Exhibition Market Latin America

2011 | 2012

Trade Shows in Latin America: New Opportunities for International Exhibitors

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"At a time when free trade is seen as one of the factors that led us into recession, we need to support foreign trade as a way out of it."

Karel de Gucht
European Commisioner for Trade

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Marienstraße 5
70178 Stuttgart · Germany
Phone: +49 (0) 711 22 55 88 - 0
Fax: +49 (0) 711 22 55 88 - 11
www.localglobal.de

AFIDA
Asociación Internacional de Ferias de América

Carrera 37 No 24 - 67
Bogotá · Colombia
Phone: +57 (0) 1 44-5193
www.afida.org

In cooperation with:

AUMA
Association of the German
Trade Fair Industry

Littenstraße 9
10179 Berlin · Germany
Phone: +49 (0) 30 24 000 - 0
Fax: +49 (0) 30 24 000 - 330
www.auma-messen.de

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Latin America – an Emerging Exhibition Market

Andrés López Valderrama
President, AFIDA

Latin America has proven to be a strong region and a great place for economic activity. Its performance during the 2008/2009 world crisis was a lot better than most other regions like North America, Europe, Africa, and some parts of Asia.

Unlike previous downturns, most of the countries entered the crisis in a position of relative strength, with large stocks of foreign exchange reserves, flexible exchange rate regimes, low inflation, and healthy banks.

Latin America was cushioned thanks to the use of responsible macroeconomic policies. In a recovery period, signs of confidence in the region are plentiful: an increased demand for the region's exports (especially commodities), a boost in consumer spending in domestic markets and a high level of foreign direct investments.

It is not surprising, therefore, that Latin America is back on track and ready for a solid recovery in 2010, with an expected growth rate of over 4 percent, which is faster than in most of the world's other regions.

Its economic performance and positive forecast for the coming years position the region as a great place to be for investors and companies looking for booming markets. It's not only good economic conditions that attract buyers and investors, but also high levels of information and good knowledge as well as understanding of the market.

One of the biggest problems for our region's exhibition industry is the lack of reliable data and specific information on key aspects like infrastructure, key players, trade shows, and the economic impact generated by the industry, and so on.

Only a few exhibition organizers, venues, national associations, chambers of commerce or pro-business companies carry out investigations and offer reliable information and statistics on the exhibition industry of their respective countries.

Practically no exhibition organizer reports its economic activity to our association or to any other entity that measures the industry, preventing the market from having accurate data on the industry's size.

There is no unified use of the industry's terminology, no understanding of international standards, and no well known concept of which elements are needed to professionalize the industry.

This is why we decided to create this book and provide professional information for those working in the exhibition industry or with and interest in entering our market.

Updated and reliable information in this edition includes aspects like market size, the economic impact of exhibition activities in the various countries, the available infrastructure, key players, trends and recommendations on how to enter the market and on how to improve and professionalize it.

"Exhibition Market Latin America 2011|2012" is the best road map of the industry in the region. Our book offers a great overview for those who have seen that our market has evolved and entered into a new perspective, with efforts underway to professionalize the industry.

During the past 5 to 7 years, parallel to the great performance of the region's economy, the exhibition industry in Latin America has grown and proved to be a great marketing tool. New events are being created every year, international exhibition organizers have shown an interest in the region and have entered the market, a higher number of attendees are going to our trade shows, and new and innovative elements are being incorporated in the exhibition practices.

The development of the exhibition industry in Latin America goes hand in hand with the economic development of our countries. Countries with a stronger economic performance have developed more stable, powerful and professional exhibition industries. Less developed countries lack information, international exhibition organizers, well built infrastructure, professional events, and so on.

In these two types of exhibition markets – the developed and the less developed – there is a need for reliable data, standardized terms and concepts, professionalization of the industry, education and internationalization.

During the last 40 years, AFIDA has been the only Association in the continent that fulfills these needs by promoting, defending and working for the exhibition industry in Latin America. Our members, major venues and exhibition organizers in Latin America and

Spain strongly believe that our region is ready for investors and international exhibition organizers that want to enter our market. We welcome you to trust our market and help us to keep positioning our region as one of the most challenging and interesting regions for the global exhibition industry. ■

Andrés López Valderrama
President of Corferias, International Exhibition Center of Bogotá
President of the International Association of Exhibitions in Latin America, AFIDA

Andrés López Valderrama holds a Law degree from Universidad del Rosario in Bogotá where he graduated with honors as one of the best and more disciplined students in the history of the University. He also completed studies at Universidad de los Andes obtaining a MBA in Business Management and a Specialization in Financial Law. From 2001 to 2006 he held the position of Executive Vice-president of the Bogotá Chamber of Commerce.

In 2006 he was elected President of one of these subsidiaries, Corferias, International Exhibition Center based in Bogotá, Colombia. As President, he has been responsible for modernizing and internationalizing the company with great results, transforming Corferias in the major Exhibition Center and Exhibition Organizer in the Andean, Caribbean and Central American Region and planning to position the venue as the second biggest in Latin America. His great vision of the trade fair industry allowed him to increase the participation of international buyers in Corferias in 65%, launch 15 new trade shows, and include innovative elements that boosted the net profit in more than 86%, all in a period of two years.

Since April 2008 he has been the President of the International Association of Fairs in Latin America, AFIDA. His knowledge of the Latin American market and his efforts to develop the industry in the continent led him to be one of the members of the UFI Board of Directors since 2008.

Trade Shows in Latin America: New Opportunities for International Exhibitors

Dr. Peter Neven
Managing Director,
AUMA

Output markets in Eastern Europe have crashed, particularly in Russia, and their dynamics have decreased in Asia. German enterprises, focused on export, are once again intensifying efforts to find alternatives. Latin America boasts a very lucrative potential.

Output markets in Latin America are by no means new, but many companies have only recently rediscovered it - or they may rediscover it soon. Only 10 years ago it was a main item on the agenda of export economies. Based on favourable economic framework conditions boosted by appropriate, significant economic data, such as the increase of GDP and stable exchange rates, many companies looked forward to opening successful output markets. These expectations have not always been fulfilled. These promising markets have suffered the effects of numerous economic and financial crises, e.g. Mexico 1994/5 (financial crisis), Brazil 1998/9 (financial crisis), Chile 1997/8 (economic crisis due to crisis in Asia), and Argentina 1998-2002 (economic crisis). The focus has significantly shifted towards Asia. Despite the rapid economic growth of crisis-stricken countries, disenchantment with Latin American markets is still vivid in general memory. Companies who do not possess detailed knowledge of the region have long looked at it with considerable reservations. Presently, the political currents in several Latin American countries, emphasising the state's influence on economy, have served to increase the scepticism of foreign enterprises.

The German (and European) exporters and company branches have not been fooled by these preconceptions and have not given up on these lucrative markets. The German Ministry of Foreign Affairs states that ca. 1,200 German enterprises are conducting business in Brazil. With the employment figures at ca. 250,000 employees, these companies are responsible for approx. 7 percent of Brazil's industrial GDP. The share of direct German investments in this South American country grosses at over 25 billion Euro. The São Paulo region boasts the largest concentration of German businesses abroad in the world.

Even the increased Asian demand for Latin America natural resources has not drawn any significant interest from European exporters to this region. The export crash, touching also the main destination export countries in the wake of the global financial and economic crisis of 2008/2009, has resulted in shifting the focus to Latin America. This interest has also been observed in companies that have only recently emerged in the market. Currently there are reports of significant interest from German entrepreneurs participating in Latin American trade fairs. This is indicated by factors such as the increased presence of Germany in Latin American fairs, from 12 planned events in 2010 to 18 planned in 2011. This interest is focused mainly on Brazil. The foreign fairs participation program of the Federal Republic of Germany is detailed on page 220.

Companies in countries that are significant for export purposes can expect a wide range of functional trade fairs. The term "functional" should however not be equalled to Western European standards. A trade fair is certainly influenced by local trade customs and the trading possibilities of the destination country (see also page 166 "Preparation: What do European Exhibitors Need to Know and Do before Going to Latin America?").

Traders, decision-makers, and people involved in issuing decisions will find trade fairs to be an important source of information. Domestic manufacturers and traders use them to find customers and maintain trade relations as well as introducing products and services into the market. Branches and representatives of foreign companies usually employ fairs as a significant marketing instrument, emphasising their presence. Fair participation is to be understood as a fulfilment of general trade fair objectives, such as customer care and maintaining trade relations, the introduction of products and services into the market, market observation, and cultivation of market image but also to increase the sale volume. Products aimed at a specific market are significant for successful fair participation, as are the correct choice of events, optimal preparation for participation, and activities pursued after the completion of fairs, including intensive follow-ups. For most industries, the exhibitions are first and foremost a platform for communication, and only then for sales. At the trade fair decisions will be prepared. Before participating in the fair for the first time as an exhibitor, the event can be used for measuring the opportunities and abilities of a specific output market. As visitors, company representatives can gauge the market transparency both in the field of competition present at the fair, as well as the fields of customer preferences, the influence of booth layout and their decoration, the specifics of local culture, and customs in trade and negotiations.

Just as the Latin American markets are nothing new, the trade fairs are far from being a new marketing instrument in the continent. In some countries trade fairs boast a long tradition. In several countries trade fairs have been organised for over a century.

The trade fair market in Latin America is not homogeneous. Every country has to be researched according to its fair's potential. Trade fairs require a critical mass of market participants and market potential. In some Latin American countries this minimum potential has not yet been reached. Consequently, trade fair economy is diversified. It is possible to find a representative for every part of the trade fair spectrum, from general multi-industry exhibitions in Cuba, Uruguay, and Paraguay to highly specialised trade fairs in Brazil and Mexico.

The oldest fairs, i.e. multi-industry and agricultural fairs boast a history longer than 100 years, such as EXPO PRADO hosted in Montevideo (Uruguay). However, tradition is not a reliable factor for the further development of a fair trade. It should be approached from the market perspective. Specialised markets with satisfactory potential form the basis of a modern, specialised market economy. Such markets have, however, emerged in countries where traditional multi-industry and agricultural fairs have not played any significant part, i.e. in Brazil and Mexico (both these trade destinations will be described in a further section on page 112 "Market Information, Research, Figures on Exhibitions"). ■

Dr. Peter Neven
Managing Director
AUMA, Association of the German Trade Fair Industry

Exhibition Market Latin America 2011 | 2012

1. Entering New Markets: Business Perspectives

Economic Development and Post–Crisis Recovery – General Overview

Peter Rösler
Manager of the Lateinamerika Verein, the German Business Association for Latin America

The crisis that started at the end of 2008 temporarily halted Latin America's economic boom phase. In 2009 the combined gross domestic product (GDP) of the region shrank by 1.8% and per capita income by 2.8%. This was mainly due to Mexico being drawn into the US maelstrom by its NAFTA membership. Altogether, the region managed to survive at a considerably higher level than that of the boom year 2007. Also, recovery already began in the 2nd quarter of 2009. Latin American countries had gone into the crisis with unprecedented liquidity and solvency as well as much stronger domestic markets. Therefore, the contraction of their economies was much smaller than that of the industrialized countries.

Furthermore, in the years to come it is to be expected that Latin America will perform a lot better than the industrialized world. However, compared with Asia, Latin American growth rates will probably remain at a lower level. Nevertheless, Latin America's exporters of agricultural and mining commodities will, in particular, benefit from the rapidly growing Asian economies. Already in 2009 China became the most important export partner of a number of South American countries. As a further result of strong growth in trade with Asia, Latin America might be tempted to turn away from its traditional business partners in Europe and North America and to align itself closer with Asia.

Asia's demand for agricultural and mining products is bound to return to the high pre-crisis level and keep on growing. As a result of reviving Asian demand, commodity prices already started to recuperate in the second half of 2009. This tendency has continued up to the present and might continue well into the year 2011. However, on the whole commodity prices tend to be more volatile than before the crisis.

The reason for the fast recovery of Latin America after only one year of recession can be found in the five years preceding the crisis. From 2004 to 2008 Latin America's GDP had grown by 30%. At the same time, per capita income rose by 22%, i.e. by 4.4% per year. In the 23 years before that, Latin America's per capita income had shown only an infinitesimally small increase, totaling 2.9% overall. That means that yearly per capita growth amounted to less than 0.1%!

The boom phase increased the weight of Latin America's economies by nearly a third. It has also increased the importance of Latin America as a global trade and investment partner. Today the combined GDP of Latin America amounts to US$ 3.8 billion. This means that it lies somewhere between Germany's GDP of US$ 3.2 billion and China's GDP of US$ 4.8 billion. However, if we measure the purchasing power parity, Latin America's combined economy is more than twice as large as that of Germany.

The region's key problem remains the huge income disparity. Poverty and exclusion from democratic participation constitute the breeding ground for populism. Even though most governments of the region have become more socially responsible and to a certain extent left-leaning, only five Latin America governments openly reject the free market economy and globalization. Four of these countries belong to the poorest in the region. Together, all five make up approximately 12% of the combined GDP and the population of Latin America. Their state interventionist policies have resulted in a sharp drop of international investors' confidence. It has never been more difficult to make general statements on the region than now. Latin America is not only divided politically. Some countries have a strong and well-balanced economy (Brazil), while others are small or depend on few products, or even just on one (Venezuela). To complicate things further, whereas some countries enjoy a worldwide set of trade partners, others do most of their trade with only one country (Mexico).

There are other aspects that allow a division of the region in two: Mexico, Central America and the Caribbean are more affected by the course of the US economy than South America. Because of NAFTA, the Mexican economy is closely intertwined with its US counterpart. Central America and the Caribbean likewise have strong economic ties with the US, whereas in South America the EU plays the more important role as a business partner. Furthermore, the economies of South America and China are complementary. This is not so in the case of Mexico and Central America, whose products compete with manufactured articles from China.

The reason for the fast recovery of Latin America after only one year of recession can be found in the five years preceding the crisis.

The winners of 2010 and 2011 will be the commodity exporters Argentina, Bolivia, Brazil, Chile and Peru. Because of political reasons, Colombia will have to cope without its second most important export market, i.e. Venezuela. It remains to be seen whether growing exports to China can compensate for this loss. Venezuela's economy is faced with two challenges: dependence on oil and growing state intervention. Therefore, another year or two of low growth or recession are possible. The speed of recovery of Mexico and Central America will not least depend upon this years' performance of the US economy. In the case of Mexico, overcoming the reform backlog would offer additional growth impulses.

Latin America's private sector companies have weathered the crisis in relatively good conditions, in spite of the shortage of financing, high exchange rate volatility and the temporary devaluation of the national currencies.

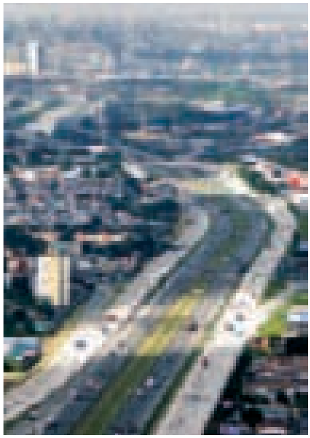
As a whole, Latin America is today better equipped to resist a recession than before the start of the 2004 boom phase. Most Latin American countries have made good use of the growing export revenues and capital inflows of recent years. They managed to reduce public debt, the debt servicing burden, fiscal deficits and inflation rates, while private investment and consumption, the savings ratio and flotations on the internal financial markets have increased. The total sales volume of Latin American bond issues on the internal financial markets increased to more than US$ 1.2 trillion. This means that dependence on capital inflows decreased. Foreign exchange reserves are approaching US$ 550 billion.

Already in 2009, Latin American stock markets recovered from the downwards movement that caused a crass undervaluation of Latin American shares. Stock indexes returned to levels not far from historical peaks. New record levels should be expected in the course of this or the coming year. At present stock markets all over the world are suffering from investor nervousness as a result of the Greek and Euro crisis. But because of low interest rate levels in the industrialized countries, investors will continue to go after risk capital investments in the emerging markets and also in Latin America. However, high capital inflows will again contribute to the appreciation of the region's currencies with adverse effects on export competitiveness.

Latin America's private sector companies have weathered the crisis in relatively good condition, in spite of the shortage of financing, high exchange rate volatility and the temporary devaluation of the national currencies. Their earnings and their investments are once again increasing. A continuation of this tendency is to be expected in the coming year too. Latin America's financial system likewise turned out to be relatively robust. Because of high internal interest rates it had luckily abstained from buying US trash bonds. And what's more, it has not only survived the crisis but has even gotten stronger as a result of mergers and acquisitions. Today the financial sector of the region is in an even better position to withstand external pressures. The exceptions are countries that nationalize commercial banks and other private activities.

Latin America has ceased to be the Cinderella of the world. Its wealth of natural and energy resources and agricultural potential plays an increasingly important role for the region's position within the world economy. The abundance of natural and food resources is a solid foundation for long-term strategic cooperation with Asia. The prices for Latin American export products will remain at a high level. Rising salaries, growing private investment and expanding credit volumes are strengthening the region's domestic economic activity. Latin American industrial production is growing in quantity as well as in quality. At the same time, the number of large Latin American corporations active on the world stage and the outflow of foreign direct investment from the region are on the increase.

Moreover, fast growing domestic markets are an important advantage throughout most of Latin America. For example, in Brazil the percentage of the middle class as a proportion of the total population rose from 34% to 49% in only four years, between 2005 and 2009. At the same time, the percentage of those in low income classes decreased from 51% to 35%. Two additional aspects are worth mentioning: This process continued well into the crisis year 2009 and monthly pay increased the most for low income earners. Altogether, Latin America is a middle income region with more than 560 million potential consumers.



In Brazil the participation of the middle class in the total population rose from 34% to 49% in only four years between 2005 and 2009.

Already in 2009, many Latin American governments adopted substantial countercyclical measures to fight the crisis and to overcome its most harmful effects. These measures included comprehensive infrastructure and social programs, increased government spending, the provision of abundant liquidity, as well as tax reductions for the stimulation of domestic consumption. Whereas the latter are being phased out step by step, both the infrastructure and the social programs continue. Brazil alone intends to spend nearly US$ 5 trillion in cooperation with the private sector on infrastructure by 2030. Many other Latin American countries will also spend large sums to overcome the present acute deficiencies in this area.

In the last few years the attractiveness of Latin America as a trade and investment partner has grown for European and especially German companies. With stocks of more than US$ 72 billion, German investors take third place in Latin America behind the US and Spain, due to, among other factors, a high reinvestment level. The most striking example of a fresh investment is the huge new ThyssenKrupp steel mill near Rio de Janeiro. Most of the companies with production activities in the region finance their investments above all from their local cash-flow.

German direct investment in Latin America is concentrated in car manufacturing, the chemical and pharmaceutical sectors, electrical engineering and machine building. For the first time in nearly 20 years we can also see new Latin American investment and trading projects from small and medium-sized German companies which were hitherto not active in the region. Apart from that, there is some

German investment in infrastructure, agriculture, tourism, mining (including oil and gas production) and the financial sector. Further activities in non-traditional sectors are to be expected in connection with the World Cup and the Olympic Games in Brazil.

The implementation of outstanding structural reforms and reforms to enhance productivity might further improve the region's growth chances.

Growth Results and Perspectives of Latin America (in %)

GDP growth	2006	2007	2008	2009*	2010**	2011**
Argentina	8.5	8.7	6.8	0.9	5.0	3.5
Bolivia	4.5	4.6	6.1	3.5	4.5	4.0
Brazil	3.7	5.7	5.1	-0.2	6.0	4.5
Chile	4.0	4.7	3.2	-1.7	4.7	6.0
Colombia	6.8	7.5	2.4	0.4	2.8	4.3
Costa Rica	6.9	7.8	2.6	-1.1	3.5	4.2
Cuba	12.5	7.3	4.1	1.4	3.0	3.5
Dominican Rep.	10.1	8.5	5.3	3.5	4.5	6.0
Ecuador	4.3	2.5	6.5	0.4	3.0	2.5
El Salvador	4.2	4.7	2.5	-3.5	1.0	2.5
Guatemala	4.6	6.3	4.0	0.6	2.5	3.5
Honduras	5.8	6.3	4.0	-1.9	2.0	2.0
Mexico	4.8	3.4	1.3	-6.5	4.5	4.5
Nicaragua	3.7	3.2	3.2	-1.5	2.0	2.5
Panama	7.9	12.1	10.7	2.4	5.0	6.3
Paraguay	4.0	6.8	5.8	-3.5	5.3	5.0
Peru	8.0	8.9	9.8	1.1	6.0	6.0
Uruguay	4.6	7.6	8.9	2.9	5.4	4.5
Venezuela	10.3	8.2	4.8	-3.3	-2.0	1.0
Latin America* **	**5.8**	**5.8**	**4.1**	**1.8**	**4.1**	**4.3**

** Preliminary 2010* *** Outlook 2010, 2011* **** Weighted average*

In 2009, Latin America successfully demonstrated its capacity to fend off the worst effects of a major external crisis. This has never before occurred to such an extent. In the years 2010 and 2011 the region could return to growth rates near pre-crisis levels. The forecasts exceed 4% per year. The implementation of outstanding structural reforms and reforms to enhance productivity might further improve the region's growth chances. Altogether, Latin America's boom phase could continue unabated for many years if further crashes of the world economy can be avoided. ■

Peter Rösler

Manager of the Lateinamerika Verein, the German Business Association for Latin America

Country Reports: Brief Data on Recent Macroeconomic Developments in Latin American Countries

Argentina: A Strategic Investment Location to Meet the Demand of Global Markets

Dr. Beatriz Nofal, President of Argentina's Investment Development Agency

Argentina is experiencing its eighth year of sustainable economic growth after a temporary slowdown imposed by the international financial crisis in 2009. The 2010 projections for Argentina forecast an economic growth threshold of 3.5% (IMF, 2010); while most analysts are confident that GDP will grow between 5% and 7%[*]. The optimistic outlook for the country is underpinned by a global recovery that is taking hold faster than originally projected. Emerging and developing economies are leading the current world recovery while some advanced economies are bouncing back. Argentina's economy remains strong and the country is well prepared to take advantage of the opportunities that the new global scenario offers.

Between 2003 and 2008, Argentina experienced six years of vigorous economic recovery and expansion, growing at an annual average rate of 8.5%, making it one of the fastest growing economies in the world. Growth was based on strong macroeconomic fundamentals including twin trade and fiscal surpluses, lower GDP-to-public debt ratios, an increased flexibility in monetary and exchange rate policies and a substantial accumulation of international reserves. In addition to these factors, higher levels of profitability and renewed competitiveness boosted domestic and foreign direct investment, strengthening the country's productive capacity. Such factors provided the country with greater resilience in the face of the global financial crisis than in the past. In fact, while the local economy was not unscathed by the international crisis, the country was able to ride out the global storm, sustaining a positive economic performance, and growing at 0.9% in 2009.

In the medium and long term, Argentina's proven macroeconomic strength combined with global structural trends create additional opportunities for the country to resume sustainable development with social inclusion, a process begun in 2003. Global and regional trends are well aligned with Argentina's comparative and competitive advan-

[*] *The ECLAC estimates, the GDP will grow 4% in 2010, while official agencies (such as the Secretariat for Economic Policy) and private consultants, such as Estudio Bein & Asociados, the Argentine Tax Analysis Institute (Instituto Argentino de Análisis Fiscal) and Abeceb.com, predict that the rate of growth will be above 5%.*

tages, making the country a strategic investment location. Four global trends illustrate the growing complementarities between Argentina's capacity and global market needs.

First, rapid economic growth in developing economies (especially in Asia and the Middle East) is creating a greater demand for food around the world. At the same time, the shift in consumption habits in developed economies is leading to an increased demand for highly differentiated gourmet and organic food products. Argentina is one of the world leading food producers and exporters with some of the highest crop yields in the world. However Argentina is renowned for the quality of its production, not only for efficiency. And while Argentina is a leading global exporter of products such as soybean oil, lemon juice, honey, and pears, the country's diversified production has earned Argentina the position as the fifth largest wine producer in the world and a reputation for gourmet and high quality beef. Argentina is also anticipating the growing demand for differentiated and eco-friendly food products, and is ranked second worldwide in terms of organic crop areas. Furthermore, major advances in biotechnological developments specifically targeted at the food industry have continued to enhance the sectors prospects throughout the country. In this way, the country is uniquely positioned to respond to the increase in demand for food products from the more dynamic emerging economies as well as from consumers seeking greater sophistication and specific attributes from products with increased differentiation and added-value.

A second global trend creating new opportunities for Argentina is the central role climate change and environmental sustainability play in the global agenda. The recovery and growth of the world economy will lead to even higher energy demands. Both these trends have turned the spotlight on the development of clean and renewable energy sources. For instance, several developed and developing countries have established mandatory biofuel blend mixes that guarantee a growing demand for cleaner energy sources. Argentina is one of the world's leading biofuels producers and is the largest biodiesel exporter in the world. Furthermore, the country's broad range of high quality natural resources, expert human resources and well established technological capabilities in the energy sector are a unique platform to support and foster future developments. Argentina offers high potential business opportunities for the development of second generation biofuels such as those based on algae and jatropha (neither of which compete with food crops) and for further advancements in wind and solar power generation. In fact, leading Argentine companies are already exporting wind power technology to locations around the globe.

A third trend is the continued move towards global value chains dominating production, as companies reach multiple locations and suppliers to remain competitive and efficient. More and more, multinational corporations are relocating their production processes to different countries and regions across the world with the objective of leveraging their competitive advantages and maximizing the specific capacities of each economy. Once predominantly the manufacturing sector, today outsourcing has extended to a wide array of services such as accounting, software and customer care.

The talent and quality of Argentina's human resources is positioning the country as a preferred location for high value added professional services in areas such as software, IT, design, architecture, culture and finance. Argentina is the fifth best location for outsourcing services, just below the US, India, the UK and China (Deloitte), while its capital city, Buenos Aires, is the 14th most attractive city in the emerging world for outsourcing activities (Global Services). The country's human resources, also renowned for their creativity, have earned Argentina a place as the fourth largest exporter of TV content worldwide. Argentina is also considered one of the three best places in the world to look for and produce ideas, right after the US and the UK (Gunn Report). In addition, investors value the country's convenient time zone and the population's outstanding English skills. A modern system of telecommunications provides additional support to the services sector.

The talent and quality of Argentina's human resources is positioning the country as a preferred location for high value added professional services.

Argentina can benefit from the global relocation of specific production segments, particularly from those concerning differentiated manufactured products or those with design, two areas the country stands out in. A longstanding industrial tradition and a diversified industrial structure give Argentina an edge in high potential and value added industrial production segments. From pharmaceuticals to metal works, automotives to nuclear reactors, the country offers a myriad of attractive business opportunities. Furthermore, as a member country of MERCOSUR, Argentina grants investors access to a regional market of 250 Mio. people.

Finally, while still an incipient phenomenon, the increasing role played by certain emerging economies in the creation and development of new technologies holds great promise for Argentina. Some developing countries have already made a name for themselves as innovators creating technological solutions specifically designed to target local or regional needs. Once again, the outstanding quality of local human resources, the vibrant network of internationally-renowned scientific institutions and strong public sector support are some of the many advantages that Argentina has to become a regional R&D hub. Argentina has the highest average number of patents per million inhabitants in

Latin America (1963-2008) as well as the highest number of researchers per million inhabitants. The country's exceptional capacity is reflected in a wide variety of awards, ranging from the highest number of Guggenheim scholarships to the highest number of Nobel prizes in sciences awarded in Latin America. The favorable global context for Argentina is further enhanced by an extraordinary opportunity at a regional level. Over the next decade, Brazil, Argentina's main trading partner, is poised for strong economic expansion. Growth will be driven by the exploitation of the Pré-Sal oil fields, infrastructure projects and associated income from the World Cup in 2014 and the Olympic Games in 2016, the development of the real estate market and an expected increase in FDI inflows. During this process, the Brazilian currency will most likely tend to appreciate, favoring the relative competitiveness of several industrial segments in Argentina. Potential complementary business opportunities include Argentina's metal works industry in Brazils oil production plans; spin-off from increased FDI flows to the neighboring country; the consolidation of regional integration in the automotive industry; the development of infrastructure projects, and service exports related to the international events to take place in Brazil, to name a few.

To make the most of such opportunities Argentina is tackling some impending challenges in terms of investment. The government's decision to complete the debt normalization process initiated in 2005 is a case in point. Argentina has already launched a debt-swap offer to exchange the defaulted bonds voluntarily held out of the 2005 settlement. ■

Dr. Beatriz Nofal
President of Argentina's Investment Development Agency

Argentina's Investment Development Agency

Since beginning operations in early 2007, Argentina's Investment Development Agency, ProsperAr, has been working to contribute to the development of national and foreign investment, as well as to foster the internationalization of Argentine companies. ProsperAr's aims are to encourage a productive and export-oriented investments which are both quantitatively and qualitatively consistent with the opportunities and challenges Argentina faces today. The agency's vision reflects world developments as well as Argentina's advantages with the objective of maximizing the country's position as an open economy and an attractive investment destination.
www.prosperar.gov.ar

Highlights on Brazil

Alessandro Teixeira
President of Apex-Brasil and WAIPA

The combination of institutional and macroeconomic stability, sustained growth, and strong policies for social inclusion and wealth distribution projects a new Brazil in the international arena. These changes, coupled with the existence of a modern and robust financial system, along with a rigorous balance of public accounts, made Brazil stronger than most countries to face the effects of the international financial crisis triggered in 2008. These facts, added to a strong domestic market and counter-cyclical measures adopted by the Federal Government, resulted in Brazil gaining prominence in the international scene.

As the ninth largest economy in the world according to the International Monetary Fund (IMF) and the largest in South America, Brazil plays a strategic role in the economic and geopolitical arena. Today, the country shows a balanced combination of steady economic growth and environmental sustainability, which, together with effective measures for better distribution of wealth, in recent years, created a friendly climate for new business opportunities. The flow of foreign investments into Brazil is rapidly increasing and a strong expansion of economic activity is expected in the coming years. Estimates of economic consultants around the world are that Brazil will reach the fifth position in the ranking of the world's largest economies over the next decade.

Among the differentials offered by Brazil are a strong economy, with creative and dynamic businesspeople, diversified industry and an efficient export structure, institutional stability, a broad and growing consumer market – with a population of 192 million people - and a unique combination of favorable climate, fertile soil and abundant natural resources.

Brazil is the largest exporter of coffee, beef and poultry, juices, sugar, and ethanol in the world, in addition to owning the largest commercial cattle herd in the world. It is the leader in deep water oil exploration - being the first country to explore the pre-salt layer - in the production of midsize aircrafts, in technology for tropical agriculture and in the use of ethanol on a commercial and sustainable scale.

Following a sustainable economic growth path, Brazil has gained international credibility and became part of the strategic plans of large multinational companies. Investors and consumers from around the world come to learn about Brazil and the various business opportunities offered by the country. Data from the Central Bank of Brazil (Bacen) show that, between 2003 and 2008, the flow of foreign direct investment increased at annual rates of 35%, from US$ 10.14 billion to US$ 45.06 billion, directed predominantly to large projects in the following areas: telecommunications, financial services, energy, water and gas. In 2009, the volume was US$ 25.95 billion due to the world financial crisis, which lead to a sharp drop in foreign direct investments worldwide.

Brazil is the leader in Latin America terms of investments on social programs; public investments are continuously increasing as an important part of our economic growth. Brazil is also engaged in discussions on climate changes, particularly in projects on sustainable development. The country is an example in the use of renewable energy, to prove that biofuels may contribute to the reduction pollutant emissions.

Reasons to invest in Brazil

- *Stable economic growth and environmental and social sustainability*
- *Macroeconomic and social structure for a long-term transformation period*
- *A vigorous domestic market*
- *Cultural and natural wealth, large and diverse population, favorable climate, fertile soil and abundant natural resources*
- *Foreign trade - opening up markets and multilateralism*
- *Rapidly Developing Education*
- *Renewable, abundant and clean energy*
- *Science and technology - reference in leading-edge sectors*
- *Skilled, creative and flexible workforce*
- *Friendly climate for investments – balanced and great opportunities*
- *Democratic and institutional stability*

What makes Brazil a major destination for foreign investments:

- As the ninth largest economy in the world, Brazil has a large consumer market, with over 190 million inhabitants. According to IBGE, by 2050, projection is that the population will reach 259 million people. The urban working class is growing, as well as their income.

- The scientific production in Brazil is in 17th place in the international ranking and the country is a reference in several high-tech niches, such as deep water oil exploration, aerospace industry, agribusiness, telecommunications and software design, particularly for the banking sector.

- With one of the largest oil reserves in the world, Brazil is a world benchmark in deep water oil exploration. With the discovery of oil in the pre-salt layer, Brazilian reserves will quadruplicate, rising from 12.8 million to 50 billion "BOE" (barrels of oil equivalent).

