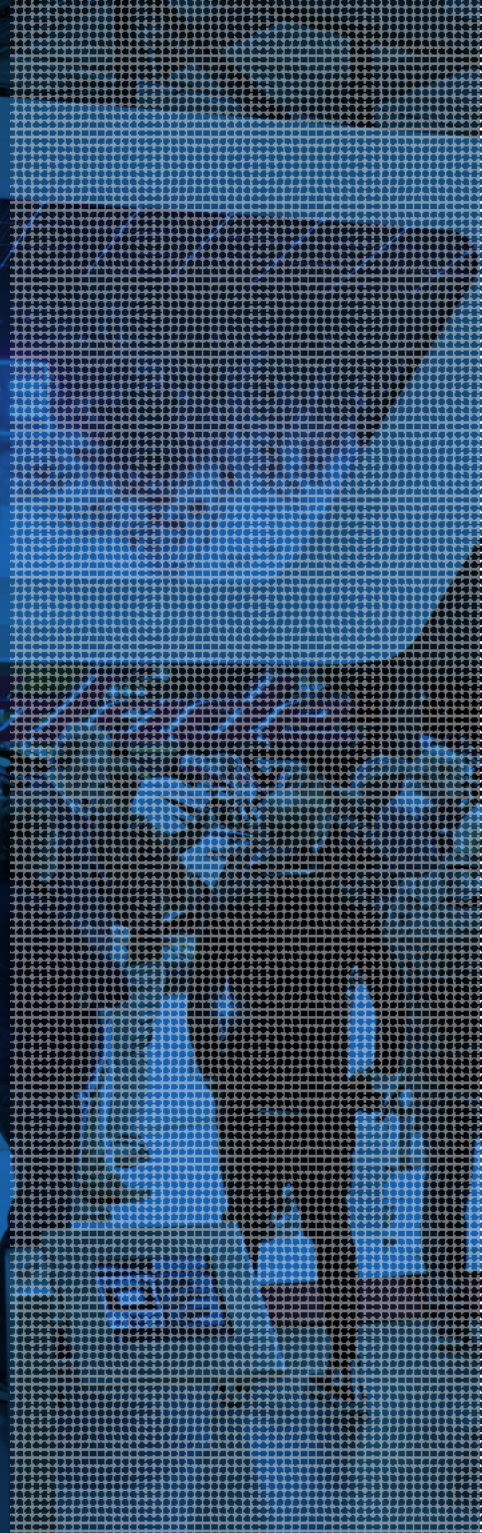


Italy's international trade shows: competing, attracting, innovating

Un'analisi A systemic analysis of the role of trade shows and conferences in the international positioning of the Italian production system, with a focus on navigating global competition and implementing new industrial policies.





The insights presented in this document contribute to the debate initiated by European institutions and the Italian government on competitiveness and economic development, in a context of geopolitical tensions, technological transformations, environmental crises, and increasingly complex socio-economic challenges that are changing rapidly. These insights are based on two strategic documents drawn up by Mario Draghi and Enrico Letta on behalf of the European institutions. The documents aim to outline the future of the Union in terms of reviving competitiveness and establishing new market governance.

The Italian government is also taking equal strategic action, with initiatives such as the participatory process that MIMIT (Ministry for Business and Made in Italy) is promoting with the so-called 'Libro Verde' (Green Paper), which defines the guidelines for future national industrial policy, and the Strategic Action Plan for exports to high-potential non-EU markets, launched by MAECI (Ministry of Foreign Affairs and International Cooperation). Against this backdrop, this *position paper* offers a thorough analysis of the role of trade shows and conferences in a country's industrial policy.



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Unless otherwise specified, all data provided in this position paper originates from the Centro Studi IT-EX.

1.
Trade shows and conferences as strategic tools for a country's development

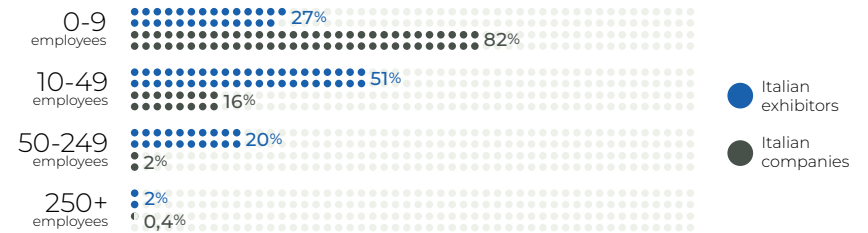
Trade shows and conferences are not merely regional marketing tools; they are complex structures that generate industrial, scientific and cultural value. Trade shows are particularly important for the manufacturing sector and the real economy. They provide a space where producers, suppliers, distributors, buyers, start-ups and innovators can meet, making them ideal platforms for the commercial development and internationalisation of businesses. Conferences, on the other hand, are forums for knowledge exchange and discussion between scientific and technological communities, where research agendas are defined and future innovation trajectories are mapped out. These events activate technology transfer processes, generate synergies between the public and private sectors, and establish globally shared quality and technological standards. In this sense, trade shows and conferences are vital for the competitiveness of national economies and international scientific progress.

