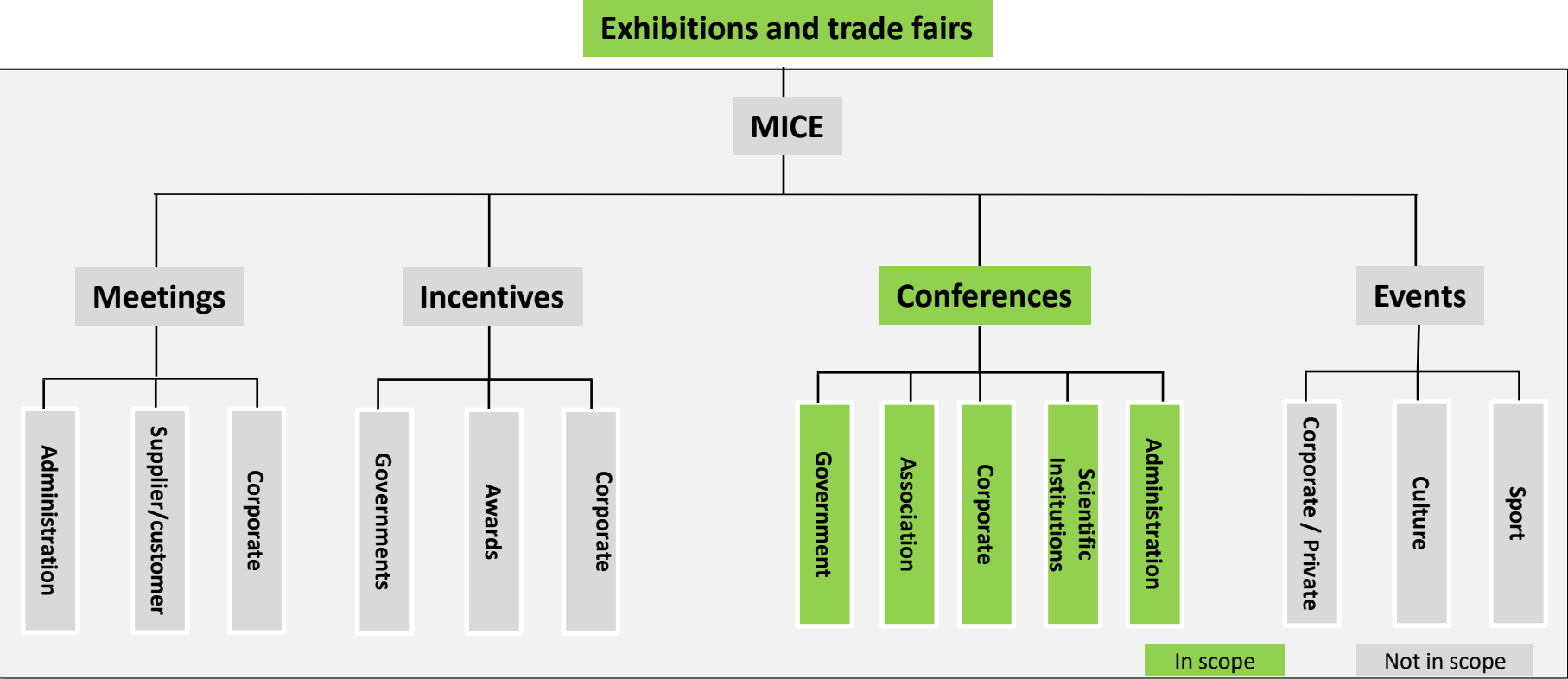


Brupartners

23.06.2021

BRUSSELS EXPO

Scope and definition



Examples are for illustrative purposes only and not comprehensive

The Global Exhibition Market – KPI's

Global Overview 2018

32.000 events yearly

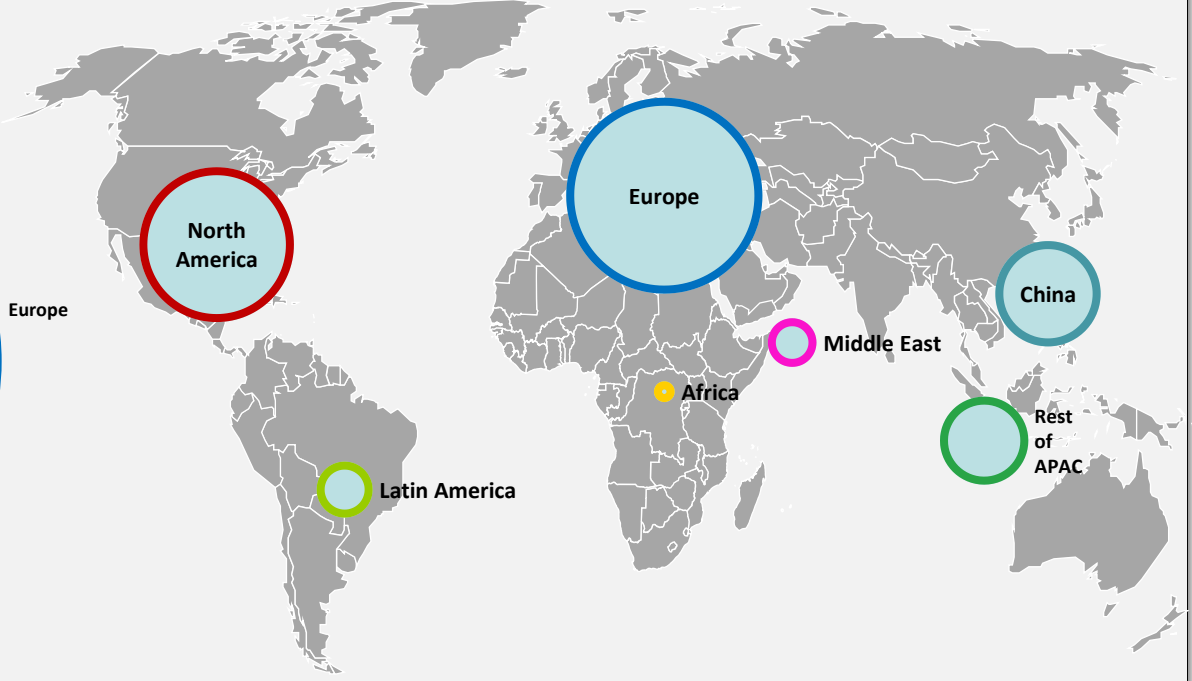
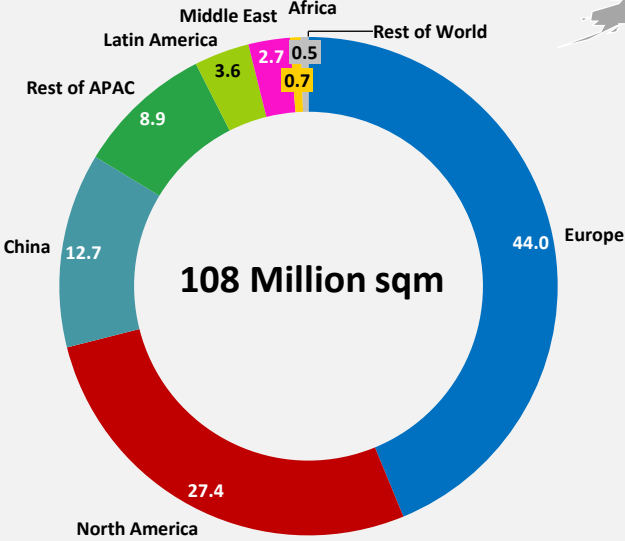


€275 billion in direct and indirect output – €7.900 per m2 capacity

Source: jwc data base, jwc research

Europe and North America make up more than 70% of the global market

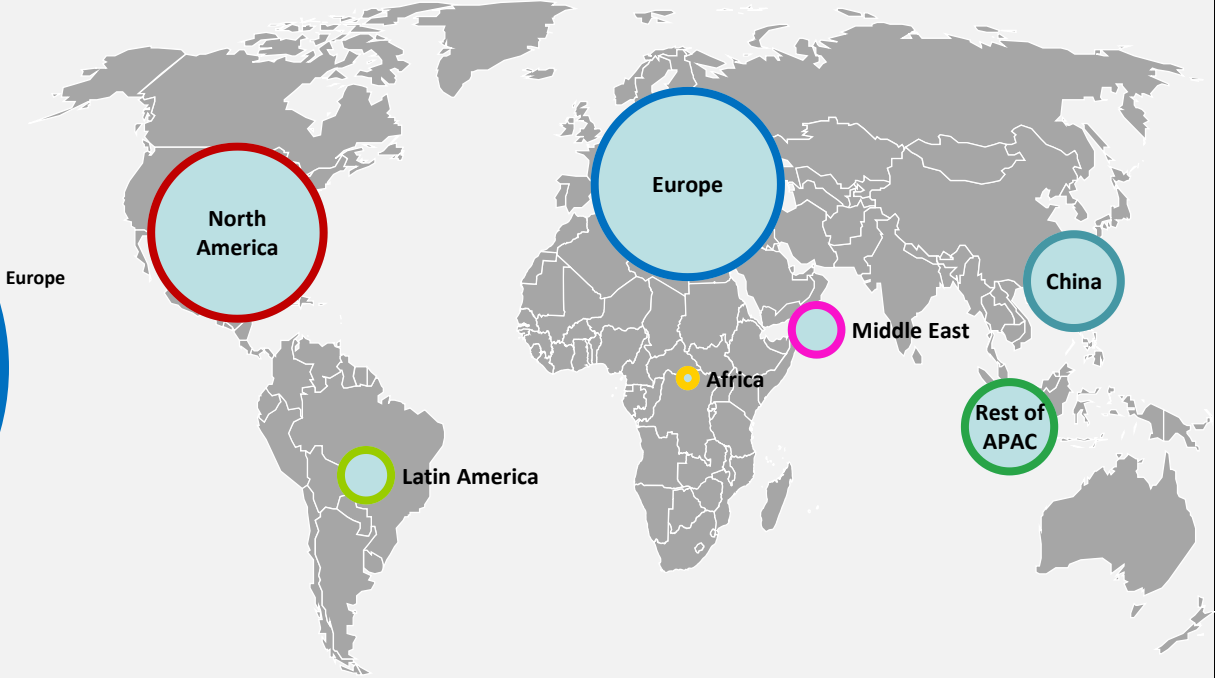
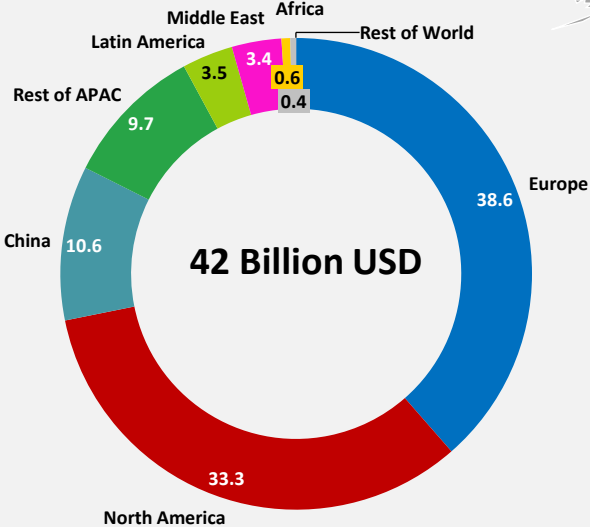
The global exhibition market 2018 - Shares of total net sqm (in %)*