Petroleum industry

- Brazil has the cleanest energy matrix in the world, with almost half (44%) of the energy consumed being from renewable sources, while the world average is 14%. Despite the fact that no less than 90% of electricity is generated by sustainable sources, it is noteworthy that only one quarter of the potential for hydroelectric generation in Brazil has been explored so far.

Sugarcane crop for ethanol industry

- Brazil pioneered the usage of ethanol-powered or flex-vehicles (which run on gasoline or ethanol in any grade), which now account for half of its fleet and for 88% of new vehicles sold. Thanks to advanced agricultural technologies, Brazil produces sugarcane ethanol without subsidies, at the lowest cost in the world, and today it is the largest exporter in the world, with plans to expand production by 37% by 2015.

- It is the fourth largest aircraft producer and leader in the production of models for up to 120 passengers.

- It is the world's largest exporter of iron ore, coffee, soybeans, orange juice, beef, chicken, sugar and ethanol.

- It offers modern banking and telecommunication systems and the most diversified industrial base in Latin America and the Caribbean.

- The primary surplus has remained around 4% since 2004 and the debt / GDP ratio is falling.

- Since 2007, Brazil changed its status, from debtor to creditor in the international market. In 2009, the Brazilian international reserves reached the unprecedented level of US$ 239 billion, an increase of 156% as compared to 2003.

- Today, the country is a key global player, with intense contact with groups such as the G-20.

- The Brazilian workforce is abundant, and there is good supply of skilled workers in the major industrial centers.

- Qualified local managers are readily available, exempting the need for executives from abroad.

- The marketing and promotion industry is well developed, and the media advertisement is broadly used. ■

Alessandro Teixeira
President of Brazilian Trade and Investment Promotion Agency (Apex-Brasil), President of the World Association of Investment Promotion Agencies (WAIPA)

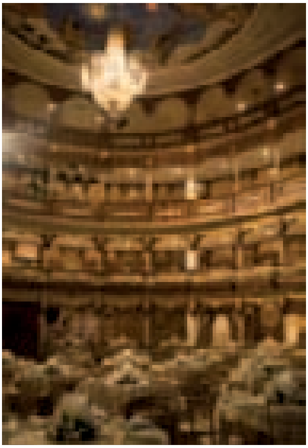
About Apex-Brasil

The Brazilian Trade and Investment Promotion Agency's (Apex-Brasil) mission comprehends a series of endeavors which include the promotion of exports of Brazilian products and services to foreign countries, the development of the internationalization of Brazilian companies and undertakings focused on attracting foreign investment into the country. The Agency seeks to increase the number of Brazilian exporting companies and to add value to the list of Brazilian exported products. On the other hand, the Agency also strives to consolidate the country's presence in traditional markets and to open new markets for the Brazilian products.

At the moment, Apex-Brasil gives support to over 80 sectors of the Brazilian economy, ranging from agribusiness to machines, technology, architecture and civil construction, entertainment and services to fashion and industrial equipment. The Agency develops and builds the image of these productive sectors by means of solid marketing activities and publicity campaigns directed to entrepreneurs and consumers of highly potential purchasing power. Every year, Apex-Brasil provides assistance to Brazilian companies' participation in more than 800 events – both in Brazil and abroad.

In order to strengthen the internationalization of Brazilian companies, the Agency has Business Support Centers that provide an excellent supporting services' structure. Located in Dubai, Miami, Warsaw, Havana, Peking and Moscow, these Centers provide assistance to companies interested in opening subsidiaries abroad in order to maintain goods and merchandise inventories, showrooms or regional offices.

www.apexbrasil.com.br



Teatro Heredia, Cartagena

Why Colombia?

Colombia is an ideal destination for doing business and enjoying the multiple leisure opportunities. It is the third largest country in the region. In addition, 77% of Colombians live in urban areas. The country also enjoys a favorable strategic location with coasts on both the Pacific and Atlantic Oceans, offering access to markets in the US, Europe, Asia, Latin America and the Caribbean. Here some reasons to invest in Colombia:

Improved Business Environment: During the past five years, the Colombian economy grew by 4% per year. In 2009, Colombia's GDP registered an increase of 0.4%, a positive growth during global recession. Colombia has the fifth largest economy in Latin America with a GDP of US$ 244 billion.

Human Resources: According to the IMD 2009, Colombia is the regional leader in entrepreneurship, highest labor force and is focused on costumer satisfaction

Ideal Export Platform: Colombia holds an advantage of having signed trade agreements. This gives companies preferential access to markets that extend to more than 1.2 billion consumers, a circumstance that is only enhanced by the strategic location of Colombia.

Incentives for Investors: In the 2010 "Doing Business Report," The World Bank ranked Colombia as the most business friendly country in Latin America. These incentives include:

- Free Trade Zones: the most competitive in Latin America because they offer up to a 50% tax break on sales into the local market. They also can be established in any place in Colombia.
- Legal Stability Contracts.
- 30% tax deduction on the cost of purchased machinery.

Quality of Life: Colombia has three of the top 30 universities in Latin America, 26 schools which give the SAT Test, 19 which are members of the International Baccalaureate Organization (IBO).

Investment Opportunities

The Ministry of Commerce, Industry and Tourism has developed the Productive Transformation Policy. This is based on two strategies: greater quantity and quality; and, the development of new and emerging sectors. These are designed to achieve sustained growth in both the economy and employment. After completing an analysis with the assistance of McKinsey, the following sectors were identified as unique business opportunities for investors and having government support in their development:

- Health Tourism
- Cosmetics and Personal Care
- BPO&O
- Software & IT
- Graphic Communications
- Electric Energy, Products and Services
- Textiles, Apparel, Design and Fashion
- Auto Parts

Cosmetics

- Market of US$ 2.6 million and production of US$ 2.4 million.
- Cosmetics exports grew by 23% between 2003 and 2007.
- Country with the second largest flora biodiversity in Latin America.
- Market for men's cosmetics is expected to grow 20% per year.
- Colombian women cosmetics pocket share duplicates the European women share.
- More than 242,000 professionals and technicians available to work in the cosmetic industry.
- Products with natural ingredients grew 9% between 2003 and 2008.

Colombia is the fifth largest economy in Latin America.

IT Services

- 27,000 business graduates and 13,000 engineering graduates per year
- Seven cities with more than 500,000 inhabitants
- Neutral Spanish accent
- Market: US$ 1 billion, growing at a rate of 42% in three years

Tourism

- 1.45 million foreign travellers visited Colombia in 2008.
- Tourism growth to Colombia (9.73%) more than doubled the worldwide growth (2%) - 2008 data.
- Income tax exemption for new or remodeled hotels.

Medical Tourism

Medical Tourism is the practice of travelling abroad to obtain healthcare services, generally at a small fraction of the cost in a person's home country.

- Pioneer Program in reproduction immunology; the first test tube baby born in Latin America; first pacemaker in the world.
- Colombia is the second best country for scientific and health infrastructure in Latin America: (IMD, 2008).
- 3,000 medical graduates per year.

10 Reasons to Host your Event in Colombia:

Auditorium Corferias, Bogotá

The gateway…
Located in the middle of the Americas, Colombia has a strategic geographic position. Its location makes it the gateway to South America and connects it to the rest of America, Asia, Africa and Europe with more than 610 direct flights every week.

A variety of choices…
Nowhere else in the world will you find such a variety of accommodations for every taste and budget. Choose from international and national luxury hotels or small and friendly boutique hotels. You will also find modern business hotels, traditional haciendas, tourist inns run by local families and indigenous dwellings surrounded by lush jungle or next to the sea.

Innovation and organization…
Choosing to hold your event in Colombia, offers more than a well-organized and successful event. Apart from a wide range of convention centers, exhibition areas and meeting rooms, the country provides all the necessary logistical services to make every event a success. Colombia stands out on the international level as it offers a great service for any kind of event, including innovative ideas that surpass corporate visitors' expectations.

365 days a year...

You can plan and host your event in Colombia any time of year. The country is located on the equator, giving it a pleasant tropical climate all year round without seasons.

Magical experiences...

The warmth of Colombia's people and cities creates a dynamic culture, well tuned to international trends. Samples of the large-scale events that have been held in the country include the World Economic Forum 2010, the 50th IDB Annual Meeting of the Board of Governors in 2009, the XVII World Tourism Organization Assembly in 2007 and Travel Mart Latin America 2007. These international events, as well as a myriad of local ones, attract thousands of visitors who fall in love with the country and the quality of the experience offered.

Open doors...

During your event, congress or convention, you will come across new possibilities for continuous learning and business opportunities. As an active member of the International Congress and Convention Association, and since the World Bank published the 'Doing Business' report, Colombia has been recognized for having the best business climate in Latin America. Colombia is also among the top ten countries in the world with the greatest reforms positioning itself as a quickly evolving country and a first-class tourist destination.

For each visitor...

Each individual visitor deserves the best service possible. The friendliness, warmth and passion of the Colombian people are national qualities. Colombia offers more than a platform for excellent quality, its people are the main reason the country has increasingly attracted foreigners looking for a destination to host events, do business or seek adventure and fun.

For everyone...

The diversity of its cities and tourist destinations means Colombia has something to offer for every kind of visitor. The variety of destinations, such as Bogotá, Cartagena de Indias, Café Triangle, Santander, Medellín, Cali, Barranquilla and Santa Marta, will surprise you with their fusion of modernity, history and culture, along with adventure, ecotourism, sun and surf. In this country of varied destinations, all visitors must put their imagination to the test and enjoy the journey that awaits them, along with the combination of coffee, flowers, emeralds and people who will give you the best the country has to offer.

You will be surprised...

Colombia is the second richest country in the world in terms of biodiversity and the first in birds, orchids and palms. We carefully preserve our cultural diversity inherited from our indigenous and European ancestors. Additionally, you will discover unique destinations that offer a selection of museums, fairs, festivals and cultural shows, collectively describing our country's history.

Millions of reasons for wanting to stay...

The incredible diversity means that Colombia offers activities for all tastes and preferences. There is a great variety of cuisine in Colombia, from exotic fruits, to seafood and cereals that supply the many excellent restaurants of world-wide repute. Our diverse landscapes and regions, rich in flora and fauna, invite you to take part in unforgettable experiences, including extreme sports and adventure activities. Furthermore, Colombia offers its visitors a top-class golfing experience. The country has over 50 challenging and varied courses, considered to be the best in Latin America. Each one has been designed in magical and exotic settings. All of this and much more proves that the only risk when coming to Colombia is wanting to stay. ■

Nubia Stella Martinez
President of PROEXPORT Colombia

PROEXPORT

PROEXPORT is the entity responsible for helping the country's economic growth through promoting exportation, international tourism and foreign investment in Colombia, supported by the Nation Branding strategy called "Colombia es Pasión" that aims to reduce the gap between the perceptions about the country and reality.

To reach this objective PROEXPORT has a systematic sales process and a "partnership" statement of work with clients that allows the creation, monitoring and closing business opportunities in international markets supported by sales offices in 18 countries around the world.
www.proexport.com.co

Mexico, a Nation of Opportunities

Mexico's Economic Outlook

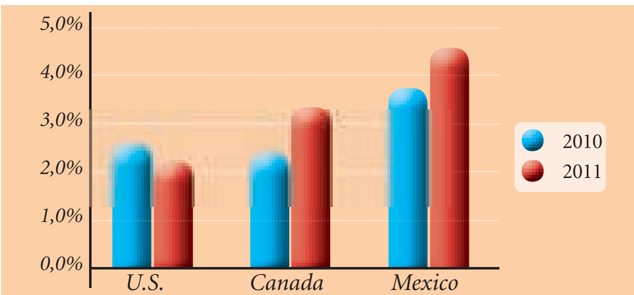
Along with most countries, Mexico was hard hit by the economic crisis that prevailed throughout the world in 2008 and 2009. GDP fell 6.5% in 2009 due to a weakened domestic demand as well as a drop in exports, a reflection of the decrease in world consumption. In particular, the United States, which absorbs over 80% of Mexico's exports, saw a sharp fall in the demand for items such as automobiles and consumer durables. This led to a 21% drop in Mexico's exports. The economic downturn in Mexico was also aggravated by the swine flu epidemic, which has had a negative impact in domestic consumption as well as other important economic sectors like tourism and entertainment.

Bruno Ferrari
CEO of ProMéxico

However, the Mexican government took decisive actions to help limit the impact of these negative trends. It implemented schemes to held export-oriented firms to maintain employment levels and raised investment in infrastructure, among other initiatives. This limited the loss of jobs (private sector employment fell less than 2%) and enhanced the future competitiveness of the nation. In addition, thanks to the prudent management of government finances and strict supervision of the banking system, Mexico avoided the financial volatility that has afflicted many nations. With the recovery of international demand in the second half of 2009, Mexico's economic prospects have brightened considerably.

Growth forecasts by economic agencies and institutions have risen steadily within the last year. The IMF now expects Mexico's GDP to grow 4.2% this year, considerably more than the rate forecast for the U.S. and Canada.

IMF Growth Forecasts



Source: IMF Word Economic Update, January 2010

Given Mexico's openness to foreign trade and investment, its prospects of growth depend on the expected evolution of the world economy. The current recovery is being led by exports; non-oil exports posted a positive year on year growth rate of 32% in March 2010. From the cyclical low of May 2009 to March 2010, non-oil exports have risen 36%. As a result, manufacturing output has also risen sharply (12% between June 2009 and February 2010).

SAMES Technicians, Querétaro

Mexico offers a stable macroeconomic environment for investors. Inflation averaged 4.5% between 2006 and 2009, compared to 6.7% for emerging markets as a whole. Country risk, measured as the spread in the yields of sovereign dollar bonds and U.S. Treasuries, has returned to pre-crisis levels. Mexico's country risk is one percentage point lower than the emerging markets average.

The Country's Advantages

Mexico offers many advantages for potential investors from different parts of the world. Reforms over the last two decades have provided investors with greater legal security and have improved the business environment for national and foreign firms. An example of this effort, the World Bank´s Doing Business 2010 rankings, which measure various factors related to opening and operating a business throughout the world (such as the time it takes to obtain construction permits) placed Mexico (51 place) higher than leading emerging economies such as China (89), Brazil (129), India (133) and Russia (120).

The country also offers one of the largest free trade agreement networks in the world, with 12 treaties covering 44 nations, which represent over one billion customers and 60% of the world's GDP. In addition, it offers a large, inexpensive pool of talented workers and professionals.

As a result, Mexico has been considered an excellent destination for establishing operating centers for diverse industries ranging from aerospace to IT services. Operating costs for manufacturing projects destined for the American market are almost 30% lower in Mexico than in the United States and 10% lower than China, according to Alix Partners*, a consultancy firm.

AT Kearney´s "Foreign Direct Investment Confidence Index 2010" ranked Mexico as the 8th most attractive economy for foreign investment position, an improvement of 11 places compared to the last index published in 2007.

** Alix-Partners U.S. Manufacturing – Outsourcing Cost Index. February 2010*

Strengths of the Mexican economy:

1. Market size: Population of 107 million.
2. Large exporting base: One of the 15 largest exporter nations in the world. Its manufacturing exports are greater the combined total of the rest of Latin America.
3. Demographic bonus: Dependant population ratio will fall to 46% minimum in 2025.
4. Biodiversity: Ranked 4th worldwide.

Legal Certainty for Foreign Investment

In order to offer a better and more secure environment for foreign investors, Mexico has reinforced and expanded its network of Reciprocal Promotion and Protection of Investments (RIPPA) agreements. These are an important part of the government's strategy to provide national and foreign investors with a legal framework that offers stronger protection for foreign investment in Mexico and Mexican investment abroad.

Nissan factory in Cuernavaca, Morelos

Mexico has signed 27 of these agreements with the following countries: Austria, Argentina, Australia, Belarus, Belgium, China, Czech Republic, Cuba, Denmark, Finland, France, Germany, Greece, Iceland, India, Italy, Korea, Netherlands, Panama, Portugal, Slovakia, Spain, Sweden, Switzerland, Trinidad & Tobago, United Kingdom and Uruguay.

President Calderon's administration has also undertaken a large number of reforms that have a direct impact on Mexico's competitiveness:

1. Investment in infrastructure, which reduces logistics and transportation costs, has increased from 3% of GDP between 2000-2006 to 5% currently (public and private investment of US$ 51 billion in 2009).
2. A Foreign Trade Simplification Program oriented to simplify customs procedures and operations.
3. An aggressive schedule to unilaterally reduce import tariffs (the average tariff will decrease from 10% to 8.3% immediately, and then to 4.3% by 2013).
4. Easing the regulation to start companies, in order to make the business framework more efficient, transparent and predictable.
5. A program for the development of Small and Medium Businesses (The "México Emprende" trust will have US$ 628 million in guarantee to boost SME loans by US$ 22.4 billion during 2009-2012).

6. Higher funding for science, technology and innovation.
7. Criminal Justice Reform and Public Security (The reform provided new and better tools for the procurement of justice).

Industrial Sectors and Investment Opportunities

Currently, ProMéxico is working to promote investments and exports in industrial sectors that offer the highest value to the country, in terms growth, employment, technology, innovation and human capital. However, business opportunities in traditional industries are also well supported through several governmental programs. While foreign direct investment fell over 50% in 2009, in line with the world average, many leading firms have maintained their investment programs in Mexico and others are entering the nation for the first time, attracted by the advantages it offers. Below we present a brief summary of the most notable investments by sector:

Aerospace: Since 2008, firms like Textron, ITR, SAFRAN, Triumph and Goodrich, to mention just the most important ones have undertaken investment projects for approximately US$ 940 million. All of these announcements consist in new project investments. The number of aerospace firms in Mexico tripled between 2005 and 2008.

Automotive: Leading firms such as Volkswagen, Daimler, GM, Ford and Chrysler have announced investments worth over US$ 10 billion in Mexico from 2006 to date.

Processed Foods: Leading firms such as Nestlé and Cadbury have opened facilities in Mexico during the past two years.

Chemical: Indy Group and Praxair from South Korea and the United States, respectively, have also pronounced their interest to invest in Mexico. The investment amount just for these two projects totals US$ 850 million, while Brazilian giant Braskem recently announced a US$ 2.5 billion investment.

Medical Supplies: Firms like Becton Dickinson and Carestream Health, from the United States and Canada, announced expansions with investment amounts above US$ 200 million.

Renewable Energies: Renovalia Energy, ACS and Acciona are planning on investing around US$ 1,970 million in wind power projects.

Tourism: Groups like Accord, NH, Sol Meliá, and Hilton have announced investment projects for approximately US$ 340 million in order to develop several tourist complexes around the country. Additionally, groups like Hansa Urbana, Terra Group and Banyan Tree Holdings have undertaken projects since last year for amounts above US$ 1,000 million.

Wind turbines in La Venta, Oaxaca

Final Considerations

It is clear that Mexico is one of the best business partners in the world. In the following years, the country will continue progressing in many levels, such as in infrastructure, legal certainty, education, deregulation and safety, among many others, with the goal of further improving its business environment. The road traveled and the goals set by the Mexican government and society will turn Mexico into the best place to do business. ■

Bruno Ferrari
CEO of ProMéxico

ProMéxico
ProMéxico is the Mexican government´s international economic promotion agency. Its mission is to promote exports of Mexican goods, attract foreign investment to the country and support the companies in their effort to enter international markets. We have a list of goods and sevices to help you export or invest successfully in our country.
www.promexico.gob.mx

Peru: an Attractive Investment Destination

Peru has been showing an excellent performance. During 2008, the GDP showed a 9.8% expansion placing us among the countries that grew the most in said period of time, which happened after 8 years of continuous growth. In 2009, when the majority of countries in the world shrunk in economic terms due to the international crisis, Peru registered a US$ 130,324 billion GDP equivalent to a growth rate close to 1%.

It is to be noted that during the last quarter of 2009 Peruvian expansion bordered 5%, which showed a capacity for quick recovery in the face of the international crisis.

Economic perspectives look favorable for Peru in the coming years, based primarily on the announcement of important investment projects, plus the high expectations for domestic consumption. We should add also the trust generated in the economic agents as a result of the responsible institutional management maintained by the economic authorities through time, independently of the political party in the administration at that time.

An aspect that sets Peruvian exports apart is their diversity, which includes mining, agriculture, fishing, hydrocarbons products, and diverse manufactures.

On the other hand, even though exports dropped in 2009 because of the international economic crisis, it was still four times the exports in 2000, and the average annual growth rate for the 2000-2009 period was 19.57%. Furthermore, imports also decreased significantly during the last year, thus the balance of trade still shows a profit in hard currency.

An aspect that sets Peruvian exports apart is their diversity, which includes mining, agriculture, fishing, hydrocarbons products, and diverse manufactures. Although mining is the sector responsible for an important percentage of the total of Peruvian exports, however there are also other exports like basic metals such as copper, zinc, molybdenum, iron and lead, plus precious metals like gold and silver.

Exports by Product Groups (US$ millions)

Group	2007	2008	2009
Traditional Products	21,464	23,796	20,571
Fishery	1,460	1,791	1,683
Agriculture	460	685	633
Mining	17,238	18,657	16,361
Oil and Petroleum Products	2,306	2,663	1,894
Non Traditional Products	6,303	7,543	6,160
Agriculture	1,507	1,912	1,823
Textiles	1,736	2,018	1,492
Chemicals	805	1,041	837
Iron & Steel Industry	906	908	560
Fishery	499	622	517
Metal-mechanic	217	324	357
Other	634	719	576
Other	114	190	154
Total Exports	**27,882**	**31,529**	**26,885**

Source: BCRP

Hub of the Pacific-South American Coast

The country's central location on the western coast of South America makes possible its projection as a regional productive and commercial hub.

Peru has the largest city in the region, Lima with its eight million inhabitants. At the same time the port of Callao, currently undergoing expansion, is the most dynamic on this coast. In addition, the development of the South American Regional Infrastructure Integration Initiative (IIRSA) will consolidate Peru as an efficient bridge for connecting the markets of South America, Asia and the United States.

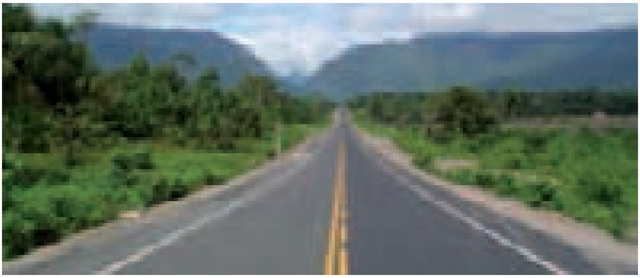
Peru is an attractive investment destination and an efficient exporter towards all of the world's regions.

Increasing Markets

Peru maintains a pro-active attitude with respect to its participation in integration mechanisms that make it possible to access broader markets, to which the investor in our country can gain access by harnessing our natural resources and competitive advantages.

The Trade Promotion Agreement (TPA) signed with the United States, which enter into force since February 1, 2009, consolidates the tariff preferences granted temporarily through the Andean Trade Promotion and Drug Eradication Act (ATPDEA) that have explained a large part of the dynamism of exports in recent years, and consolidates trade policy reforms implemented by Peru during the nineties.

Peru is a leading nation or "regional hub" in the South American Pacific area.



The negotiation of the TPA with the United States set new standards in terms of the movement of goods and services and the protection of investment, which served as the foundation for negotiating the Free Trade Agreements with Singapore, Canada, China and the EFTA countries, the Early Harvest Protocol signed with Thailand and the deepening of the Economy complementary Agreement (ACE) with Chile.

On this same foundation, negotiations are being developed for the deepening of ACE with Mexico and the signing of Free Trade Agreements with Japan. In addition, Peru is negotiating an Association Agreement with the European Union, a block that sets zero tariff for fishing, agriculture and textile products through the General System of Andean Preferences.

Peru is also a member of the free trade area agreed upon among the Andean nations that also includes Bolivia, Ecuador and Colombia (Andean Community of Nations) and that comprises a market of nearly 100 million inhabitants. Furthermore, in the framework of ALADI, the Latin American integration Association, Peru has signed ACEs with MERCOSUR.

Finally it should be noted that since 1998 Peru has been a full member of the Asia-Pacific Economic Cooperation Forum (APEC), whose market totals almost 50% of the world's population, which is being called to become a natural link between the industrialized economies of Asia and emerging economies in Latin America.

World Leaders that Produce Locally

There are numerous international groups from all regions of the world that maintain a presence in this country. It should be indicated that investment comes from both European (the largest portion provided by Spain and the United Kingdom) and North America countries (the United States, Canada and Mexico). In addition, there is an increasing trend among our South American neighbors to invest in Peru.

A sizable portion of these foreign investments relate to use of the country's natural resources, providing public services, banking and tourism and infrastructure construction, within the framework of companies' internationalization strategies.

In the case of investments originating from Asia, Africa and Oceania, the most important are investments in mining, hydrocarbons and also large corporations providing machinery and electrical goods.

Geographic Location

Peru is a leading nation or "regional hub" in the South American Pacific area. It is located in the middle of South America. With a total area of 1,285,216 km or 496,223 miles, it is the third largest country in South America and it is divided into three distinctive geographic regions: the Coast, the highlands (Andes), and the rainforest.

Peru has an extensive and mega-diverse territory strategically located in the central zone of South America over one of the largest oceans on the Planet.

The Amazon River, which passes through the Amazon Rainforest, connects the nation to Brazil and the Atlantic Ocean. The Andres Mountains link Peru with Ecuador, Colombia, Bolivia, Venezuela, Chile and Argentina through routes that tend to follows the legendary Incan trails. With the Pacific Ocean, Peru connects with APEC member countries - which Peru is a member - to one of the most important, rich, and growing markets in the world.

Peru is the leading exporter of asparagus and paprika in the world.

Peru is a country that features practically all of the planet's climates, with remarkable natural, mining, and power resources.

Due in part to these natural advantages, Peru is:

- The leading exporter of asparagus and paprika in the world
- The leading producer of fish meal and oil
- The leading producer of Alpaca and Vicuña fibers
- The leading producer of silver world-wide
- An up-and-coming net hydrocarbon exporter

And in Latin America, Peru is:

- The leading producer of gold, zinc, tin and lead
- Second in copper, in addition to a leader in other metals
- Third largest country in South America and
- Second largest in area of natural forests
- One of the leading textile exporters (with articles of high value), it has great diversification in its exports
- It has larger biological richness and variety ■

ProInversión
Peru

The Private Investment Promotion Agency - ProInversión

ProInversión promotes investment by private agents not depending on the Peruvian State, so as to incentive Peru's competitiveness and sustainable development and improve the population's well-being. ProInversión renders the full range of services for investors in Peru.

www.proinversion.gob.pe

Coface Country Ratings – Latin America

The Coface country rating aims at evaluating the average credit risk of companies in a given country. The rating is based on economic, financial and political data. But it also takes into account Coface experience on the country, under two dimensions: Coface's payment experience on the companies of the country and also its assessment of the Business climate. *(Data as of June 2010)*

Argentina

Major Macro Economic Indicators	
Population	39.9 million
GDP	US$ 328,385 million
Rating country	C
Business climate rating	B

Major Macro Economic Indicators	2007	2008	2009(e)	2010 (f)
Economic growth (%)	8.7	6.8	-2.5	1.5 3.0
Public sector balance (%GDP)	1.0	1.4	-1.0	-0.4
Current account balance (%GDP)	2.7	2.3	4.2	3.6
Foreign debt (%GDP)	57.4	47.8	53.3	56.2
Foreign exchange reserves (in months of imports)	8.2	6.7	8.8	7.9

(e) estimate (f) forecast

Strengths	Weaknesses
Abundant agricultural, energy and mineral resources, combined with rich tourist potential and cultural heritage	Some dependence on raw materials Lack of investment in energy and infrastructure
Level of education and human development indicators above Latin America's average	Relations with the IMF and all foreign creditors have yet to return to normal since the bond debt restructuring in June 2005
Comparative advantages in farm and food products (soybeans, meat, dairy products) and skilled services (information technology, engineering)	Business environment often affected by unpredictability Persistence of strong inequality and social unrest

Shaky Economic Recovery

In the June 2009 mid-term elections the government lost the majority it claimed in Congress. President Cristina Kirchner will thus be in a weakened position for the rest of her term in office, which could result in immobilism on reforms.

In this context, the recession caused by the international economic and financial crisis in 2009 will give way to fragile recovery in 2010 due partly to the improvement expected at the international level. The growth of demand from the main trading partners, particularly Brazil and China, will spur a recovery in exports and employment. In conjunction with easing inflation, that will buoy private consumption and investment. Incentives granted by the government will not suffice, however, to completely restore the confidence of the private sector, especially in agriculture. And the growth of public sector consumption is expected to decelerate as a result of a fiscal adjustment process.

A Necessary Normalisation of Relations with Foreign Creditors

The counter-cyclical fiscal policy pursued in 2009 to limit the negative effects of the international crisis caused public sector finances to deteriorate. But Argentina should be able to meet its residual financing needs in 2010, resorting if necessary to heterodox methods, even if some operators entertain doubts as to the sustainability of Argentina's economic model and its willingness to meet its bond-debt service commitments. With its external position thus weakened as a result of the crisis, Argentina is nonetheless seeking to restore normal relations with the IMF, Paris Club public creditors, and private creditors that refused the conditions offered in the 2005 debt restructuring, and thereby regain access to international financial markets. Liquidity crisis risk is, however, expected to remain manageable this year in view of Argentina's substantial current account surplus, the satisfactory level of its foreign exchange reserves, and the moderate character of its short term debt with the peso thus expected to depreciate less against the dollar than it did in 2009. The banking system has moreover held up well in the global crisis. ■

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Brazil

Major Macro Economic Indicators	
Population	192.0 million
GDP	US$ 1,612,539 million
Rating country	A4
Business climate rating	A4

Major Macro Economic Indicators	2007	2008	2009(e)	2010(f)
Economic growth (%)	5.7	5.2	-0.2	6.3
Public sector balance (%GDP)	-2.5	-2.0	-3.3	-2.8
Current account balance (%GDP)	0.1	-1.7	-1.5	-3.0
Foreign debt (%GDP)	20.6	18.7	22.7	20.0
Foreign exchange reserves (in months of imports)	10.9	8.5	13.2	11.0

(e) estimate (f) forecast

Strengths	Weaknesses
Abundant and varied natural resources	Socio-political obstacles to necessary structural reforms (education, social security, job market, taxes, regulations)
Significant proportion of manufactured products in total production and exports	Lack of investment in energy, rail, road, port, and airport infrastructure
Increased capacity to cope with exogenous shocks and international financial-market volatility	Exposure to fluctuations in world prices for certain staple commodities
Policy of maintaining fundamental macroeconomic equilibrium	High public debt exposed to domestic interest-rate trends and maturity that is still too short
Size and potential of the domestic market	
Competitive labour costs	

Quick Growth Rebound and Inflation under Control

After a slight contraction in 2009, the Brazilian economy is expected to resume relatively strong growth this year amid the run-up to the presidential election in October and the recovery expected in the global economy. The growth is driven by increased public spending, strong household consumption fuelled by the rise of wages and the decline in interest rates, as well as by a recovery in corporate investment.

Due to the strong recovery in activity, coupled with inflationary trends, the Central Bank will probably have to gradually tighten its monetary policy during the course of 2010, after cutting its key rate (Selic interest rate) to a historical low in 2009.

Putting the Deterioration of Public and External Accounts into Perspective

As a result of the international crisis, which required implementation of counter-cyclical measures, the public finances situation was weakened with public spending remaining too rigid, the structure of domestic debt deteriorating, and already high public debt growing further and consequently impeding investment in infrastructure. Sovereign risk will nonetheless remain manageable in view of the relatively moderate cost of the economic stimulus programme and the net creditor external position maintained by the public sector since 2008.

Foreign trade has been following the trend in world trade and will thus be likely to benefit from the upturn expected this year. In 2009, however, for the first time since 1978, exports of staple commodities exceeded those of manufactured products, a trend likely to continue with Brazil's export performance driven by sales to China, consisting mainly of commodities. With the services deficit likely to grow, the current account deficit will widen, but foreign direct investment is expected to cover almost half of large external financing needs.