2.
Trade shows: an expression of economic democracy

Trade shows are an 'open' economic infrastructure. Unlike digital platforms, which are highly monopolistic, they offer large, accessible spaces where companies of all sizes can compete on equal terms, showcase innovations and gather first-hand market insights. Compared to the average size of Italian manufacturing companies, IT-EX (Italian Association of International Exhibitions) exhibitors generally have a larger workforce, with an average of 39 employees compared to the national average of 10. 51% of exhibitors are small businesses, 20% are medium-sized enterprises, and micro-businesses account for a significant proportion (27%). Start-ups also have a notable presence (5%).

For micro and small businesses (MSBs), which often lack international commercial structures, participating in an international trade fair provides an opportunity to come into direct contact with foreign buyers and customers, observe industry trends and showcase new products. They also have the opportunity to establish valuable partnerships with start-ups, research centres, suppliers, and public

Figura 1 \ Distribution of companies by size: a comparison between IT-EX exhibitors and manufacturing companies in Italy



stakeholders. Therefore, it goes without saying that trade shows regenerate the industrial fabric by promoting the internationalisation of businesses and helping them to grow.

3.
European leadership and Italy's position in the trade show industry

Europe is a global leader in the trade show and conference sector. 40% of the world's rented exhibition floor space¹ is located in Europe, which is a significant lead over Asia (29%) and North America (22%)². Even more impressive is Europe's 57% share of the intergovernmental and association conference market, which demonstrates the continent's ability to attract and organise major scientific and institutional events.

Italy plays a strong role in this context thanks to its internationally renowned events, which are mainly organised by trade associations and are deeply rooted in the strategic 'Made in Italy' manufacturing sectors. The trade shows represented by IT-EX have very high international attendance: 39% of exhibitors and 35% of

1. Rented floor space refers to the total amount of space paid for and rented by exhibitors for stands at all scheduled trade shows. This figure varies depending on the trade show and is an indicator of activity. Exhibition capacity refers to all the space permanently available at an exhibition centre for the purpose of organising or hosting a trade show. This figure does not vary from year to year and is an indicator of available stock.

2. Data processing by Centro Studi IT-EX based on GIPR 2024 data.



visitors are from abroad, with some trade shows exceeding 50%, compared to a national average of 16% and 7% respectively.

One figure in particular confirms the attractive and dynamic nature of trade fairs: Italian manufacturing companies generate an average of 16% of their turnover from exports — a figure that rises to 39% for Italian IT-EX exhibitors. These companies have a strong presence in foreign markets, with an average stable presence in 14 countries compared to a national average of no more than three countries³. Furthermore, they are long-standing exporters, with an average of 26 years' experience. While approximately 22.3% of manufacturing companies in Italy export⁴, 89% of trade show exhibitors do so.

4. Trade shows and conferences: scientific culture, drivers of innovation and technology transfer

Trade shows and conferences are catalysts for innovation. A study of Italian companies that attended IT-EX trade shows revealed that 56% of exhibitors introduced innovations, investigated new solutions or improved their products or services as a result of attending a trade show. This figure becomes even more significant during periods of recession, when trade shows play a pivotal role in the competitive realignment of companies.

Scientific conferences, for their part, provide an excellent environment for knowledge sharing. IAC 2024 (the International Astronautical Congress), organised in Milan with the involvement of ASI, Leonardo and AIDAA, is a prime example: over 11,200 delegates from 120 countries, more than 7,000 scientific abstracts, 500 exhibitors, including all the world's major space agencies. Another example is the 28th National Conference of the Italian Chemical Society, which took place in Milan in August 2024, with the theme of 'Chemistry elements of future'.

Thanks to its large exhibition area, the event offered attendees the opportunity to learn about and explore innovative technical solutions in various fields of chemistry

³. Data processing by Centro Studi IT-EX based on ISTAT's 2024 report 'Competitività dei settori produttivi' (Report on the Competitiveness of the Productive Sectors).

⁴. Ibid.

— a valuable opportunity given the large number of scientists and professionals in attendance from Italy and abroad. Dozens of speakers took part in the various working, Plenary and thematic sessions, with almost 2,000 contributions. Trade shows are also ideal environments for collaboration between established companies and start-ups — 5% of start-ups are present at international trade shows, which is higher than the national average of 3.2%. Thanks to their digital expertise and innovative business models, start-ups contribute to the technological advancement of industrial sectors by promoting innovation and accelerating processes such as digitalisation, sustainability, and the adoption of advanced technologies, including those related to cybersecurity.

5. The differentiation and strategic positioning of Italian international trade shows

Not all trade shows are created equal — it is the highly international ones that generate value and innovation.

In the IT-EX universe, which had over 11,000 exhibitors and 750,000 foreign visitors in 2024, three fundamental categories⁵ can be identified that reflect different objectives, strategies, and modes of attendance.