* Source: Company reports, association reports, jwc research, jwc estimates

Europe and North America make up more than 70% of the global market

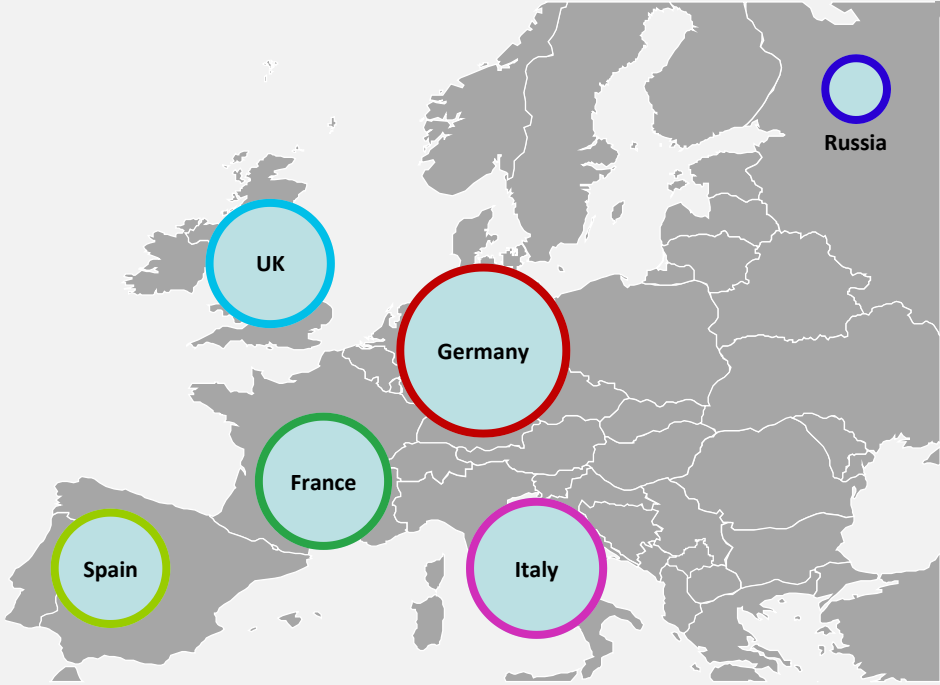
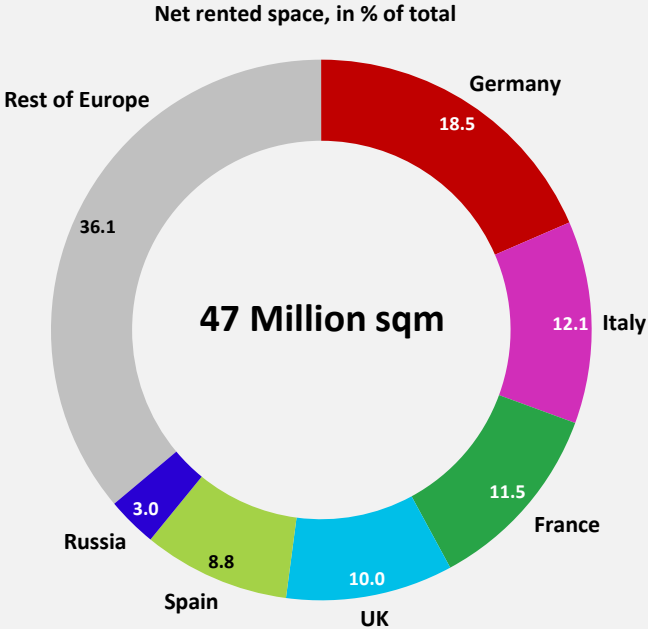
The global exhibition market 2018 - Shares of total revenue (in %)*



*Source: Company reports, association reports, jwc research, jwc estimates; including turnover from services, venue management, attendees and other live events

The European exhibition market is dominated by 5 countries

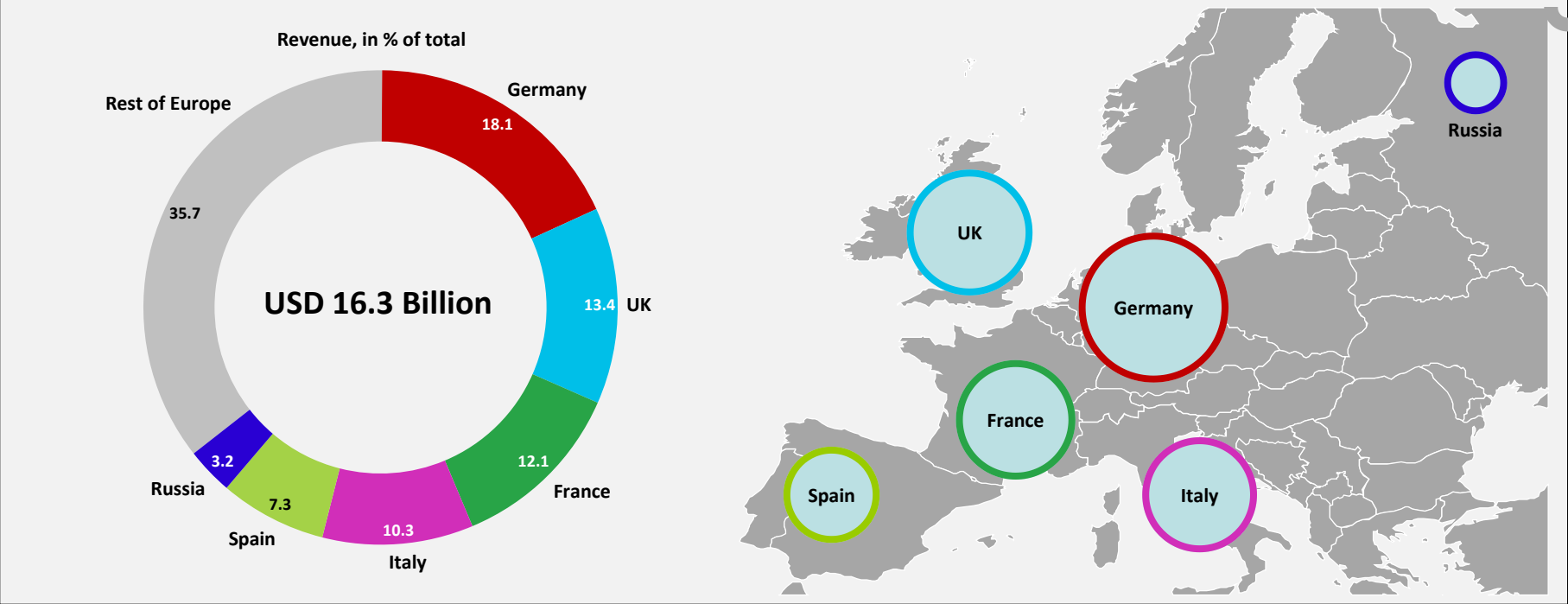
The European exhibition market 2018 – Shares of total net sqm (in %)*



*Note: Estimation of the full market size for each country, including regional exhibitions, source: company reports, association reports, jwc research, jwc estimates

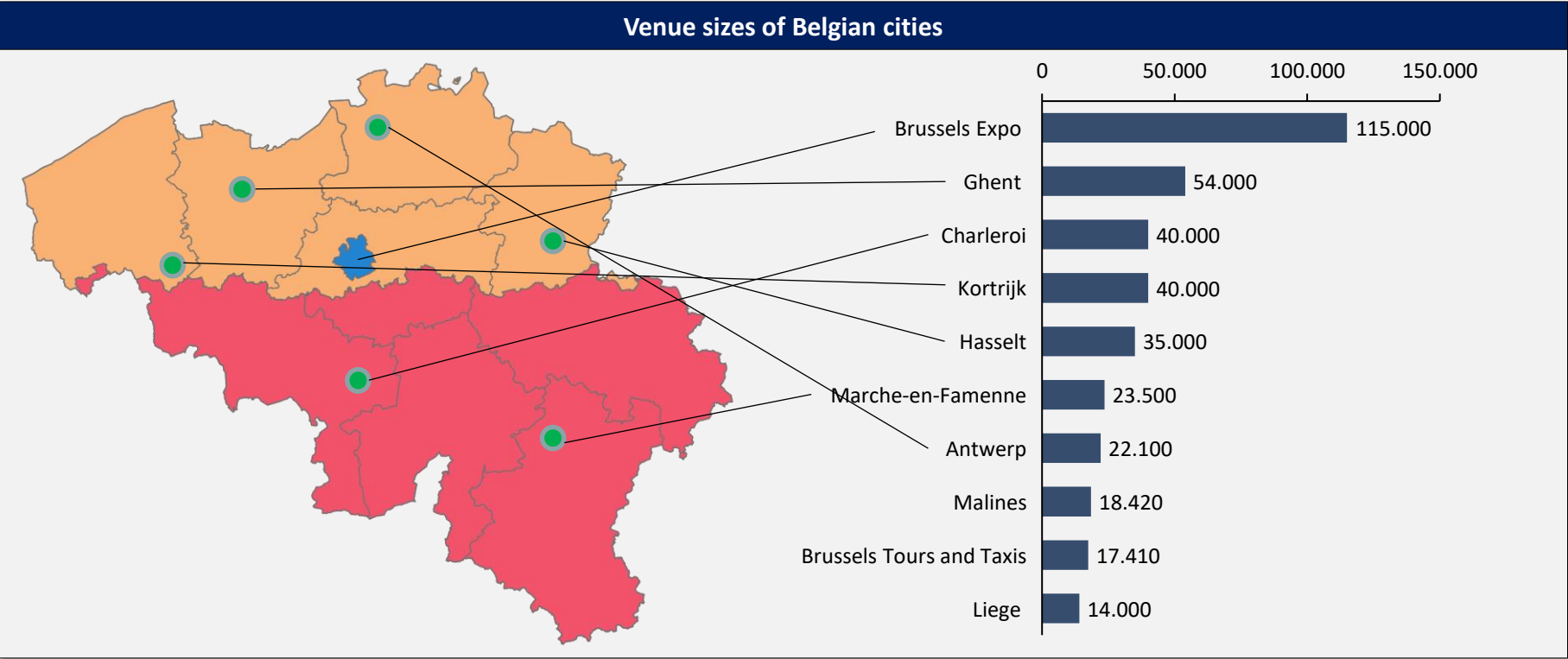
The European exhibition market is dominated by 5 countries

The European exhibition market 2018 – Shares of total revenue (in %)*







*Note: Estimation of the full market size for each country, including regional exhibitions, source: company reports, association reports, jwc research, jwc estimates; including turnover from services, venue management, attendees and other live events

Brussels leads in available indoor exhibition space in Belgium



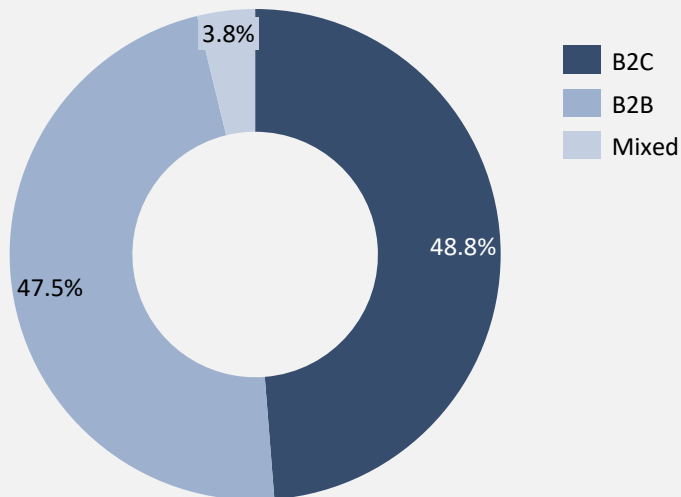
A closer look at the biggest venues in Belgium