Foreign debt amount will grow substantially in 2010, with an increase in the proportion of private debt, and the burden of serving that debt remaining high in relation to exports. But Brazil's external vulnerability will likely remain manageable. As a result of the relatively bright outlook overall, the real is expected to remain at fair levels with foreign exchange reserves increasing to record levels. Although the banking sector is solid, the sharp rise in loans granted by state-run banks in the framework of the stimulus programme constitutes a potential risk. ■

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Chile

Major Macro Economic Indicators	
Population	16.8 million
GDP	US$ 169,458 million
Rating country	A2
Business climate rating	A2

Major Macro Economic Indicators

	2007	2008	2009(e)	2010(f)
Economic growth (%)	5.1	3.2	-1.3	4.5
Public sector balance (%GDP)	8.8	5.5	-4.0	-1.0
Current account balance (%GDP)	4.4	-2.0	1.2	1.0
Foreign debt (%GDP)	35.8	34.9	41.3	34.5
Foreign exchange reserves (in months of imports)	2.6	3.2	4.2	4.0

(e) estimate (f) forecast

Strengths	Weaknesses
Abundant mining resources (world leader for copper), extensive agriculture, fishing and forestry	Small size of economy, heavily exposed to world economic fluctuations due to its openness
General consensus on the prudent economic policy in place for the last 20 years	Excessive dependence on copper exports (half of total)
Many free trade agreements signed	Dependence on foreign sources for energy
Regional platform for investors attracted by the country's political stability, the quality of its institutions and infrastructure and its sound financial system	Disparities of income among the greatest in the world due notably to deficiencies in education
International standing boosted by membership of OECD since the end of 2009.	

Recovery Linked to World Economic Trends

After the recession of 2009 caused by the international economic crisis, recovery is expected in 2010. Along with the rebound in the world economy and sustained demand from Asian countries, economic activity should also benefit from investment in the private sector, especially in mining and energy, as well as modernisation of public infrastructures. The contribution of household consumption will be weaker, due notably to high unemployment. The expected surge in world raw materials prices should not affect the deflationary trend observed in 2009, particularly as there should also be a rise in the value of the peso.

Weight of Foreign Trade

Foreign trade remains dominated by the sales of copper, whose prices have soared and will remain high in 2010, thanks largely to demand from Asia. Sales of other products (wood, pulp, agricultural products) improve with the help of the many free trade agreements. On the other hand, the country remains dependent on imports for its energy needs and will, therefore, be affected by the higher levels of oil prices. Nonetheless, dependency on imported oil and also on gas from Argentina, supply of which can be problematic, will be reduced as a new liquefied natural gas facility comes on stream. The continued substantial trade surplus and the falling-off of dividend remittances by foreign-owned companies should keep the current account also in surplus. Finally, with the reduction of foreign debt ratios and the satisfactory level of foreign exchange reserves, the external financial position of the country should remain comfortable.

Signs of Improved Payments Experience

Aided by a sound and performing banking system, private enterprise benefits from an easier monetary policy and extremely low interest rates. Investment is thereby facilitated, especially in the expanding sectors such a as energy, mining and financial services. Payment incidents have, however, been seen in sectors faced with cyclical problems such as the construction industry, mechanical engineering, automotive distribution, and paper-cardboard or suffering from specific problems (e.g. sanitary) such as salmon farming.

Overall, after a phase of relative deterioration, the payment pattern of the private sector is improving progressively. ■

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Colombia

Major Macro Economic Indicators	
Population	44.5 million
GDP	US$ 242,268 million
Rating country	A4
Business climate rating	B

Major Macro Economic Indicators	2007	2008	2009(e)	2010(f)
Economic growth (%)	7.5	2.4	-0.5	2.5
Public sector balance (%GDP)	-2.7	-2.3	-4.1	-4.5
Current account balance (%GDP)	-2.8	-2.8	-2.9	-3.0
Foreign debt (%GDP)	21.7	19.0	22.2	19.6
Foreign exchange reserves (in months of imports)	5.2	5.0	6.0	5.7

(e) estimate (f) forecast

Strengths	Weaknesses
Abundant natural resources (agricultural, mining)	Difficult security situation due to drug-related violence despite the weakening of FARC, Latin America's largest guerrilla movement
Diversification of exports in the framework of ATPDEA, the Andean Trade Promotion and Drug Eradication Act	Poverty afflicting half the population amid severe income inequality
Policy of maintaining macroeconomic stability and strengthening the financial sector	Insufficient flexibility on public spending and narrow VAT base
Extensive military aid from the United States focused on limiting drug production and trafficking and combating the guerrilla movement	Strained relations with neighbouring Ecuador and Venezuela

Modest Recovery

A modest economic recovery is expected in 2010 after Colombia suffered in 2009 its first recession - albeit limited - since 1999, as a result of the global crisis. Growth will be fuelled by public spending in the run-up to elections in May 2010 and by private investment in energy and mining thanks to an easing of monetary policy and the recovery of the global economy. Household consumption will, however, remain affected by the moderation of wages, high unemployment, and the stagnation of remittances from emigrants.

Persistence of the twin fiscal and current account deficits

After the counter-cyclical policy pursued in 2009 necessitated by the crisis, officials have plans for further stimulus measures in 2010 due to the upcoming elections, with investments in roads and sanitation. As a result of the substantial fiscal deficits accumulated these past twelve years, public debt has remained at significant levels (nearly half of GDP). But the tax reforms essential to improvement in public finances continue to come up against considerable resistance in parliament.

Exports will begin to trend up again due to the moderate recovery in the United States (the main trading partner) and the firming up of world prices for staple commodity exports: oil, coal, coffee. The restrictions imposed by Venezuela (second largest export market) will, however, have a negative effect. Imports are expected to grow at the same pace as exports as a result of the modest rebound of domestic demand. In total, with the stagnation of remittances, the current account deficit will widen slightly, but it is expected to be financed easily, over half by foreign direct investment inflows and the balance via international markets.

Colombia's external position is underpinned the relatively high level of foreign exchange reserves and a US$ 10.5 billion Flexible credit line granted by the IMF in May 2009, whose possible use until May this year is not subject to conditions. ■

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Mexico

Major Macro Economic Indicators	
Population	106.4 million.
GDP	US$ 1,085,951 million
Rating country	A4
Business climate rating	A4

Major Macro Economic Indicators	2007	2008	2009(e)	2010(f)
Economic growth (%)	3.2	1.3	-6.5	4.5
Public sector balance (%GDP)	-1.4	-1.5	-4.7	-4.0
Current account balance (%GDP)	-0.8	-1.5	-1.1	-1.5
Foreign debt (%GDP)	18.0	18.1	23.1	19.7
Foreign exchange reserves (in months of imports)	2.8	2.9	3.7	3.2

(e) estimated (f) forecast

Strengths	Weaknesses
A manufacturing power notably capitalising on its membership in the North American free-trade area NAFTA	Excessive concentration of exports to the United States and competitiveness problems in relation to China
Relatively good macroeconomic fundamentals	Dependence of public sector finances on oil revenues
Moderation of foreign debt reassuring to international investors Relatively healthy banking sector	Socio-political obstacles to structural reforms (energy, telecommunications, education, labour, legal system)
Young and growing working population	Lack of investment and skilled labour hindering the move upmarket of production
	Extensive social inequality and poverty
	Business environment in need of improvement

A Significant Recovery after the Violent Shock Suffered in 2009

Mainly as a result of the sharp economic contraction in the United States, Mexico suffered a recession in 2009 more severe than the one associated with the economic and financial crisis of 1994-95, nick-named "Tequila". Following this shock, the resurgence of activity is linked to economic recovery in the United States; having begun at the end of 2009, recovery is expected to continue in 2010. This means that growth will chiefly be led by external demand, which favours export manufacturing. Any increase in internal demand is likely, in contrast, to be more modest. Although private consumption is expected to benefit from the rise of wages, it will be undermined by the level of unemployment and investment will take off only softly.

Deterioration of Public and External Accounts

The effects of the recession have undermined public sector finances, although the fiscal austerity measures planned for 2010 should make it possible to limit public sector deficit. The major problem posed by public finances — their excessive dependence on oil revenues was, however, not resolved by the limited fiscal reforms carried out in 2007-2008, even if public sector debt remains manageable with its foreign component in decline.

With the steady decline of oil production by the state-controlled monopoly Pemex, combined with stabilisation remittances from emigrant workers, the external account deficit will grow. Neverthe-less, in order to cover a significant growing financing need, Mexico should be able to again count mainly on foreign direct investment. The Bank of Mexico has not, therfore, asked to renew ist swap line for US$ 30 billion with the American Federal Reserve Bank beyond Februrary 2010. However, in March 2010 the authorities asked for the Flexible Credit Line of a US$ 48 billion granted by the IMF, in April 2009 to be maintained.

And the expected maintenance of stable and moderate short-term debt in conjunction with a flexible exchange rate is expected to mitigate growing liquidity crisis risk. Furthermore, the position of the banking sector remains relatively satisfactory and thanks to its prudence it avoided the risks resulting from the "subprime" crisis in the United States. ■

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Peru

Major Macro Economic Indicators	
Population	28.8 million
GDP	US$ 127,434 million
Rating country	B
Business climate rating	B

Major Macro Economic Indicators	2007	2008	2009(e)	2010(f)
Economic growth (%)	8.9	9.8	1.0	4.9
Public sector balance (%GDP)	3.2	2.2	-3.0	-1.5
Current account balance (%GDP)	1.4	-3.3	-0.2	-1.3
Foreign debt (%GDP)	30.0	26.6	23.2	21.2
Foreign exchange reserves (in months of imports)	9.5	8.4	11.1	10.6

(e) estimate (f) forecast

Strengths	Weaknesses
Abundant natural resources in mining (copper, gold, zinc), energy, agriculture and fishing	Vulnerable to climatic changes and fluctuations in world raw material prices
Tourism attracted by exceptional cultural heritage	Economic contrasts following ethnic lines, with a relatively modern sector in the coastal plains and mining areas and a subsistence sector in the interior
Careful management of public finances	
External financial position in satisfactory state	Insufficient infrastructure (roads, electrification, water supply and treatment), reinforcing the social and geographical inequalities
Increasing number of free trade agreements signed	Poverty affecting more than half the population

Strong Return to Growth

Growth should rebound significantly in 2010 after a severe decline in 2009, resulting from the international crisis. While household consumption will be contained by tight credit and high unemployment, economic activity will be driven by private investment, following the re-building of stocks, and public expenditure in the area of public works and social programmes.

Robust Public Finances

Measures to boost the economy via a counter-cyclical fiscal policy, led to a deficit in 2009, which should, however, decline significantly in 2010, despite new fiscal stimulus measures ahead of the regional elections in November 2010 and the presidential and legislative elections in April 2011. The government remains committed to a programme of reforms in liaison with the IMF and the public debt ratio represents only a quarter of GDP, although the part denominated in foreign currencies remains substantial. In general, public finances are healthy; Peru has accumulated a fiscal stabilisation fund of US$ 3 billion.

Small Current Account Deficit but External Position Satisfactory

After the dip in 2009, exports should benefit in 2010 from stronger demand from Asia, especially sales of ores and also fish to China, now the country's second trading partner behind the US. After the signing of a free trade agreement with the US in 2007, a new commercial agreement with China comes into force at the beginning of 2010. Another agreement was concluded with Canada and Singapore and negotiations are under way with Mexico and the EU. The recovery will nevertheless cause imports to rise even faster, especially of heavy equipment. A probable fall in remittances from expatriates and in tourist revenues, combined with an increase in repatriation of profits by foreign-owned companies, should spell a slight decline of the current account deficit, entirely covered, however, by new foreign direct investment.

Moreover, repayments ahead of schedule of debt due to the "Paris Club" public creditors have contributed to reducing external debt and related service costs, so that debt ratios equal the best of the region. Also, a high level of foreign exchange reserves reduces the risk of a liquidity crisis and should contribute to the stability of the nuevo sol in 2010. Besides, the banking system remains sound, despite a significant dollarisation. ■

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Venezuela

Major Macro Economic Indicators	
Population	27.9 million
GDP	US$ 313,799 million
Rating country	C
Business climate rating	C

Major Macro Economic Indicators

	2007	2008	2009(e)	2010(f)
Economic growth (%)	8.4	4.8	-2.0	1.0
Public sector balance (%GDP)	-2.5	-1.0	-6.5	-5.5
Current account balance (%GDP)	8.8	12.2	0.5	2.2
Foreign debt (%GDP)	24.4	18.1	17.3	18.0
Foreign exchange reserves (in months of imports)	5.0	6.1	4.5	4.9

(e) estimate (f) forecast

Strengths	Weaknesses
Significant natural resources: oil, gas, mining, with extensive oil reserves in the Orinoco belt	Economy over-dependent on oil (90% of exports, half fiscal revenues and a third of GDP)
Oil revenues provide a strong base to back up regional influence	Opaque, uncontrolled management of oil revenues
The US is the principal customer for Venezuelan oil, despite political differences	Production capacity of publicly-owned oil company, PDVSA, limited by insufficient investment.
External financial position in significant surplus	State interventionism and corruption affecting the confidence of the private sector and making economic diversification more difficult

Stagflation in Prospect, after January 2010 Devaluation

After having suffered its first recession since 2003, caused by the drop in oil prices and the world economic crisis, the Venezuelan economy should recover a little in 2010. However, practically the only motor will be public spending, with flat household consumption and continuing under-investment.

With inflation still strong, the economy is set for a period of stagflation. The inappropriate fiscal, monetary and exchange policies, combined with insufficient production capacity, will continue to put pressure on prices. Given notably the inflation rate disparity with the country's major trading partners, the government has announced a devaluation in January 2010, by formalizing two exchange rates, according to the "priority" status of the sectors, along with a parallel market rate, the exchange market continuing to be administered by the Comisión de Administración de Divisas (CADIVI).

Deteriorating Public Finances and Increasing Risk of a Liquidity Crisis

With a larger room for manoeuvre, thanks to the devaluation, and an expectation of higher oil prices, fiscal policy is meant to be expansionist in 2010, given legislative elections in September. However, priority should still be given to current expenditure, particularly on social spending, whereas infrastructure investment should be constrained. Besides, the government has not created any stabilisation fund and public finance management remains marked by recourse to extra-budgetary commitments, through the National Development Fund (FONDEN) and the state oil company Petróleos de Venezuela (PDVSA).

Still, given the country's net creditor position on external accounts, foreign debt remains manageable, but oil prices remain the essential variable factor in the solvability and the willingness of the country to pay its debts. Also, the risk of a liquidity crisis is increasing, due to slippage in certain short-term debt ratios along with continuing capital flight and the drawing on foreign exchange reserves, which should continue, to some extent, to be tapped for the benefit of FONDEN and PDVSA. ■

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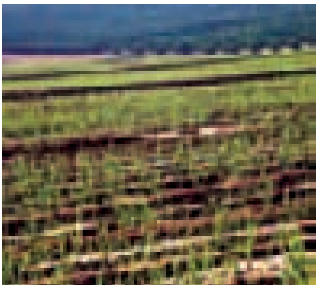
Sectoral Reports: New Business Opportunities in Latin America

Agrobusiness: Brazil's Agricultural Economy Unbeatable in the Long Run

Brazil's international agricultural advantage will be increasingly more visible in the upcoming years. Many countries struggle with feeding their growing populations, but Brazil still has a considerable supply of fertile soil and the technology to use it with the highest productivity. Presently, Brazil is already the most important exporter of many foodstuffs. Many sectors see the establishment of enterprises which play a significant role on international markets – the so-called global players – such as JBS, the largest meat producer in the world.

Right behind the US and the EU, Brazil is the third largest exporter of agricultural produce. In the case of coffee, orange juice, sugar, beef, and poultry Brazil is already number one. In the first quarter of 2010, the export grew yet another 15%. More than one third of the entirety of Brazilian exports consists of agricultural produce. The financial crisis and the drought which ravaged the south of the country slightly impeded trade in 2009, but 2009/10 has already seen a record harvest again – about 146 million tons of grain and oilseed crops, i.e. about 8.3% more than the previous year and 1.5% more than the best harvest up until to now in 2007/08. Additionally, 542 million tons of sugarcane was harvested in central and southern Brazil alone, i.e. 7.3% more than in previous harvests.


Sugarcane Cultivation

Current research carried out by the ministry of agriculture predicts how the production, domestic consumption, and exports will develop in the span of the next 10 years. According to this research, the greatest dynamic of production will be noted in soy, chicken meat, sugar, ethanol, milk, soy oil, and cellulose. This expansion will mostly be caused by increased productivity. While production will grow a predicted 2.7% per year, the expansion of farmland will only increase by about 0.5% per year. The additional areas of cultivation, amounting to nearly 10 million hectares, will allow for the expansion of soy, sugarcane, and maize in particular. Through consistent technological improvement, practically-oriented research, and a non-dogmatic use of gene technology and chemical fertilisers, Brazil's agricultural economy has substantially expanded its productivity during the past few years. The newest plan postulates the development of a domestic fertiliser industry, so as to eliminate the dependency on imports, which constitute about 70% of the entire demand. In order to achieve this, in early 2010 the mining consortium Vale paid 3.8 billion dollars to take over the fertiliser branch from Bunge, and thus also the leader of the market, the Fosfertil company. Vale wants to turn the obtainment of phosphate and fertilisers into its third largest production branch and undertake activity on an international scale as well.

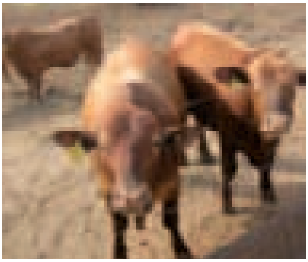
On the other hand, Bunge wants to concentrate more on sugar and ethanol. In order to achieve this, the enterprise took over the Moema group for a price of 1.5 billion dollars, becoming the third largest enterprise in ethanol production right after Cosan and Louis Dreyfus. The company wants to spend another 750 million dollars developing organic chemistry. The number one, Cosan, joined the Shell consortium in early 2010, which – thanks to the global Shell gas station network and Cosan's production of 2 billion litres per harvest – resulted in a dominant combination. The state-owned oil consortium, Petrobras, wants to invest about 2.4 billion R$ [R$ = Brazilian real] into ethanol by 2013, so as not to miss the opportunity to participate in this branch of industry, one which is very promising for the future. The BP group is represented by an over 50% share in the Tropical Bioenergia enterprise. By 2020, ethanol production is expected to double, reaching 62.9 billion litres, while the currently moderate export will treble to reach about 15 billion litres. According to data from the ministry of agriculture, the production of sugar should also note significant growth, by about 11 million tons.


Sugarcane

In the case of maize, the upcoming harvest will see the first time when genetically modified plants will surpass conventional crops. Abimilho, the union of maize cultivators, expects the share of genetically modified maize to grow up to 80% by 2011. The maize harvest of 2009/2010 will amount to 53.5 million tons and will thus be significantly larger than expected. Apart from meat, soy is the main export of the Brazilian agricultural economy. In the first quarter of 2010 alone, goods exported to other countries amounted to nearly 2.5 billion dollars. Until 2020, the ministry of agriculture prognoses the production of about 25 million additional tons of soy – firstly to sustain the export, currently undergoing a boom, and secondly to provide for the domestic meat industry.

The production of meat will continue to develop very dynamically, especially in the poultry sector. Domestically, the increase in income has resulted in an increased consumption of beef. In the case of poultry one can observe a significantly income-dependent growth trend. About 65% of the additional chicken meat is destined for the domestic market. In the case of beef, it is 77%. Brazil's exports currently amount to nearly 42% of global chicken meat sales. In the case of beef, this number is 25%.

The Brazilian enterprise JBS Friboi caused a stir on the international arena, taking over, one after another, most of the large enterprises from the US (Swift, Pilgrim's Pride) as well as Argentina and Australia. With a turnover of about 30 billion dollars, it became the largest meat producer in the world and the second largest private enterprise in Brazil. The fusion of companies in the meat processing industry, Sadia and Perdigao into Brazil Foods, as well as Marfrig and Seara, means that new industry giants – and possible future global players – have arisen.



Milk production will grow by an average of 2% per year in the span of the next decade.

The ministry also expects significant growth in coffee and milk production. In the case of coffee, apart from its traditionally strong export, domestic consumption has been rising by 5% for the past few years. Milk production will grow by an average of 2% per year in the span of the next decade, to reach a total of 7 billion litres. When it comes to orange juice, where Brazil occupies the leading position in the global market, international trade blockades constitute a major obstacle on the way to further development. As far as wheat is concerned, Brazil still depends on imports. In 2020, the country will still have to import about 7 million tons. Importing is also necessary when it comes to rice. Altogether, the production of grains and oilseed crops (including maize, soy, wheat, rice, and beans) will grow by 37% until 2020 and reach 177 million tons.

In the cellulose sector, the financial crisis hampered the prospects of a major long-term development, i.e. the relocation of global production to Brazil. As a result of the drastic currency value changes when the crisis erupted, Brazilian companies – strongly dependent on exports – overreached on currency speculations and suffered considerable losses. The consequence of that was the fusion of Aracruz and the cellulose consortium Votorantim (VCP), from which emerged a new company called Fibria. Still, Brazil has exceptionally good conditions for cellulose production, as the Brazilian eucalyptus tree grows three times faster than its counterpart in Canada and five times faster than the trees in Scandinavia. Industry experts count on an average annual export growth of 4% and six to eight new production plants established in the next eight to ten years. Also in the paper segment, where the production is channelled more towards domestic markets, experts estimate that the demand will continuously grow by over 4% per year. ■

Oliver Döhne, *GTAI, Germany Trade and Invest*

Latin American Car Market Offers Great Potential

The Latin American car market has recorded good dynamics of economic growth in the first months of 2010. The crisis had a diverse impact on different countries in the region. While mainly export-focused countries, such as Mexico, have experienced a crash of their output market, Brazil has broken a new record in its strong domestic market regarding the registration of new automobiles. The South American model for success, compact and eco-friendly small cars for the domestic market, could have been introduced in Mexico as well.

The most important car manufacturers in Latin America are Brazil, Mexico and Argentina. Assembly plants are also found in Venezuela and Colombia. In total, ca. 5.4 million cars were produced in Latin America in 2009, three fifths of them in Brazil alone. The two largest car manufacturers, Brazil and Mexico, greatly differ in their structure. Brazil produces mainly small cars for domestic market; Mexico focuses on the assembly of larger cars to be re-imported to the US.

Car production in 2009 (units; change in %)

Country	Production	Change
Brazil	3,182,617	-1.0
Mexico	1,530,439	-28.5
Argentina	512,924	-14.1
Venezuela	111,655	-17.3
Colombia	88,342	-24.1

Source: National motor associations

Brazil owes its success at retaining its 2009 production figures at roughly the same level as in 2008 to the great interest generated by its domestic market. The main manufacturers are: VW, Fiat, GM, and Ford. Asian manufacturers' presence in this market is not as pronounced as in other countries. However, Toyota, Hyundai, and Chinese company Chery do plan on opening large manufacturing plants in Brazil. The country is increasingly becoming a centre for development of small, compact, low emissions cars. Ethanol fuel is a common sight in Brazil. Over 94% of new vehicles come equipped with flex-fuel technology engines.

Diesel engines are banned in passenger cars and trucks are obliged to increase the amount of biodiesel in their fuel. All manufacturers have announced the investment of billions of euros to this end.

The car industry crashed in Mexico in 2009 due to the lack of demand in the US, but was able to regain sure footing thanks to a strong exports comeback in early 2010. The current pressure to cut costs, the low wages for its experienced workforce, the advantageous exchange rate of the Mexican peso, and the proximity of the largest output market in the world are doubly profitable. Experts perceive the need to increase production and introduce several choices for the domestic market to follow the Brazilian example and free the industry from total reliance on the US market.

Argentina's production, due to the steady mood and purchasing tastes in neighbouring Brazil, has recorded a smaller loss than was feared. Six of ten Argentinean cars are exported, mainly to Brazil. A weak sub-suppliers and contractors' base limits Argentina's attractiveness as a site for car manufacture. The exchange rate for the Brazilian real has increased the competitiveness of Argentina. However, in 2010 these advantages may be offset again by increasing local costs.

Domestic car sales (units; change in %)

Country	Turnover 2009	Change 2009/2008	Change 2010/2009 *
Brazil	3,141,240	11.4	8.2
Mexico	767,900	-27.0	3.9-7.0
Argentina	611,770	-20.4	10.0
Colombia	181,714	-16.8	8.1
Chile	172,044	-28.0	15.0
Venezuela	136,517	-49.7	-26.7
Peru	76,932	-16.8	12.0-15.0

* projected

Source: National Automotive Associations

In Venezuela, domestic production is not gaining momentum as it is held back by a lack of production supplies deliveries. The government is slow to release the necessary dollar means. The most important manufacturers in Venezuela are GM, Toyota, and Ford. Colombia is used as a production base by GM, Renault, and Mazda. Imported chassis serve as a basis for not only passenger cars, but for buses as well. A large percentage of passenger cars are exported mainly to Venezuela, thus their lack of demand in 2009 caused an export crash in Colombia amounting to 86.8%. This resulted in this year's production volume being reduced by 24%. Colombia wants to gradually switch its car production so that all new cars employ the flex-fuel technology by 2016. All cars with an engine displacement larger than 2 litres are to run on a mixture of gasoline and ethanol by 2013.

The largest Latin American vehicle output market is Brazil. Four times as many cars as in Mexico are being sold there. In the crisis-touched 2009, sales amounting to 3.1 million units have increased by ca. 8% compared to the record-breaking 2008. Luxury cars are imported from abroad. Stable market conditions encouraging consumption and the availability of loans were coupled with massive government aid (a 1-year exemption from industrial production tax, IPI).

Due to fairly low saturation of the domestic market, with one car per ca. six people, the market watchers expect all the largest Brazilian manufacturers to record steady growth without the need to compete for a share of the market. The competition will intensify later.

The increasing development of infrastructure (PAC investment program, 2014 FIFA World Cup, 2016 Olympic Games) makes the projections for new car sales very attractive. The leaders of the market since 2009 include Mercedes-Benz and Volkswagen, as a part of the MAN holding group. "Whoever wants to experience economic growth in the coming years should have their eyes on Brazil" remarks Jackson Schneider, the retiring head of Anfavea, the Brazilian motor companies association.

Mexico's domestic market was still weak at the beginning of 2010. The sales figures in the first two months were 6% lower than corresponding figures from the previous year. They are sure to gradually improve in the coming months. Venezuela faces sterner problems as far as car sales are concerned. Trade projections indicate a continued decrease in sales amounting to ca. 27%. By mid March 2010, the government failed to issue import licences. As concerns most imports, the government wishes to communicate bilaterally with particular supplier countries and sell imports later to the domestic market at a concession.

The Colombian car market has only recently been regaining its dynamics of growth and it has failed so far to reach the high figures of 2007 and 2008. Subsidised loans introduced by the government to stimulate demand are no longer available in 2010. While the interest rates are low, the banks present a very reserved approach to loans.

The new car market is developing at a languid pace as it is obligatory to scrap your old vehicle in order to purchase a new one. The market watchers do not expect to see large economic growth, so consumer tendencies which relate to expensive purchases should remain at the same level. When it comes down to it, the market potential, with a current ratio of 1 passenger car to every 15 citizens, is vast.

The best sales projections for 2010 come from Chile. There, the trade association expects to see a rise of at least 15%. SUVs are particularly popular. The new Chilean car market has stabilised after a crash in 2009. With 1 passenger car to every 6 citizens, Chile too presents many opportunities. ■

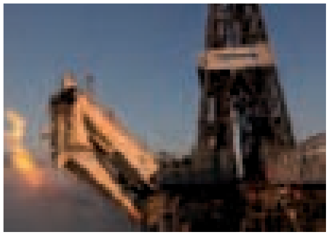
Oliver Döhne
GTAI, Germany Trade and Invest

Energy: Oil & Gas 2010 Outlook – Recovering Economies to Drive New Growth

The year 2010 should be a welcome one for oil companies operating in Latin America that were forced to cut capex in 2009 because of falling crude prices. The price of oil will undoubtedly continue to influence future investments, but both governments and companies have learned from the extreme volatility of 2008 and early 2009 and realized that long-term investments should not be based on the short-term price of oil.

Most analysts, meanwhile, are expecting stable oil prices throughout the year. While nowhere close to the highs seen in 2008, both oil majors and juniors alike can see profitability with oil around US$ 70 billion.

The perceived economic recovery and the associated speculative trading have had a lot to do with the rebound of oil to US$ 75-80 billion, but the weak dollar has also played an important role. According to Deutsche Bank energy economist Adam Sieminski, a weakening dollar could lead to US$ 100 billion oil, boosting regional exporters but possibly curtailing economic recovery. OPEC will most likely continue to restrict output to influence prices but has said it would call a special meeting if oil were to return to the US$ 100 billion mark.



The year 2010 should be a welcome one for oil companies operating in Latin America.

The WTI oil price for 2010 has been estimated under current prices at US$ 85 billion by Bank of America-Merrill Lynch, US$ 75 billion by the IEA, US$ 74 billion by a Reuters poll, US$ 73 billion by a Dow Jones poll, US$ 65 billion by Deutsche Bank and US$ 74 billion by BNamericas (reaching US$ 78 billion by year end). These prices should be high enough to prompt new exploration activity after this past year's rig exodus.

Brazil's Rise

Brazil's new subsalt reserves of 10-16Bboe (with potential reserves of 25-100Bboe) will likely continue to dominate headlines across the region in 2010, but new legislation for the vast reserves could damper some interest in the country.

The new framework, which has been sent to congress by President Lula's government for final approval, aims to name federal oil company Petrobras as operator of every new subsalt block, will use production-sharing contracts for subsalt fields and all future strategic oil and gas finds, will give Petrobras a minimum interest of 30% in each production consortium, and will result in the formation of another state company, Petro-sal, to manage E&P activity in the subsalt area on behalf of governmental interests.

Congress was expected to finalize the new legislation in the first quarter of the year, and hydrocarbons regulator ANP will then host a round for new subsalt areas. But the government's plan to hold the auction in the first half of 2010 may be too bold. The ANP, however, is expected to hold a round for smaller, onshore blocks, and juniors that traditionally operate in Colombia, Peru and Argentina are looking to pick up acreage that Petrobras may have to ignore to focus its efforts on the massive pre-salt areas.

Besides the new rounds planned in Colombia and Peru for 2010, which will attract interest from juniors and mid-sized oil companies, Brazil's pre-salt promise has inspired Argentina and Uruguay to take renewed interest in their offshore potential. Uruguay in 2009 awarded several offshore blocks for its southern coast, and exploration is expected to begin in 2010. Argentina has also been intending to award offshore blocks, and some exploration is already underway. While it seems premature to speculate on the offshore potential of either Argentina or Uruguay, even a discovery a fraction of the size of Brazil's could significantly change either country's hydrocarbons situation.

Problem Areas

While no one doubts Mexico's potential, state oil company Pemex will likely face a challenging year. The country will see continued production declines at its prolific Cantarell field, and newly formed hydrocarbons regulator CNH may attempt to assert more control to force reform at Pemex. The agency has already called for an overhaul of Pemex's Chicontepec program, which has seen stagnant production levels despite massive spending in the area. Pemex, meanwhile, will face a challenge to meet its own goal to reduce natural gas flaring. Venezuela will also face a tough 2010. While many had hoped state oil firm PDVSA would begin to solve some of its problems in 2009, little progress was made during the year. The Carabobo tender for seven new heavy crude blocks saw several delays. Venezuela will most likely continue to look to political allies including Russia, China and Iran for new sources of funding.

PDVSA is also facing growing labor strife and has still not paid all it owes to service firms that operate in the country. With the threat of strikes and resistance from service firms to commit to new projects, PDVSA will have trouble even maintaining current production. In Argentina, authorities will face continued pressure to increase the regulated price of oil and natural gas. Some progress has been made under the Gas Plus and Oil Plus programs, and companies that have projects approved with higher prices will continue to invest in the country.

Other Highlights to Look Out for in the next Years

- Spanish oil major Repsol could sell more of its stake in Argentine oil major YPF.
- Chile will continue to increase its reliance on imported LNG as the country's first plant in Quintero boosts capacity. A second plant in northern Mejillones is also expected to begin operations in 2010.
- New exploration in southern Chile could result in modest finds of natural gas.
- Peru's LNG export project is due to begin operations.
- New rounds are also expected in Trinidad & Tobago and Jamaica.
- China will continue to increase its presence in the region as it seeks to secure oil reserves.
- Bolivia could finally see modest gains in natural gas production. The government has acknowledged problems and created agencies to increase production.
- Oil majors Total and Repsol have promised big investments, and production is expected to begin at the massive Itau field in 2010.
- Ecuador aims to finalize new contracts with private companies operating in the region.
- Companies operating in Colombia including Ecopetrol and Pacific Rubiales will see major production increases. ■

Nathan Crooks
Senior Editor Energy, Business News Americas

Global Services in Chile

Chile has positioned itself as one of the best locations in the world for the global services industry, joining countries such as China and India. Chile's emerging global services sector is taking shape. Over 60 world class centers have established in the country and outsourcing services were worth over US$ 840 million in 2008. The industry has shown vigorous growth internationally, and Chile is among the most competitive locations in the world.