- **Hub trade shows:** these are the most internationalised events, attracting exhibitors and visitors from multiple geographical markets. They are regarded as the benchmark for the entire economic sector involved. They are characterised by shares of over 25% international exhibitors and 20% foreign visitors, with peaks exceeding 50%. They stand out not only for their ability to generate business opportunities, but also because they significantly contribute to defining global quality and technological standards. Their presence in Italy is a strategic asset to be exploited.
- **Export trade shows:** these are aimed at international buyers interested in Italian manufacturing excellence. These events promote Italy's leading sectors,

⁵. Data processing by Centro Studi IT-EX based on data by F. Golfetto, various years.



leveraging the value of 'Made in Italy' and the strength of its manufacturing districts (international visitor attendance >20%).

- **Import trade shows:** these events attract foreign exhibitors interested in entering the Italian market and offer investment and partnership opportunities (international exhibitor attendance >25%).

IT-EX trade shows are soft power tools capable of positioning Italy in key global production chains. They have an impact not only on the economy, but also from a cultural and symbolic perspective, strengthening Italy's industrial identity, promoting the exchange of knowledge, and consolidating lasting relationships between businesses, institutions, and scientific communities. They are often attractive due to the presence of dynamic manufacturing districts and areas with a strong innovative environment: local ecosystems capable of fostering synergies between businesses, research and institutions, generating value for an entire sector.

6. International competition and the strategies of some leading countries in trade shows

Competition in the international trade show sector is becoming increasingly fierce, fuelled by aggressive public policies, substantial infrastructure investment and long-term strategies. China and Germany are prime examples of this trend. China has rebuilt its market economy thanks to trade shows, which have been used as a strategic tool to restart local and national trade⁶.

Over the last 20 years, the country has constructed numerous exhibition centres and now accounts for 31% of global production capacity in the trade show sector (39% if the analysis is limited to large exhibition centres, i.e. those larger than 100,000 square metres). Around 1,000 trade shows dedicated to the B2B

⁶ See various contributions by G. William Skinner and Frank B. Tipton, *Asian Firms: History, Institutions and Management*, EEP, 2008.



segment are held annually in China's domestic market, compared to around 1,400 in Europe⁷. But that's not all. Chinese companies' attendance at trade shows in other countries has increased and is supported. Every year, Chinese trade groups⁸ are present at around 1,000 trade shows worldwide, mainly in Asia. There are over 200 such groups in Europe, primarily in Germany (75), particularly at trade shows dedicated to industrial manufacturing (28%), environmental issues (12%), and home and personal accessories (11%). Around 20 Chinese trade groups attend Italian trade shows, primarily events dedicated to construction (24%) and the food sector (10%). Today, the Chinese central government is focusing on attracting foreign trade show organisers to create events directly in China. This strategy is accompanied by strong incentives covering up to 100% of the cost of exhibition space and hotel accommodation for foreign visitors. The Chinese government, at both the central and provincial levels, is also promoting the internationalisation of Chinese organisers in Southeast Asian countries and other territories with which China has strong trade relations.

Germany has long encouraged European and non-European companies to attend its domestic trade shows as part of a strategy to lead the way in terms of the size of its trade shows, which has sometimes compromised their original positioning. During the pre-Covid period, there were 16,000 Chinese exhibitors participating in German trade shows, accounting for 8% of the total and 13% of foreign exhibitors. Visitors from Southeast and Central Asia totalled 280,000 – 2% of the total and 9% of international visitors. In this context, Italian trade shows are notable for their focus on quality, product promotion and fostering long-term relationships between companies and buyers. Italian organisers, who are often linked to trade associations, favour sector positioning and reputation over the sheer size of the event. In summary, while Germany focuses on size and openness, Italy stands out for the quality of its offerings, sector positioning, and reputation. The decline of Interstoff in Frankfurt⁹ and the success of Milano Unica is a clear example of this.

⁷. Data from Business Strategy Group, latest data available, and from the Fondazione Fiera Milano database, 2023.

⁸. A trade group is a group of exhibitors at a trade show who share an identity and exhibition space. They are coordinated by a specialised entity, such as an export consortium, a trade fair agency, or a Chamber of Commerce. Trade group exhibitions are a tool used by public agencies, such as the Italian Trade and Investment Agency (ICE), to promote exports from a given country.

⁹. Interstoff, trade show dedicated to clothing textiles.

7.

The state as strategist for a non-ideological industrial policy

In a global context characterised by technological transitions, geopolitical tensions, and shifts in production and consumption patterns, the state is tasked with playing a pivotal role in fostering and advancing the national trade show system. This does not imply a return to the 20th-century concept of the 'state as entrepreneur', but rather the emergence of a 'strategist state', capable of directing industrial policies and bolstering the resources that support the most dynamic companies and the most promising sectors¹⁰.

Trade shows are not only promotional tools. They also play an instrumental role in industrial and commercial policies by strengthening production chains, accelerating the adoption of innovations, expanding outlet markets, and facilitating the meeting of supply and demand for technologies. Accordingly, the state must act with certain priorities in mind:

- **Protecting independence and countering global concentration** is important, as is promoting the 'national champions' of the trade show sector and preserving the identity and authenticity of local organizing entities.
- **Consolidating Italy's position in strategic supply chains and supporting the attraction of major international events** through institutional endorsements, incentives, and bureaucratic simplifications.
- **Strengthening the links between the trade fair system and economic diplomacy**, and promoting free trade agreements and bilateral industrial collaborations.