	 Brussels Expo Heysel area, Brussels	 Flanders Expo Ghent, Flanders	 Kortrijk Xpo Kortrijk, Flanders	 Antwerp Expo Antwerp, Flanders
Total space	115,000 m ²	52,000 m ²	40,000 m ²	22,100 m ²
# halls	12	8	4	4
# meeting rooms*	5	6	7	7
Total PAX	2,500 + 10,000 (Halls)	2,410	1,000	1,290 + 7,850 (Halls)
Largest room PAX	10,000 (Palais 12)	500 (Flex XL)	550 (XXL)	3,750 (Hall 3)
Opened in	1935	1987	1967 (extended in 2005 & 2009)	1989
Major shows (2017)	<ul style="list-style-type: none"> Batibouw (Construction) Net space: 70,000 m² Brussels Furniture Fair Net space: 45,000 m² 	<ul style="list-style-type: none"> BIS (Construction) Net space: 22,017 m² Horeca Expo Net space: 26,918 m² 	<ul style="list-style-type: none"> Matexpo (Machines) Net space: 20,693 m² Velofollies (Cycling) Net space: 16,945 m² 	<ul style="list-style-type: none"> Bouw & Reno Net space: 9,789 m² Transport & Logistics Net space: 8,032 m²

Source: jwc research, UFI Eurofairs 2017. *Note: Meeting rooms are defined as rooms which are not used for exhibition purposes, including auditoriums or ballrooms

The Belgian Exhibition Market – many b2c shows

Percentage of exhibitions in Belgium by type of visitors, 2017



Top 3 b2c or mixed b2b & b2c exhibitions in Belgium, 2017

Event	City	Net rented m ²	Visitors
Batibouw	Brussels	57,500 m ²	297,327
Agribex	Brussels	30,914 m ²	101,270
Bis	Ghent	22,017 m ²	60,000

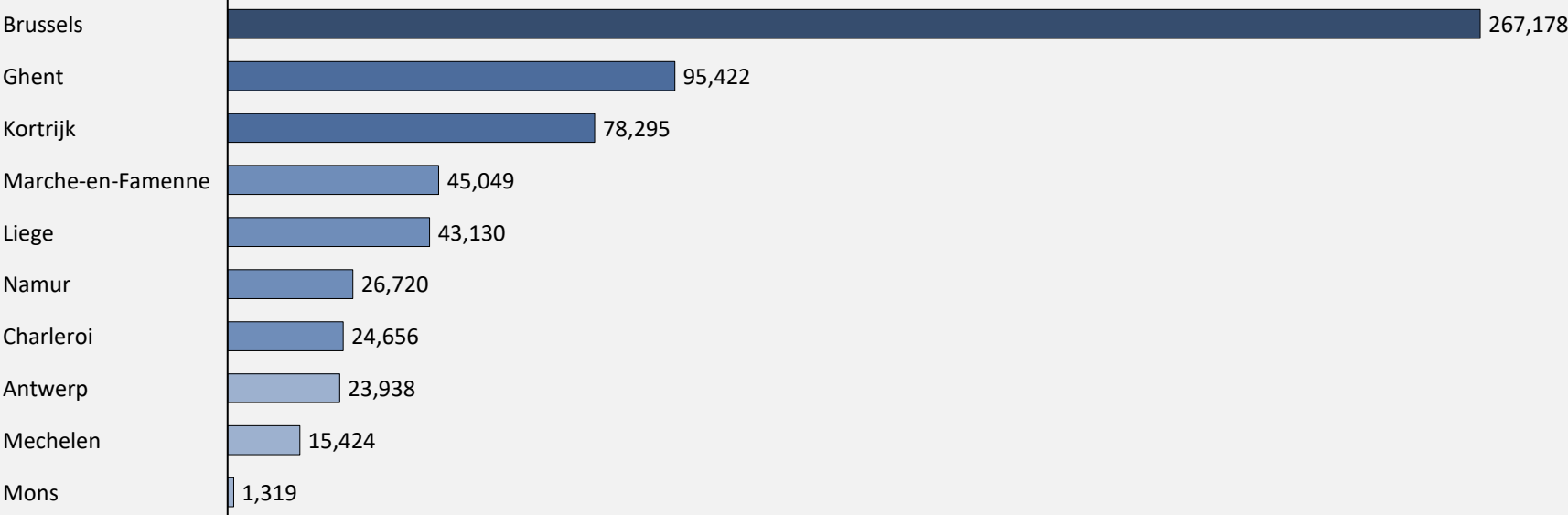
Top 3 b2b exhibitions* in Belgium, 2017

Event	City	Net rented m ²	Visitors
Seafood Expo	Brussels	37,679 m ²	27,891
Horeca Expo	Ghent	26,918 m ²	51,100
Furniture Fair	Brussels	21,750 m ²	18,668

Source: : jwc data base, jwc research, jwc estimates UFI EuroFairs 2017. *Note: Unaudited data - For shows in Brussels, net rented m² estimated by multiplying gross rented m² by an assumed utilization rate of 50%

Brussels by far the most significant city

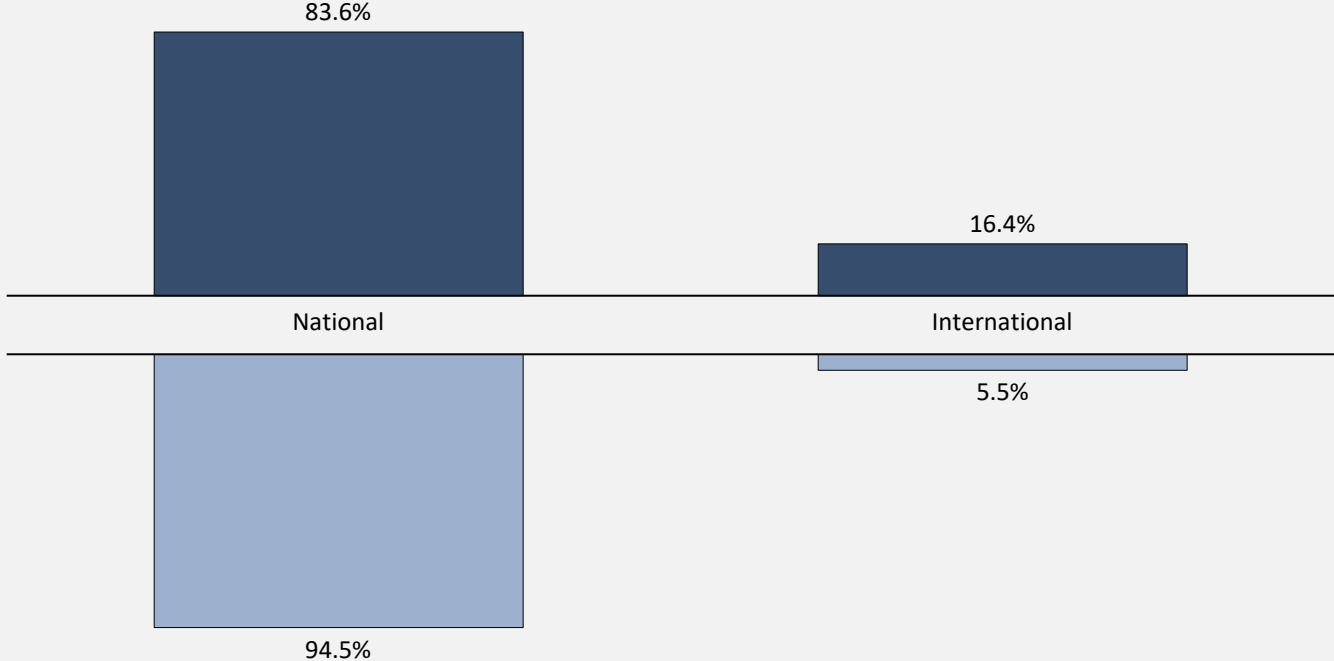
Net rented m² at exhibitions in Belgium by city, 2017



Source : jwc data base, jwc research, jwc estimates UFI EuroFairs 2017. *Note: Unaudited data - For shows in Brussels, net rented m² estimated by multiplying gross rented m² by an assumed utilization rate of 50%

The majority of b2b exhibitions are domestic

Split of national vs. international participants for Belgian b2b fairs, 2017



Exhibitors

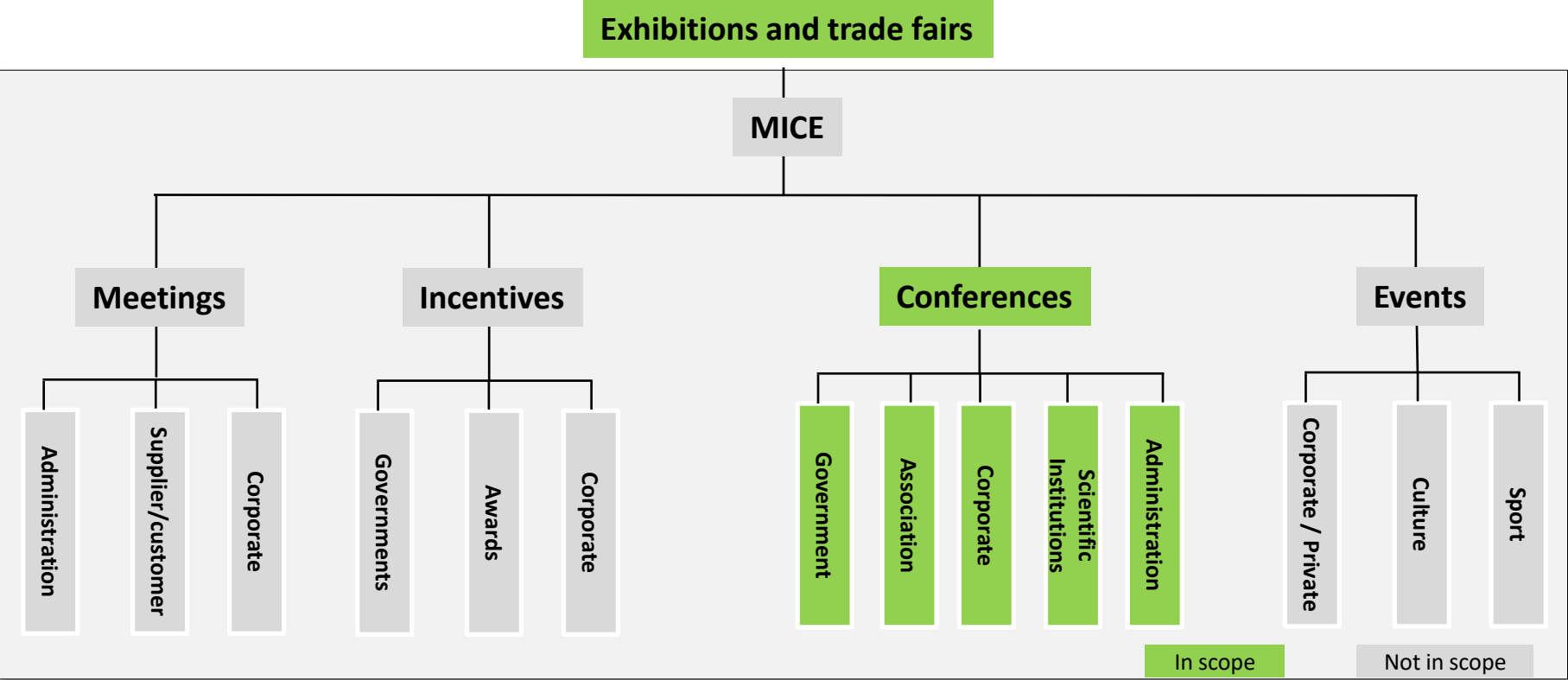


Visitors



Source: : jwc data base, jwc research, jwc estimates UFI EuroFairs 2012-2017, AUMA.