Chile is known for its strong economic environment and relatively low inflation rates.

Given the industry's rapid expansion and success stories in countries like Ireland and India, Chile began promoting foreign investments in high technology at the beginning of this decade. The country took advantage of political and economic stability, modern infrastructure and telecommunications, skilled labor force and competitive costs compared to other competitors in the region. As a result, the global services (or offshoring) industry has experienced rapid growth, becoming one of the most competitive industries at the regional level and attracting multinational companies such as Citybank, Oracle, General Electric and Equifax.

The first few months of 2010 alone have seen the arrival of McAfee, which inaugurated its research center "McAfee Labs" (the first of its kind in the region and which will serve security needs throughout Latin America), and the expansion of Oracle with its subsidiary "Oracle Financial Services", which will offer services to the Southern Cone together with its centers in Ireland and India. The companies that have already set up in Chile identify the country's business climate, quality of life and skilled human capital as factors that make it an attractive global services destination.

Strengths

Chile is known for its strong economic environment and relatively low inflation rates. In addition, its regulatory framework allows for lower costs and shorter start up times for new businesses. The country's infrastructure and quality of life stand out as far superior to that of its neighbors. These institutional and economic strengths are what have placed Chile among the 10 most competitive locations in the world for the global services industry in a ranking led by giants such as India and China (Chile placed seventh among 50 countries according A.T. Kearney's 2009 Global Services Location ranking). Based on the same ranking, Chile has the best business climate in the entire region for the development of this industry, standing out from countries like Argentina and Brazil.

In terms of costs for companies, wages in Chile are in line with the regional average. Companies that set up businesses in the country receive support through the Chilean Economic Development Agency's (CORFO) InvestChile program. This support includes networking and consulting services as well as financial incentives for labor related training.

The Global Services Cluster

In 2000, Chile decided to open itself up to the world, attracting world class companies that could use the country as a base for international operations. That was the beginning of a development strategy that has led to the results that can be seen today.

In light of this work, the Global Services Cluster was created in 2007. The cluster is made up of representatives from the public and private sectors, and its purpose is to boost this industry in the country. It identifies weak points in the development of these services and seeks solutions that benefit the country as a whole.

The cluster has set itself some lofty goals: to provide outsourcing services worth US$ 1 billion in 2010 and to increase this figure to US$ 5 billion by 2015. With this in mind, work is being done to strengthen areas such as human capital, so critical to this industry, based on people rather than material resources. In addition to creating a national registry of English speakers made available to companies for their hiring processes, a scholarship program has been running for the past three years that has provided English-language instruction to over 3,000 people. This figure will rise to 5,000 with the 2010 call of applications. Similarly, strategies are in place to attract foreign investment and adjust the regulatory framework to efficiently transfer and operate new technological platforms.

Large Companies Choose Chile

Various companies that had already set up in countries such as India have chosen Chile as the site for new centers and services. Some of the companies that recognized in Chile the qualities needed to operate their businesses include Equifax, JP Morgan, Capgemini, Evalueserve and General Electric.

In August 2009, Equifax inaugurated its third technology development center in the world in Santiago, the country's capital. This center carries out research and development of technological solutions related to risk assessment, working in conjunction with Equifax's centers in the United States and India to research and develop software used in financial analyses and decision-making.

Evalueserve –one of the largest KPO companies in the world with subsidiaries in India and China– also chose Chile as a platform. The company arrived in Chile in 2007, attracted by the advantages in infrastructure, human resources and government incentives, among others.

Evalueserve offers services to its clients in the United States from its facilities in the Valparaíso Region, on the country's central coast, taking advantage of the similar time zone between the two countries. It can also work together with its centers in India to offer more effective services. ■

Juan Antonio Figueroa
Head of Investment Promotion Division
Chilean Economic Development Agency (CORFO)

IT: Mobility on the Mind

Step out of that suit and tie and jump into some shorts and sneakers because IT investments will hit the ground running in 2010. Literally. Mobility will mark Latin American IT investments this year, as both companies and consumers look to stay connected while out and about.

For example, the corporate segment will demand more ERP, BI, CRM and other sales applications for mobile devices, as executives perform business tasks both inside and outside the office. Company needs such as winning and retaining clients, cross-selling and up-selling and obtaining and analyzing information in real time will hit the road without a doubt.

Meanwhile, managing the different mobile platforms may make heads spin, with both companies and consumers seeking to juggle Windows CE and Android, as well as the operating systems on iPhones and Blackberrys.

Finally, cheap prices, 3G network growth and portability will propel sales of netbooks and ultra-thin PCs region wide, primarily through retail. New players will enter the Latin American market and attempt to woo first-time users, members of lower and middle socioeconomic classes and also consumers seeking a second portable computer.

Other IT Trends to Look Out for in 2010: Smaller Deals

The days of multi-year megaprojects are long-gone, at least for now. The nascent state of the global economic recovery coupled with slow (but steady) improvement in visibility will continue to make Latin American firms scrutinize investments.

- Companies region wide will be more inclined to sign hardware, software and service contracts with durations of roughly three years, and will shy away from deals of five or more years. Flexibility will also be highly prized.

- Rather than carrying out large overhauls, Latin American companies will implement IT solutions that solve pinpoint problems and ratchet up performance in specific areas.

- Companies will not experiment with new technologies unless they directly impact their business processes.

IT Security

With IT security threats becoming stealthier and more complex, companies in Latin America will beef up precautions against attacks capable of shutting down operations and inflicting huge costs.

- IT security providers will look to pull Latin American SMEs out of the IT security Stone Age, with slimmed down solutions and consulting services that can fit even the smallest budgets.

- Companies with existing IT security investments will expand their foci, maintaining investments in traditional areas such as networking and anti-virus, but also moving to safeguard against fraud, data loss and also internal security threats.

- Although countries such as China and Russia will continue to generate the highest number of attacks globally, more IT threats will appear in Spanish and Portuguese and, likewise, hone in on specific, Latin American targets.

- Compliance and regulation will play a more important role than ever, with companies in Latin America adopting IT security to meet a combination of local, international and industry-wide rules.

Andean and Brazilian Boom

Brazil's rapid rebound from the global economic crisis will translate into a deluge of new technology expenditures, while IT investments in Peru and Colombia will boom because of increasingly favorable investment climates and the need to modernize out-of-date technology.

- Arguably two of Latin America's most untapped markets, Peru and Colombia, will see the migration of both regional and international IT providers. Meanwhile, companies already established in Brazil, Peru and Colombia will expand operations to capture more business opportunities.

- Natural resource sectors - such as mining in Peru and Colombia and oil and gas in Brazil - will modernize old computing systems and apply IT to their business processes. Increasing efficiency and cutting costs to safeguard against commodity price fluctuations will be key.

- Brazil's government sector sales will be confined to the first months of 2010 due to legislation curtailing expenditures before elections. Still, the corporate sector will see an uptick in sales, particularly in industries such as finance.

- Companies in Brazil will incorporate IT in both the design and execution of early investments for the 2014 World Cup and 2016 Olympic Games.

Outsourcing

Latin American companies will engage in both business process and IT outsourcing to slash total costs of operations and focus on their core business. Likewise, Latin America will continue to provide services for other regions of the world.

- Instead of spending time and money in creating an IT department, smaller firms in Latin America will tap technology providers to implement, manage and maintain their solutions.

- IT providers will not only loan and maintain services and software as in years past, but will also offer printers, computers, servers and other hardware components, thus giving life to hardware as a service (HaaS).

- Educated workforces, the availability of English speakers and time zone and cultural similarities with larger markets such as the US and Europe will allow Argentina, Chile, Colombia, Brazil and Mexico to consolidate their leadership positions in the Latin American outsourcing industry.

Virtualization

Corporate clients will adopt virtualization solutions to squeeze the juice out of their existing IT investments.

- Latin American companies will use virtualization to consolidate storage and server use, thus reducing energy and maintenance costs. Executives will also virtualize to organize information and access their desktops from different devices with an internet connection.

- As virtualization penetration in Latin America's largest companies surpasses 70-80%, technology providers will attempt to tap the interest in medium-sized firms.

- Adoption will remain strongest in both vertical markets and countries with greater technological maturity - namely the financial and telecommunications industries, and also Chile, Mexico and Brazil.

Market Consolidation

IT providers in Latin America will continue to see their clients morph through mergers and acquisitions, which will generate benefits and disadvantages for technology providers.

- Industry consolidation in the retail and financial sectors will most likely spill over into 2010, though possible mergers and acquisitions will exist in all sectors of the economy.

- Companies formed after mergers and acquisitions will turn to integrators to mesh their IT systems and streamline communications between different departments. However, M&As sometimes freeze new IT investments in the short term, especially if the newly formed company prioritizes other areas of internal reorganization.

- The US$ 500 million investment plan announced by Chilean integrator Sonda will serve as a harbinger of M&A activity within the very IT sector, as regional players will scoop up firms to extend both their geographic presence and product offering. ■

Matthew Malinowski
Reporter Telecom & IT, Business News Americas

Mining: a Strategic Sector for Mexico and the World

Mining is a strategic sector for the Mexican economy and is one of the country's assets when it comes to attracting foreign direct investment. Despite the international financial crisis, in 2009 Mexico remained as one of the most attractive and safe destinations for mining companies worldwide, reason why investors are taking increasing interest on Mexican mines.

Open pit Mining, Madera, Chihuahua

Current economic dynamics would be hard to understand without mining. Although some insist that modern economies derive a large proportion of their revenue and prosperity from the service sector, primary sector activities form the economy's real bedrock. Without exaggerating, the World Bank confirms that the most significant progress toward satisfying human needs –including food, accommodation, health, education, employment and transport– relies on the increasingly efficient use of mineral resources. Furthermore, some studies suggest that activities such as manufacturing, construction and even agriculture, could not exist without mineral production.

Mining plays a leading social-economic role in Mexico. At its various stages –from exploration to production– it generates a significant number of jobs and income for the country. In 2009, it accounted for 3.6% of Mexico's GDP (mining expanded), 4% of Mexican exports and 270,000 direct jobs. Due to the rising demand for minerals by the world's largest and most rapidly growing economies, mining is becoming increasingly important. China, for example, has increased its mineral consumption to support its dizzying economic growth, contributing to the growth in global prices for various minerals. African and Latin American countries are among its providers. The African continent is seen as a gigantic deposit of mineral resources – with everything from oil to coltan – and the world's largest economies are ever more interested in that part of the world. But when it comes to mining, Mexico has a number of advantages, even over African countries.

Mexico offers a more solid and less risky alternative for mining production than other regions.

Mexico offers a solid and less risky alternative for mining production. Several African countries suffer from armed conflict, endemic diseases, poor infrastructure and lack of governmental transparency, which exponentially increases the operating costs for foreign investment despite the abundance of mineral resources.

Mexico possesses significant mineral deposits that are widely sought after around the world. The country is among the twelve largest producers of 17 minerals. It is the world's second largest producer of silver, bismuth and fluorite; the third of celestite; the fourth of wollastonite and diatomite; the fifth of lead; the sixth of cadmium and molybdenum; the seventh of zinc, salt and graphite; the eighth of manganese and baryte and the twelfth of feldspar, gold and copper.

Investors are taking increasing interest in Mexican mines given their reserves of strategic minerals, some of which are key to industries such as aerospace, military and electronics.

This all explains how, despite the international financial crisis, Mexico remained one of the world's top investment destinations in 2009. In terms of mining exploration, it ranked as the top investment destination in Latin America and fourth in the world.

The country possesses significant mineral deposits that are widely sought after around the world.

Mexican legislation encourages investments in the sector. The 1993 Mining Law (Ley Minera) replaced the 1961 legislation and opened up new areas to foreign investment previously limited to Mexican financing. It also removed the requirement for foreign capital investments to be associated with Mexican capital in a proportion of 49-51 percent respectively. The Foreign Investment Law further liberalized the mining industry in a process consolidated by NAFTA and the removal of several investment requirements – for production work only to use Mexican supplies, for training and technology transfer or for nationality requirements imposed on the majority of members sitting on boards of directors– as well as tariff reduction on foreign trade and the import of equipment and machinery. That opened up unprecedented opportunities for private foreign investors interested in the mining sector.

The new legislation heralded another important change: the duration of concessions, which are awarded for 50 years and may be extended.

The Mexican mining sector is a highly attractive investment. It is far quicker for a company to obtain an operating license in Mexico than in other countries. The US company Hecla referred to the "comparative advantages" offered by Mexico in relation to

Copper deposit Milpillas, Sonora

its other commercial partners, confirming that it had taken only eight months to be granted the license concession for the project at LaChoya in Sonora. In the US or Canada the process would have taken between five and 10 years. Workers' salaries are another incentive to invest. In Mexico, the average monthly salary in the mining sector is 482 US$, compared to US$ 1,137 in Brazil and US$ 1,472 in Turkey. In South Korea, the US and Germany the figure rises to 2,611, 3,384 and US$ 3,696 respectively, showing that labor costs in the sector in Mexico are between 60% and 80% lower than in those countries. Therefore mining is not just a strategic sector for the Mexican economy but also for the world, which is looking ever more closely at the opportunities, potential and advantages Mexico offers in this sector. ■

María Cristina Rosas
Professor and researcher in the Political and Social Sciences Faculty, National Autonomous University of Mexico (UNAM)

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Security: Growing Market Opportunities for Security Technologies in Latin America

Especially Brazil and Mexico will be spending considerable sums on domestic security in the upcoming years. At the same time, the region imports nearly all products from this industry segment. The growing demand is noted in the area of integrated solutions offered by one provider. The high costs of telecommunications, safety regulations divorced from reality, and the lack of minimum quality standards in security technology do, however, hinder the initiation of this kind of business activity.

The vast majority of Latin American society perceives their environment as increasingly dangerous – even if these subjective perceptions are not confirmed by local crime statistics. In large markets, such as Argentina, Brazil, Venezuela, and Mexico, the increasing need for personal security has had an influence on the significant growth of sales in the security technologies industry. An increasing role is also played by public investments in safety, such as for example in digital video monitoring.

In large markets, such as Argentina, Brazil, Venezuela, and Mexico, the increasing need for personal security has had an influence on the significant growth of sales in the security technologies industry.

In Latin America the objections to video monitoring infringing on privacy do not play a significant role. A good example is Mexico. 2010 is the jubilee year, when the country celebrates its 200th anniversary of independence. For this occasion, the state installed approximately 2100 new monitoring cameras in the capital, which did not cause any public discussion. It can therefore be expected that this segment of the market will continue to see high growth rates in this region. This applies to smaller markets as well. For example, Uruguay and Panama will see new business opportunities thanks to significant infrastructure undertakings.

The integration of various systems and brands plays an increasing role in Latin America. Investors search with gathering intensity for security solutions for their production plants and offices. These solutions should be uniform and come from a single provider. In the preferred scenario, the entrance controlling systems, along with the cameras, the alarm systems, and smoke detectors, should come from one bidder.

In Latin America, the demand for security technology is met nearly exclusively by imported goods. Only the simpler equipment is produced or assembled domestically. US security technologies have the largest market share, followed by products imported from Japan. The trends observed on the US market occur in Latin American countries with several years' delay.

In the meantime, Latin America has entered the digital age. The Buenos Aires underground has wireless security cameras. The use of GPRS for remote surveillance failed because of the high costs of using the mobile telephone network. Quasi-monopoly structures and weak supervision exercised by competitors contribute to the fact that telecommunication services are still expensive in many areas.

Latin America imports an increasing number of cheap security technologies from China and other East Asian countries. This competition is becoming stronger, also against the small and medium German bidders who supply high quality alarm systems and monitoring for private households. There are practically no regulations or minimum standards set for security technology in the region.

In Mexico, fire protection regulations are in place, but the supervising department does not have sufficient personnel to employ them properly. The insurers of buildings are often the ones who insist on installing fire protection systems. This is why bidders hope that in the upcoming decade, strict regulations will be introduced and rigorously employed. In Venezuela and Chile this is already the case in respect to fire protection regulations. This subject does not play a significant role in the security technology market in those countries anymore.

Among the countries in the region, Mexico is the strongest security technology market in terms of its turnover, but it is Brazil which offers the best business opportunities in the near future. In Brazil, the growing buying power of the middle class is matched by a growing perception of a lack of safety. Additionally, the 2014 World Cup and the 2016 Olympics which are to be held in Brazil will prove to be a powerful driving force behind the sales of high quality security equipment.

In order to ensure the security of stadiums and event venues – amongst others facing terrorist threats – the products needed include detectors of explosive materials, body scanners, monitoring cameras, entrance control systems, and fire protection systems. The demand for security technologies is also reported by hotels, restaurants, and retail shops, which note an increase in turnover with the approaching events. Security experts estimate that the sales of electronic security technologies in Brazil will grow by 70% in the three upcoming years.

The sport events in Brazil will also force the legislators to introduce new, modern regulations pertaining to security firms, and local security enterprises will become more professional. According to the experts, many firms in the safety industry have so far operated illegally, because the legal framework is very narrow. A similar situation can be observed in Argentina and Mexico, where an estimated 30% to 70% of people in this industry work informally. In Colombia the market is increasingly open to foreign security enterprises, and thus exerts pressure on this industry pertaining to the professional value of services rendered. This in turn provides a driving force behind the sales of high quality security technologies in Colombia.

Brazil sees yet another trend, which also advances the security technology industry. While the demand for professional services grows, educated safety specialists are very rare and their services are expensive. Due to this, security guards are increasingly being supplanted by electronic monitoring and alarm systems.

The fight against drug cartels, and the accompanying increase in violence, additionally contributes to the growth of the demand for security technologies, especially in Mexico. However, many projects in Mexico are financed with the money which the country receives – through the Merida-Initiative association – from the USA. In this case, the provider's country of origin is determined in advance.

Electronic Security Technology Turnover

Country	Turnover in US$ million*
Mexico	430
Brazil **	295
Argentina	84
Colombia	70
Venezuela	57
Chile	45
Panama	18

* The data pertains to the sales of security technology systems, without assembly & associated Services ** Prognoses

Source: Security Industry Association (SIA)

In Argentina, and above all in the Buenos Aires agglomeration, crime rates and the risk of danger have noted an increase. The market of security technology follows the demand, noting two-digit growth rates. Especially the state's demand offers attractive trade opportunities. Monitoring camera systems are installed on a large scale in Buenos Aires – in public plazas, on underground and railway stations, at universities, and in schools. This practice has also spread to other Argentinean cities – especially since there are no legal restrictions in this regard. ■

Peter Buerstedde
GTAI, Germany Trade and Invest

Telecom: Leveraging Economic Recovery to Push Broadband

Looking ahead to 2010 there are many signs that Latin American economies are on the mend. And with it comes telephony operators' expectations for a better new year. But it's no longer just voice that will float operators' bottom line. In 2009 it almost became cliché to hear telephony companies - fixed and mobile - talk about an increased focus on value added services, the backbone of which is broadband. And the broadband wave that operators are riding will take them well through 2010.

Broadband in General

Eventually, everything will operate and interconnect over fixed and mobile broadband, including voice, data and TV. The year 2010 will see Latin America taking more steps in that direction. Point Topic's Q2 Global Broadband Statistics report found that Latin America had the second fastest growing broadband subscription rate after Eastern Europe. Nonetheless, Latin America's overall broadband penetration rate of around 5% at end-2008 (with some 26.8 million accounts) means the region still has a lot of catching up to do compared to developed markets that are pushing 30%.

To date most fixed line broadband is based on ADSL or cable modem. Eventually, as demand for bandwidth hungry applications increases, operators in this region will be obliged to deploy fiber-based architectures where possible.

To date, niche players like GTD in Chile and GVT in Brazil - that focus on the high-income segment and corporate users - have deployed this costly infrastructure.

However, companies that serve the masses like Telefónica Chile are carrying out trials with DSL upgrade technologies such as VDSL (which can provide up to 50Mbps) and ADSL2+ (which can reach 24Mbps) to see how much the company can get out of its existing copper infrastructure before having to go to fiber.

Mobile Broadband

According to Cisco's Visual Networking Index, for 2008-13 Latin America will be the world's fastest growing region in terms of mobile data traffic at 166% CAGR, followed by Asia Pacific with 146%. One of the main drivers of mobile broadband traffic is video. Pyramid Research forecasts the number of subscribers to mobile video in Latin America will see a 39% CAGR from the end of 2008 to the end of 2014, the highest growth rate of any region worldwide.

Latin America will continue to have a 2-3 year delay behind developed nations and many major operators are planning to extend the life of their 3G technologies with upgrades to HSPA+ and other evolutions before moving to 4G. América Móvil's CEO Daniel Hajj has said that most of the company's overall investments in the next two years would be focused on expanding 3G infrastructure, as well as trying to migrate users to postpaid plans.

3G Launches still to Take Place in 2010

Costa Rica plans to auction three blocks of spectrum in the 850-900MHz, 1,800MHz and 2,100MHz bands in early 2010. Digicel, Cable & Wireless, Tigo, Claro and Movistar have all expressed interest in participating. To prepare it for the new competition, Costa Rica's state-owned telco ICE is deploying a US$ 235 million 3G network with Huawei, due to come online in 2010. The telecoms watchdog is also planning to offer spectrum in the 3.4-3.6Ghz and 3.6-3.7Ghz bands for WiMax. Movistar is desperate for new spectrum throughout the region, while trunking operator Nextel is likely to seek spectrum following the same 3G strategy as in Chile and Peru.

Handsets and Netbooks

The majority of access to 3G networks so far in Latin America has been via USB modems on laptops. However, the region has one of the fastest growing adoption rates of smartphones in the world.

While smartphones represented only 3% of total handset unit sales in Latin America in 2008, compared to 12% globally, Pyramid Research predicts Latin America will grow from 7million smartphones sold in 2009, representing 5.4% of the regional total, to 48 million in 2014, or 30%of the total handsets sold in Latin America.

LTE

Long term evolution (LTE) is the next inevitable step in mobile internet development, promising data transmission speeds of 100Mbps and low latency to support new services such as interactive TV. The latest update by the Global Mobile Suppliers Association (GSA) in

October reported 42 commitments worldwide by operators in 21 countries to deploy LTE. Some 15 networks are due to be in service by the end of 2010. The first commercial rollouts in Latin America are expected in 2011-12.

In Latin America Entel PCS confirmed it would start trials before the end of 2009. Vivo in Brazil has made a vocal commitment and Telefónica is planning to conduct LTE tests with six suppliers in six countries, two of which are Argentina and Brazil.

Spectrum

The 700MHz and 2.6GHz bands have been touted as the most likely spectrum allocated for LTE though analysts say the AWS (Advanced Wireless Services) spectrum bands, which are 1.7GHz and 2.1GHz, could also be a good option for LTE.

Operators are likely to need 20-40MHz extra to deploy LTE and that is one of the major issues to be dealt with in 2010 - spectrum limitation. On one hand, several regulators have been imposing spectrum caps on existing operators in auctions to ensure the entrance of new players. Meanwhile others have been looking at how they can reshuffle existing spectrum to maximize each band with the technology that is most suited to it.

Brazilian telecoms regulator Anatel is in the process of “spectrum refarming” for several frequencies including many of the lower-end bands like 450MHz and below, and 2.5GHz. Mexico’s transport and communications ministry SCT has also been scrutinizing the renewal of telecommunications licenses, taking into account expected development of new technologies and optimal use of spectrum.

WiMax

The other 4G wireless technology, WiMax, has a head start in this region. However, much debate in recent years has centered on whether WiMax will be eclipsed by LTE, which most major mobile operators have already agreed to migrate to.

The unfavorable economic climate in 2009 did not help WiMax, with some projects being put on hold, and spectrum auctions in major markets such as Mexico, Argentina and Brazil delayed. In Brazil there is also the concern that Anatel seems to be leaning towards reserving spectrum in the 2.5GHz band for LTE and not WiMax. According to

Signals Telecoms Consulting, economies of scale have still not been reached regarding WiMax equipment costs, and WiMax is doomed to being a niche technology.

However, Israeli WiMax equipment supplier Alvarion, which claimed to have a 62-68% share of the Latin American WiMax equipment supply market at the end of 2008, is upbeat and insists that demand remains robust and there is actually subscriber growth. It predicts gradual recovery to begin in 1H10.The supporters of WiMax argue there is room for both LTE and WiMax and that the two will co-exist.

M&A

Latin American mobile giant América Móvil announced in January it planned to takeover sister companies Telmex Internacional and Telmex. After receiving regulatory approval the company said it expected the transaction to be completed in the second quarter. América Móvil has said it plans to delist Telmex Internacional from all stock exchanges where it currently trades. The company is studying the best way to integrate the wireless and wireline operations of AMX and Telint in the countries where they are both present. It may face regulatory and legal obstacles in Brazil and Colombia.

Ecuadorian state-owned telecoms operator Corporación Nacional de Telecomunicaciones (CNT) has announced it will absorb state mobile telephony operator Alegro PCS. Alegro has recorded losses of US$ 220 million since it was formed in 2003.

The Bahamas government is open to bids for a 51% stake in incumbent operator BTC. Colombian fixed line operator ETB continues to study whether it is feasible to seek a major equity partner, while the country's largest fixed line operator UNE plans to consult shareholders of sister company EPM Bogotá over a restructuring plan via which the latter unit would be fully absorbed by UNE.

Telecom Italia (TI) awaits a decision by Argentina's supreme court on its rights to vote on the board of Telecom Argentina (TEO). If the court rules that TI cannot participate in TEO board meetings, this could speed up an eventual decision by TI to sell its 50% stake in TEO controlling company Sofora.

If TI does decide to sell its Argentine interests, it won't come cheap. It has remained surprisingly cool to a US$ 835 million offer on the table, and its shareholders association Asati has said the stake is worth at least US$ 1.3 billion. And Guyana's government continues to discuss a plan to sell its 20% stake in incumbent operator GT&T. Venezuela all followed suit. ■

Patrick Nixon
Senior Reporter, Business News Americas

Business News Americas

Business News Americas is an online bilingual news and business intelligence service covering 12 different business sectors throughout Latin America and the Caribbean. The company provides highly specialized, sector-focused business news and business intelligence tools through its online intelligence platform, e-mail services and customized content delivery options in English and Spanish.

Textile Apparel Design and Fashion Sector in Colombia

Colombia is a textile country par excellence as it has shown one of the highest growth rates in its exports activity. Since the beginning of the century the main textile industries appeared in the region of Antioquia, distributed in Municipalities such as: Medellin, Bello and Itagui. Throughout history the country developed its infrastructure as cotton grower and exporter of short and medium staple cotton in the regions of Atlantico, Meta, Valle and Tolima. The strengthening of the cotton sector allowed the development of the textile industry of Antioquia and Manizales.

Today Medellin is the center of the sector in Colombia, with a growing presence in other regions such as Bogotá/Cundinamarca and Atlantico. The composition of the Textile, Apparel, Design and Fashion Cluster of Medellin/Antioquia by company size is comprised as follows: 90.4% are micro-businesses, 7.2% are small businesses, 1.9% medium business and 0.5% large businesses.

It is estimated that the business network located in this Cluster is comprised of 11,966 companies, with total assets for almost US$ 2,765 million. Furthermore it is the center for apparel manufacturing of shirts and pants with cotton fabrics. Bogotá is a younger industry, generating 36% of the textile industry and 33% of apparel.

The Colombian textile and apparel industry is one of the largest and most experienced in Latin America.

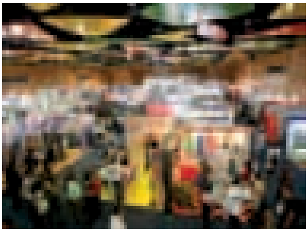
Bogotá is characterized for being the center for apparel manufacturing of shirts, men's and women's clothing. Cali is the third apparel manufacturing center specialized in formal shirts for men. Ibague has had an interesting development in its industry, tending to become one of the country's most important textile and apparel centers.

The Colombian textile and apparel industry is one of the largest and most experienced in Latin America with application of cutting-edge technology in the process of production with manufactured fibers. Its quality has allowed it to successfully reach and grow in the United States, European Union and Andean Community markets, amongst others. The sector includes: Cotton crops, Fabric production, Garment manufacture, Commercialization.

Currently this industry is going through a crisis, which according to Trujillo 2009 has lost 60,000 direct and indirect jobs in the department of Antioquia, this being the most representative of the textile and apparel industry. However, thanks to the project of World Class

Productive Sector Transformation promoted by the Ministry of Trade, Industry and Tourism the textile apparel sector was selected to participate in the promotion strategies for new and emerging sectors and more and better of what is good in order to transform the textile apparel sector along with other sectors into world class sectors.

Conclusions and Trends of the Textile Apparel Design and Fashion Sector in Colombia



Colombia is a textile country par excellence as it has shown one of the highest rates in its exports activity.

Textiles and apparel represent 92% of the value added of the value chain. The chain contributes 8% of the Colombian industry added value, 20% of employment and 5% of exports. Colombia is a net importer of textiles (only 15% of the production is exported) and net exporter of apparel (57% of the production is exported).

- Various players stand out due to their development of added value services integrating logistically with its clients abroad, commercially, among other activities.

- Several of the great textile companies have made important investments and efforts regarding innovation (fabric finishes, intelligent fabrics, use of natural fibers such as bamboo, etc.) and some have textile design teams. However, the country has a lack of specialized training programs (textile engineering, textile design, etc.) that may promote competiveness in the sector.

- As a success factor, the businessmen of the sector must focus on markets and products with greater added value. Have a clear sector aspiration and work as a chain in order to achieve their objectives. As a risk factor, there is a lack of motivation for businessmen to invest, transform and cooperate among themselves.

- From here on the businessmen of the sector must face the challenges as a tight guild, increase their productivity and aspire to compete in a global environment that is more and more competitive.

In light of the current economic crisis, the sector is forced to explore new market niches in search of diversification of their markets in favor of the growth of the companies of the sector achieving the internationalization of our economy. ■

Inexmoda, Instituto para la Exportación y la Moda
Colombia

Transport and Logistics: Latin America Wants to Get Back on Track

Many Latin American countries struggle with their transport infrastructure as it is insufficient to cope with rapidly increasing trade turnover. According to the data by UN ECLAC/CEPAL, Latin American and Caribbean export volumes have increased in the last 10 years by 69%. The World Bank experts agree: with better roads, railways, airports, and seaports, trade and production could increase at an even greater pace. In many Latin American countries infrastructure is overstretched. The World Bank's Logistics Performance Index (LPI) called Latin American countries mediocre in January 2010, and put them far behind Asian countries. Brazil, the foremost of the Latin American countries, occupies the 41st of 155 places. Argentina, Chile, Mexico, and Panama take 48th to 51st place, Venezuela is 84th, and Cuba, the last of the region, occupies the 150th place. The evaluation includes not only physical infrastructure, but also organizational aspects such as duty and administration procedures and the quality and cost of logistic services.


Latin American and Caribbean export volumes have increased in the last 10 years by 69%.

The transport infrastructure of Latin American countries has also been graded as bad to average in the most recent edition of Global Competitiveness Reports by the WEF. Peru, Brazil, Costa Rica, and Venezuela occupy the places from 126 to 129 in a ranking of ports from 133 countries. Mexico and Argentina place toward the end of middle ranks. As far as railway infrastructure is concerned, the region is in the worse half of the ranking of comparable countries if the entire region is considered. In a point scale ranging from 1.0 (= extremely underdeveloped) to 7.0 (= extensive and highly proficient) railway connections of the region are graded at only 1.0 to 2.3. The road infrastructure is not considerably better, either. As far as air traffic is concerned, the WEF experts' grades range from a weak 2.4 for Paraguay to a considerable 6.0 for Chile. Chile is one of the few areas of Latin America considered to have good infrastructure. In the wake of a strong earthquake of February 2009 the country has to allocate considerable amounts of money for the repair of major road, bridge, port, and airport damage. The government has estimated the short term investment needs of transport and water supply at US$ 1.2 billion. This estimate does not include damage to sea ports.

The lack of international transport roads is a handicap to regional integration. There are no suitable road connections between Brazil and Peru or Colombia and Panama. There are no transboundary railways at all. Brazil has to export its goods to Asia by means of ships through the Atlantic Ocean, and traversing Cape Horn, as there are no land connections across the Andes to the shores of the Pacific. The Initiative for the Integration of the Regional Infrastructure of South America (*www.iirsa.org*) founded in 2000 by twelve South American countries aims at rectifying the situation. Its webpage enumerates over 500 possible state and interstate projects requiring the total funding of US$ 83 billion. The largest project, estimated to cost US$ 4.8 billion is a projected railway connection between Argentina and Chile by means of crossing the Andes, but this project still lacks funding.