8.

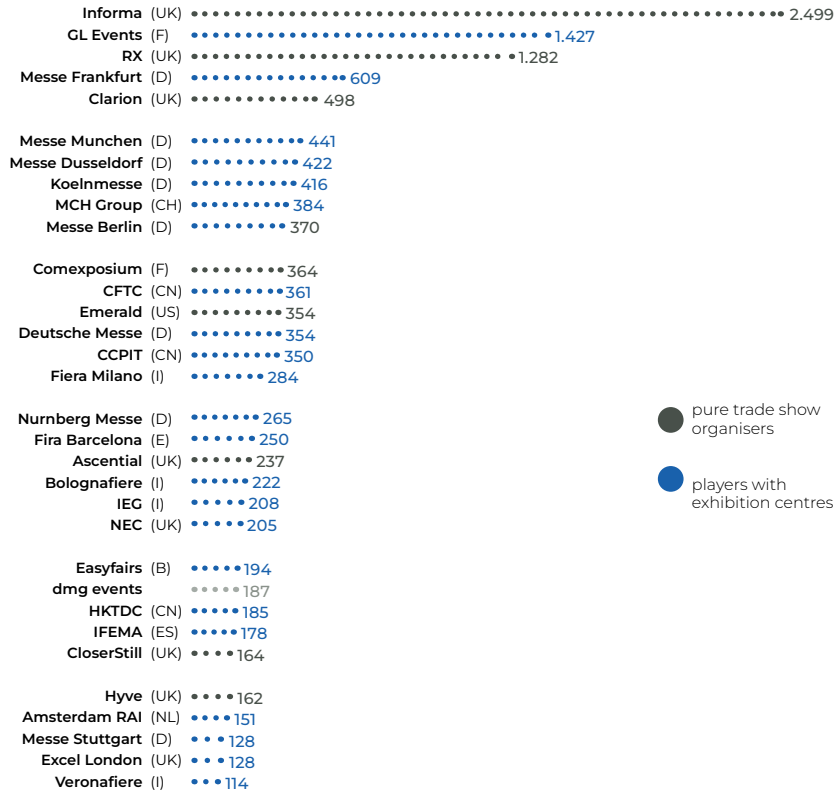
Protecting independence and countering excessive concentration

The global trade show market is undergoing a major transformation, characterised by mergers and acquisitions carried out by large multinational groups and investment funds. Large multinationals have rapidly expanded their 'event portfolios', with the aim of building increasingly integrated global trade show networks. The main players account for an estimated 40% of the €34 billion global turnover.

¹⁰. 'Libro Verde', MIMIT, 2024.



Figure 2 \ Turnover of the main players in the trade show industry
(2023, in millions of euros)¹¹



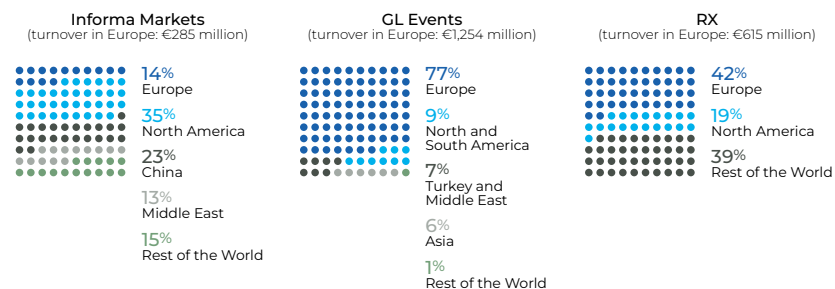
The three main companies in the trade show sector – Informa, GL Events and RX – have very different geographical strategies. Informa Markets generates €285 million in revenue from Europe, accounting for 14% of its total. In contrast, the North American market and China together account for 55% of the total. GL

¹¹ Source: Centro Studi IT-EX's analysis of 2023 turnover, Annual Report, AMR. With regard to Informa, the Markets + Connect + Tech divisions are considered. With regard to NEC, the latest available data (from 2022) is reported.



Events focuses most of its activity in Europe, with France contributing €1 billion of its €1.2 billion in European revenues alone. Europe also represents a significant component of RX's business, accounting for 42% of its total turnover with €615 million.

Figure 3 \ Geographical distribution of turnover for the top three trade show operators (2023, in millions of euros)¹²



in this scenario, Italian trade shows, which are leading in sectors such as fashion, design, cosmetics, mechanics and food, represent a particularly attractive target. Many Italian trade shows are organised by trade associations, each of which organises typically one or two shows, making them a direct mirror of the national manufacturing system. This distinctive strength could translate into structural vulnerability if it is not adequately protected. In order for Italy to continue competing successfully in its current leading sectors in the context of globalisation, trade shows must become a strategic asset and an active instrument of industrial policy. Much of the positioning of our products is maintained during these important events thanks to the soft power they represent. Therefore, it is not a question of safeguarding the trade show itself, but the national economic system. It is thus crucial to preserve the autonomy and identity of Italian trade

shows, as these cannot be replicated in other geographical contexts. They embody industrial traditions, local expertise and technological niche skills. Preserving autonomy is essential to safeguarding technological progress and preserving local know-how.