Scope and definition

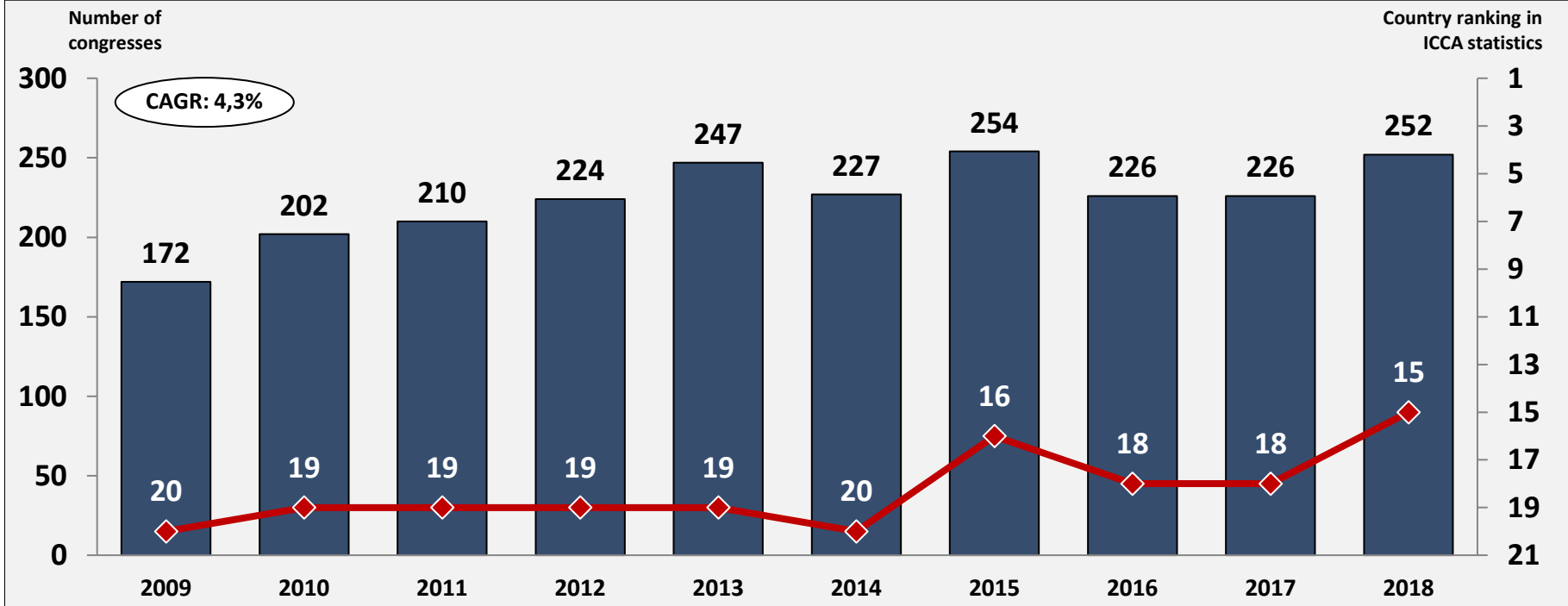


Examples are for illustrative purposes only and not comprehensive

Belgium has become a bigger player in the congress market over the last 10 years



Development of number of international congresses and country ranking for Belgium, 2009-2018

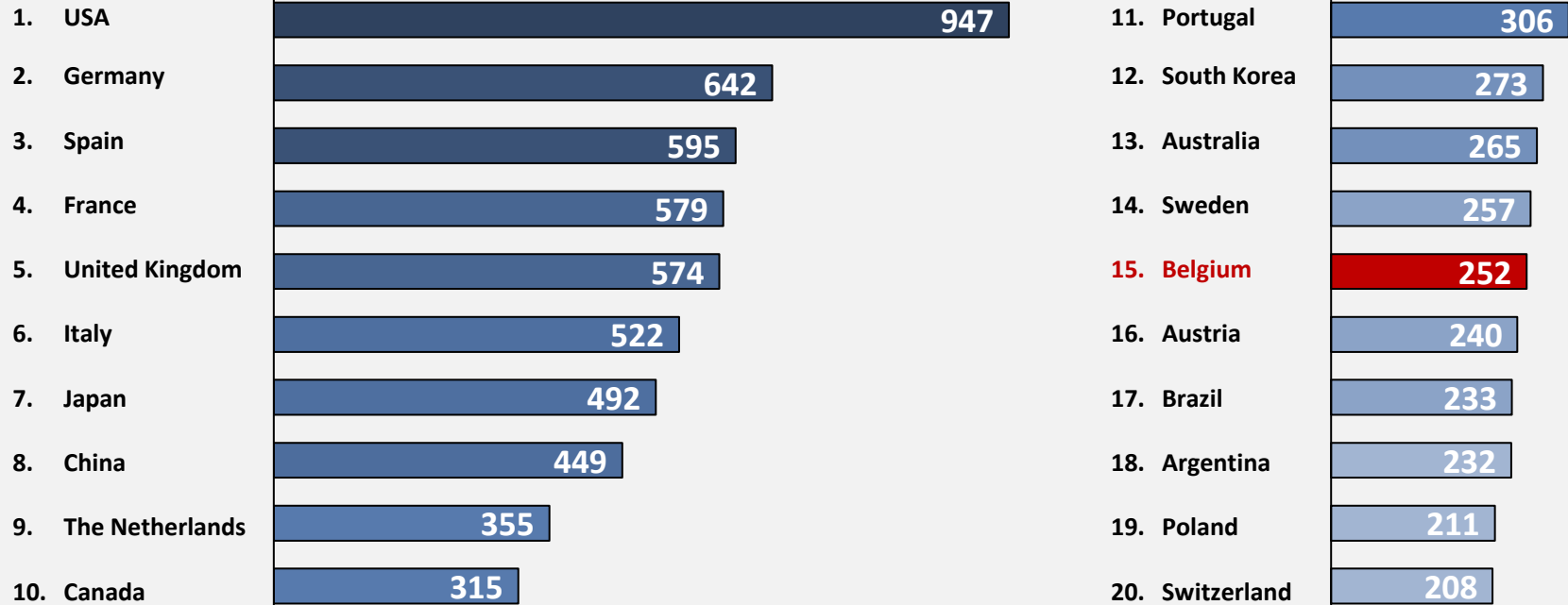


Source : jwc data base, jwc research, Company reports, company presentations, jwc estimates UIA, ICCA Statistics 2018

Belgium ranks 15th for number of meetings in 2018, 12 countries out of the TOP 20 are European



Number of meetings in 2018: TOP 20 countries

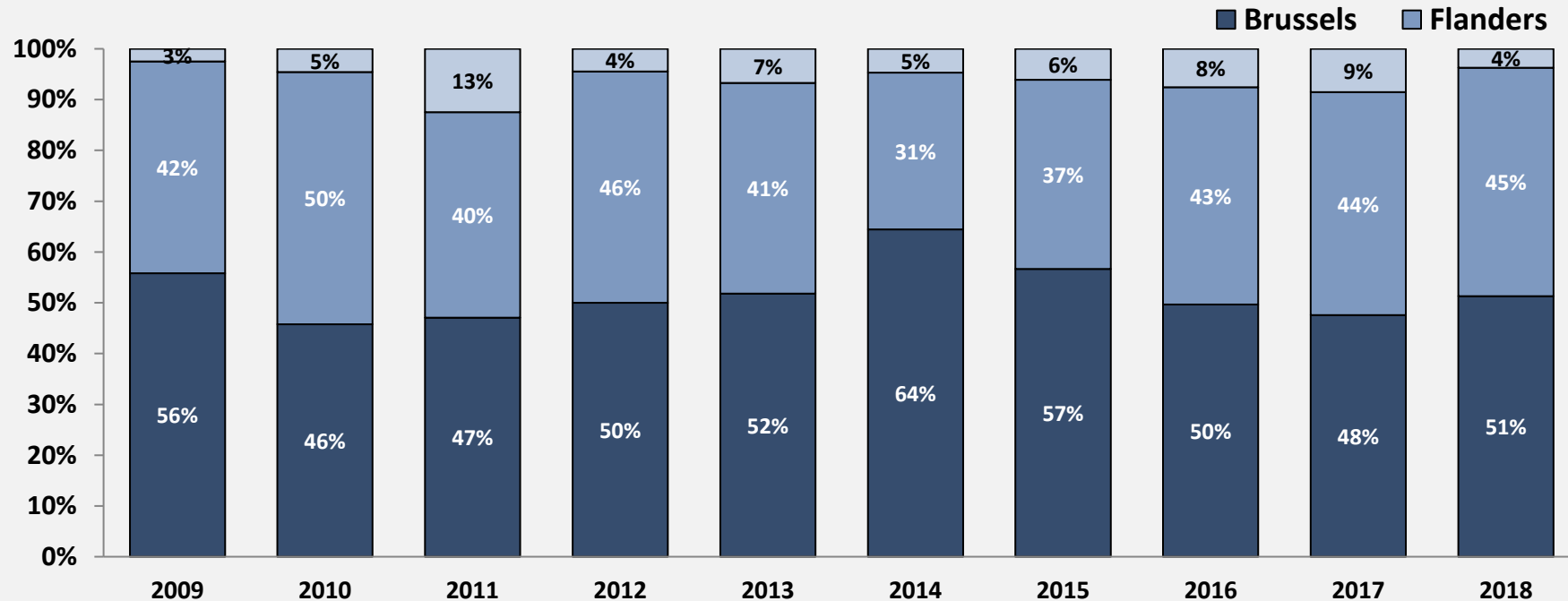


Source: : jwc data base, jwc research, Company reports, company presentations, jwc estimates UIA, ICCA Statistics 2018

Brussels and Flanders make up 95% of the Belgian market in 2018, Brussels' share has been stable over the past 10 years



Development of market share (number of international congresses) by Belgian region, 2009-2018