Transport infrastructure of Latin American countries*

Country	Railways (km)	Roads (km)	Air traffic (passengers, millions)
Argentina	29,300	231,400	14,616
Bolivia	2,400	62,500	287
Brazil	28,100	1,739,000	52,045
Chile	8,700 79	79,600	16,056
Ecuador	1,000	43,700	3,693
Columbia	600	164,300	9,762
Mexico	17,500	360,100	32,544
Panama	100	11,600	7,940
Paraguay	0	29,500	481
Peru	2,900	79,000	6,472
Uruguay	1,600	77,700	940
Venezuela	700	96,200	2,635

* the most recent annual data

Source: ECLAC/CEPAL

Over two thirds of these projects are to be partially or fully funded by private investors. In the wake of the global financial crisis it has become increasingly difficult to find investors as it will be impossible to complete anything without a diverse range of credit grantors. A small number of big investors are able to secure money in the financial market. The Brazilian Stock Exchange, currently in the midst of a boom, is particularly productive. The Brazilian billionaire Eike Batista provided a shining example by taking the logistic enterprise he established in 2007 onto the stock exchange in 2008 with aim of using its share capital to fund national project plans. His move proved to be very successful and paved the way for the realization of a giant port project in Açu, north of Rio de Janeiro. Batista counts the national development bank BNDES as a member of his team with the bank as a partial shareholder and credit grantor. Brazil is investing mainly in the development of its transport infrastructure. Due to the fact that the 2014 FIFA World Cup and the 2016 Olympic Games are set to take place in Rio de Janeiro, Brazil is facing an enormous challenge. Presently none of the 12 cities hosting the World Cup is able to seamlessly coordinate the flow of football fans between the airport, hotels and sports venues. Few cities have roads other than the one next to a railway under construction. Apart from developing the underground in Sao Paulo, Rio de Janeiro, and Salvador, the hosts look to modern electric tramways. In Sao Paulo, Manaus, and Rio de Janeiro monorail trains are planned as well. The largest railway project is the development of an express railway between Campinas, Sao Paulo, and Rio de Janeiro whose cost is projected at 15 billion euro, but due to delays it will not be completed in time for the World Cup.

The long-neglected railway system is gaining prominence in the Brazilian scheme for transporting goods as the demand for Brazilian resources increases and the road network becomes overburdened. According to government projections, the transportation of goods by rail is to increase from the present 25% to 35% by 2025. By 2020, 15,000 km of new railway are to be laid.


The National Transport and Logistics Plan establishes railway network investments for the transportation of goods at a total of ca. 61 billion euros.

The National Transport and Logistics Plan establishes railway network investments for the transportation of goods at a total of ca. 61 billion euros. According to the data assembled by the national development bank, BNDES, by 2013 a total amount of ca. 14 billion euros will be allocated to the development of road networks. A further sum of 6 billion euros will be allocated to the development of ports by 2013. Airports are another important item on the agenda. Runways and airport terminals in the 12 cities hosting the World Cup require state funding of up to 4 billion euros. Investments in transport and logistics play an important part in all the cyclical programs introduced by Latin American countries to ward off the global financial crisis. Colombia alone has allocated more than US$ 7.5 billion to investments in the development of roads, focused on several key projects such as "Ruta del Sol" and "Autopistas de las Americas". Argentina has announced a highway building program. The total combined length of new highways to be built amounts to 2,500 km.

Mexico is focusing mainly on roads and highways and plans a new "Punta Colonet" cargo port with all the infrastructure comprised of maintenance, transport and storage facilities. Peru aims at the reactivation and development of its railways. Apart from a local, short-range connection between Lima and the Callao port, the mining companies Buenaventura and Mapsa want to allocate several billion euros as a private investment in the development of new freight lines. The Callao port is to be enlarged, as well. ■

Carl Moses
GTAI, Germany Trade and Invest

2. Exhibitions in Latin America – a New Industry on the Rise

History and Culture: Driving Forces in the Development of the Exhibition Industry in Latin America

Latin America is a great place for international exhibition organizers who are looking for new markets.

In order to have a clear view of the exhibition industry in Latin America, we must analyze the region's internal characteristics, which are key elements for understanding our behavior and development. In terms of history, Latin America is a relatively new region. It's 500 years of development offsets older civilizations like those of Europe and Asia with more than 1.500 years of history.

In terms of cultural development, our continent has been influenced by European, African and native cultures giving rise to a "cultural mosaic" that sees huge contrasts between the continent's countries. Another cultural characteristic is the easy-going and spontaneous way of life of the Latin American peoples. This degree of calmness translates into a shorter-term view of reality and a rush for short-term results. Studies have demonstrated that older cultures have attained a higher degree of development and have learned to wait for longer-term results. Naturally, these characteristics also affect the exhibition markets.

Characterization of the Exhibition Industry in Latin America

Aside from the above elements, AFIDA has identified other factors that promote or discourage exhibition activity in Latin America:

- political stability and security issues
- the economic and social situation
- the penetration of the globalization process and the internationalization of the economy
- the trade fair culture
- the priority of business exhibitions for the city/region in question
- the existence of competition
- the influence of trade associations and unions in the organization of trade fairs

Our analysis of the previous factors concludes that in terms of exhibition development, the region is divided into two groups. Each of them represents different and complex realities, and there are also unique characteristics within each country. The first group is composed of countries with greater development in terms of their exhibition industries: Brazil and Mexico, followed by Colombia and Argentina. The second group is formed of all the other countries.

The following characteristics apply to the countries within the first group:

- the existence of facilities, convention centers and venues with good infrastructure which are in line with international infrastructure standards
- the presence of international trade fair organizers
- strong local trade fair organizers
- high levels of competition within the industry
- a well recognized and developed trade fair culture in the respective government as well as in business and trade organizations
- respective government creates public policies aimed at attracting corporate tourism and enhancing the competitiveness of cities; they also offer fiscal incentives
- the trade fair industry is represented by strong exhibition associations

The most notorious characteristics for the second group are (countries with an emerging exhibition culture):

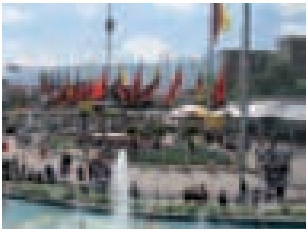
- the inexistence of proper trade fair grounds or venues; the locations used for exhibitions are adapted using tents
- the presence of multiple and small local organizers with similar events in the same industries, giving rise to fragmentation of the market
- the exhibitions are treated as wholesale events and hardly ever as specialized events with proper interaction between demand and supply
- the government and the business sector do not attach enough importance to the exhibition industry
- the inadequate representation of the industry (absence of associations or cohesive forces)

Market Opportunities

Based on its stable economy, its good economic prospects, and the elements highlighted above, Latin America is a great place for international exhibition organizers who are looking for new markets. Latin

America provides such companies with the opportunity to develop new projects, improve their financial performance and capture new visitors and exhibitors for their current or future events.

Our region is a market waiting to be developed – a market where professional organizers can benefit from fertile soil and from an emerging economic market. Latin America could be the next place for global exhibition industry expansion once the Chinese, Russian and Middle Eastern markets are fully exploited by international organizers. According to world figures, which contain records of 19,000 exhibitions, the Latin American market represents only 4% of the global market. Our region therefore offers a great potential for growth and development.



Corferias, International Center for Business and Exhibitions Bogotá, Colombia

The exhibition numbers in the region prove its growthing market potential: in 2010, 1.479 exhibitions take place in the region. These exhibitions are being held in 119 cities, 18 countries and represent 75 economic sectors. They attract a total of approximately 180,000 exhibitors and nearly 19 million visitors.

Regarding the economic sectors, there is a concentration of the exhibition activity in traditional business sectors, creating a huge opportunity for non traditional sectors to be developed within the industry.

Business Challenges and Strategic Recommendations

As already mentioned, the market lacks certain conditions which are needed to guarantee the proper functioning of the exhibition industry. Therefore, international companies seeking to explore or invest in the region must include the following aspects in their strategy for the Latin American market:

- investment in new infrastructure
- the inclusion of ICTs (Information and Communication Technologies)
- the inclusion of new business models
- new ideas to attract the younger generations
- professional buyers
- the generation of a trade fair culture among businesses, trade associations and governments
- more training for trade fair organizers and venue owners

- the professionalization of trade fair activities, providing an incentive for innovation and competition (breaking away from the informality of some markets)
- the inclusion of local players, who perfectly understand the changing and complex inner market conditions
  - public-private commitment to develop adequate infrastructure and create attractive destinations for business players
  - greater government support via public policies and funding
- an international perspective with a domestic focus ("glocal" strategy)
  - the use of international corporate support
  - the ability to adapt to the domestic environment (fluctuations, market distortion, power groups, weak infrastructure, weak trade associations, weak information systems, legal complexity, safety and security issues etc.)
  - a management system with sufficient local independence and bicultural leadership capable of understanding the different corporate and local management styles
- the development of networks and strategic alliances with local partners
  - world-class quality seal for exhibitions
  - world quality standards for operating and managing events
  - technology tools to facilitate registration and management of the event, and to create added value for customers ■

Andrés López Valderrama
President of the International Association of Exhibitions in Latin America – AFIDA, Colombia

The Exhibition Industry in Latin America

Regional Key Data

The following data is extracted from an investigation on the exhibition´s industry, (exhibitions, trade shows, congresses and conventions) of 18 countries (Argentina, Bolivia, Brazil, Colombia, Chile, Cuba, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panamá, Paraguay, Peru, Uruguay y Venezuela) for the year 2010.

The results correspond only to the exhibition industry (specialized trade shows and exhibitions as well as consumer shows).

Exhibition Space, Number of Exhibitions, Exhibitors and Attendees

During 2010, the region conducts 1,479 exhibitions, of which 88% are celebrated in 5 countries. Mexico and Brasil rank first with 402 and 401 exhibitions respectively. Argentina, Colombia and Peru follow the lead with 293,170 and 38 exhibitions respectively.

Exhibition market by country, 2010

Country	N. of Exhibitions
Brazil	402
Mexico	401
Argentina	293
Colombia	170
Peru	41
Ecuador	35
Venezuela	26
Chile	25
Bolivia	20
Panamá	13
Cuba	10
Uruguay	9
Honduras	8
Guatemala	7
El Salvador	7
Costa Rica	7
Paraguay	5
Nicaragua	3
TOTAL	1.479

Source: AFIDA

The activity of AFIDA members accounts for 44% (639 exhibitions) of the total number of exhibitions conducted in Latin America. The rest, 56% are not celebrated on AFIDA venues or by AFIDA exhibition organizers. Analyzing AFIDA´s exhibitions, in 2010, 28%, are held in Brazil, 27.5% in Mexico, 16.28% in Colombia, 12.36% in Argentina and 4% in Peru. These 5 countries develop 87% of the activity.

AFIDA exhibitions by country 2010	
Country	**N. of Exhibitions**
Brazil	139
Mexico	112
Colombia	104
Argentina	79
Ecuador	24
Peru	21
Bolivia	18
Chile	7
Cuba	7
El Salvador	6
Panamá	6
Venezuela	6
Honduras	6
TOTAL	639

Source: AFIDA

In 2010, our members estimate that 180,000 exhibitors and 19 million attendees will take part in their exhibitions. AFIDA research shows that 7 millions of m² will be sold by exhibition organizers and venues during the year.

Economic Activity

There is a correspondence between the dominant economic sectors of Latin America and the exhibitions conducted in the region. Although almost all the countries are including more developed products, our economies are still in a process of development where most of the countries produce food items, consumer goods, or building materials. Larger countries like Brazil produce cars, trucks, and airplanes, giving rise to the development of this industry among the top 6 in the exhibition industry.

Construction and/or engineering lead the market with 4.96% (57 exhibitions), Food and Beverage with 4.87% (56 exhibitions). There is a concentration of the exhibition activity in traditional business sectors, creating a huge opportunity for non traditional business sectors to be developed within the industry. There is a concentration of the exhibition activity in traditional business sectors, creating a huge opportunity for non traditional business sectors to be developed within the industry.

Exhibition market according to the number of exhibitions by business sector 2010 - 2011 (first 12 sectors)

Sector	N. of Exhibitions
Construction and/or Engineering	57
Food and Beverages	56
Automobile and/or Auto parts	49
Animals and/or Livestock	49
Health	49
Multisectoral	45
Business and Innovation	42
Education	41
Industrial and automated products and processes	37
Technology	35
Furniture and household	33
Enviroment and/or biotechnology/energy	32

Source: AFIDA

Exhibition market according to the number of exhibitions and business sectors (first 5 countries by sector)

Country	Construction and/or Engineering	Country	Food and Beverages
Brazil	14	Brazil	14
Mexico	9	Mexico	14
Chile	6	Colombia	13
Ecuador	6	Argentina	10
Colombia	5	Ecuador	2
Country	**Automobile and/or Autoparts**	**Country**	**Animals and/or Livestock**
Colombia	14	Colombia	15
Brazil	11	Mexico	12
Mexico	8	Argentina	7
Panamá	4	Brazil	5
Venezuela	3	Paraguay	2
Country	**Health**	**Country**	**Health**
Mexico	16	Cuba	6
Brazil	8	Argentina	4
Colombia	6		

Source: AFIDA

Convention Centers and Venues

Only a few countries in Latin America have purpose-built exhibition venues. The number of venues per country differs according to the country´s area, population and economic activity. Brazil, Mexico, Argentina and Colombia rank first.

In some countries exhibitions are celebrated in not purpose-built exhibition spaces, but in tents, malls, hotels and other scenarios.

Number of venues and convention centers by country

Country	N. venues or convention centers	N. exhibitions per year
Brazil	36	402
Mexico	35	401
Argentina	21	293
Colombia	16	170
Chile	8	25
Venezuela	6	26
Peru	5	38
Ecuador	5	35
Panamá	5	13
Bolivia	4	20
Uruguay	4	9
Cuba	3	10
Costa Rica	3	7
Guatemala	2	7
Paraguay	2	5
Honduras	1	8
Nicaragua	1	3
El Salvador	1	7

Source: AFIDA

Regarding the number of exhibitions, (either organized by the venue or not) Parque Anhembi occupies the first place, with 93 exhibitions, (6.93%), followed by Expo Guadalajara and Cintermex, both with 64 exhibitions (6.38%), Centro Internacional de Exposiciones y Convenciones WTC de Mexico, with 63 exhibitions (4.94%), Corferias with 60 exhibitions (6.17%) and Centro de Exposiciones Fenac with 60 exhibitions (4.12%).

Leading venues according to the number of exhibitions conducted in 2010 (first 20 countries)

Country	Venues	N. of Exhibitions	Exhibition Space
Brazil	Parque Anhembi	93	400,000
Mexico	Expo Guadalajara	64	70,000
Mexico	Cintermex Monterrey	64	37,000
Mexico	Centro Internacional de Exposiciones y Convenciones WTC	63	24,000
Brazil	Centro de Exposiciones Fenac	60	36,399
Colombia	Corferias	60	59,430
Argentina	La Rural S.A	54	55,000
Brazil	Expo Center Norte	54	98,000
Mexico	Centro Banamex	42	34,000
Mexico	Poliforum Leon Congresos y Exposiciones	39	45,000
Argentina	Centro Costa Salguero	38	40,000
Brazil	Centro de Exposiciones Imigrantes	38	240,000
Colombia	Plaza Mayor de Medellin	28	15,000
Colombia	Cenfer	28	20,000
Peru	Centro de Convenciones del Jockey	27	
Brazil	Transamerica Expo Center (TEC)	25	100,000
Colombia	Centro de Eventos del Pacífico	22	110,000
Chile	Espacio Riesco	18	130,000
Ecuador	Centro de Convenciones de Guayaquil Simón Bolívar	12	12,000
Brazil	Centro Convenciones da Bahia	11	57,000
Colombia	Expofuturo	9	36,000

Source: AFIDA

Exhibition Organizers

The major exhibition organizers are situated in Brazil, Colombia, Argentina, Mexico and Chile. Traditionally, in some countries like Mexico, the venues rent space to other companies, which are the exhibition organizers.

This tendency is changing and nowadays, venues owners are participating in the making of the exhibitions, by becoming exhibition organizers. The following list corresponds to exhibition organizers that develop their own trade or consumer shows.

Leading exhibition organizers according to the number of exhibitions conducted in 2010 - (first 23 countries)

Country	Organizer	N. of Exhibitions
Brazil	Reed Exhibitions Latin America	50
Colombia	Corferias	37
Brazil	Cipa Publicacoes Productos e Servicios Ltda	28
Brazil	Fagga Promocao de eventos	24
Argentina	Expotrade S.A.	15
Brazil	Francal Feiras e Empreendimentos Ltda	15
Brazil	Diretriz Feiras e Eventos	12
Argentina	Indexport Messe Frankfurt	12
Brazil	Trade Network Participacoes	12
Brazil	Greenfield Consultoria e Promocao de Eventos Ltda	12
Brazil	Multiplus Producoes e Empreendimentos Ltda	12
Colombia	Fenalco	11
Brazil	Nuernbergmesse Brasil	10
Mexico	E.J Krausse	9
Colombia	Sofex Américas	9
Colombia	Cenfer	9
Mexico	Giprex, S.A. de C.V.	8
Chile	Fisa S.A	7
Argentina	La Rural S.A	7
Mexico	Tradex Exposiciones Internacionales, S.C.	7

Source: AFIDA

Leading Exhibition Trade Shows in Latin America

The following information corresponds only to AFIDA Members. It does not include some of the exhibition organizers mentioned in other parts of the study.

The leading exhibition trade shows in Latin America according to number of exhibitors are Expoartesanias (with 8,520 exhibitors) followed by Expofarmacia (with 6,482 exhibitors), Fispal Tecnologia (with 2,100 exhibitors), Mecanica (with 1,969 exhibitors) and Febratex (with 1,950 exhibitors).

Leading exhibitions according to exhibitors - (first 14 exhibitions by number of exhibitors)

AFIDA Member	Exhibition	N. of Exhibitors
Corferias	Expoartesanias	8,520
AOCA*	Expofarmacia	6,482
UBRAFE*	Fispal Tecnologia	2,100
UBRAFE	Mecanica	1,969
UBRAFE	Febratex	1,950
Expo Guadalajara	Feria Internacional del Libro	1,925
Expo Guadalajara	Expo Antad	1,800
AOCA	Feria Internacional de Turismo de America Latina	1,685
UBRAFE	Fispal Food Service	1,500
AOCA	Feria Internacional del Libro de Buenos Aires	1,305
UBRAFE	Hospitalar	1,200
PABEXPO - Palacio de Convenciones	Feria Internacional de la Habana FIHAV	1,200
UBRAFE	Couromoda	1,100
UBRAFE	House & Gift Fair South America	1,000
Expo Guadalajara	Confitexpo	390

Source: AFIDA

According to the exhibition space, the leading exhibition trade shows in Latin America (only corresponding to AFIDA Members) are Agrishow (360,000 m²), Feria Internacional de Azuero (180,000) and Feria Internacional del Libro (151,460).

Leading exhibitions according to exhibition space - (first 15 exhibitions by number of square meters)

AFIDA Member	Exhibition	N. square meters
REED EXHIBITIONS ALCÁNTARA MACHADO	Agrishow	360,000
FERIA INTERNACIONAL DE AZUERO	Feria Internac-ional de Azuero	180,000
CORFERIAS	Feria Internacional del Libro	151,460
PATRONATO DE LA FERIA DE LA CHORRERA	Patronato de la Feria de la Chorrera	140,000
PATRONATO DE LA FERIA INTERNACIONAL DE DAVID	Patronato de la Feria Internacional de David	121,166
UBRAFE	Salao Internacional de Automovel	85,000
REED EXHIBITIONS ALCÁNTARA MACHADO	Feicon Batimat	85,000
UBRAFE	Hospitalar	82,000
UBRAFE	Couromoda	82,000
REED EXHIBITIONS ALCANTARA MACHADO	Expolux	80,000
UBRAFE	Mecanica	78,000
UBRAFE	Fispal Tecnologia	70,000
UBRAFE	House & Gift Fair South America	67,500
UBRAFE	Hair Brasil 2010	65,000
UBRAFE	Fenasucro	55,000

Source: AFIDA

The Feria Internacional de Libro de Buenos Aires organized by Fundacion el Libro, is the leading exhibition according to the number of attendees (1,200,000 attendees), followed by Feria Internacional de la Chorrera organized by Patronato de la Feria de la Chorrera with 312,742 attendees.

Leading exhibitions according to the number of attendees - (first 15 exhibitions by number of attendees)

AFIDA Member	Exhibition	N. of Attendees
FUNDACION EL LIBRO	Feria Internacional de Libro de Buenos Aires	1,200,000
PATRONATO DE LA FERIA DE LA CHORRERA	Feria Internacional de la Chorrera	312,742
UBRAFE	Autopar	26,000
EXPO GUADALAJARA	Feria Internacional del Libro	17,112
LA RURAL, PREDIO FERIAL DE BUENOS AIRES	EXPOSICIÓN RURAL - Exposición de Ganadería, Agricultura e Industria Internacional	839,419
UBRAFE	Salao Internacional de Automovel	625,330
AMPROFEC	Expo Fresas de Irapuato	350,000
CAMARA DE COMERCIO E INDUSTRIAS DE CORTES-CCIC	Expo Juniana	350,000
Corferias	Feria Internacional del Libro	281,644
CENTROS DE CONVEN-CIONES DEL PERÚ S.A.	Feria Internacional del Libro de Lima	275,000
Corferias	Feria del Hogar	215,239
FERIA INTERNAC-IONAL DE AZUERO	Feria Internacional de Azuero	186,164
REED EXHIBI-TIONS ALCÁNTARA MACHADO	Feicon Batimat	172,000
Corferias	Salon Internacional del Automovil	160,151

Source: AFIDA

The next list corresponds to the leading events according to the number of editions celebrated. The EXPOSICIÓN RURAL-Exposición de Ganadería, Agricultura e Industria Internacional is the oldest one with 124 editions.

**Asociación Argentina de Organizadores y Proveedores de Exposiciones y Congresos - AOCA*

**UBRAFE - União Brasileira dos Promotores de Feiras*

Leading exhibitions according to the number of editions - (first 15 exhibitions by number of editions)

AFIDA Member	Exhibition	N. of Edition	Recur-rence
LA RURAL, PREDIO FERIAL DE BUENOS AIRES	EXPOSICIÓN RURAL-Exposición de Ganadería, Agri-cultura e Industria Internacional	124	Anual
AOCA	Efica 82	82	Anual
Corferias	Asocebu	63	Anual
AMPROFEC	Espacio Sede del Regalo	59	Semestral
Paatronato de la Feria Internacional de David	Feria Internacional de David	55	Anual
Patronato de la Feria de la Chorrera	Feria Internacional de la Chorrera	50	Anual
Feria Internacional de Azuero	Feria Internacional de Azuero	48	Anual
UBRAFE	Nova Equipotel 2010	48	Anual
FUNDACION FIMAULE	Feria Internacional de la Región del Maule	46	Anual
AOCA	MABYN 46°	46	Semestral
UBRAFE	House & Gift Fair South America	41	Anual
UBRAFE	Couromoda	37	Anual
REED EXHIBITIONS ALCÁNTARA MACH-ADO	Feria de las Américas	37	Anual
AOCA	Feria Internacional del Libro de Buenos Aires	36	Anual
CENTROS DE CONVEN-CIONES DEL PERÚ S.A.	Feria del Libro Ricardo Palma	30	Anual
AMPROFEC	ANPIC	30	Anual
Corferias	Vitrina Turistica Anato	29	Anual
UBRAFE	Mecanica	28	Bienal
Corferias	Feria Internacional de Bogotá	28	Bienal
Corferias	Feria del Hogar	27	Anual
PABEXPO - Palacio de Convenciones	Feria Internacional de la Habana FIHAV	27	Anual
Feicobol	Feria Internacional de Cochabamba		

Source: AFIDA

Ana Maria Arango Medina
Executive Director of the International Association of Exhibitions in Latin America – AFIDA, Colombia

Market Information, Research, Figures on Exhibitions

Gerd Bettermann
Department Global Markets, AUMA

Please find below a presentation of the most developed trade fair markets on the subcontinent. AUMA, through its online database, presents in four languages (German, English, Spanish, and French) the information on the most important trade fairs from the European exhibitors' point of view (***www.auma.de*** > ***trade fair database*** > ***worldwide***).

Brazil

Fairs and exhibitions are held across the entirety of Brazil. Fairs attended by foreign exhibitors are, however, mainly held in São Paulo, and a few are held in Rio de Janeiro. Rio de Janeiro has a lot to offer in terms of tourism for the conference, congress, and incentive or integration/motivational industries. This sharing of duties between the two Brazilian agglomerations was established and has developed in the 1990s. Other trade fair locations are likely to appear outside of São Paulo where particular branches of industry settle. However, these are scarce. In the case of some of the industries, trade fairs managed to receive supra-regional significance outside of São Paulo as well, e.g. "FIMEC –The Leather Products and Footwear Fair" held in Novo Hamburgo, "EXPOSIBRAM – Mining Industry Fair and Congress" in Belo Horizonte, and "FEMADE – The Furniture and Woodworking Machine Industries Fair" in Curitiba.

São Paulo has five large trade fair areas. The Anhembi Park, opened in 1970, is the oldest trade fair area of the metropolis. The area presently offers ca. 68,000 m² of gross hall space. Anhembi Park is both a fair and exhibition area, and a centre of art and culture offering a wide array of leisure possibilities; it is located directly by the "Express Way" connecting the bus station, the airport, and the centre of São Paulo.

In 1993, another area, the Expo Center Norte, was commissioned for use, which presently has over 75,000 m² of gross hall space to offer. Expo Center Norte is a very modern trade fair development with five trade fair halls. The area is part of a multifunctional centre, also hosting one of Latin America's largest retail centres and a first-class hotel. Center Norte is within a 40-minute-drive of an international airport.

In 2001, the construction of the Imigrantes Centro de Exposições was completed. The area covers nearly 40,000 m² of gross hall space. The centre is located in the south of São Paulo.

ITM Expo is located to the west of downtown São Paulo, between Rio Pinheiros and Rio Tiete. This location offers 7,500 m² of gross hall space.

The Transamercia Expo Center is located 45 km away from the international Guarulho airport and 12 km away from the domestic Congonhas airport. The venue was opened in 2001 and presently offers 28,000 m² of gross hall space.

The Brazilian trade fair industry skipped the stage of universal and multi-industry events. Industrialisation and improvements in infrastructure, supported by the government in the 1960s and 1970s, allowed the professional industry trade fair market to develop. As early as the late 1950s and early 1960s, the first industry fairs were established for the most important branches of the domestic economy. Many of them are still to be found in the fair events calendar.

Almost every branch of the economy has its fair. One of the first to appear was the "MECANICA Machinery and Industry Trade Fair". Established in 1959, it is held every two years and is still very popular.

In the 1980s diversification gained considerable momentum. The calendar of trade fairs was extended by the more highly-specialised investment goods fairs themed around textiles, foodstuffs, IT, and many other sectors.

The 2010 calendar of UBRAFE, the Brazilian Association of Trade Fairs Organizers, which has 34 of the most significant trade fair organizers on the Brazilian market as members, lists over 150 events.

The Brazilian statistics provided by UBRAFE cover over 32,000 exhibitors, 2.5 million m² of rented space and over 2.5 million visitors each year. As informed by the organizers, the biggest Brazilian trade fair covers around 40,000 m² of rented space, hosts ca. 1,500 exhibitors, and is attended by over 100,000 visitors.

In Latin America, Brazil being no exception here, it is not customary for the organizers to verify retail statistics. Therefore the presented data should only be treated as a set of approximations. The quality of the trade fair is, however, by no means determined solely by raw numbers. The quality of the attendees from a given industry is a telling reflection of business potential. The potential market impact should be compared with the branch-specific requirements for trade fair space. That is why specific markets in Brazil also have good and important, yet small, trade fairs.

Trade fair participants are to be expected primarily from the more remote areas of a given agglomeration. However, exceptions are possible. We can see this, for example, in the FIMEC fair in Novo Hamburgo, which is visited by people from the rest of South America, primarily from Argentina. A more detailed study of the analyses concerning the attendees provided by the organizers may be instructive for the exhibitors and contribute to the future success of the fair.

Both for German exhibitors as well as German fair organizers, Brazil is an important fair location among Latin American countries. The Federal Ministry of Economy and Technology, in co-operation with the Association of the German Trade Fair Industry (AUMA), supports German companies during selected foreign trade fairs (please find further details about the programme on page 220). In 2010, the "German pavilions" will appear during 6 trade fairs in Brazil and in 2010 Germany will attend 11 events.

Four German trade fair companies operate in Brazil, organising their own trade fairs. Events held by the German trade fair companies are published by AUMA in its own brochure entitled "German Trade Fair Quality Abroad GTQ". A list of the respective trade fairs is listed on page 236.

In April, NürnbergMesse GmbH purchased Nielsen Business Media Brazil. The new subsidiary, NuernbergMesse Brasil, will be organising its own trade fairs in São Paulo which will be themed around pharmacy, cosmetics, analytics, glass technology, kitchens and bathrooms, domestic animals and veterinary medicine, food and beverages, and sustained long-term economic development. For several years the NürnbergMesse Group is organizing two specialist trade fairs in Brazil – "BioFach América Latina" and "ExpoSustentat". NürnbergMesse Brasil's event calendar for 2010 includes 9 trade fairs (2010: 8 of its own events).

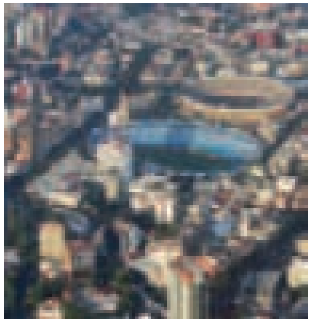
Hannover Fairs Sulamérica Ltd., a company established in 1998 in São Paulo, has been planning and organising international trade fairs in Brazil for Deutsche Messe AG. In 2010, Hannover Fairs Sulamérica Ltd. will organise the "FEMADE – International Exhibition for Machines, Equipment, and Products for the Woodworking and Furniture Industry" in Curitiba, and the "MERCOPAR – Subcontracting and Industrial Integration Fair" in Caxias do Sul. In 2011, the programme of fairs organised by Hannover Fairs Sulamérica will be extended to include two additional trade fairs, namely the "BITS Business IT South America – a CeBIT Event – South America's Exhibition and Conference for Business IT", in Porto Alegre and "CeMAT

SOUTH AMERICA International Trade Fair for Materials Handling and Logistics" in São Paulo.

Messe Düsseldorf GmbH will organise the "TUBOTECH International Trade Fair for Tubes, Fittings, and Components" in 2011 in São Paulo. Messe München GmbH has "electronicAmericas – International Trade Fair for Components, Assemblies and Electronic Production, and Laser Technology" on its 2011 event agenda.

Mexico

Together with opening of the Mexican market to world trade in the 1980s, trade fairs penetrated with greater intensity the international awareness of the Mexican economy. Trade fair economy skipped the stage of multi-industry fairs and set right off into specialized trade fairs. The necessity to catch up with the neglected marketing tool, namely the trade fair, was tremendous. The initial experiences were mainly gathered "on the job" or imported by foreign organizers. From the beginning, given the physical proximity, an important role was played by US-American trade fair organizers and institutions.



Mexico City

Fairs and exhibitions are organised all around Mexico. Fairs with the greatest international attendance on the part of the exhibitors are held primarily in Mexico City and occasionally in Monterrey or Guadalajara. According to research performed by the US-American "Tradeshow Week" professional magazine, over 88% of all major Mexican fairs are held in these three cities, with over 40% in Mexico City alone. Another significant Mexican trade fair city that needs to be mentioned is León. Other trade fair areas or areas used for the purposes of trade fair events or exhibitions with a gross area of over 4,000 m² are located in Chihuahua City, Acapulco, Puebla, Cancun, and Boca del Rio. Fairs held there bear a rather limited impact in terms of both visitors and exhibitors. Nine Mexican trade fair sites offer a sum total of over 230,000 m² gross hall space.

Towards the beginning of the Mexican fair boom in the 1980s, Mexico City was initially short of exhibition space, which for various reasons could not quickly be provided. Hotel areas and other locations such as the sports stadium Palacio de los Deportes were used as temporary solutions. Half-way through the 1990s, the construction of the first real fair area was finalised in the with the completion of the International Convention & Exhibition Center. Soon other projects would follow. These were designed, as is also the case nowadays in other world metropolises, as part of a broader economic and cultural complex.

Mexico City has the following important venues at its disposal: the centrally-located International Convention & Exhibition Center as part of the World Trade Center (12,800 m²) situated in the city; Centro Banamex (34,000 m²) on the outskirts; Expo Bancomer Santa Fe (32,400 m²) in the developing district of Santa Fe; and Palacio de los Deportes (9,000 m²) which is still used for the purposes of fairs and exhibitions.