Spain and Portugal, for example, adopt very aggressive protection policies, recognising that defending 'trade show sovereignty' is integral to a country's industrial policy. The case of the Mobile World Congress¹³ in Barcelona is emblematic: from 2025 to 2030, the Generalitat and the Spanish government will invest €24 million per year to keep the event in the city (compared to €15 million in the previous period). The Portuguese government and the Municipality of Lisbon played a crucial role in ensuring that the Web Summit¹⁴ remained in Lisbon (previously hosted in Dublin). In 2018, a ten-year agreement was signed (2019–2028), providing for a total investment of €110 million, with an annual contribution of €11 million from the Portuguese state. The agreement includes a penalty clause of €3 billion if the event is transferred to another city. The Lisbon Municipality also makes an annual financial contribution to support the organisation of the event.

9. Consolidating Italy's position and attracting major international events

In many traditional sectors, the trade show market tends to be highly concentrated, with only one or two leading events remaining at a global level. In this context, it is important to maintain the competitiveness of Italian trade shows. These are now facing acquisition campaigns from multinationals and international funds, as well as competition from non-European economic systems – particularly Asian ones – which adopt aggressive expansion models. A notable example is China. Italy holds a strong position in certain sectors, such as fashion and design. Italian events in key 'Made in Italy' sectors, such as those organised by Pitti Immagine in Florence, have maintained their global significance, whereas

¹². Source: Centro Studi IT-EX's analysis based on 2024 financial statements from Informa, GL Events, and RX.

¹³. https://www.elnacional.cat/ca/economia/comenca-nova-mwc-barcelona-voluntat- quedar-se-indefinidament_790137_102.html
¹⁴. <https://www.theportugalnews.com/news/2022-09-18/63-million-from-council-for-web-summit-70346>; https://essen- cial-portugal.com/en/news-portugal/web-summit-lisbon-2028/?utm_source=chatgpt.com





other European countries have experienced a decline in the number of events in these domains. Several events in the same sector have been cancelled, including Interstoff in Frankfurt, IMM and Herren Mode Woche in Cologne, and IGEDO and GDS in Düsseldorf. The Italian recreational boating industry, represented by its trade show in Genoa, is a global benchmark.

In sectors where there is greater fragmentation, such as food, there are several leading events: ANUGA (Germany), SIAL (France), and an Italian offering strengthened by the collaboration between TUTTOFOOD and CIBUS. In this domain, leadership is diffused. Within the Horeca and food processing sector, Italy holds a prominent position in specialised segments with dedicated trade shows such as Host and Ipack Ima in Milan. In the construction sector, the main events (BAU and BAUMA) are held in Germany, although France and Italy also host international trade shows. Interest is increasingly focused on issues such as property redevelopment and energy efficiency, in line with European regulations. The European digital sector is structurally lagging behind. Only four of the world's 50 largest tech companies are European.

Large global groups dominate the market and do not participate in trade shows, instead promoting corporate events dedicated to their own ecosystems of developers and users (e.g., Microsoft, Apple, and Salesforce). Around 70 such events are held in Europe each year, attracting over 130,000 participants. Italy has a wide range of conference facilities available to host such events, and we enjoy a good competitive advantage in this area. However, specific attraction strategies are needed.

In high-tech, science-intensive sectors such as medicine, space, energy, AI, chemistry, and materials, which have been identified by the Draghi Report and MIMIT in the 'Libro Verde' as key growth areas, conferences organised by scientific associations are the main meeting points. These events are allocated according to ecosystemic logic, involving strong institutional support in the form of official letters of invitation, attendance by institutional representatives, and financial backing, which guarantees the possibility of hosting events of global significance. Notable examples with a strong reputational impact include the World Gas Conference (WGC, with over 30,000 participants), the World Water Forum (with 20,000 participants), and the European Association for the Study of



Diabetes (EASD, with over 15,000 participants). Other notable examples include conferences promoted by the United Nations, such as the COP Youth Event 2021 in Milan. The pharmaceutical supply chain is characterised by a complex, globalised value chain. The main trade shows, such as CPHI¹⁵, are itinerant and segmented by geographical area (Europe, the Middle East, Asia, and the Americas). The 2024 European edition was held in Milan. Finished products are promoted at conferences for individual medical and clinical specialities. These itinerant events promote the dissemination of research and cooperation between academic institutions and businesses. During CPHI in Milan, dialogue was encouraged between international companies and the national innovation ecosystem, including Italian start-ups, which were hosted in a dedicated area. The event confirmed the important role of trade shows in bringing together industry, research and technology transfer. The EU is at the forefront of clean technologies¹⁶, such as wind turbines, electrolysers and low-carbon fuels. This sector is covered by a significant number of specialised events, including IFAT in Munich, Pollutec in Lyon, and Ecomondo in Rimini¹⁷. This segment is growing and shows a high level of dynamism. To consolidate its development, it is important to encourage access for innovative start-ups to broaden the technological base and strengthen the competitiveness of local ecosystems.