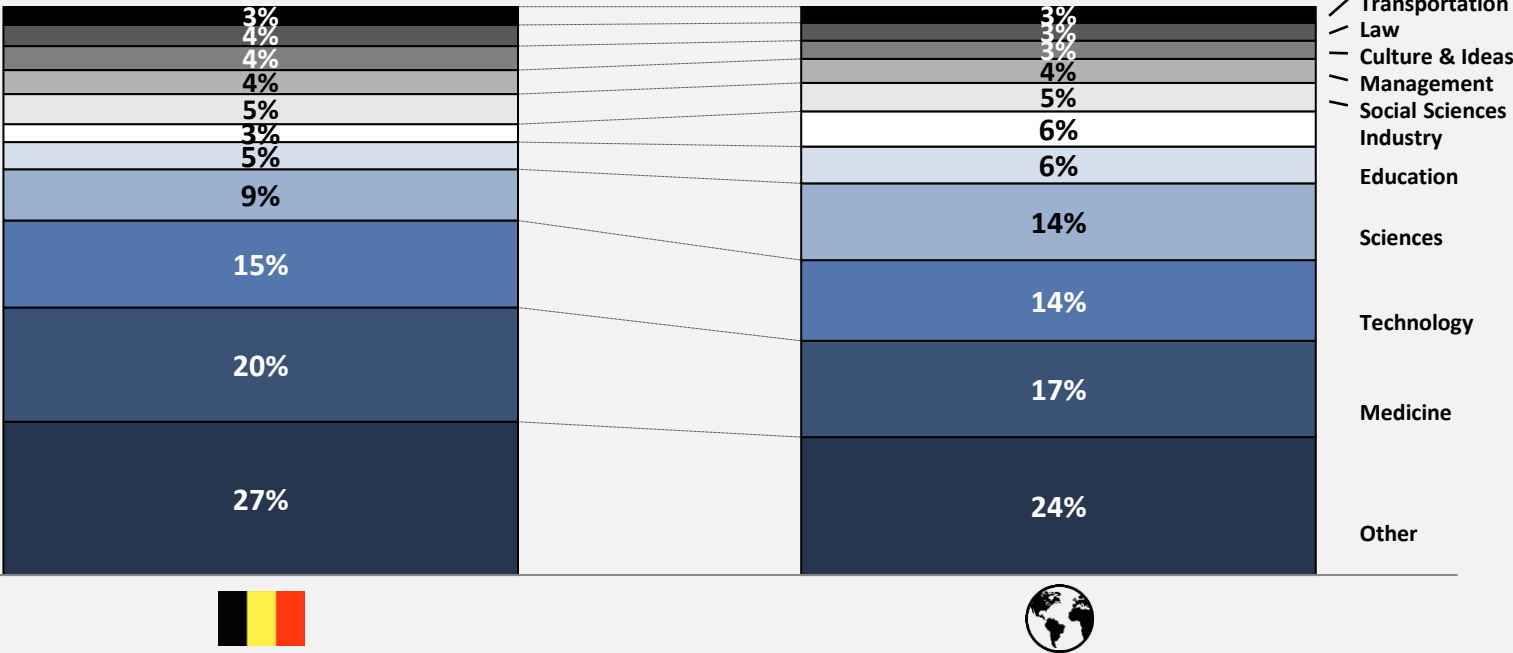


Source : jwc data base, jwc research, Company reports, company presentations, jwc estimates UIA, ICCA Statistics 2018

Medicine is the most frequent sector in Belgium, the sector distribution is in line with the global one

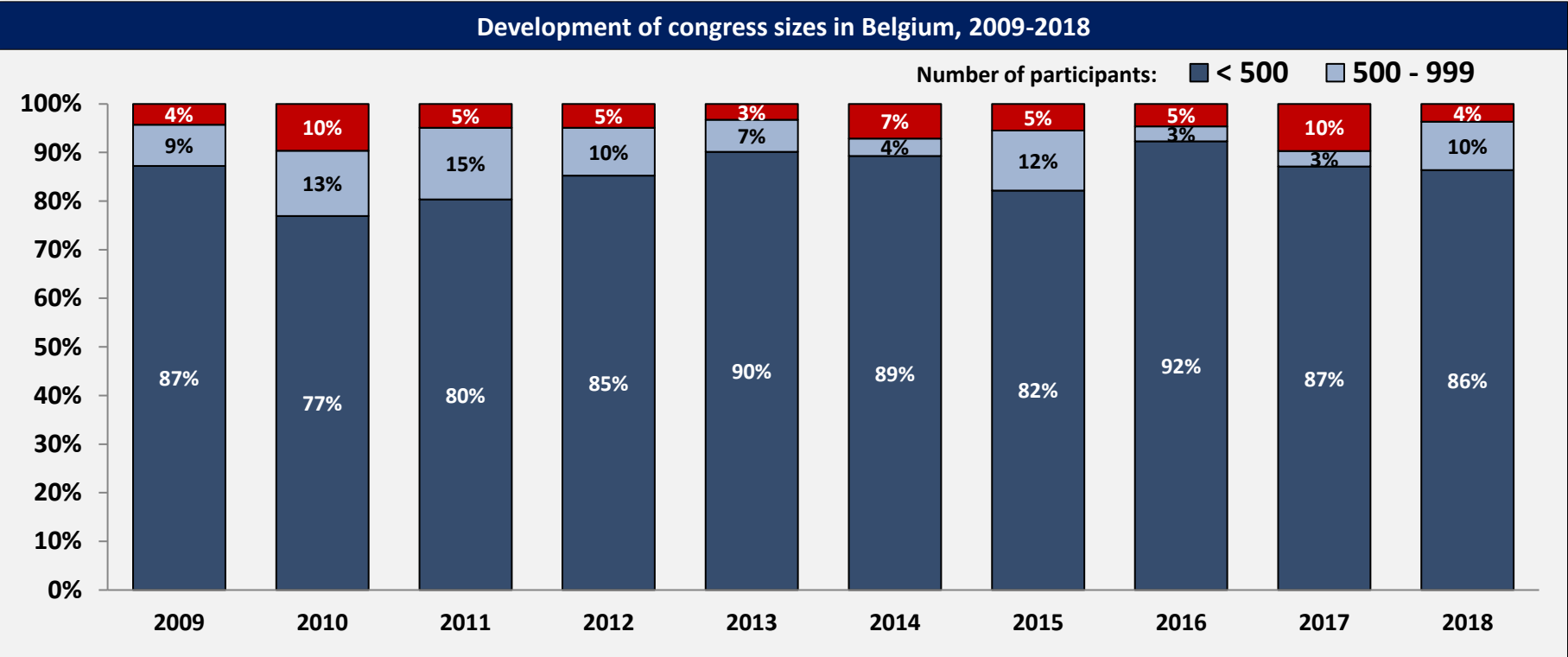


Sector focus of international congresses in Belgium and global, 2018



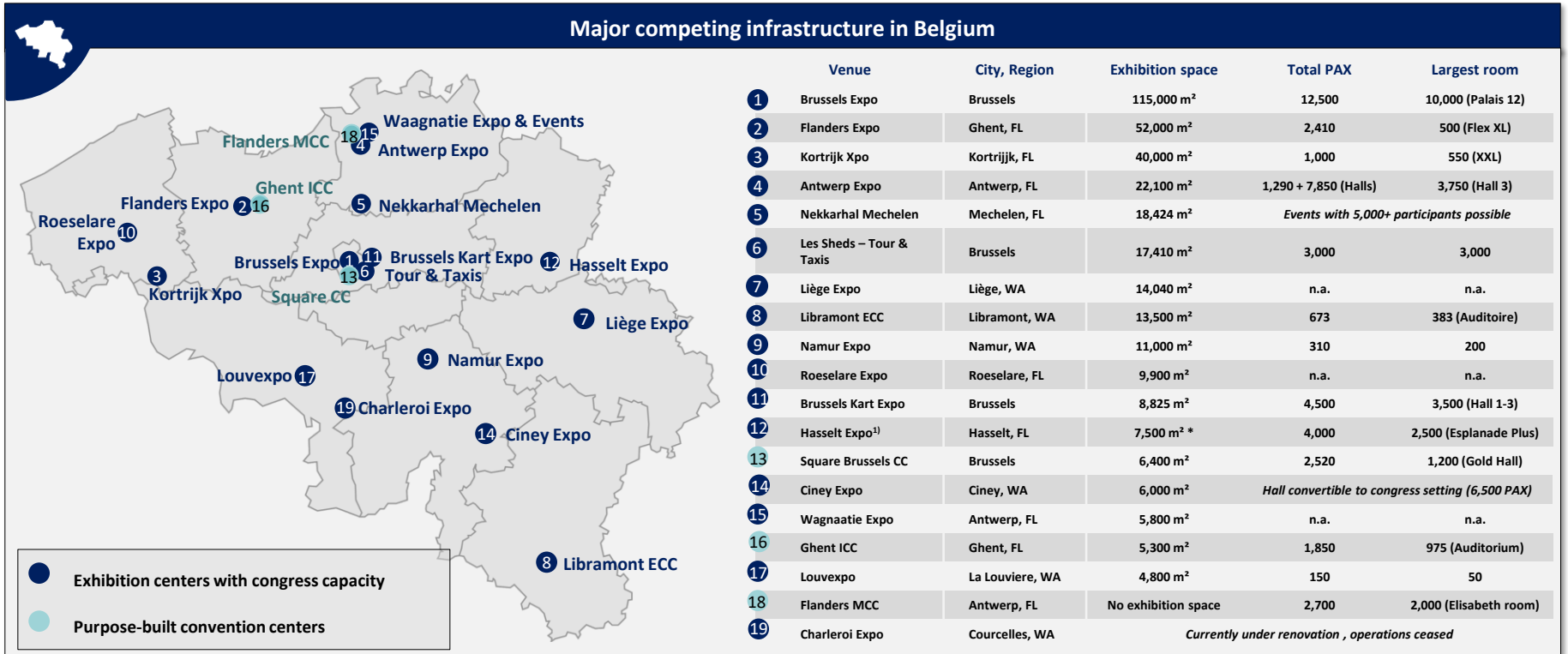
Source: : jwc data base, jwc research, Company reports, company presentations, jwc estimates UIA, ICCA Statistics 2018

There have been very little congresses with more than 1,000 participants over the past 10 years in Belgium



Source : jwc data base, jwc research, Company reports, company presentations, jwc estimates UIA, ICCA Statistics 2018




Venue infrastructure in Belgium: Overview



Source: Visit Brussels, jwc research

Notes: 1) Hasselt Expo excluding Ethias Arena 2) Tours and Taxis total PAX 13,000 according to website

Infrastructure in Belgium: Most important purpose-built conference centers

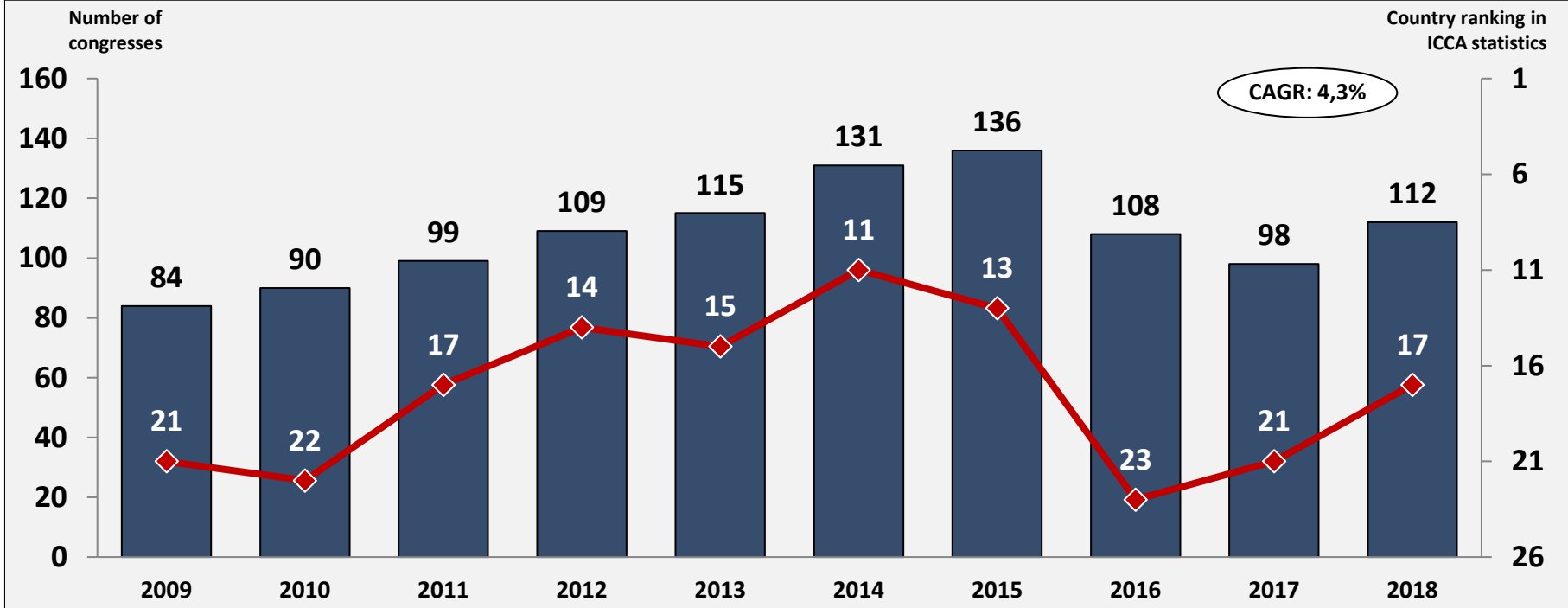
	 Square Brussels CC Central district, Brussels	 Ghent ICC Ghent, Flanders	 Flanders MCC Antwerp, Flanders
Exhibition space	6,400 m ²	5,300 m ²	No exhibition space
# of halls	5	3 (ground level of building)	0
# of meeting rooms*	29 (25 studios + 4 auditoriums)	22	26
Total PAX	2,520	1,850	2,700
Largest room PAX	1,200 (Gold Hall Auditorium)	975 (Auditorium)	2,000 (Queen Elisabeth room)
Opened in	2009	1972	2009
Major congresses	Photovoltaic Solar Energy CE (2,000 ppl) • Slas Europe (1,000 ppl) • GS1 Global Forum (836 ppl)	• EAAP (Animal Science) • EVEC (Veterinary) • UIPAC (Crop protection)	• European Lotteries (900 ppl) • European Brewery Convention (500 ppl) • Associations World Congress (500 ppl)

