cooperation which multiplies and protects the economic interests of the members of the Chamber.

Polish Chamber of Exhibition Industry is a member of the Polish Chamber of Commerce. PCEI is an active member of UFI - the Global Association of the Exhibition Industry - and cooperates intensively with CENTREX, the International Exhibition Statistics Union, which associates the largest exhibition organizers of Central and Eastern Europe, as well as with AUMA, the German Association of the Trade Fair Industry, and with many other foreign organizations of the exhibition Industry.

Contact:

Beata Kozyra, President of the Board b.kozyra@polfair.com.pl
Marzenna Łukaszewicz, Executive Director of PCEI: m.lukaszewicz@polfair.pl
Jan Studencki, Promotion Specialist: j.studencki@polfair.com.pl

Polish Chamber of Exhibition Industry, ul. Bukowska 12, 60-819 Poznań, tel. no. +48 61 866 15 32;
www.polfair.pl www.targiwpolisce.pl