One seemingly marginal operational aspect that has a concrete impact on the organisational effectiveness of international events is the procedure for issuing visas to foreign operators. Trade show organisers and Italian and foreign companies involved in the events regularly invite buyers, delegations, and professionals from countries with which they do not necessarily have an existing or formalised relationship. In such circumstances, the visa application process can be particularly complex. In a trade show system geared towards internationalisation and competitiveness, introducing simplified procedures and dedicated channels for attending recognised trade shows would be a sensible approach. This would add value by maintaining leadership, improving accessibility to events, and strengthening their attractiveness for global operators.

¹⁵. Itinerant trade show for the global pharmaceutical industry.

¹⁶. The future of European competitiveness, M. Draghi, 2024.

¹⁷. IFAT – environmental technologies; Pollutec – solutions for combating climate change; Ecomondo – green and circular economy.

10. Strengthening the links between the trade show system and economic diplomacy

An effective industrial policy must be part of an integrated vision of international trade policies. We are now witnessing the daily return of protectionist measures, which hinder shared global economic growth by fuelling fragmentation rather than cooperation. For this reason, it is crucial to complement industrial policy with robust economic diplomacy strategies to ensure public investment generates lasting benefits and is not undermined by international barriers or tensions.

For countries like Italy, which are heavily reliant on exports, it is vital to advocate for comprehensive and inclusive trade agreements. A recent example is the free trade agreement between the European Union and MERCOSUR, which opens up new markets and consolidates strategic economic relations.

In this context, the MAECI's Strategic Action Plan¹⁸ for exports to new, high-potential countries in non-EU markets is crucial in identifying a targeted set of emerging markets that align with the manufacturing excellence of 'Made in Italy'. The aim is to promote Italian products internationally and build new, profitable commercial relations, both bilateral and multilateral.

Italy can boast extraordinary production diversification¹⁹, the widest in Europe and second only to China worldwide. This is a significant advantage that enables Italy to cover a large proportion of global market segments. International trade shows play a central role in this diversification, providing strategic platforms for Italian companies to position themselves in the Global Value Chain. Trade shows are, ultimately, true instruments of economic diplomacy. Therefore, coordination between MIMIT, MAECI, ICE (the Italian Trade and Investment Agency), the trade show system, and the manufacturing sector is essential to ensure that trade shows are not only commercial events, but also integrated tools for economic development.

¹⁸. Presented on March 21, 2025.

¹⁹. OECD Economic Surveys: Italy 2024; S. De Nardis and C. Pensa, M. Fortis, various years.



11. Conclusions

In a global economy characterised by technological transitions, imbalances in international competition, and increasing geopolitical fragmentation, trade shows and conferences are essential platforms for supporting national industrial policies. Beyond their promotional function, these events operate as complex platforms that generate economic value, enable technology transfer, and foster collaboration between public and private organisations, thereby positioning the Italian production system within global innovation networks. From this perspective, the national trade show system is a strategic asset for Italy's economic sovereignty.

Its polycentric and sectoral structure, which is rooted in production districts and trade associations, is what makes the Italian system distinctive. While this configuration is a strength, it could present weaknesses in an increasingly concentrated and competitive market where pressure from large international operators is growing. With this in mind, protecting the autonomy and identity of Italian events can help to preserve Italy's distinctive skills. It can also help to strengthen Italy's ability to safeguard strategic supply chains.

Developing targeted industrial policies supported by a long-term vision and coordinated institutional strategy can attract international events with high scientific and technological content. Recent examples such as IAC 2024, CPPI Europe, and conferences organised by international scientific associations demonstrate these events' potential to enhance the country's scientific reputation and influence global knowledge-intensive supply chains.

Coordination between the trade show system, economic diplomacy and networks representing the manufacturing world is essential for transforming every trade show or conference into an active hub of economic, technological and scientific cooperation. Recognising and enhancing the systemic nature of these relational infrastructures means investing in the conditions that enable innovation, openness, and competitiveness throughout the entire national system.

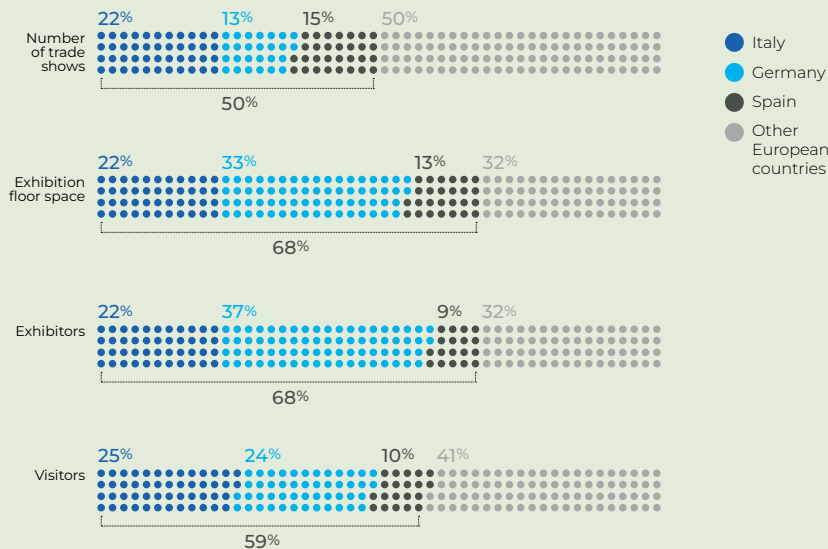


Excerpt from 'Italy's International Trade Shows'