Source: jwc research, cvent. *Note: Meeting rooms are defined as rooms which are not used for exhibition purposes, including auditoriums or ballrooms

The number of congresses hold in Brussels dropped in 2016, likely due to the terrorist attacks and following loss of reputation



Development of number of international congresses and country ranking for Brussels, 2009-2018

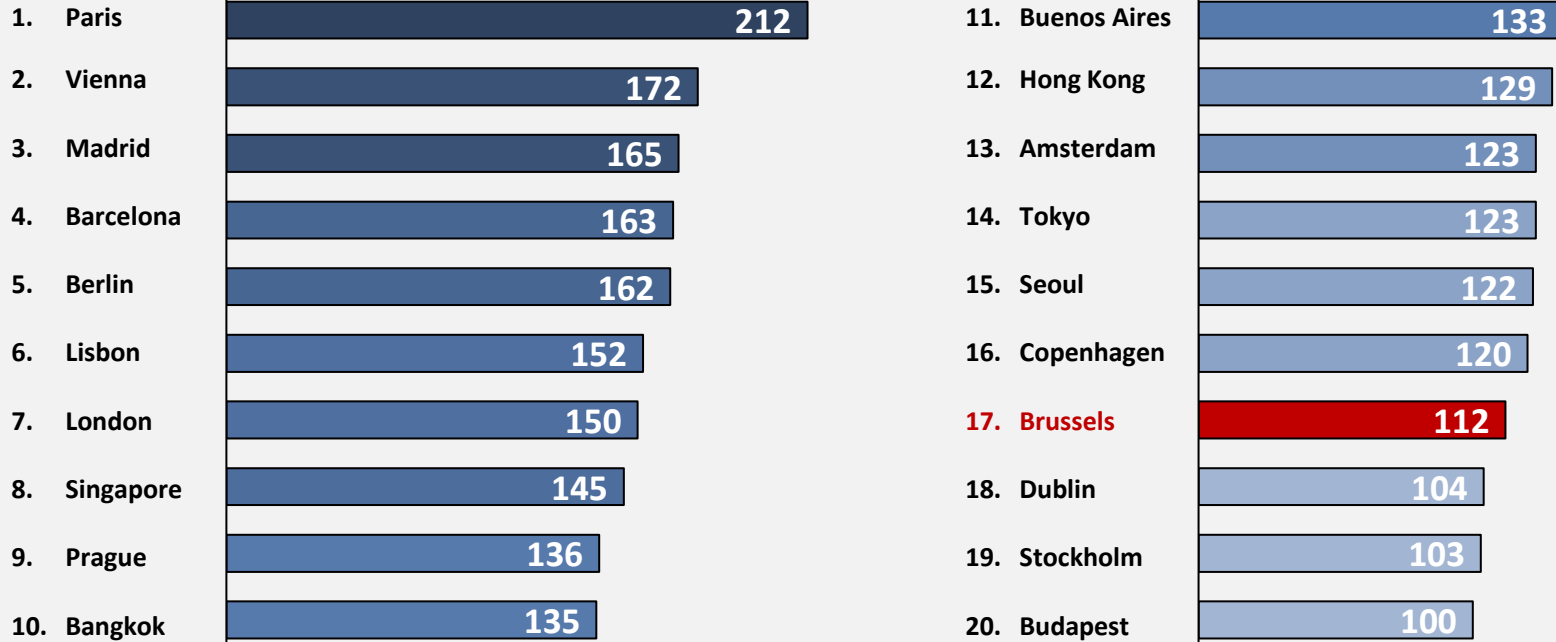


Source: : jwc data base, jwc research, Company reports, company presentations, jwc estimates UIA, ICCA Statistics 2018

Brussels ranks 17th for number of meetings, 8 of the TOP 20 cities are in a radius of 1,000 km from Brussels



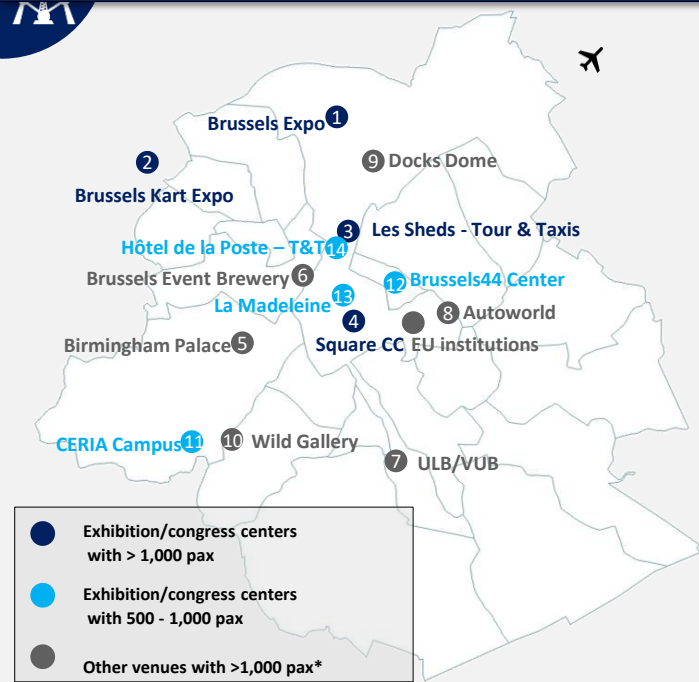
Number of meetings in 2018: TOP 20 cities



Source: : jwc data base, jwc research, Company reports, company presentations, jwc estimates UIA, ICCA Statistics 2018

Venues in Brussels: Overview

Congress & exhibition venues with > 500 pax and other venues with > 1,000 pax* in Brussels



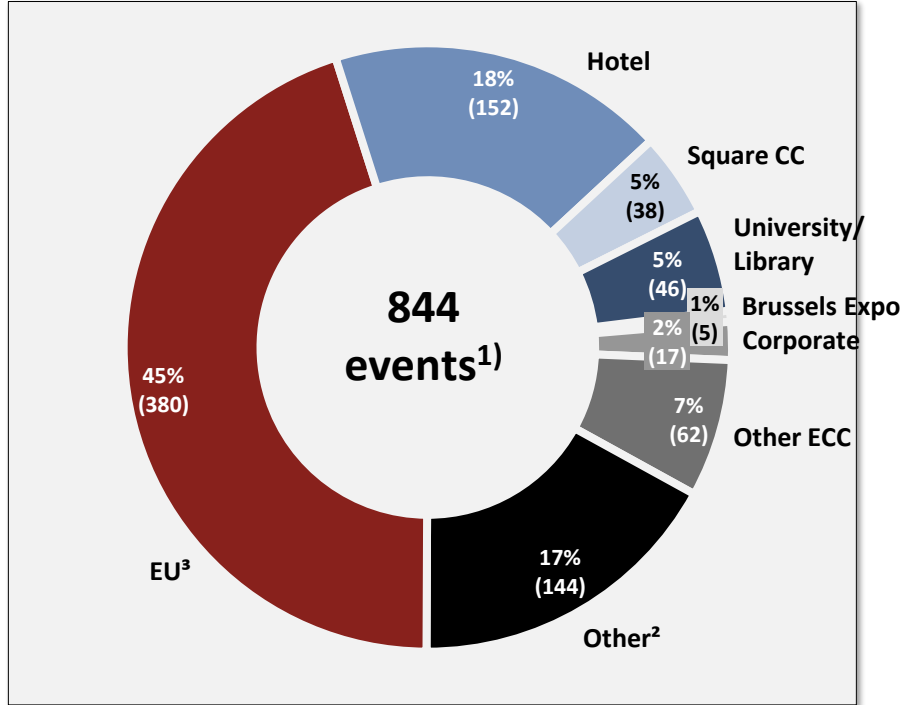
Venue	Total PAX	# rooms (excl. exhibition halls)
1 Brussels Expo	12,500	5
2 Brussels Kart Expo	4,500	7
3 Les Sheds – Tour & Taxis	3,000	4
4 Square Brussels Convention Centre	2,520	29
5 Birmingham Palace	2,000	3
6 Brussels Event Brewery	1,500	3
7 Free University of Brussels (ULB/VUB)	1,476	62
8 Autoworld	1,200	8
9 Docks Dome	1,100	11
10 Wild Gallery	1,100	5
11 CERIA Campus	840	1
12 Brussels44 Center	768	11
13 La Madeleine	750	1
14 Hôtel de la Poste – Tour & Taxis	600	16

+  European Institutions (EU parliament, EU commission, EU council, Committee of the regions)

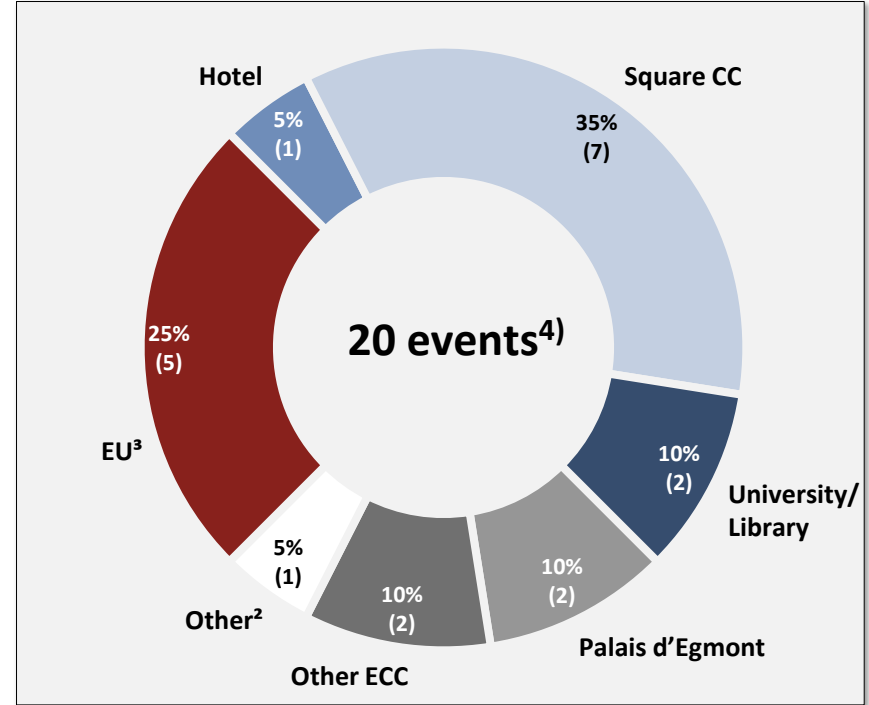
Source: jwc research, Visit Brussels. Note: Other venues excludes theatres, concert halls and sports venues