Each branch of industry in the country has its own dedicated trade fair. However, out of over 500 fairs and exhibitions only a few are recognized as significant by foreign exhibitors. The Mexican AMPROFEC (Asociación Mexicana de Profesionales de Ferias, Exposiciones y Convenciones) trade fair association was established in 1988 in Mexico City, with its seat in Mexico City. Its members are trade fair, exhibition and congress organizers, trade fair and congress centres, companies engaged in the construction of trade fair and exhibition stalls, trade fair service providers, and marketing companies.

The trade fair association considers its main objective to be the qualitative improvement of the events by means of training offered to fair organizers. AMPROFEC is supported by the American sister association IAEE (International Association of Exhibitions and Events).

AMEREF (Asociacion Mexicana de Recintos Feriales), an association of trade fair and congress centres, was established in 2001 in Guadalajara. Among its 21 members are the biggest fair sites and convention centres, such as the Banamex (Mexico City), the World Trade Center (Mexico City), Expo Guadalajara, Cintermex (Monterrey), and POLIFORUM in León. The association was established to exchange experiences, educate, and promote the image of its members as well as support them.

The MexicanTourism Board "Secretaria de Turismo" attracts foreign trade fair and congress participants with the slogan "0% VAT for International Congresses, Conventions, Fairs, and Exhibitions". The conditions are that the event needs to be organised by a foreign organizer, and the service providers (e.g. hotels, Convention Centres) need to be registered with the Internal Revenue Service (IRS). Further information is available on the Internet on Mexican government pages (***www.sectur.gob.mx/work/sites/secturing/resources/LocalContent/14136/3/VAT.pdf***).

Presently Messe Frankfurt is the only German trade fair company organizing trade fairs in Mexico: "PAACE Automechanika Mexico – The International Trade Exposition of Latin America for Automotive OE, the Aftermarket, Remanufacturing", and "Waste & Recycling Expo Mexico – The International Trade Show for Waste Management, Collection, and Recycling Technologies" are both held in Mexico City. Germany has been participating every year since 2003 in the Guadalajara book fair "FIL - Feria International de Libro Guadalajara". In addition to the book fair, a German Pavilion is also planned at the FDI World Dental Congress/World Trade Exhibition in Mexico City for 2011.

Argentina

The Argentinean trade fair economy is confined mainly to the country's capital city, Buenos Aires (2.77 million inhabitants). Its immediate area of influence (the Buenos Aires conurbation) is inhabited by around 13 million people, i.e. around one third of the population of Argentina.

Two large trade fair areas are La Rural Predio Ferial de Bunos Aires, founded in 1878 (45,000 m² gross hall area) and Centro Costa Salguero (19,700 m²), established in 1993. Each of the venues hosts over 20 trade fair events. The vast majority of trade fairs are not of interest to foreign exhibitors. The AUMA trade fair database covers 25 Argentinean trade fairs.

La Rural Predio Ferial de Buenos Aires

Trade fairs are organised for the most important branches of industry in the country. These include fairs related to agriculture, foodstuffs, foodstuff processing, fruit farming, animal husbandry, plastic manufacturing, cars and automotive parts, metal processing and machine tools, the construction industry, and medicine.

"Expoagro" is the most important agricultural trade fair which takes place every year in the open field in different rural regions.

Messe Frankfurt organises, through its subsidiary Indexport Messe Frankfurt S.A., six trade fair events in Buenos Aires. Two of these are held on an annual basis, and four are held biannually. The trade fairs include, among others, the "TECNO FIDTA International Fair of Food Technology" and "Automechanika Argentina".

In 2010, a German Pavilion will be presented at the "Dental Show" trade fair, and in 2011 at EXPOAGRO – "The International Agricultural Exhibition".

Chile

The Chilean internal market, with its 16.8 million inhabitants, is regarded as one of the smaller markets on the subcontinent. Its capital city, Santiago, which has around 6 million inhabitants, constitutes the political and economic centre of the country. At the same time, Santiago is also the most important place for organising trade fairs.

The old and traditional trade site called Parque de Cerellos was closed down. Nowadays trade fairs are mainly organised in Espacio Riesco – Centro de Convenciones Santiago (17,000 m² of gross hall area) and in Centro Cultural Estación Mapocho (5,200 m² of gross hall area). Espacio Riesco is a relatively new trade fair venue, constructed in keeping with the strictest technical requirements regarding the erection of public service premises in zones prone to earthquakes. That is why this centre was not destroyed by the major earthquake (measuring 8.8 on the Richter scale) which struck Chile in February 2010.

FISA Feria Internacional de Santiago, an organizer of trade fairs, originates from the La Sociedad Nacional de Agricultura association, founded in 1869. This agricultural association organised trade fairs related to agriculture, animal husbandry, and industrial machines. "FISA-Feria Internacional de Santiago", a multi-industry tade fair was organised for the first time in 1962. This trade fair developed and became an important event for international participants. In its heyday, the trade fair was attended by Germany and 30 other countries, which showed their national pavilions there. In 1998 this multi-industry trade fair took place for the last time. In the meantime, since around 1990, trade fairs for the most important branches of the national industry have entered the event agenda. These fairs are organised to the present day. They include Expomin (mining), Exponaval (shipping and naval industry), Edifica (construction), Agrotech (agriculture), and Ambiental (environment). These trade fairs are organised every two years. The only fair which is held every year is Expovivienda – a real estate trade fair.

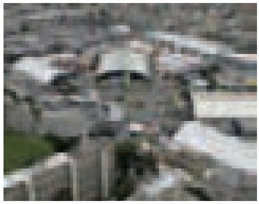
Through its trade fairs, FISA meets the majority of market demand for the most significant national industry branches. There are some other trade fairs organised by other entities. An example is Landesmesse Stuttgart, which holds its own trade fair, "Intervitis Interfructa" (wine making technology), in Talca. The "Salón Dental Chile" a dental trade fair in Santiago is organised by Mundo Dental, a Chilean professional editing house, and the "CHILE PLAST- International Plastic Industry Fair" is organised by the Chilean Association of Plastic Manufacturers (Asociación Gremial de Industriales del Plástico de Chile).

Since 2006, Germany has continued to participate in the EXPOMIN trade fair. In May 2010, Germany took part in the Salón Dental fair for the first time.

Colombia

Colombia is definitely the most important trade fair country in the Andean Community of Nations. The influence of Bogotá trade fairs extends to neighbouring countries: Bolivia, Ecuador, Peru, and Venezuela. Like in other Latin American countries, the Colombian trade fair market is fairly young. Until the late 1980s, only multi-industry fairs were organised and they constituted the only import possibility for this difficult to access market.

Together with the liberalisation of foreign policy, Colombia enjoyed a boom related to the development of trade fairs. It resulted in the currently rather wide range of trade fair events organised throughout the country. The trade fairs with a large share of international companies are organised primarily in Bogotá.



Corferias, International Center for Business and Exhibitions Colombia, Bogotá

In the Colombian capital, Bogotá, the trade fairs market is dominated by the formerly nationalised, and later privatised (in 1997) company under the name of CORFERIAS S.A. (Centro Internacional de Negocios y Exposiciones). CORFERIAS is the owner of the trade fair site under the same name, situated right between the airport and the city centre. The company currently has 17 halls with a total gross area of 45,000 m² and an open area for lease of 15,000 m².

Over 20 events are held here each year. During the year, the fairs are attended by 6,500 exhibitors and over 1.2 million visitors. Two traditional events, alternating year after year, are organised by the company itself: The "FIB International Industrial Fair" and "AGROEXPO Agriculture Fair". Other important events are organised in co-operation with industry associations.

Smaller trade fairs and exhibitions are organised in Bogotá in newly constructed hotels and in the easily accessible surroundings, and in the Centro de Convenciones y Exposiciones Gonzalo Jiménez de Quesada. These alternative premises are usually used by private organizers for congress fairs with the number of visitors reaching up to 100 exhibitors and 1,000 visitors.At the beginning of 2010, AIFEC Colombian Trade Fair Corporation (Asociación Colombiana de la Industria de Ferias, Congresos, Convenciones y Actividades Afines) was founded.

2011 will see Germany participating for the first time in the mining industry trade fair called "Colombia Minera – International Mining Show".

Other Trade Fair Spots in Latin America

Other trade fairs which could be of interest to foreign companies are organised in Cuba and Venezuela.

In Cuba, there is “FIHAV International Trade Fair” in Havana. This is a multi-industry fair. Germany is participating in this trade fair with a national pavilion since 1999. The trade fair grounds of Expocuba are located within a distance of 22 km from the centre of Havana and are accessible exclusively by car for persons travelling on business. The trade fair area hosts 24 halls which are designed as national pavilions.

Due to large natural gas deposits in Venezuela, a strong position is held by a trade fair related to this branch of industry, i.e. “LAPS – The Latin American Petroleum Show” in Maracaibo.

Germany participates regularly with an information stand in the “EXPOCRUZ trade fair in Santa Cruz” (Bolivia). The history of EXPOCRUZ dates back to 1962, when it was the first trade fair related to cattle in Santa Cruz de la Sierra. The event was subsequently joined by the following institutions: CAO (Camara Agropecuaria del Oriente – Chamber of Agriculture of East Bolivia) and CAINCO (Camara de Industria y Comercio – Chamber of Trade and Industry). They both helped the fair to achieve its current position. From that period on, the fair has been organised every year. Taking into account its size and importance, it remains the most important trade fair in the country. It is intended for many industry branches and has a distinctively public character, as well having moreover the character of a national holiday. The trade fair area is easily accessible – it takes no more than 15 minutes to get there by car from the city centre. The majority of the halls are air-conditioned.

In Peru and Ecuador, the 1990s marked the beginning of popularity for trade fairs which, due to the lack of market potential, could not establish their position. The exception is the “EXTEMIN” an exhibition for mining technology which is held in odd years in Arequipa (Peru). Germany has been attending this fair since 2001.

“EXPOCOMER” is a fair that has been organised since 1983 in Panama (Atlapa Convention Center) as one of the largest fairs in Central America. Almost 500 exhibitors occupy an area of 9,000 m². This multi-industry fair is visited by 16,000 visitors. ■

Gerd Bettermann
Department Global Markets,
AUMA, Association of the German Trade Fair Industry

Anhembi – a Household Name in the Events

The largest exhibition center in South America has events scheduled up to 2014.

Exhibition Pavilion Entrance

São Paulo is the capital of events in Brazil. Approximately 90,000 are held in the city each year, representing 75% of the trade show and exhibition market – a sector that generates almost R$ 2.9 billion in business each year (not taking tourist expenditure into account). Anhembi Park hosts most of these events.

Being the largest venue in terms of area (400,000 m²) and in terms of the number and versatility of rentable spaces in South America, Anhembi is responsible for 30% of the total number of large events held in Brazil – with approximately 11,000,000 people visiting each year from all over the world.

40 Years of Success

The iconic Anhembi Park is celebrating its 40th anniversary in November, having been visited by millions and millions of people for concerts, graduation parties, trade shows, congresses, business meetings and events.

Salão do Automóvel (the São Paulo International Automobile Show) was the first event held in Anhembi in 1970. During the past 40 years, Anhembi has been visited by important people such as the Dalai Lama (2006) and Fidel Castro (1990), and it has also hosted important events like UNCTAD XI (2004), the Free Jazz Festival (1980), the Bolshoi Ballet (1992), the Chinese National Circus (2006), as well as concerts from Guns' n Roses (1992), Alice Cooper (1973), the Jackson 5 (1974) and more recently, Jack Johnson, Santana, the Black Eyed Peas, Elton John, and many more.

Moreover, Anhembi continues to host large and varied events such as Skol Sensation, the first ever Formula Indy in São Paulo, Carnival, the São Paulo Book Fair, the São Paulo Tourism Show, "Super Casas Bahia", X Games, the Spirit of London, and hundreds more – not to mention the São Paulo International Automobile Show which kicked off this successful venue all those years ago.

Multiple Spaces

Five large venues make up the park: Pavilhão de Exposições (the Exhibition Pavilion), Palácio das Convenções (the Convention Center) with several rooms, a large auditorium and two wide halls, Auditório Elis Regina (the Auditorium), Polo Cultural e Esportivo Grande Otelo - Sambódromo (the Sambadrome), and the Anhembi Arena. With large, versatile and totally renewed areas, the park is the best option for events of all sizes and markets. Located in a privileged and easily accessible area, Anhembi Park is close to airports, hotels and the main highways.

The pavilion is the largest covered, permanent exhibition venue in Latin America, hosting an average of 22 large trade fairs per year, with an average of 70,000 people. Anhembi has the largest parking area in the city, with 7,500 vacant lots and a capacity to receive 13,000 vehicles (on rotation) a day.

Plenty of Business for your Clients

Anhembi Park

An event organized at Anhembi is always a success. The most famous events complex in the city is managed by São Paulo Turismo (SPTuris, a city government owned company for tourist and event promotion), and enjoys strong brand awareness on the part of people who have already been here. That is why the venue is also written on road signs, demonstrating its established tradition. Indeed, the venue's popularity is reflected in the official figures.

There are more than 11,000 exhibitors each year at an average of 300 events, including 22 large fairs, 38 congresses, 90 car exhibitions, 23 seminars and workshops, 12 concerts, 80 graduation ceremonies, 6 graduation parties, and many more.

In 2009, the average occupation rate of all areas was 75%, an increase of approximately 8% compared to the previous year – highlighting the exhibition pavilion in particular, which increased its occupation rate from 78% to 86%.

Although undergoing a period of restoration, the Convention Center had effective occupation of 45% in 2009 and expects to pass 70% in 2010.

The Grande Otelo Cultural and Sports Center, also known as the "Sambadrome", was also undergoing works and had an occupation rate of 53% in 2009; this figure is expected to increase in 2010.

Two Wheels Vehicle Show

The main trade shows have been confirmed at Anhembi up to 2014, which represents an average occupancy of 80% until then.

The Size of your Event

The use of several Anhembi areas for the same event demonstrates the venue's versatility. Examples include the International Otorhinolaryngology Congress and the Two Wheels Trade Show. Lectures and workshops are held at the Convention Center, trade fairs and exhibitions at the Exhibition Pavilion and concerts and varied activities at the Sambadrome (all simultaneously).

After three editions not held at Anhembi, the Two Wheels Trade Show was back “home” in 2009 and exceeded the organizer’s expectations. During the six days of events, the show played host to 243,000 visitors, 17% more than in 2007. There were 443 exhibitors, 22 countries and 800 brands of motorcycle, bicycle, equipment and accessories. The event covered 110,000 m2 at Anhembi Park, both at the exhibition area in the Pavilion and in the Arena, where shows and test drives were held. However, the complex can also be used for more than one event simultaneously, which can double visitor numbers for both events!

Convention Palace

The Brazilian Seminar of Civil Defense was another highlighted event, providing theoretical training at the Convention Center followed by practical training at the Sambadrome. As part of a simulated accident, a mock hospital was set up to deal with a car crash, with the use of several ambulances, motorcycles, fire trucks with extendable ladders, helicopters, first-aid tents, and the deployment of the emergency services.

Redesigned Areas

After almost 40 years following its construction, the Exhibition Pavilion at Anhembi Park underwent important structural redesign works.

In addition to the new ceiling, which provides thermal and acoustic comfort for the venue, the Pavilion now has flooring made of asphalt concrete. A new monumental glass and steel entrance has also been built.

There is now monitoring equipment which includes cameras connected to a security system, new restrooms in the outside area, dressing rooms for assembly staff and also an area for event registration, providing improved comfort.

The Convention Center Palace is perfect for medium and small events; the area underwent an expansion of 4,000 m², creating two new halls for versatile use, including trade shows or graduation parties, a food and catering service area and much more. New multipurpose rooms are available to increase, reduce or divide the area, according to the event. Additionally, the restrooms were also totally renovated. Another important area of the complex, the Grande Otelo Cultural and Sports Center, also underwent reconstruction works. The concentration area (Anhembi Arena) and dispersion area have been asphalt resurfaced, new gates have been installed and accessibility works have been carried out – such as new ramps for disabled people. In addition, the side ditches have been filled in, allowing the track to be 2 meters wider on both sides.

Automation of the parking area is another important innovation, with electronic gates making entering and exiting faster and easier.

Therfore, despite being 40 years old, Anhembi Park is now "brand new", ready to host the most varied events and to keep providing unique experiences to visitors.

2009 Anhembi Facts and Figures	
Trade Fairs	18,000 exhibitors, 5,000,000 visitors
Congresses	2,000 exhibitors, 250,000 visitors
Car Exhibitions	1,200,000 people
Seminars / Workshops	220 lecturers, 16,000 visitors
Concerts	650,000 people
Graduation Ceremonies	15,000 students, 120,000 people
Graduation Parties	30,000 people

Services

In order to improve the number and the quality of services provided to clients and visitors, Anhembi started the following services in 2009:

- Banks:
  More ATMs at the Convention Center and the Exhibition Pavilion for all clients and visitors, making a total of 13 ATMs in the whole park.

- Food and beverage:
  Anhembi established a partnership with Holiday Inn to provide food and beverages at events.

- VIP Parking:
  Users have an optional exclusive entrance, reception area and valet parking. This service is also provided by an experienced partner company. ■

Nara Lima de Sá
São Paolo Turismo S/A
www.anhembi.com.br

Corferias, Generating Opportunities and Progress

The International Exhibition Center of Bogota promotes trade, industrial and social development through the organization of national and international trade shows, exhibitions and events, generating new business opportunities and qualified contacts among visitors and exhibitors in a venue operated under international standards.

Corferias is located in Bogota, Colombia, and during its 55 years of existence, it has become the fifth largest trade show organizer in Latin America and the largest venue in the Andean region, with a total area of 139,000 square meters. By the end of 2010, we will have a growing portfolio of more than 50 exhibitions. Corferias exhibition activity has a major impact on the economic development of the city. It currently accounts for Bogota´s 5.5% Gross Domestic Product (GDP), achieved through an exhibition agenda that covers the economic sectors with the greatest potential in the region.

Corferias, International Exhibition Center of Bogotá

Thus, Corferias contributes to improving the competitiveness of Bogota, by being a strategic platform that attracts foreign investment and generates trade.

Corferias helps to improve the quality of life of the citizens, creating new employment opportunities and contributing to the urban and regional development.

In order to follow the globalization trends and identify new markets and worldwide business opportunities, Corferias has developed an internationalization strategy, and expanded its customer network in the region. To do so, Corferias has relied on an innovation strategy that identifies the needs of the international markets and creates appropriate exhibitions to these global tendencies.

International Leadership and Innovation

Through an innovative dynamic that facilitates its participation in the international markets, Corferias has targeted different market niches, created new exhibitions and duplicated its exhibition activity in the last four years. Currently, our exhibitions are visited by more than 1,600,000 people per year, including more than 10,000 exhibitors.

To consolidate its international leadership in the Andean region, Central America and the Caribbean, last year CORFERIAS opened a subsidiary in Peru, Corferias del Pacifico.

Auditorium, Corferias

The creation of Corferias del Pacifico is a strategic project that by using the privileged location of Peru, it enables CORFERIAS to consolidate a strategic axis Colombia- Peru, with projection towards the Andean Region, Brasil and the Asia- Pacific Economic Cooperation, APEC.

Corferias del Pacifico has promoted strategic alliances with national associations of Peru, identified key sectors, trends and innovation processes, and has generated public-private alliances aimed to strengthening the country's competitiveness through the exhibition business.

Expoalimentaria was the first exhibition held in Peru, in September 2009. It was developed in alliance with Promperu, the Ministry of Agriculture and the support of the Association of Exporters (ADEX). With high-impact results that exceeded expectations, Expoalimentaria generated business for US$20,452,000 and included the participation of more than 200 exhibitors and 7,600 visitors.

Four exhibitions are expected to be done in 2010, Feria Educando, Expo Industria, the Exhibition of the Regions and Expo Inversion. In this way, Corferias will keep on strengthening networks and partnerships, key elements for making our events a modern marketing tool, for improving the region´s development and for positioning Peru as the key place for conducting businesses, exhibitions and conventions.

As a parallel aspect of the internationalization process, Corferias has managed to increase the participation of international buyers in our exhibitions. In 2009 Corferias received 3.459 international professional buyers from over 65 countries, which participated in business

round tables with 1.336 exhibitors who were benefited from this encounters.

Due to its extensive experience and market knowledge of the Andean region, Central America and the Caribbean, Corferias has positioned events such Agroexpo, the International Fair of Bogotá, the International Book Fair, Expobuilding & Expodesign, the International Auto Show and Alimentec, as important platforms for the development of these markets, and has become the strategic partner of companies in achieving their business objectives.

Corferias has created concepts and experiences that mark a difference, so that each of the exhibitions become a platform for effective communication and information in terms of trends and innovations and the appropriate scenario to generate highly qualified business and contacts aligned with quality of exhibitors and visitors.

The role of Corferias towards the international exhibition industry has been strengthened since April 2008 when its CEO, Andres Lopez Valderrama, became president of the International Association of Exhibitions in Latin America (AFIDA). As an acknowledgement of his outstanding job, he was reelected in March 2010.

Modernisation and Strengthening

In order to modernize and strengthen its infrastructure and properly meet its customer needs, Corferias is expanding its venue with the construction of a 15,000 square meters hall, which will be the largest column-free hall in Latin America.

In 2008, and in order to facilitate the development of the exhibition business and access to the international markets, Corferias achieved the status of Permanent Special Free Trade Zone, setting a competitive advantage by offering tax benefits to exhibitors and visitors.

Contribution to Sustainable Development

As a way to contribute to the sustainable and environmental improvement and competitiveness of Bogota, Corferias, along with the District authorities of Bogota, is working on the consolidation of a Sustainable Tourism Exhibition District (Innobo).

Innobo, created under the promise of “Business Innovation for Bogota”, is a public and private initiative unprecedented at the Latin American level that seeks to consolidate the exhibition industry, the business tourism activity and the city´s attractiveness for doing businesses.

The project includes the construction of a metropolitan convention center that will be the largest of the Andean region, Central America and the Caribbean. It will have a covered structure of high architectural specifications and column free spaces.

Innobo contemplates the modernization and enlargement of Corferias and the inclusion of the most advanced integrated service platform, supported with high technology, great mobility and connectivity. It also includes access to more and better public spaces, parks, bike lanes, avenues and a touristic cluster, including hotel rooms, catering services (more than 3,000 rooms), restaurants and transportation.

Hall 4, Corferias

As a result, Corferias will contribute to the economic development of the city, because Innobo will allow Bogota to have the same attractiveness levels of the great capitals of the world. With this project, Corferias will strengthen its position of the ideal place for conducting high-impact events and exhibitions of international class. ■

Andrés López Valderrama
President Corferias, International Exhibition Center of Bogotá
President of the International Association of Exhibitions
in Latin America – AFIDA, Colombia

E.J. Krause, Leader in Business Conferences and Exhibitions Management in Mexico

As the leading company in Mexico, E.J. Krause de Mexico has 17 years of experience in the development of national and international business conferences and exhibitions. It belongs to the worldwide network of E.J. Krause & Associates Inc., one of the largest privately owned commercial exhibition companies in the United States. E.J. Krause & Associates Inc. was founded in 1984 and today enjoys global recognition. We have the international support of more than 10 offices in Europe, Asia and the Americas, allowing us to draw on a great deal of national and international experience. For example, we have the ability to attract a great number of international exhibitors and pavilions to each of our events.

E.J. Krause Mexico has 17 years of experience in the development of national and international business conferences and exhibitions.

EJK currently organizes more than 80 events for more than 16 industries on a global scale. In Mexico, we are experienced in holding shows for many areas, such as communications and information technologies, manufacturing, environment, efficient energy, water, concrete construction, food and beverages, forestry, packing, packaging and processing as well as the plastics industry. As such, we have ample experience in bringing to Mexico many exhibitions that have been successful in different parts of the world. Due to its importance and its geographic location, the Mexican market is one of the favorite destinations for the exhibition industry.

In Mexico today, trade shows and exhibitions have managed to grow exponentially, having greater presence not only in terms of the number of venues available, but also in the variety of markets attending them. This is one of the many opportunities that companies presently have to increase their sales.

Exhibitions are enhanced by all kinds of activities that make them more attractive to buyers and visitors; above all, they should be seen as a business platform that helps companies present themselves, with the aim of increasing their profitability.

How do we Achieve This?

The success of an exhibition or trade show is directly related to the professionalism and experience of the organizer. In this sense, the success of the exhibitions and trade shows of EJK are part of the formula that our company has developed and continually refines and updates with the aim of always achieving the best results. This formula is the sum of the strategic alliances we have made with chambers, associations, government agencies and departments and this has allowed us to enjoy significant support. Another factor is the joint ventures with major national and international companies such as SMS International, Reed Exhibitions, Hanley Wood and the MIS Training Institute.

All of this feeds into the creativity that characterizes the development of campaigns used to attract the public, utilizing marketing tools, promotional material, publicity and public relations. In addition, most recently we have intensively adopted a new generation of tools, such as social networks and mobile marketing. ■

José Navarro
General Director of E.J. Krause Mexico
www.ejkrause.com.mx

EXPOFUTURO

To attract and encourage major events in the region, the Pereira Chamber of Commerce built an exhibition center with excellent specifications, providing the city with a new pole of development and encouraging even more visitors. These visitors are attracted by the quality of national and international events taking place in the Perla del Otú.

A center for exhibitions, fairs and conferences, Expofuturo opened in June 2005 and has become the most important exhibition center in the region.

The City, Pereira

History

The history of Pereira goes back as far as the Pre-Colombian period. At this time the area which today houses the city was inhabited by the Quimbaya and Pijao peoples. These cultures were known for their highly skilled silversmiths.

In recent years the city has taken on a notably urban character with a significant improvement in its cultural awareness, a marked trend towards social integration and a high level of education – all of which has contributed to a sustained and steady development.

Location

Pereira is blessed in its geographical location. Its 451,645 inhabitants live in the mid-west of the country on the central Andean mountain range between the three prominent cities of Bogotá, Medellín and Cali. The city stands at a height of 1,411m above sea level and extends over an area of 607 km².

Pereira, lively, commercial, welcoming and one of the best cities to do business.

Pereira sits on a range of different thermal soils and is spread across diverse altitudes, leading to an extremely variable climate (yet with an average temperature of 21°C). The surface area extends from the snowcapped mountains of the Santa Isabel plateau to the steamy banks of the river Cauca.

Economy

Historically, coffee has been an important contributor to the economic growth of Pereira. It was the principal agricultural product of the region and thus the driving force in the city's development.

Coffee culture

Pereira is the capital of Risaralda and as such forms part of the Coffee Triangle (Triángulo del Café). This zone accounts for the majority of the country's coffee production.

Pereira's economy has experienced considerable growth in the last couple of years, propelled in this measure by its various business and finance sectors. In addition to agricultural production, commerce and industry have also played an important role in the city's development.

Industry, however, is another important dimension, particularly since Pereira plays host to a range of factories responsible for the manufacture of garments, footwear, metallurgy and machinery, paper and foodstuffs. These bring with them both national and international investment.

Above all else, Pereira is the perfect place to do business. The World Bank's 2008 and 2010 study entitled "Doing Business" named Pereira as the city best suited for business in Colombia.

Education

Pereira has always been concerned as much with the present as with the future, and it has attached great importance to education. The recognition and academic standing of Pereira's universities makes the city a popular choice for students from all regions of the country.

We have made it our aim to raise a motivated and independent younger generation that will in future bring continued growth and prosperity to the city and to the country.

Tourism

Pereira's beauty has long been recognized at the national level. The charm and vitality of the city are due in large part to its people, its landscapes and parks, as well as its night life and shopping malls, to name just a few factors.

In Pereira tourism extends well beyond the city's limits, including the Matecaña Zoo, with its 678 animals of 146 species, the Nevados National Park, a flora and fauna reserve, tourist zones, natural hot springs and rural dwellings.

The city also has a vibrant nightlife thanks to a variety of recreational centers as well as places to socialize and dance, which, in conjunction with the warm heartedness of the locals, makes for the perfect combination.

The Exhibition Center EXPOFUTURO

EXPOFUTURO has been designed to hold all types of event, either indoor or outdoor, provides a space for the city to trade in, and offers different sectors of the economy with infrastructure in line with the growth of the capital of Risaralda. This exhibition center, with a total area of 36,000 m², is amongst the best exhibition centers in the country, positioning itself as a new option with the best conditions for trade shows, conventions, exhibitions, conferences, symposiums, concerts, and many other types of event. EXPOFUTURO is spacious, practical, dynamic, and versatile; it is constructed in accordance with the most modern architectural standards for large spaces.

Expofuturo also has an area of 3,000 m² for outdoor events with excellent conditions of comfort for exhibitors and the public. It also has a large parking lot for 250 vehicles and a dining area for visitors.

The Pavilion

Since 2009, the pavilion has all the standards of ventilation, lighting (taking advantage of natural light) acoustics and technology necessary to hold exhibitions, fairs, conventions, concerts, and other types of event. With a total area of approximately 2,700 m², the pavilion has room for 250 booths and a 300 m² stage.

Expofuturo, is a venue of excellent specifications and location.

The Conference Hall

For the development of academic events, conferences, courses, workshops and seminars, we have a large conference room of 430 m² with capacity for 500 people, equipped with excellent technology as well as sound and lighting systems. Adjacent to the main hall are two rooms for business centers, press conferences, small conferences or VIP rooms, each with capacity for 50 people.

International Coffee Lounge

The International Coffee Lounge brings coffee farmers, businesses, institutions, agencies, as well as national and international coffee associations together under one roof, and aims to become the event that will provide the most added value to the most important sector of the national economy. In 2012 this space will host events on specialty coffees and high quality Columbian produce. ■

Eric Duport Jaramillo
Director of the Chamber of Commerce of Pereira
www.expofuturo.com

Expo Guadalajara, Among the Best, Regarding Services, Technology and World-Class Infrastructure


Expo Guadalajara

The organization of an important event can be challenging – but also satisfying once you get it right. Guadalajara is the ideal destination to help you make this happen since it enjoys a wide variety of world class venues, modern infrastructure with state-of-the-art technology, Mexico's famous hospitality and 0% VAT for the meeting industry.

The birthplace of Mexican identity, Guadalajara coexists in harmony with all its blends. For more than 450 years the city has been evolving and boosting its own maturity, offering both locals and foreigners a fully fledged metropolis.

The city has enjoyed a solid position in the business tourism segment thanks to strong infrastructure in terms of accommodation and trade fair sites. Expo Guadalajara is one of the most prestigious precincts in Latin America, taking in more than 120 fairs and exhibits per year, including the world famous book fair FIL.

With an offer of 20,000 hotel rooms and many more to come, the city guarantees its visitors multiple accommodation options for all tastes and finances, including a wide range of culture, sports, gastronomy, and recreational activities.

Located 540 km (335 miles) northwest of Mexico City, Guadalajara is the proud state capital of Jalisco and the second most influential city in Mexico.

Blessed with excellent temperatures ranging from 11º to 26º C (52º to 79º F), Guadalajara ranks among Mexico's three most important cities and is home to some of the nation's most important cultural symbols, including amazing gastronomy, our famous mariachi music, and our most famous traditional beverage – "tequila".

With the second largest economic and industrial output in Mexico, Guadalajara makes up 37% of the state of Jalisco's total gross production. Its economic base is strong and well diversified, mainly based on commerce and services, although the manufacturing sector plays a defining role. It is also ranked in the top ten in Latin America in terms of gross domestic product, and is the highest ranking in Mexico. In its 2007 survey entitled "Cities of the Future", FDI Magazine ranked Guadalajara highest among major Mexican cities, and designated Guadalajara as having the second strongest economic potential of any major North American, city behind Chicago. FDI Magazine also ranked the city as the most business friendly Latin American city in 2007.

The electronics and information technology sectors have given this city the nickname of the "Silicon Valley of Mexico". Guadalajara is the main producer of software as well as electronic and digital components in the country. Telecommunication and computer equipment account for about a quarter of Mexico's electronics exports. Companies such as General Electric, IBM, Intel Corporation, Freescale Semiconductor, Hitachi Ltd., Hewlett-Packard, Siemens, Flextronics, TCS and Jabil Circuit have impressive production plants in the suburbs.

The city is perfectly connected. 450 national and international flights operate on a daily basis, connecting Guadalajara with the main cities of Mexico, the United States and Canada. A wide range of flights to Europe and Central America are also offered. The "Miguel Hidalgo International Airport" is the second largest airport – after México City – regarding aircraft inflow and the number of passengers, and is located 35 minutes outside the city's perimeter.