by Centro Studi Fondazione Fiera Milano

Comparing the major European trade show countries – Italy, Germany, and Spain – reveals that the evolution of trade shows is closely linked to national production models, industrial vocations, and economic development trajectories. In 2023, these three countries accounted for over 59% of visitors, around 68% of exhibitors, and the majority of total exhibition floor space.

Market shares: Italy, Germany, Spain



However, there are significant differences between the three countries.

Italy

3.270.317	79.502	6.464.211	206
Net area	Exhibitors	Visitors	No. of trade shows

Italy hosts the most international trade shows¹ (206) and attracts the most visitors (approximately 6.5 million). Its rented floor space exceeds 3.2 million sqm, with over 79,000 exhibitors. Italy shows a more dynamic trend. While it is still in a recovery phase, it stands out for its better performance in terms of visitor numbers. The average size of trade shows in Italy in 2023 was almost 16,000 sqm, down from just over 18,000 sqm in 2019, while the average stand area remained stable at 43 to 41 sqm. The ratio of visitors to exhibitors – audience per stand – has decreased compared to the pre-Covid period, falling from 94 in 2019 to 81 in 2023. However, this remains the highest figure among the three main countries analysed. Unlike Germany and Spain, trade shows in Italy are spread across the whole country, with a strong concentration in the centre and north. In Italy, the trade show sector largely mirrors the country's key manufacturing sectors, particularly fashion, furniture, and food. Trade shows in these industries attract significant numbers of foreign visitors and exhibitors.

Germany

4.797.523	130.257	6.273.721	127
Net area	Exhibitors	Visitors	No. of trade shows

Germany hosts 127 trade shows, has the largest amount of exhibition floor space (more than 4.7 million sqm) and the largest number of exhibitors (130,000). Visitor numbers are just over 6.2 million. Germany therefore maintains its leadership in

¹ UFI's Internationality criteria (The Global Association of the Exhibition Industry): Foreign exhibitors > 10% and/or Foreign visitors > 5%.

terms of rented floor space and total exhibitors, although it has not yet returned to pre-pandemic levels.

While the average size of trade shows in Germany has decreased between 2019 and 2023, it remains higher than in other European countries. The average stand size has remained stable at around 36 to 37 sqm, while the number of visitors per stand has decreased from 54 to 48.

The German trade fair system focuses heavily on 'hub' events with a high level of internationalisation, which is consistent with its industrial structure of leading companies in global value chains and an export-oriented manufacturing industry.

Spain

1.903.825	33.378	2.673.822	137
Net area	Exhibitors	Visitors	No. of trade shows

Spain hosts 137 trade shows. The exhibition floor space totals just under 2 million sqm, with over 33,000 exhibitors and approximately 2.7 million visitors. Spain is experiencing a particularly rapid rebound since the pandemic, surpassing 2019 figures, yet remains the country with the least international influence in terms of exhibitors and visitors. The average floor space of exhibitions in Spain remains stable at just under 14,000 sqm. The number of attendees per stand is growing (from 72 to 80 people). Conversely, the average stand size is decreasing slightly (from 62 to 57 sqm), but Spain continues to have the largest average stand size compared to the other three European countries.

In Spain, international trade shows focus on two sectors: IT, and Health and Environment. These sectors hosted two global and itinerant trade shows in 2023.

In summary, the European trade show sector is undergoing a phase of reorganisation, where quantity and quality do not always align. While Italy is consolidating its position in terms of the breadth of its offering, there are opportunities to promote internationalisation in certain sectors.



About IT-EX

On 7 February 2024, Italy's leading trade show organisers founded IT-EX, an association representing Italian trade shows of international significance. The IT-EX Italian Association of International Exhibitions is the main implementer of the country's economic policy, supporting the promotion of exports and internationalisation, particularly among SMEs and Micro-Enterprises.