UIA statistics: Congress venues in Brussels

UIA events in Brussels by venues – all events, 2018



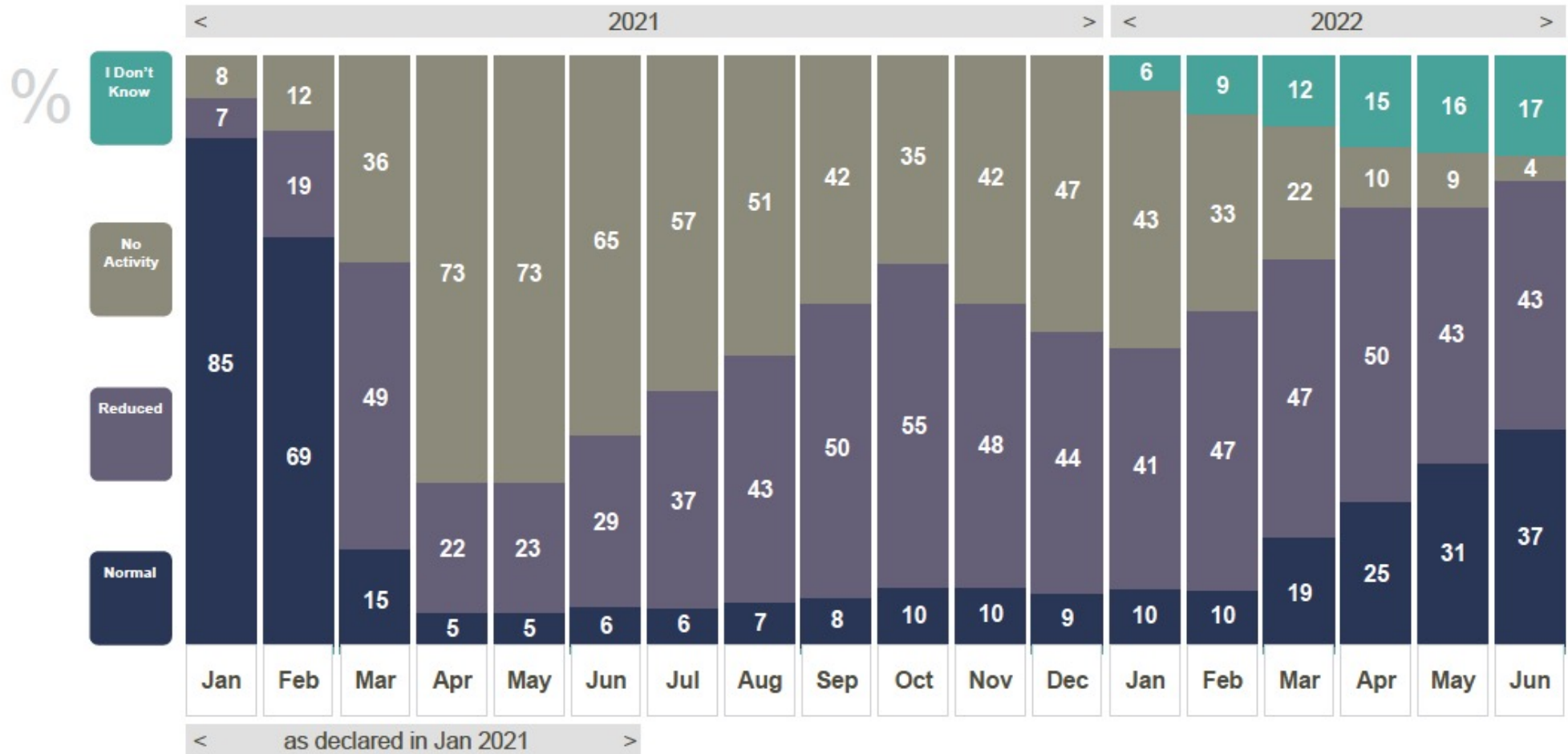
UIA events in Brussels by venues – events with >500 participants, 2018



Source: UIA statistics 2018. Notes: 1) Number of events with venue information in UIA database 2) Other include sports, theatre, institutional (non-EU), historical and miscellaneous venues. 3) EU includes representations of foreign countries to EU (embassies) 4) Number of events with information about venue and number of participants in UIA database

RE-OPENING

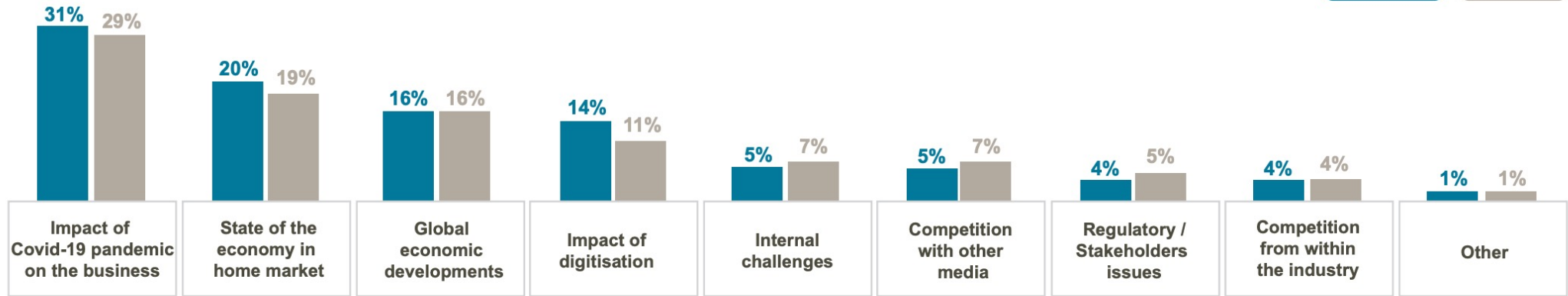
Situation of industry operations in 2021 and current predictions for the 1st half of 2022



RE-OPENING

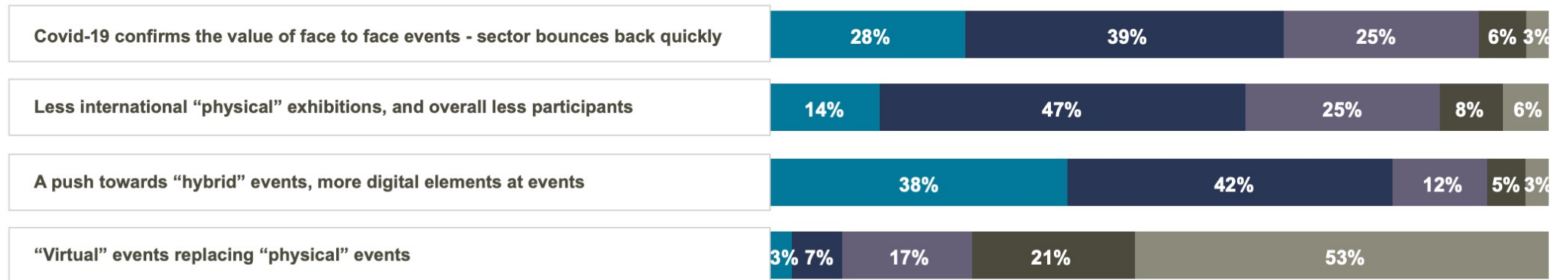
Most important business issues in the exhibition industry

Europe Global



Format of exhibitions in the coming years

Yes, for sure Most probably Not sure Not sure at all Definitely not



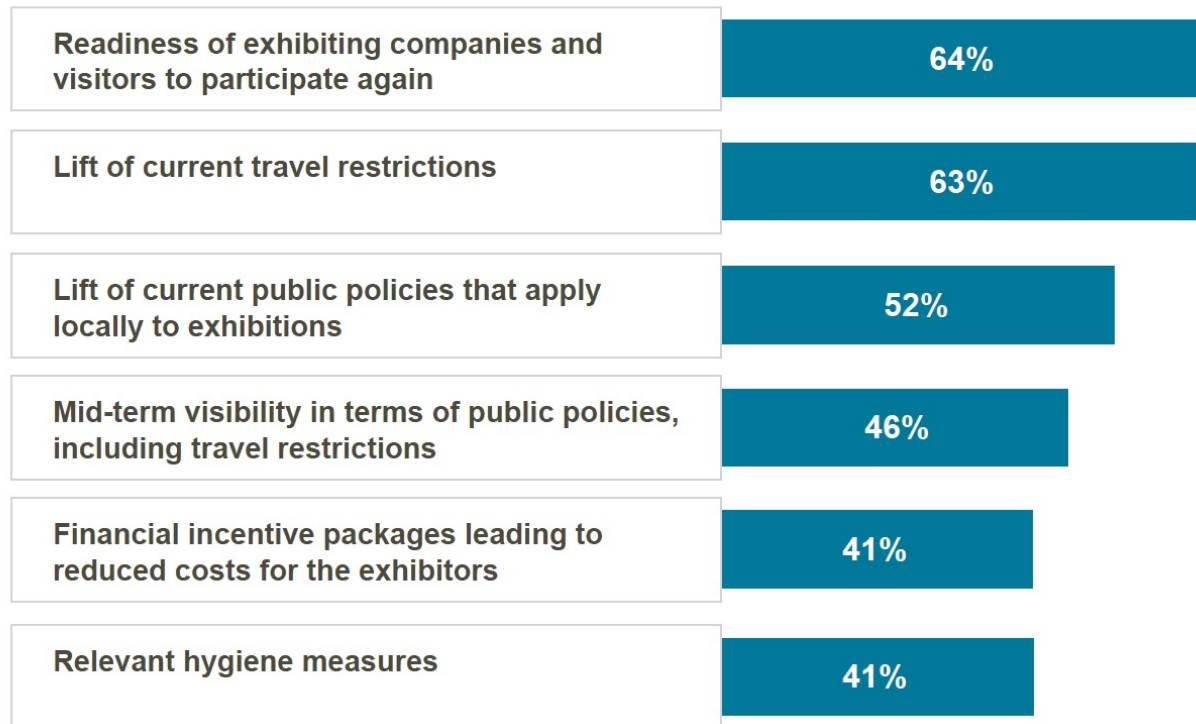
RE-OPENING

What do you believe would most help the “bounce back” of exhibitions?