Expo Guadalajara offers the highest quality services to its customers, exhibitors and visitors.

Visitors who attend seminars, conventions, exhibition shows and other events in fields such as academia, entertainment, sports and business are concentrated in the main commercial district near Expo Guadalajara, with a strong cluster of the best hotels in town.

Exhibition, Congress and Convention Center – Expo Guadalajara, your Best Option in Mexico

Expo Guadalajara is an excellent option for holding any event, national or International. Located in the heart of an important business area and only 25 minutes away from the international airport, it is a venue designed in accordance with international standards. Expo Guadalajara offers up to 753,200 square feet of space on a single level, which is made up of the exhibition floor as well as ideal rooms for congresses and conventions. It also offers 20 rooms in the business center, an area for outdoor events and Foro Expo, which can hold up to 3,000 people for concerts or shows. 64,560 square feet of functional mezzanines allow the flow of up to 50,000 people per day. There are also excellent loading and docking areas, as well as a parking lot for 2,200 vehicles.

The last expansion gave space to the new Guadalajara Ballroom – unique in Latin America – which has 150,640 square feet of column free space which can be divided up into 10 separate, fully-carpeted rooms.

This exhibition and congress center includes services like wireless internet, electricity, drainage, compressed air, telephone and videoconferencing as well as a commercial area with ATMs, a bank and a travel agency.

Expo Guadalajara offers the highest quality services to its customers, exhibitors and visitors. For this reason it has been awarded ISO certification 9001:2008, demonstrating environmental responsibility as a "green venue", and being recognized as a socially responsible company and a company that is a great place to work.

For over 23 years, Expo Guadalajara has been the home of several leading global events such as the International Book Fair (FIL), The National Hardware Suppliers Exhibition, The International Furniture Exhibition, The International Clothing Exhibition (Intermoda), The National Association of Departmental and Convenience Stores Exhibition (ANTAD), and as a result of our process of internationalization this year we will host a swathe of relevant events like Aerospace Meetings, the Educating Cities Congress, the Second Meeting of the Directors of UNIVERSIA, and the 2010 Plenipotentiary Conference of the ITU Telecommunication Union.

Guadalajara´s Convention and Visitors Bureau

Guadalajara's Convention and Visitors Bureau is the main driving force behind Guadalajara's brand. Its objective is the design and execution of domestic and international strategies for the promotion of tourism in order to increase the competitiveness and visibility of Guadalajara's products for congresses, conventions, incentive travel and exhibitions by means of the joint efforts of the various public and private sector stakeholders who take part in the production chain.

As a pioneer on this matter with 40 years in the field, GCVB has supported countless events, assuring success by way of a guided and accompanied plan. ■

Fernando Espinosa García
Deputy Director, Expo Guadalajara
www.expo-guadalajara.com.mx


If you're thinking in Mexico for your next congress, think very Mexican
EXPO GUADALAJARA
MÉXICO
go!

Fexpocruz– The Largest Business Showcase from Bolivia to the World

EXPOCRUZ 2009

Bolivia, a country with more than eight million people and 1,098,581 km², is located in the center of South America and borders with Argentina, Brazil, Chile, Paraguay and Peru. It has a varied climate due to its geographic division. The eastern and western branch of the Andean Mountain Range close up the Bolivian Highlands, a place where cold weather predominates with an average temperature of 10°C. Two thirds of the country are occupied by plains and tropical forests, where average temperatures are 25°C. The Highlands and the Lowlands are separated by temperate valleys located in the center of the country with temperatures of 15°C.

Santa Cruz de la Sierra, considered a tropical paradise in Bolivia, is a region of exuberant vegetation and large fields of jungle and prairies. Located in the West of the country, only a third of its territory is covered by gentle mountains, with the rest lying over a large Amazon plain.

Due to the enterprising spirit of its people, the continuous expansion of its agricultural border, the strengthening of its blooming agricultural industry and its original tourist attractions, Santa Cruz is today the economic powerhouse of Bolivia.

The traditional hospitality of the "cruceño", the diversity of the regional landscapes and the large ethnic, natural and archeological richness sheltered in this infinite western plain has made of Santa Cruz a formidable tourist destination of international importance.

The history of the International Fair of Santa Cruz (Fexpocruz) began in the year 1962 with the holding of the first Cattle Fair of Santa Cruz, which was held in a farm owned by the "Gabriel Rene Moreno" Autonomous University. Initially its purposes were purely academic, with the objective of allowing undergraduates at this university (in the degree of veterinary sciences) to appreciate the achievements made in the field of genetics.

Later, a formidable group of enterprising minds, grouped in the Agriculture and Livestock Chamber of the West (CAO) and the Chamber of Industry, Commerce, Services and Tourism (CAINCO), sensed the enormous potential of this fair to set up business and financial contacts between Bolivia and the rest of the world. In 1966 they acquired the grounds with private funds, and the trade fair now has infrastructure and services worthy of an international level event. In 1968 the first international multi-sector fair was held in Bolivia, an event that marked the beginning of fair activities in the country. Today, Fexpocruz, the International Fair of Santa Cruz, has more than 40 years of experience in organizing international fairs, meeting all the relevant standards. This has enabled it to become the largest organizing entity for fair events in Bolivia.

This is why we currently carry out four specialized fairs each year: EXPOFOREST – Forest, Wooed and technology International Fair; AGROPECRUZ - International Agriculture and Livestock Fair; MUJER – Integral Fair of the Woman; and EXPOMYPE – National Production Fair. In the month of September we also hold EXPOCRUZ, a multi-sector international fair. In addition, we have the International Center of Conventions Santa Cruz, the largest convention center in Bolivia, which is dedicated to the organization of international business and social events, conferences and conventions.

Supporting the most important productive sectors which account for almost 90% of the economy of the region and the country, we have contributed to the development of Bolivia, generating business opportunities and financial, social and cultural relations. Via Expocruz, a fair that has the participation of more than 20 of the country's industrial sectors, Fexpocruz enables the generation of business contacts not only among small, medium and large Bolivian companies, but it also eases the interaction among companies from more than 30 countries from all over the world. This is why it is considered one of the largest multi-sector fairs in Latin America.

Expocruz welcomes nearly half a million visitors during its ten days of events and has the participation of more than 2,000 exhibiting companies – something which has caused this event to be considered the business showcase of Bolivia to the world.

China Pavilion, EXPOCRUZ 2009

The grounds of Fexpocruz have an area of 164,857 m², of which 39,000 m² are used as an exhibiting area (covered and uncovered). There are 20 pavilions with an area ranging from 500 to 3,000 m². The remaining area is made up of resting areas, a central park where the native vegetation and centennial trees have been preserved (which is used as the main stage for the presentation of first class national and international artists), and a large parking lot.

It is important to emphasize that we also have a service department that handles the assembly and disassembly of the fair events and makes the materials (octanorm®, furniture, assorted accessories, electrical services, telecommunications, etc.) available to the exhibitors, plus the necessary supplies to provide a guaranteed quality service. The largest international convention center in the country has so much to offer, including space, organization, advice, support, experience and first class gastronomy.

Our convention center has the following halls:

- "Sirionó" Hall: measuring 55 x 30 m with 1,650 m² of available space, plus a large lobby and capacity for 1,200 guests.
- "Chiquitano" Hall: measuring 42 x 24 m with 1,000 m² of available space, a ceiling of 5.5 m, capacity for 800 guests and the availability of a lobby and two support rooms for 40 people each.
- "Chané" Hall: measuring 33 x 19 m with 650 m² of available space, a ceiling of 4.6 m and capability for 450 guests.
- "Yuracaré" Room: measuring 10 x 6 m with 60 m² of available space, ceilings of 3 m and capacity for 60 people.
- "Xarayés" Room: measuring 8 x 8 m with 48 m² of available space, ceilings of 3 m and capacity for 30 people.

All the halls have air conditioning, parquet floor and a lobby with tiled flooring, in addition to the parking lot within the trade fair grounds.

Fexpocruz is a professional operator in the organization of:

- international fairs
- cocktail receptions
- conferences
- conventions
- seminars
- symposiums
- forums
- graduation events and celebrations
- weddings
- social events
- business events

International fairs, social and business events carried out in Fexpocruz each year attract more than 1 million visitors, with Santa Cruz de la Sierra itself having a population of approximately 2.5 million people. ■

Mario A. Herrera Sánchez
General Director, Fexpocruz
www.fexpocruz.com.bo

La Rural, Exhibition Center of Buenos Aires


Claudio Dowdall, Chief Executive Officer, La Rural, Exhibition Center of Buenos Aires

The National Public Administration in Argentina has adopted a sustainable development model to be implemented together with the private sector of the exhibition and congress industry, based on product quality, tourist services, and environmental conditions. Its goal is to ensure competitive tourism development capable of positioning Argentina as a quality destination in the international market, as provided by the guidelines convened in the Strategic Federal Plan for Sustainable Tourism (PFETS).

Moreover, the Conference & Conventions Bureau is being set up in the various destinations across the country that host these type of events. And what's more, foreigners who participate in conferences, conventions, and international trade fairs in Argentina are exempt from paying value added tax. This way, the synergy between the public and private sectors allows the successful organization of international conventions, with the support and cooperation of each destination.

Argentina is an ideal place for organizing conventions, conferences, fairs and incentive trips, offering more than 25 destinations that can satisfy international demands.

Buenos Aires, our City

The City of Buenos Aires continues to maintain its pole position amongst Argentine cities in the world ranking, showing very significant growth. The city climbed from 32nd place in 2007 to 15th in 2008, positioning itself right below Sao Paulo among the Latin American cities. With over 3 million inhabitants, Buenos Aires has become, in recent years, a cosmopolitan city with all the characteristics of a world metropolis.

Entertainment, luxurious hotel facilities, excellent gastronomy, historical areas, museums, tradition and night life are the reasons why domestic and international tourists arrive every day. Added to an infrastructure similar to the one displayed by any international capital – in terms of services, transport, and commerce –, Buenos Aires is growing in terms of its entertainment, culture and investment options. Fairs and congresses have also been one of the activities attracting overseas and home visitors. Due to its overall characteristics, Buenos Aires has become an ideal destination for organizers of international shows, exhibitions and congresses. During the last five years, convention tourism has demonstrated remarkable growth in Argentina, placing our country number 22 in the world ranking, and, at a regional level, among the leaders in Latin America. Several years ago in La Rural, the most important exhibitions Center of Buenos Aires, we began to provide organizers, tourists and visitors with top quality options to satisfy this demand. Investment, job creation and associated services are elements of our work to consolidate Buenos Aires as an international metropolis.

La Rural, an Exporting Platform

La Rural, the Exhibition Center of Buenos Aires, has consolidated its position as the biggest center of fairs, exhibitions, congresses, conventions and events of the country. Its leadership is a result not only of the number of events held at the venue, but also by their dimensions in every sense: the exhibition and convention center has successfully hosted the most visited fairs such as the Books Fair and the Rural Exhibition; the most prestigious professionals have also convened here, as proven by the 24th World Gas Congress and Al Gore's presentation of "An inconvenient truth"; business meetings of different industries have also been held here, such as international wine buyers within the Wines and Wineries Exhibition, as well as all Argentinean airlines, ski centers, clothing companies and tour agencies at the Snow Exhibition.

The over 45,000 m² of indoor space and the remaining 10,000 m² of outdoor space have also been used to host, among other events, the most important sports event of the last two years (the Rally Dakar Argentina-Chile), one of the most important art exhibitions in Latin America (ArteBA), a meeting of executives and CEOs (Expomanagement), and the tourism offers of all geographical regions at the International Tourism Fair.

Our company's solid track record and expertise in the organization of all these matters has turned this venue into an attraction for people of all walks of life, including professionals, foreign visitors, and families. Likewise, for those who organize or exhibit, our exhibition center is the main platform for generating global awareness for their products and services. La Rural strengthens these characteristics year after year without forgetting the aspects that make it an integral business: human values, social responsibility, and investment in infrastructure. ■

Claudio Dowdall
Chief Executive Officer, La Rural, Exhibition Center of Buenos Aires
www.larural.com.ar

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UBRAFE

União Brasileira dos Promotores de Feiras

The International Exhibition Business: Next Stop – Latin America

Examples of successful international exhibitions in Latin America:

Debuts in Brazil

Dr. Andreas Gruchow
Member of the Board
of Deutsche Messe

Hannover-based organizer Deutsche Messe continued its international expansion with the announcement of two new shows in Brazil: CeMAT South America in São Paulo and BITS (Business IT South America) in Porto Alegre. CeMAT South America, scheduled to debut from 4 to 7 April 2011 at Centro de Exposições Imigrantes in São Paulo, is an export version of CeMAT Hannover, the world's leading intralogistics fair. It will showcase the complete range of material handling and logistics solutions.

"South America is a key component of our international strategy, one in which Brazil is currently the largest market for our exhibiting customers," explains Dr. Andreas Gruchow, member of the board of Deutsche Messe. "Brazil has managed to avoid much of the impact of the worldwide financial crisis. Economic growth this year is projected at roughly five percent and, as the economy grows, so will demand for modern logistics solutions. Subsequently, many leading manufacturers have expressed strong interest in CeMAT South America." Deutsche Messe is organizing CeMAT South America with the cooperation and support of the Brazilian logistics association ABIMAQ (Chamber of Material Handling) and the German Engineering Federation VDMA.

BITS

Deutsche Messe also announced the launch of BITS, a new trade fair and conference developed specifically for the Brazilian and Latin American IT markets. BITS will debut from 10 to 12 May 2011 at FIERGS Exhibition & Convention Centre in Porto Alegre, Brazil. The event will provide the region's IT and communications industry with its first comprehensive B2B platform, one that combines exhibits with supporting events such as seminars, forums, and matchmaking to deliver more value to participants than a one dimensional fair or congress.

"Brazil is Latin America's largest economy and an industry leader in information technology and business process outsourcing," said Gruchow. "Brazil's IT industry benefits from five decades of strong government and private investment and the region's largest technical-skills labor pool. Growth in the Latin American IT market is projected at 3.1 percent in 2010, increasing to 4.3 percent by 2016. Even more impressive is that GDP is expected to grow five percent in 2010. When considering these positive factors, it is clear that now it is the time to bring a CeBIT event to this region," says Gruchow. Deutsche Messe is organizing BITS with the cooperation and support of the Center of Industries of the State of Rio Grande do Sul (CIERGS) and the Federation of Industries of the State of Rio Grande do Sul (FIERGS), which collectively represent 41,000 factories with 600,000 employees. Additional partners include the IT industry associations SOFTEX and SOFTSUL.

"Supplying Contacts"

Deutsche Messe's Dr. Andreas Gruchow explains how the world's leading trade fair organizer is expanding in new international markets.

■ What guides Deutsche Messe when it enters new markets?

We base our decisions on two factors: On the one hand there are the economic dynamics inherent to a particular country, region or industry sector; on the other hand there are naturally our customer's preferences. We support our customers by helping them open up new, dynamic markets and by providing them with the best possible trade fair service all over the world. Trade fairs are a highly efficient tool for initiating high-value business contacts, particularly in countries such as Brazil, China, India, Russia, the United Arab Emirates, and the Eurasia region.

Two of Deutsche Messe's flagship exhibitions will be localized in Latin America in 2011.

■ Many partners offering projects and proposals target Deutsche Messe. What are the prerequisites for you in starting negotiations?

We are open to all kinds of ideas and concepts. When selecting and cooperating with our partners, we follow two fundamental guidelines. First, the concept must fit into the context of our event or add useful elements to it. We always highlight trends at our fairs with exciting conferences, forums, networking events, and special exhibits. Accordingly, we partner with organizations that help us realize these concepts. Second, we are a for-profit company so any potential cooperation must fit within the framework of our business model. Our goal is to deliver consistency and high-quality to our customers so we invest in the long-term. We seek partners who have the same mindset so that both parties benefit. ■

Dr. Andreas Gruchow
Member of the Board of Deutsche Messe

Automechanika: a Succesful Exhibition Brand in Latin America

Automechanika Argentina
Messe Frankfurt

With 424 million euros* in sales, Messe Frankfurt is one of the world's largest trade fair organizers. The Group boasts a global network of 28 subsidiaries, five branch offices and 52 international sales partners. This means Messe Frankfurt is present in more than 150 countries. Events "Made by Messe Frankfurt" take place at more than 30 locations around the globe. In 2009, Messe Frankfurt organised more than 90 trade fairs, of which 54 took place outside Germany. The traditional heart of the company is and remains its home location in Frankfurt, which played host to some 37,900 exhibitors and approximately 2.25 million visitors in 2009*. Messe Frankfurt has also systematically pursued its globalisation target, with the result that today more fairs are staged abroad than at its home base in Frankfurt. Successful platforms in a particular business sector are taken to other countries from the home base and then these established brands, such as Ambiente, Automechanika or Heimtextil, are adjusted to suit the requirements in the respective country.

14 events, 13 countries: Automechanika is the most international trade-fair brand in the world

Thus, with own subsidiaries in Mexico City and Buenos Aires Messe Frankfurt is very successful in Latin America. One of the strongest fairs organised in this region is the Automechanika which is not only one of Messe Frankfurt's biggest events but also the most international trade-fair brand in the world. With a total of 14 events, the world's leading international trade fair for the automotive industry is held in thirteen different countries. The nucleus of the brand's success and seal of quality is the Automechanika Frankfurt, which made its debut in 1971. Since then, the fair has developed into the world's leading business platform for the supplier industry, the workshop sector and the trade. The first Automechanika in Latin America took place in 1999 as PAACE Automechanika Mexico followed by Automechanika Argentina in 2000.

Automechanika Argentina has noted a successful development and has grown into one of the leading fairs in the Mercosur region. In spite of a decreasing economy during the first years of this century, Automechanika Argentina recorded constant growth rates. It is the leading meeting point for the biggest and most important industry representatives. Especially the sector of parts, accessories and work-

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** preliminary numbers 2009*

shop- and service-equipment has a high grow potential. The last edition was held at the La Rural exhibition centre from 12 to 15 November 2008. 42,264 visitors showed their interest in the products and services displayed by the 576 exhibitors on a fully booked exhibition ground. With 40,000 square metres (gross), the event is the third-largest within the Automechanika brand and the most similar of all Automechanika fairs to Frankfurt in terms of appearance. The next edition will take place from 17 to 20 November 2010.

Automechanika Argentina
Messe Frankfurt

With 236 exhibitors and around 13,400 trade visitors, PAACE Automechanika Mexico is one of the leading fairs for the automotive aftermarket in Latin America. Mexico is one of the world's most dynamic automobile markets and the Mexican government offers favourable conditions for foreign investors. The next PAACE Automechanika will be held from 14 to 16 July 2010.

The coming years also hold out great promise for the sector, as the trend seems to continue upwards. Over 60 percent of the vehicles made in Latin America are exported. According to a prognosis worldwide automobile production will rise steadily over the next five years – a process of growth from which automobile manufacturers and the supplier industry in Latin American are likely to profit in particular.

Good signs for further successful years of Automechanika fairs in Latin America! ■

Philipp Ferger
Messe Frankfurt Exhibition GmbH
Marketing Communications Automechanika / Independent Brands

FEMADE Another Example of Deutsche Messe's International Expansion Strategy

FFEMADE, a trade fair that serves the wood, furniture and forestry industries, recently concluded its 24–28 May 2010 run in Curitiba, Brazil, marking another example of Deutsche Messe's strategy for international expansion. This year was the first time that Deutsche Messe subsidiary Hannover Fairs Sulamérica took a more active and formal role as the organizer of the event, while it's founder, the Brazilian Machinery and Equipment Manufacturers Association (ABIMAQ), continues its involvement as a supporter. FEMADE was launched in 2000 and established itself as a leading trade fair for the forest and woodworking industry in Brazil.

FEMADE showcased 96 exhibiting companies on 4,708 square meters of net display area.

Deutsche Messe has organized LIGNA – the world's leading trade fair for the forestry and wood industries – in Hannover since 1975, as well as WoodMac China (in cooperation with Allworld, C.I.E.) in Shanghai since 2005. So adding FEMADE to its portfolio was a logical step as it expands activities in Brazil. "We see Brazil as one of the most important markets of the future, and we are systematically working with our Brazilian subsidiary to further expand in South America," said Dr. Andreas Gruchow, Board Member of Deutsche Messe AG. "With FEMADE we had a good opportunity to apply our wood and forestry experience, and Curitiba is ideal because it's one of Brazil's most important timber and furniture industry centers."

FEMADE showcased 96 exhibiting companies on 4,708 square meters of net display area and attracted 8,188 visitors from Argentina, Bolivia, Brazil, Chile, China, Colombia, Ecuador, Finland, France, Italy, Mexico, Peru, Portugal, Taiwan, Turkey, and Uruguay. According to Constantino Bäumle, Managing Director of Hannover Fairs Sulamérica, "The Brazilian market is of particular interest to the Asian, European and Latin American furniture and timber industries. FEMADE provides optimal conditions for initiating business contacts."

FEMADE's 96 exhibitors in 2010 marked a 45 percent increase in comparison to 66 in 2008, and the percentage of international companies increased significantly from 4.5% to 30%. "FEMADE 2010 provided our exhibiting customers with the ideal presentation platform for their products and services," said Dr. Gruchow, adding, "In a large country such as Brazil, a trade show of this kind is an extremely effective marketing tool."

FEMADE hosted two international business matchmaking events for the woodworking machinery industry and the timber industry, respectively. ABIMAQ and Apex-Brasil (Brazilian Export and Investment Promotion Agency) organized the machinery event, where companies from Argentina, Colombia, Guatemala, and Peru placed 30-plus initial orders with a volume of more than US$ 1 million U.S. Hannover Fairs Sulamérica coordinated the timber industry event, which facilitated more than 50 meetings between companies from Brazil as well as Argentina, China, Germany, France, Italy, and Turkey.

FEMADE 2011 is schedule for 13–16 September in Curitiba.
More information is available at ***www.feirafemade.com.br***

Educational highlights included the seminar "Sustainable Use of Wood", which hosted 137 participants and addressed such topics as conservation of natural resources, sustainability in industrial processes, and growing demand for environmentally friendly products; and the first Brazilian retailer forum for carpentry and joinery, which featured renowned industry representatives discussing the complexities of the wood and furniture industry.

"Our goal is to provide our customers with creative ways to strengthen their networks and generate new business. Working with partners such as ABIMAQ, we create special events that focus on challenges and offer solutions. Ultimately, we want to help stimulate growth across the industry," explained Dr. Gruchow. ■

Brock McCormack
Spokesman, International Fairs, Deutsche Messe

From Bavaria to Brazil: the Global Strategy of NürnbergMesse

Ligia Amorim
Managing Director
NürnbergMesse Brasil

Sao Paulo is the largest German industrial city outside Germany. Three quarters of a total of 1,200 German businesses are located in Brazil's industrial megalopolis. This fact alone could be reason enough for the international trade show company NürnbergMesse to set up its Latin American affiliate here. But rather than a "me too" effect, NürnbergMesse's engagement in Brazil is part of a carefully planned long-term strategy. As Director of NürnbergMesse Brasil, I have witnessed this development at first hand. Let's start at the beginning.

NürnbergMesse was founded in 1974 and is today one of Germany's leading trade show companies, running about 120 specialized trade shows worldwide. It ranks among Germany's top ten exhibition companies, and globally among the top 20. Its turnover has steadily increased over the years, and is expected to rise to 170 million Euros in 2010. But NürnbergMesse does not stop there. Its ambitious plans for the future postulate doubling its turnover to 300 million by 2020, to reach the top ten worldwide. A sixth of this projected turnover is to be generated abroad. To reach these ambitious goals, NürnbergMesse is planning to invest 100 million Euros over the next ten years.

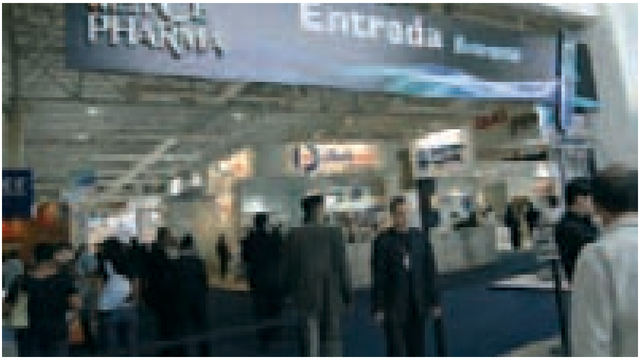
Towards a Global Company

The reasons behind these plans are not growth for growth's sake. For an exhibition company to stay competitive among the world leaders, its shows must gain the status of global lead events where exhibitors and visitors from all over the world meet. It has become harder – if it was ever possible – for a single event to gain that status. While NürnbergMesse has a number of trade shows that are leaders in their field, they cannot reach the whole world in one place. With the rise of economies outside the traditionally strong European and North-American markets, new platforms for trade and business are needed, particularly in Asia and Latin America. It is this fact that NürnbergMesse has recognised, aligning its strategy accordingly.

By creating or buying trade shows abroad that match its themes at home, NürnbergMesse plans to establish lead shows in lead regions with the ultimate aim of gaining global market leadership for its key show themes. To reach this goal, working with local partners by establishing affiliates is vital. The decision regarding where exactly to set these up, however, is not trivial.

The Door to Latin America

Brazil has become the key region in Latin America. The fifth largest country in the world with some 190 million inhabitants, it is the gateway to the South American continent. Its economy today is the twelfth strongest in the world, with almost constant growth over the last 15 years. Though not unaffected by the worldwide economic crisis, Brazil has held up well, even showing a modest growth of 0.1 percent in 2009. Forecasts for 2010 have already been upgraded after the first quarter, with experts now estimating growth of 7.0 percent – at the end of 2009, the expectation for 2010 was just 5.8 percent.



*FCE Pharma 2009
Transamerica Expo Center,
São Paulo*

One of the reasons for Brazil's healthy economy is its broad basis, which includes all the important economic sectors such as agriculture, the mining, oil and petrochemical industries, mechanical engineering and metal processing. Its domestic demand is huge, currently accounting for 85 percent of total production. Social programmes like the family support scheme "Bolsa Familia" have created a burgeoning lower middle class. Not least among the signs of Brazil's strong industrial growth is the increase in lorry traffic and car sales, as well as the country's growing production of packaging materials. Increasing industrialisation, political stability and huge deposits of commodities form the basis of Brazil's economic potential. A positive cycle has been created where consumption drives investment, which leads to new jobs and more income, in turn fuelling consumption. It is hardly any wonder that a strong trade show market has developed alongside this vibrant progress.

An Immature but Energetic Market

Brazil's trade show market is broadly based. All major economic sectors are well represented, and there isn't a sector without its recognized exhibition. In 2009, 172 expos were held in 22 cities, attracting 7.5 million visitors and 38,000 exhibitors, nearly a sixth of whom came from abroad. During the global economic crisis, there was no significant reduction in exhibition spaces or international attendance. Compared to other Latin American markets, trade shows in Brazil are much better developed; facilities often meet international standards and there is a strong presence of international show organizers. This is supported by a well-organized trade show culture in government and business, and trade shows are represented by strong organisations.

However, the market is still quite immature with a number of events not very well organized and not always attracting the most qualified visitors. Exhibitors themselves have become much more selective. A lot of companies, particularly in the B2B sector, are increasingly demanding qualified events, not just in terms of visitors and exhibitors but also in terms of infrastructure.

Nielsen Business Media Brazil

In 1995, Miller Freeman founded a trade show company which, after a few changes in ownership, became Nielsen Business Media Brazil (NBM Brazil), a subsidiary of Nielsen Business Media in New York. When I took on its management in 2006, I had more than a decade of experience in the administration of trade shows. I was able to run the business quite independently since our portfolio in Brazil did not have much overlap with that of our headquarters. NBM Brazil was profitable, with a turnover of seven million Euros a year, and naturally became a takeover target for companies seeking to expand their business abroad. It was not long before NürnbergMesse and NBM Brazil noticed striking similarities.

"The chance of a decade, the biggest acquisition in our company history and the most important step we have taken abroad so far", were the words of Bernd A. Diederichs, CEO of NürnbergMesse, when he publicly unveiled the purchase of NBM Brazil in April 2009. For NBM Brazil to become an affiliate of NürnbergMesse was almost a given. In 2009, NBM Brazil's trade show programme included nine specialised fairs in the consumer goods, processing & packaging and building & construction sectors. Amazingly, each of the shows had an equivalent in Nuremberg – a portfolio match that

was almost too good to be true. NürnbergMesse quickly realised that rather than set up rival shows in Brazil, it wanted to buy ours, complete with our exhibition team of 20 and myself at the helm.

Perfect Portfolio Match

In the processing and packaging portfolio alone, there are different markets where we have corresponding trade shows, covering segments as diverse as bulk goods and medical technology. The Brazilian trade shows FCE Pharma and FCE Cosmetique, which yearly attract around 25,000 visitors, are directed at decision-makers in the pharmaceutical and cosmetics production industries – just like the TechnoPharm at Nuremberg, which equally focuses on the life sciences sector. TechnoPharm is held jointly with Powtech, an international trade fair for the mechanical processing technologies and instrumentation. These industries, again, are part of our portfolio in Brazil, too: Every other year, Analítica Latin America attracts some 10,000 visitors to Sao Paulo to view and discuss the latest in laboratory technology, analysis, biotechnology and quality control

FCE Cosmetique 2009 Transamerica Expo Center, São Paulo

The list goes on. Our show Pet South America, which attracts more than 20,000 professionals from the pet care industry, corresponds to Interzoo at Nuremberg and China's International Pet Show in China, co-organized by NürnbergMesse.

In the same vein, within the building and construction sector, there are three matches between shows in Brazil and Nuremberg: Revestir, the international show for natural stone and stone processing corresponds to Stone+tec held in Nuremberg; Kitchen Bath at Sao Paulo finds its match in Nuremberg-based IFH/Intherm, and Glass South America is not far from topics dealt with at NürnbergMesse's fensterbau/frontale.

Made for Each Other

However, the similarities between NürnbergMesse and NBM Brazil are not confined to show themes. We both have a similar structure and understanding of what actually makes good trade shows. Just like NürnbergMesse, in Brazil we also place a lot of importance on having a clear concept and focus for each show. Representing the entire supply chain of a sector is vital, as is running high-level conferences in parallel with the fairs. To do this successfully, one needs to have a good understanding of the market as well as the marketing strategies of your customers. They need a market place where people can meet, exchange information, get an update on their professional issues and do their networking – but always with a strong business focus.

Generally speaking, trade show philosophies in Brazil are closer to European than to North-American concepts. The structure of a Brazilian trade show is not unlike a German exhibition. For all the similarities, however, there are differences in the way Brazilians do business.

Doing Business in Brazil

Brazil is famous for its hospitality, warmth and spontaneity.

Brazil is famous for its hospitality, warmth and spontaneity. Creating a pleasant environment, perhaps including playful demonstrations of products, is important to many exhibitors. They invest heavily in lounges and VIP rooms to create spaces where they can discuss business comfortably and informally.

Our understanding of time is quite different from that of Europeans. On the one hand, Europeans take their time planning ahead and taking long-term decisions. We Brazilians, in contrast, tend to act from day to day – often out of necessity, because other things are more urgent. But when it comes to business development, we take the time to get to know our potential business partners. We establish relationships based not just on data and facts; we consider personal likes and dislikes equally important – this is where we invest a lot of time. But once we touch hands, we are very loyal business partners who help our counterparts with all kinds of matters. It is not least this knowledge of local peculiarities and "soft skills" which makes it important for NürnbergMesse to have its own affiliate in the country, run by local people.

Global Collaboration

Since joining NürnbergMesse, our shows have already become more visible, particularly on the international stage. Being part of a German trade fair company means we can use the shows in Nuremberg as a platform to promote Brazil as one of the key countries for companies wanting to grow internationally.

Our aim is to double our turnover to 14 million Euros by 2020.

If there was an earlier concern that local events in Brazil could reduce the flow of visitors from South America to the trade fairs in Germany, these have not been confirmed. Trade shows in Germany will remain attractive to South American exporters as they often serve as a springboard to tertiary markets. In addition, NürnbergMesse's affiliates, which include North America and China, promote each other's shows to their own exhibitors and vice versa.