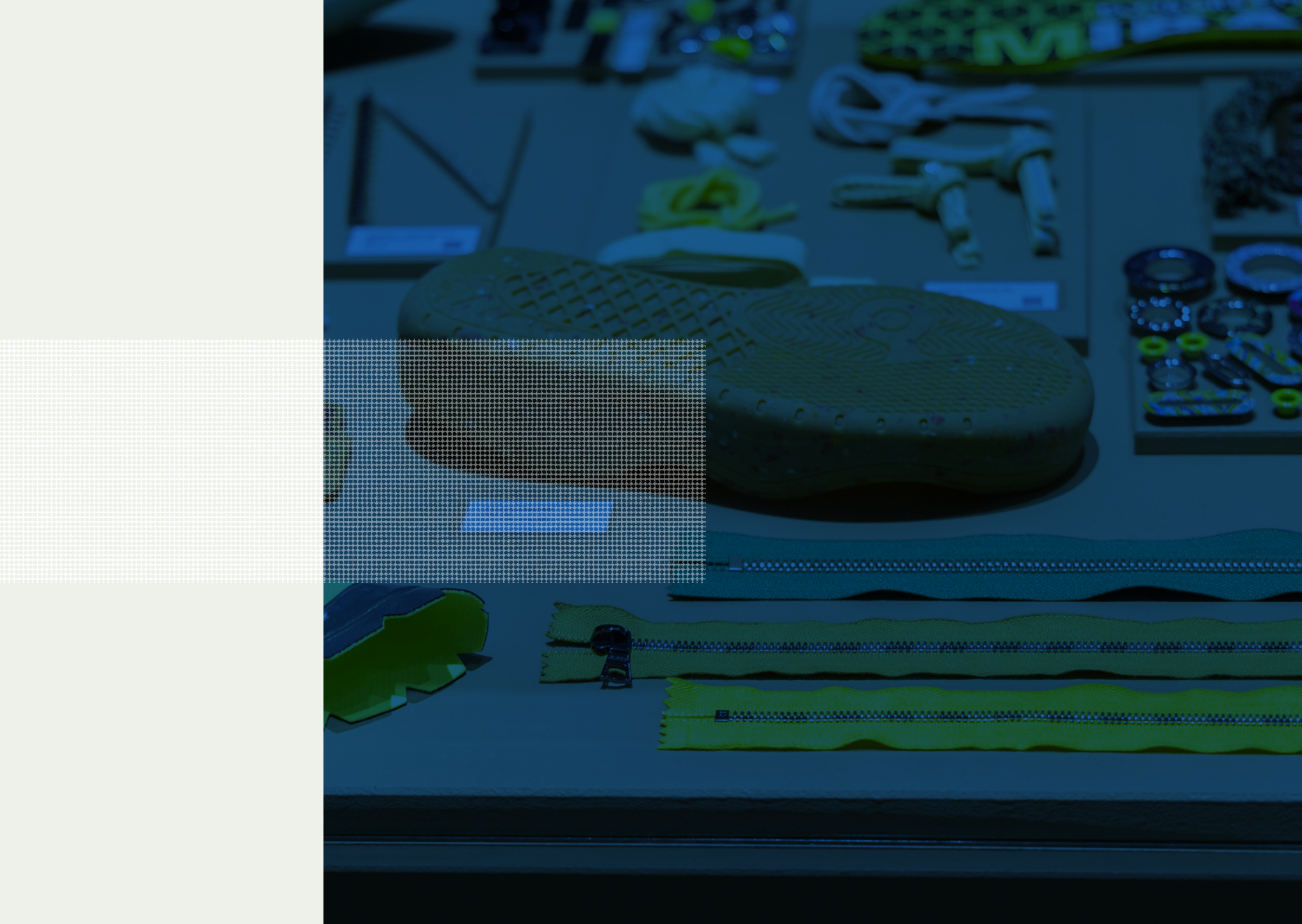
The association has a dual mission: it plays an institutional role and provides services to its members. Specifically:

- Acting as the main qualified interface for the Italian government and the Italian Trade and Investment Agency (ICE) in identifying guidelines for the promotion and development of industrial policies and export support (known as the 'Control Room'), including through its members.
- Developing support services for members, such as introducing new trends and best practices, organising training conferences and developing operational services and themes (e.g. finance for exhibitors, certifications and trademark protection).

Thanks to their size and relevance, the trade shows managed by IT-EX's members attract over 2.8 million visitors in total (including almost 750,000 foreign buyers) and over 26,000 exhibitors (including over 11,000 foreign exhibitors).

IT-EX is a member of UFI (The Global Association of the Exhibition Industry), the Leonardo Committee, and the Virtuous – NetZeroCarbon Emissions in the Global Events Industry platform.

Members	Organised trade shows
Aimpes Servizi S.r.l.	Mipel
Anci Servizi S.r.l.	Micam
Assomac Servizi S.r.l.	Simac Tanning Tech
Assoservizi Biella S.r.l.	Filo
CEU S.p.A.	BI-MU, Emo Milano, Lamiera
EICMA S.p.A.	Eicma
ExpoSicam S.r.l.	Sicam
Federlegno Arredo Eventi S.p.A.	Eurocucina, Euroluce, Salone Internazionale del Bagno, Salone Internazionale del complemento d'arredo, Salone Internazionale del Mobile, Workplace3.0
Fiera Milano S.p.A.	Bit, Expodetergo International, GEE Global Elevator Exhibition, Host Milano, Made Expo, Miart, Milano Fashion&Jewels, Milano Home, NME Next Mobility Exhibition, Print4All, PTE PromotionTrade Exhibition, Salone Franchising Milano, SBE Smart Building Expo, Sicurezza, Si Sposaitalia Collezioni, Transpotec Logitec
Ge.Fi. S.p.A.	Artigiano in Fiera
IES S.r.l.	Mido
I Saloni Nautici S.r.l.	Salone Nautico Internazionale di Genova
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