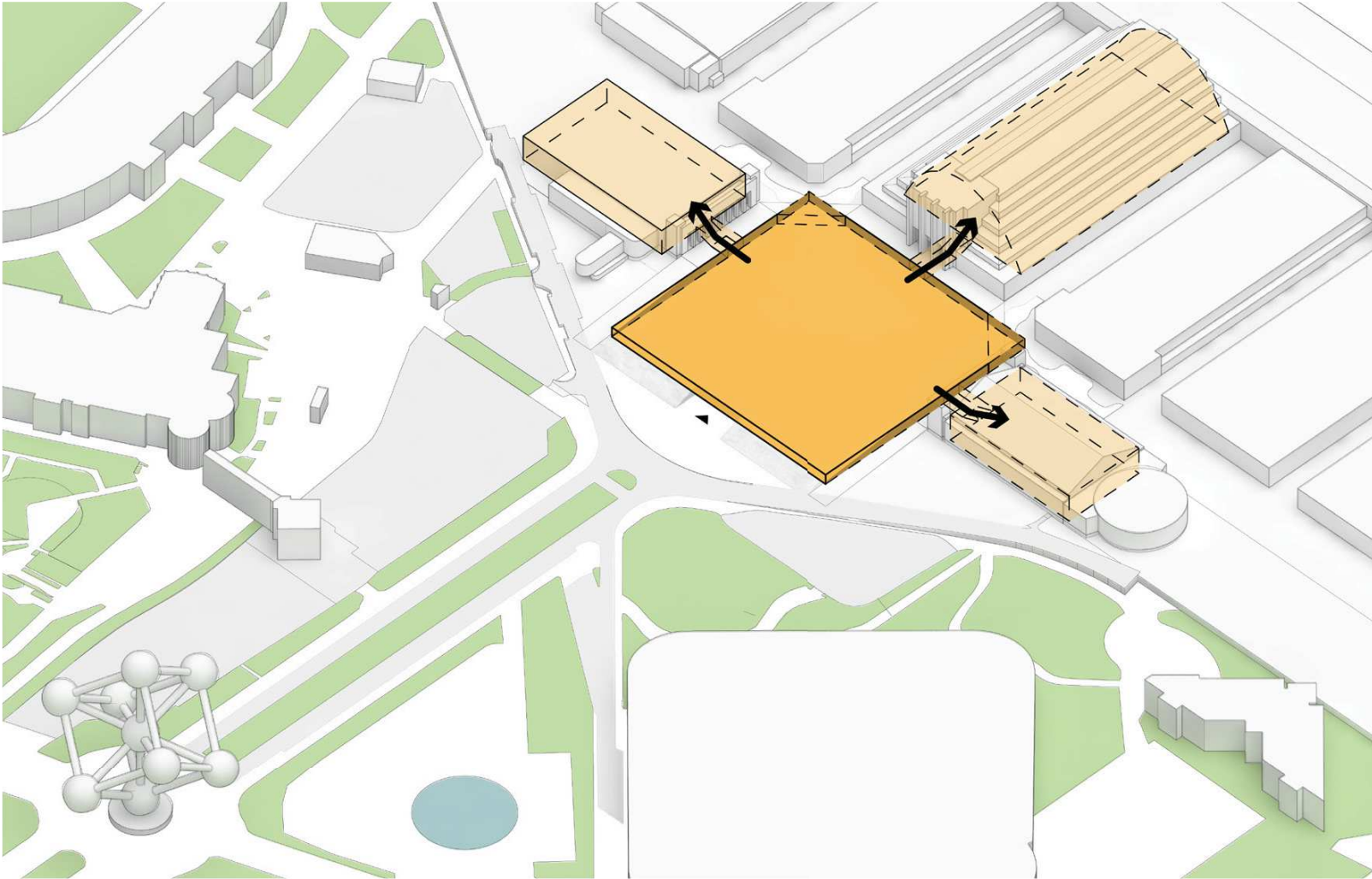
2022 @ Brussels Expo

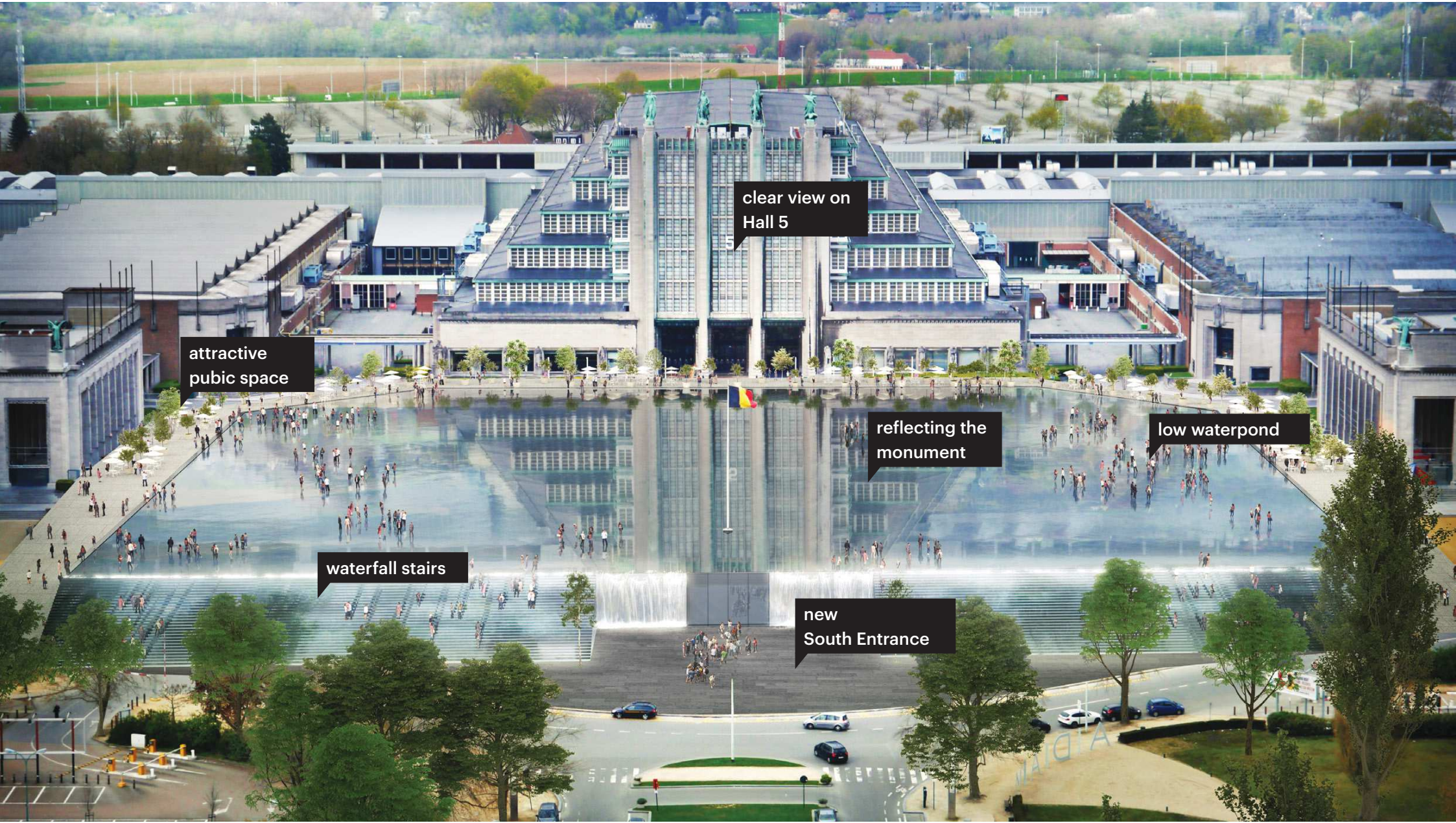
2022 : 8.882.700 SQM DAY
2018 : 11.427.366 SQM DAY

77%



LARGE INVESTMENT IN 2023 ?





clear view on
Hall 5

attractive
pubic space

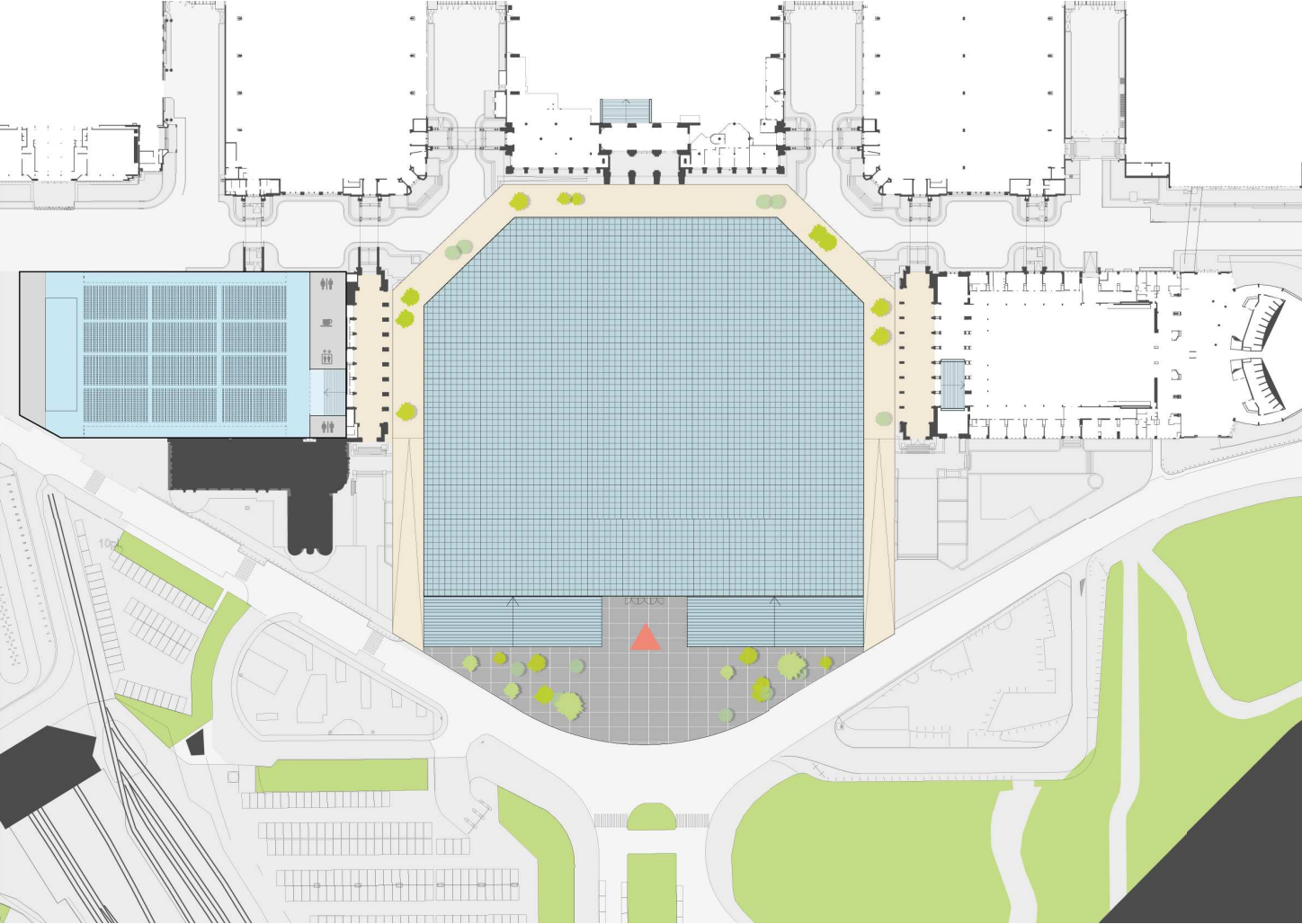
reflecting the
monument

low waterpond

waterfall stairs

new
South Entrance

Level floor hall 5



Level front plaza