The Future

Of course, in line with NürnbergMesse's expansion strategy, we are not planning to stand still and rest on our laurels. We too will seize opportunities for expansion and for consolidating our existing trade show themes. Our aim is to double our turnover to 14 million Euros by 2020. Exactly where the expansion potential is to be found is the million dollar question – but Brazil itself is a huge country, so we could start "exporting" some of our events to other parts of the country. In terms of sectors, sustainability and organic products are certainly growth markets – and ones where we already have our foot firmly in the door. Watch this space. ■

Ligia Amorim
Managing Director, NürnbergMesse Brasil

About the NürnbergMesse Group

NürnbergMesse is one of the 20 largest exhibition companies in the world and among the Top Ten in Europe. The company's portfolio covers about 120 international exhibitions and congresses at the Nürnberg location and worldwide. Every year, some 24,500 exhibitors (33% of which come from outside Germany), 785,000 trade visitors (17% international) and 305,000 consumers participate in the self-run, partner and guest events of the NürnbergMesse Group. The Group has subsidiaries in China, North America, Brazil and – most recently – Italy, and also has a network of 40 representatives operating in more than 80 countries.

Exhibition Market Latin America 2011 | 2012

3. Know-how: Efficient Trade Fair Participation

Preparation: What do European Exhibitors Need to Know and Do before Going to Latin America?

As they are influenced by numerous aspects of a given market's economic complexity, trade fairs are always unique. This is why experience connected with participating in one trade fair does not correspond exactly to another event. Technical and organizational effort connected with planning and implementing the project of fair participation depends, on the one hand, on the particular fair environment found on the site, and on the other, on the own experience and familiarity with this environment, as well as the target participation range, e.g. the size and decor of the own stand.

The same range of participation in showcases abroad will be more demanding in terms of technicalities and organisation than in the case of domestic trade fairs. Large distances from the company's registered office to the exhibition venue (across various time zones), and communicating in a foreign language may prove an obstacle when preparing for the event. Cultural differences are yet another source of misunderstanding during communication.

Different mentalities are manifested in the way active participants of trade fairs perceive each other. Active participants include – besides visitors and co-exhibitors – organizers, managers of the venue, trade fair contractors, companies hired to construct and assemble the stands, stand staff (interpreters and hostesses), trade fair carriers, and catering providers. The trade fair environment includes customs offices, and other state institutions crucial in the context of planning.

Entering the market is associated with a large degree of uncertainty when it comes to scheduling and cost estimation. Referring to one's own experience is impossible, or possible only to a limited extent. Cooperation with trade fair service providers has not been tested yet. Is a worker assembling the stand to be trusted with the accuracy and timeliness of the service? How soon are the fair goods checked at the customs office? Basically, the market is not yet familiar. Misunderstandings occur, and scheduling should provide for ample reserves of time and resources in order to avoid nasty surprises later. Participating in trade fairs is all about timing. It is impossible to compensate the losses resulting from a lack of preparation at the event's launch. Consequences may surpass direct financial losses. If potential clients notice unpunctuality then the company's reputation is also impaired.

The tradeshow's image and the associated course of action are – beside such economic facts as market size – determined by social and cultural aspects. Trade fairs serve as an extensive information exchange platform, using all levels of communication. What the stand's staff say conveys part of the message, just as much as the stand's decor, commercial slogans and trademarks, advertising, or the facial expressions and gestures of the stand's staff do.

Visitors have their own image and expectations towards the behaviour of a reliable business partner, and the development of trustworthy business contacts. These may vary, as they are largely influenced by culture, customs, and the business traditions of a given country. A visitor in the USA does not expect a complex stand construction. During a conversation, they will get straight to the point. A visitor in Latin America is expecting an European type of stand construction. From his point of view informal talks are essential in terms of building and fostering long-term trade contacts.

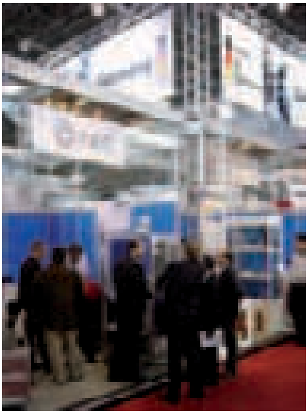
Adjusting fair presentation to visitors' expectations should be performed early enough, so that exhibits selection allows for modification in terms of country-specific needs. Materials for displaying at a stand, such as prospectuses, adverts of one's own trade fair presentation (e.g. via direct mailing), stand construction and decor, as well as space assigned for conducting conversations should all be targeted at key recipients' groups.

Gathering Information

Besides client-oriented trade fair presentation, successful participation in trade fairs depends largely on careful planning and preparation. It usually begins with obtaining information on the market, especially buyers' preferences (are selected products able to spark off the interest of buyers on the target market, or should they be modified owing to climate conditions, different preferences, etc.?), in order to meet the given country's mentality – just as described in the opening paragraph.

Once the target market has been analysed, a proper exhibition should be selected. Latin American trade fairs are listed in this brochure (see page 244). Detailed information may be obtained free of charge through AUMA's online database. The next step is checking the structure of the trade fair services. Do organizers take care of stand assembly? If yes, in what order? What other companies assembling stands are available on site? What are the chances of staffing the stands, e.g. with interpreters, hostesses, or kitchen assistants?

What are the possibilities in terms of promoting and advertising the company's participation in the exhibition by means of own advertising campaigns? Do organizers allow for such option, and if yes – under what conditions? Is direct mailing available, and who offers such services? Contact persons may include employees of German Foreign Trade Chambers on site, offering a wide array of services. Their contact details may be found through the central portal ***www.ahk.de*** of the German Chamber of Industry and Commerce (DIHK).



MECANICA - International Machinery and Industrial Supplies Trade Fair, 11.5.-15.5.2010, São Paulo.

It is essential to gather as much information as possible. Proper evaluation and organisation of obtained data from a distance may prove to be difficult. Before taking part in a given trade fair as an exhibitor, it is advised one attend them as a visitor. There is no better chance to get familiar with a country, branch of industry, or people than directly at the fair. It is also a valuable experience in terms of finding out what potential customers find interesting, both when it comes to products (product design, functionality, service) and personal contact (formal or informal). Visitors' preferences towards various stand decors will give an opportunity to deduce what type of presentation is considered appealing in a given country, and which is not. Furthermore, visiting such exhibitions will tell us much about their organizers' and contractors' professionalism. Thus gained experience may prove useful during the first appearance at the fair in the role of an exhibitor.

If it is impossible to visit the country personally, one must rely on second hand information, and subject it to extra critical analysis. Business partners' accounts of their experience may prove very beneficial. A good platform for exchanging experience with other entrepreneurs considering the same target market is constituted by foreign economic forums of specialist industry associations and chambers of industry and commerce (IHKs).

If one already has experience from participating in trade fairs held in other regions of the world, they must definitely be used in the preparation phase. Such expertise is helpful when it comes to "check list" planning. What needs to be taken into consideration when preparing for a trade fair? In terms of time management, the stages of preparation for various events are fairly similar. The beginning of a project connected with participation, and length of individual stages of scheduling may depend on a given country's nature. If it is common knowledge that the target port for exhibits is overloaded, or the customs office is rather inefficient, a proper time reserve should be left.

Trade fair preparation may be divided into three stages time-wise: "before the fair"; "during the fair"; and "after the fair". All three stages should be scheduled before the event even begins. All three stages should include tasks assigned to employees, and external service providers. Quite often, the employees of the company that exhibits its products at the showplace are not informed of their role in the preparation for the event. The person responsible for a given trade fair should be in charge of every aspect from the very beginning, coordinating tasks within the enterprise, and those that need to be subcontracted. Firstly, it needs to be defined which tasks will be implemented internally and by which department, and which are to be performed by external service providers (companies assembling trade fair stands, trade fair carriers, interpreters, hostesses, advertising agencies, designers, etc.). Which national and foreign offices will be contacted (customs offices in the target country, chambers of commerce and industry in order to obtain a permit for temporary admission of goods (ATA Carnet))? Domestic export regulations must be observed.

All costs need to be taken into account, and estimated realistically. Service providers should be asked for price quotations. Yet, it must be clear that the cheapest offer is not always the most attractive. A carrier which works really well within Germany may not be an expert in the field of Latin America or trade fair exports to Latin America. In order for the exhibits to arrive at the showplace stand in time, it is prudent to cooperate with a carrying company which specialises in trade fair transportation in a given region.

Simultaneously with cost estimation, one should search for possibilities of additional support. Possibilities offered to German exhibitors by the federal government and the federal states of Germany are described in detail on page 220 "Presentations at Foreign Trade Fairs supported by the Federal Government of Germany".

Further planning connects active participants of trade fair presentation in terms of deadlines. Which tasks depend on other tasks, which may be implemented simultaneously, which have a potential for creating bottlenecks. Therefore: what needs to be sent and when does it need to be sent if it must arrive on site in time? The importance of having time reserves, especially during the first exhibition at fairs, has already been emphasised. On the first day of the trade fair a stand needs to be operational – assembled and fully equipped.

AUMA has developed a basic schedule for planning trade fairs in its brochure: "Effective fair participation, part 2: foreign fairs". The agenda may serve as additional support. A short presentation is included in this brochure on pages 171-177 "Participation in Trade Fairs Abroad: Planning and Organization".

It is essential to mention the points that less experienced exhibitors do not take into consideration. Recruiting visitors is not only the organizer's responsibility. Branch-oriented visitors plan their trade fair route even before they arrive at the venue. That is why the stand should arouse visitors' interest.

Trade fair presentation must express the company's image, but also consider commercial traditions of a given country. The stand must be appealing. Important aspects contributing to its attractiveness include a well-chosen theme for a given trade fair and country, stand staff, as well as product profiles and key topics adjusted to the country in question.

People tend to underestimate the importance of determining definite objectives. Unless clear goals are defined, it is difficult to evaluate the company's trade fair success. AUMA has prepared and presented on its website a tool for analysing fair participation benefits [TradeFair Benefit Check], which aids exhibitors both in terms of setting goals, and in evaluating the success after the exhibition.

Some trade fair "first timers" consider the show finished after its last day. Nevertheless, it is the follow-up that is increasingly important. Closing commercial transactions is often postponed to the period after the trade fair is closed. Important contacts are initiated during the exhibition, and they need to be developed after the event. In order for that to be successful, the stand staff should note the key aspects of each conversation, so that they are able to address individual requests after the trade show.

Despite good preparation, much experience is only gained on the job, along with the first trade fair participation. The observations and comments should be written down so that when the next trade fair is due, they facilitate preparation for the event. ■

Gerd Bettermann
Department Global Markets,
AUMA, Association of the German Trade Fair Industry

Participation in Trade Fairs Abroad: Planning and Organization

A chronological overview structured in project phases:

Planning and organizing a trade fair participation in a foreign country is quite a challenge, especially for smaller enterprises which take the risk to access distant and difficult markets for the first time. The chronological coordination of the tasks in particular is often not really easy to understand for newcomers.

Each of the seven points mentioned below contains the most important tasks of the respective project phase, from the initial stages to the wrap-up. The suggested time frames are average values and can therefore vary greatly.

1. Research and preliminary planning
2. Planning
3. Preparation
4. Last-minute precautions
5. At the fairground
6. During the trade fair
7. Wrap-up and analysis

Research and Preplanning

Internal Product Check

- Are the products internationally competitive?
- Technically advanced/trendy products?
- Newly developed product niches?

Gathering Information

- On the economic area
- On the suitable trade fairs
- On the situation of the industry (by country, product or trade fair)
- On support programs (overseas trade fair support at federal and regional levels)

Evaluating the Information Gathered!

- Data on market and trade fairs
- Costs (rent for fair stand etc.)
- Aims of corporate policy
- Participation as an exhibitor
- Infrastructure in your own company?
- Estimate of total costs

Making a Decision!

- “Yes” for participation in trade fair
- Product selection – exhibits
- Size of fair stand
- Registration
- Internal preparations
- Determine and exhibition coordinator

Planning

Registering for the Fair

- Suggest location of fair stand – request paperwork
- For securing location
- Plan of exhibition hall and occupancy
- Exhibitor’s handbook
- Address
- Stand construction companies
- Responsible carrier
- Pay deposit

Planning Travel Details

- Determine flight details
- Book hotel rooms (travel agency or fair organizer)
- Arrange for company visits

Internal Arrangements

- Set up working group for overseas trade fairs
- Active coordination of development, production, design, export, marketing
- Review of industrial property rights for trade marks, utility models, designs, patents and copyrights

Personal Preparation

- Politics
- Economy
- Culture
- Language

Preparation

Planning of the Fair Stand

- Stand design
- Product presentation

Determining Stand Labelling & Graphics Hiring Stand Construction Company, Working through Exhibitor's Handbook

- Carrier /transport
- Shipping date
- Exhibits
- PR work
- Marketing
- Staff for exhibition stand
- Cost for communications

Establishing Contacts

- Foreign Chamber of Commerce
- Embassy

Confirming Travel Arrangements, Calculating Total Costs, Ensuring Health Protection

- Appropriate vaccination

Choosing Proper and Practical Clothing

Last-Minute Precautions

Assembling a security package!

- Photocopies of all contracts and orders / electronical backups
- Exhibits (graphics, cards, name tags etc.)
- Travel (Photocopies of passport, tickets, credit cards, visa)
- Financial resources

Being Reachable

- Telephone and fax numbers of hotel and fair organizer
- Leave stand number at the home office!
- Exact travel details
- Note time difference
- Determine hours for communication with the home office

Travel Literature

- Travel and language guides
- Maps

At the Fair Ground

Visiting the Fairground

- Get the exact address of destination
- Exhibitor registration
- Pick up exhibitor identification

Preparing the Exhibition Stand

- Brief staff with regard to fairground

Checking on Service Providers

- Stand construction
- Check technical infrastructure
- Carrier/delivery date
- Catalogue entries correct?

Follow-up with Costumers

- Reissue invitations
- Arrange dates for company visits
- Obtain information on manufacturers and dealers

Establishing Official Contacts

- Invite representatives of your embassy and/or the Foreign Chamber of Commerce to the exhibition stand

During the Fair

Watching

- Quality of exhibitors (where from, specialization, products on offer, type of presentation)
- Quality of visitors (trade visitors, interested attendants, family trip)
- Name recognition and organization of trade fair: Is trade fair established at the market? Are there competing events? Are there organizational flaws? Are there weak spots of a technical kind which are typical for the country? (sign of how robust products need to be in this country)
- Location of stand – international hall or hall containing manufacturers of similar products?
- Analyze/interview visitors – which products attract visitors? Technology, design and price appropriate for target market? Which other trade fairs does the visitor attend? Is he/she a regular visitor of this trade fair / of other trade fairs? How does the visitor see the development of the respective industry (opportunities / issues)? How does the visitor assess products of immediate competitors (quality, price, sales practices, service)?

Checking the Product Offerings

- Is the product range suitable for the market?
- Which prerequisites need to be created for a successful market access? (local warehousing, building sales network, training for after-sales services)

Keeping Minutes on a Daily Basis

- Exhibition visitors (total number of trade fair visitors, passers-by at the stand, stand visitors)
- Stand visitors
- Information on company and function of visitor
- Address
- Industry
- Interest in which products?
- Requested follow-up measures?
- Assessment of potential customer
- Market evaluation
- Evaluation of the day at the exhibition and of special occurrences

Wrap-up and Analysis

Evaluating

- Achievement of objectives
- Market knowledge
- Costs
- Analysis of errors and flaws
- Consequences for company

Reporting

- Internal
- Chamber of Commerce
- Association
- AUMA

Contacts

- Confirm orders
- Keep promises
- Send out letters to those interested

Planning

- Participate again
- At another trade fair?
- Different range of products?
- Establish preliminary contacts
- Search for sales representatives

Quick Checklist

12-9 months before trade fair

1. Preliminary Planning

- ○ Identify if products are ready for export (if not, participation in trade fair abroad can be disregarded)
- ○ Definition of targets: strenghtening of company image, presentation of new product developments, test of product range, public relations, establishing new contacts, search for sales representatives, sales
- ○ Selection of economic area
- ○ Selection of trade fair for participation
- ○ Collect information on: market, trade fair
- ○ Talking advantage of support from federal or regional authorities
- ○ If no support, participate as single exhibitor
- ○ Determine exhibition budget, an important parameter: exhibition stand size

9-6 months before trade fair

2. Planning

- ○ Determine an exhibition coordinator within the company
- ○ Review of industrial property rights
- ○ Registration with the exhibition organizer
- ○ Internal preparation for: specification and placement of exhibits, brochures, marketing
- ○ Travel plans
- ○ Personal preparation

6-3 months before trade fair

3. Preparation

- ○ Planning of exhibition stand
- ○ Stand construction
- ○ Stand design (graphics, layout)
- ○ Staff
- ○ Transport (carrier) and customs agency
- ○ Establish contacts on location (embassy, CoC)
- ○ Advertising
- ○ Set up detailed projection of costs
    - Basic costs (stand rent, energy, registration fee, obligatory insurance)
    - Costs for stand construction and design (graphics, decoration)
    - Costs for service and communication (hired staff, catering, promotion, catalogue, telephone, telefax, internet)
    - Costs for transport (carrier, insurance, packaging)
    - Personnel and travel costs
    - Costs for preparation and analysis (cooperation with other departments, special product developments)

- Travel plans (booking of flights and hotel, visa, vaccination)
- Information on the country and its people

4. Last-minute Precautions

- Check planning details
- Assemble security package: photocopies/electronical backups of the most important paperwork (contracts, orders, pro forma invoices), graphics, brochures, business cards, name tags, promotional gifts, funds, forms (daily reports, order forms)
- Communicate travel plans in company
- Arrange for functioning of stand (staff, catering)

5. At the Fairground

- Contact customs agency
- Check stand construction
- Check exhibits
- Contact organizer
- Registration
- Contact official German representation
- Contact potential customers
- Contact media
- Staff training

6. During the Trade Fair

- Watching exhibition details: origins of exhibitors and visitors, type of exhibitors present, quality of visitors, competitor material
- Contacts with visitors
- Sales conversations
- Daily reports
- Disposition of exhibitions

7. Wrap-up and Analysis

- Answering customer inquiries
- Sending information to visitors
- Press information
- Accounting/budget control
- Checking of targets
- Evaluation (cost-benefit)
- Consequences ■

AUMA, Association of the German Trade Fair Industry

Gerresheimer Relies on NürnbergMesse Group Trade Shows

Regular attendance at international trade shows is the day-to-day business of the Gerresheimer Group (Gerresheimer). Gerresheimer is the world's leading manufacturer of specialty glass and plastic products for the pharmaceutical and healthcare industries. In 2008, the Düsseldorf-based group expanded into Brazil. An immediate target for Gerresheimer was the FCE Pharma event, Brazil's largest trade fair for the pharmaceutical and healthcare sectors. By doing this, Gerresheimer laid the foundations for its business in Latin America.

Brazil: Emerging Economic Nation

Thinking of Brazil solely in terms of soccer, samba and carnival, or as simply the largest country in South America, would be to underestimate a dynamic economy and a highly attractive location for German companies. Despite some downturns at the beginning of the millennium, the world's twelfth largest economy has grown relentlessly for nearly fifteen years. Economic reforms in recent years have kept the country looking healthy, even during the global financial and economic crisis. Economists estimate that the economic performance of the largest South American economy will continue to grow strongly in 2010. Foreign as well as domestic companies can take advantage of some outstanding opportunities to enter the Brazilian market.

Gerresheimer Expands Activities in South America

Gerresheimer is the world's leading manufacturer of specialty glass and plastic products for the pharmaceutical and healthcare industries.

Currently, some 2,000 German companies own a subsidiary in Brazil. Gerresheimer is one of them. Founded in 1864 in Düsseldorf, North-Rhine-Westphalia, the group has extended its business activities internationally over the past two decades through targeted acquisitions and intensive development of technologies and knowledge. Approximately 9,400 employees are employed at 40 branches across Asia, Europe and North and South America. In 2008, Gerresheimer began its expansion into South America's most populous country.

Jens Christian Friis, Vice President Plastic Packaging Gerresheimer South America, explains the reason for the company's move. "Brazil is a country with great growth opportunities – particularly in the pharmaceutical industry. With the founding of Gerresheimer Plasticos Sao Paulo (Gerresheimer Plasticos), we wanted to strengthen our market share in this region." In February 2008, Gerresheimer took over the

Gerresheimer at FCE Pharma 2008

Brazilian company Allplas Embalagens (Allplas). Allplas is located in the state of São Paulo and has two manufacturing plants. The enterprise is Brazil's market leader in pharmaceutical plastic packaging. Just a few months earlier, Gerresheimer had begun to put down roots in South America for the first time. In the course of purchasing EDP, the Spanish market leader for pharmaceutical PET bottles, Gerresheimer simultaneously took over EDP's Argentine subsidiary. EDP specialises in pharmaceutical packaging and application systems, and holds a leading market position in the region.

Besides focusing on their specific products, Gerresheimer's South American operations play an important strategic role within the group. As Friis observes: "We see ourselves as global market partners. Our regional expansion and wider product portfolio today enable us to offer a much richer and more varied product spectrum in all parts of the world."

Global Marketing

In the wake of acquiring Allplas and EDP, Gerresheimer needed to carry out some internal restructuring. The divisions of the formerly independent companies were reshaped and responsibilities were changed. To make the transition to becoming part of the Gerresheimer group as smooth as possible, senior employees of the German parent company moved to Brazil. Friis was one of them. In his former role, he was Sales Director Plastic Packaging Germany; today, he is Vice President of the group's South American operations.

Gerresheimer adapted the new subsidiary's marketing activities to fit in with the group strategy. Prior to the acquisition, Allplas had participated at many different trade shows throughout Brazil. But Gerresheimer focused exclusively on attendance at the FCE Pharma event. This highly specialized trade fair is held annually at the Transamerica Expo Center in São Paulo. The fair plays host to all the leading companies in the pharmaceutical industry, as well as to SMEs filling gaps in the market with their specialised products. The 25,000 trade visitors come mainly from South and North America, but also from Europe and Asia. A few months after the acquisition of EDP and Allplas, Gerresheimer was an exhibitor at FCE Pharma. Says Friis: "We took a close look at all the fairs that Allplas had taken part in previously. The FCE Pharma event won us over because of its ability to offer us access to a very specialised industry audience. "

The location of FCE Pharma is also a major advantage, the city of São Paulo being Brazil's most important economic, financial and cultural centre.

FCE Pharma's strong focus on technologies for the pharmaceutical and healthcare industries guarantees that exhibitors like Gerresheimer will be able to make contact with highly qualified industry professionals. FCE Pharma is the only exhibition in the industry covering not only Latin America but also the North American region. Compared to other trade shows, the location of FCE Pharma is also a major advantage, the city of São Paulo being Brazil's most important economic, financial and cultural centre. In addition, two airports, multiple highways and major rail link make the city the most important traffic hub in the country. As Friis confirms: "Participating at FCE Pharma ensured that we could meet the industry's most important representatives."

Gerresheimer Subsidiaries under one Roof

To make sure that visitors could become acquainted with the whole product range, Gerresheimer Plasticos decided to bring its Mexican sister company to FCE Pharma as well. Gerresheimer manufactures glass and plastic products for the pharmaceutical and healthcare industries in Mexico and the US.

The collaborative decision of the Brazilian, Mexican and the North American arms of the company to participate jointly at FCE Pharma accorded well with the strategy of the marketing department in Germany. Fabian Su, Marketing Manager Gerresheimer, coordinates the group's global trade fair activities: "Taking part at FCE Pharma was so attractive for us because we were new in the market. We simply had to be there to get our faces known and to get on the regional map. FCE Pharma offered us a unique opportunity to establish contacts in Latin America and North America and to show our existing customers some continuity. We were able to present our complete portfolio of glass and plastic products."

Local Organization of the Trade Fair

Even bearing in mind that this was the company's first outing at FCE Pharma, Su was happy to entrust the organisation and staffing of the Gerresheimer stand to the Brazilian team. In coming to this decision, Su emphasises the complicated customs regulations for non-EU countries such as Brazil: "It would have been a very nerve-wracking and lengthy process to import products from Germany to Brazil just for the trade show." Since Gerresheimer Plasticos fabricates its products locally, the complex logistics management processes were avoided. The Brazilian team organised the stand within a much shorter time frame than we could have and, above all, more cost-effectively.

Gerresheimer at FCE Pharma 2008

The roughly 60 m² stand size planned by Allplas proved ideal for the three Gerresheimer sister companies. "During the fair, we wanted to confine our attentions to what actually defines Gerresheimer. For that reason, we deliberately avoided an unnecessarily large stand of 100 m² or more that we could not adequately fill." Friis is convinced that getting the product mix right and concentrating on excellent customer interactions is far more important than booth size: "If we want to establish ourselves as a global partner for our customers, we have to bring the flexibility to adjust our portfolio to market-specific needs. This requires listening carefully during customer meetings, as well as permanently monitoring the market. This is why trade fairs like FCE Pharma offer an ideal platform."

Successful Follow-up Business

The follow-up business from the trade show has shown Gerresheimer how important the company's presence at FCE Pharma was. Former Allplas customers were keen to get to know this hitherto unknown company with German roots from which they would be getting their products in future. Thanks to their presence at the fair, Gerresheimer was able to introduce their business while also having the opportunity to present to customers both the company's global concept and the solutions on offer from different areas of the group. Key global customers were introduced to local solutions for their Brazilian subsidiaries by the Global Key Account Management. "Of course, an event like this is an immense cost factor. But the investment has paid off," says Friis.

Gerresheimer Continues Exhibiting

The clear focus of FCE Pharma on products for the pharmaceutical industry enabled us to have discussions with existing customers and prospects at eye level.

The high quality of FCE Pharma totally convinced Friis and his team: "The clear focus of FCE Pharma on products for the pharmaceutical industry enabled us to have discussions with existing customers and prospects at eye level. We were able to really go deep with them." So it was no surprise that Gerresheimer wanted to apply for a stand at FCE Pharma again the following year. In April 2009, NürnbergMesse Group acquired the Brazilian trade fair company Nielsen Business Media Brazil, the previous organizer of FCE Pharma. The newly founded subsidiary NürnbergMesse Brazil took over the concept of FCE Pharma and continued the successful trade show under the same name. Friis hopes to benefit from the change of organizer. "The name 'NürnbergMesse Group' stands for high-quality events worldwide. This positive reputation will bring added value to FCE Pharma – and hopefully to us as exhibitors as well."

In 2009, the group took part at FCE Pharma for the second time. Gerresheimer stayed true to its proven concept, presenting its glass and plastic products under one roof. Gerresheimer Plasticos again exhibited jointly with their Mexican location and, for the first time, with the Argentine location Gerresheimer Buenos Aires. Gerresheimer is keen to reinforce its position within the Latin American market, as Friis observes: "As regular participants at FCE Pharma, we aim to deepen our bond with our customers." In due course, further divisions of Gerresheimer will present their products alongside Gerresheimer Plasticos to establish the group's entire range of glass and plastic products in the region. In May 2010, the group was represented at FCE Pharma for the third time. Friis sums up: "As an international knowledge platform for the Pharma and Healthcare industries within the whole of North America and Latin America, FCE Pharma is unbeatable. The clear focus of NürnbergMesse Brazil's concept – reducing many potential topics to just the most important issues for the industry – ensures a highly qualified audience." Friis has already noted the dates for the next FCE Pharma in his calendar. ■

Petra Wolf
Member of Management Board, Director International Operations
NürnbergMesse Group

MANN+HUMMEL at Trade Shows in Brazil and Argentina

The MANN+HUMMEL Group is a development partner and original equipment supplier to the international automotive and mechanical engineering industries. The Group's product portfolio includes air filter systems, intake manifold systems, liquid filter systems, cabin filters and cylinder head covers made of plastic with many integrated functions for the automotive industry, as well as filter elements for vehicle servicing and repair. With 41 locations all over the world and 11,800 employees, MANN+HUMMEL is one of the major corporations in automotive components. In 2009 the corporation achieved a total revenue of € 1,672 billion.

Francisco Gomes Neto Group Vice President and CEO of MANN+HUMMEL Americas

At the end of the 1950's cooperation started with filter manufacturers in Argentina and Brazil. Today MANN+HUMMEL Argentina S.A. has one subsidiary in Buenos Aires and MANN+HUMMEL Brazil Ltda. has three subsidiaries – one in Indaiatuba/Sao Paulo, one in Manaus/Amazonas and one in Contagem/Minas Gerais.

Important Trade Shows for MANN+HUMMEL

Interview with Francisco Gomes Neto, Group Vice President and CEO of MANN+HUMMEL Americas about the activities of the company in Latin America.

- Which meaning has the Latin American market for MANN+HUMMEL?

Latin America is a very important market for MANN+HUMMEL and it's part of MANN+HUMMEL growth strategy plans in the Americas. MANN+HUMMEL has a leadership position in the OEM markets in Brazil and Argentina in Passenger Cars, Trucks, Buses, Motorcycles and Agricultural machines. MANN+HUMMEL has also a very important market share in the aftermarket in countries like Brazil, Argentina, Chile, Uruguay, Paraguay, Bolivia and others. In the Latin America aftermarket MANN+HUMMEL sells its products with two brands: MANN-FILTER and Purolator.

- What do you expect from Latin America after the crisis?

The Latin America countries did not suffer so much as other developed markets. The recovery in Brazil for example was very fast already in the second quarter of 2009. We expect an average moderate market growth in Latin America after the crisis.

■ How do you participate at trade shows in Latin America?
Today in Brazil, the most important trade show is AUTOMEC, which is segmented by passenger cars in one year, and commercial vehicles, truck and buses in the other year. However, we participate only on AUTOMEC Passenger Cars, because is the most visited trade show of all Latin America, and it´s a reference in the autoparts market. In Argentina, we have Automechanika, another trade show also international, and very important to the Mercosur axis.

■ How do you prepare trade shows in Latin America to reach your customers?
For each trade show, we prepare the main points to be highlighted: product launches, portfolio´s increase, new technologies, etc. On the booth, we design specific areas for product demonstration and also areas of personalized service to our dealers and customers from all Latin America. The materials are available in Portuguese and Spanish version.

■ Are there specific formats to communicate with your customers in Latin America? (conferences, receptions…)
We always elaborate conventions and sales meeting according with the need. Recently, we organized a sales meeting with the principal Latin America customers together with MANN+HUMMEL Argentina, to show new products (like the increase of our cabin filter´s portfolio) and analyze the concentration points to be worked in each country/region.

■ Do you develop marketing and branding elements for trade shows in Latin America in your headquarters in Germany or do you adopt it in Latin America?
We utilize an alignment with the overall standard that the MANN+HUMMEL Group has, however, this format is adaptable to our needs. The appearance is similar, but we have the opportunity to establish local actions and compatible communication with our target in every region.

■ How do you use trade shows as basis for sourcing activities?
We researched new suppliers on trade shows, and eventually we make new contacts for new projects. But today we supply more to other companies than we buy. ■

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Practical Information for a Successful Exhibition

The most recognizable brands in the world are always searching for new markets. Latin America has become a very important market due to its growing economies and the interest of its consumers in getting modern technology and high quality products that are imported at good prices.

DIPER EXHIBITIONS/ PUBLICISLIVE World Economic Forum, Cartagena, Colombia 2010

The most important thing when entering these markets is to do business with companies that spread your image throughout Latin America. One way to achieve this is by participating in fairs and trade shows.To achieve good results in a trade show in Latin America you should take into account the impact of the design, quality, and logistics of your booth. This can be accomplished by hiring a company that knows both the region and how to exhibit in each country. Thus, for a successful exhibition the following aspects are important:

Design

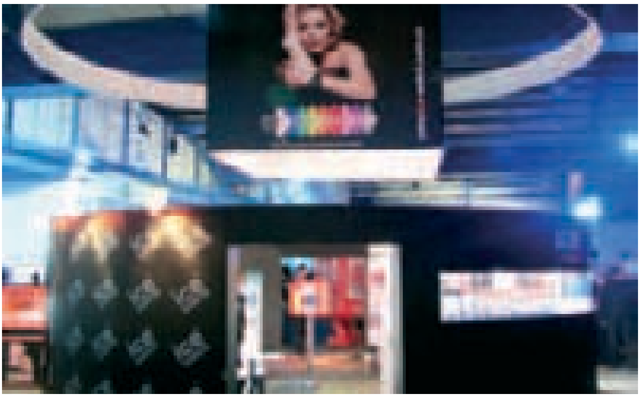
It is important to create branding and market position through personalized management. For this reason, any concept should go through a design department, which can transform the exhibition needs of the client. The designers take into account the culture, materials, laws, and requirements of the country in which the exhibit is to take place – without affecting corporate identity. This design department must have the ability to adapt given concepts from European companies that want to exhibit in a Latin American country but which also want to alter their concepts or keep them according to each country and/or convention center.

Production

To achieve quality and commitment to production it is necessary to have several years of expertise, effective planning, and optimal execution backing you up. The exhibiting company should have the relevant infrastructure, specialized support machinery, and rental equipment. Most importantly, are the companies' personnel who will accompany you during the whole process and be available at any time. You will also want the opportunity to see the progress being made to your project by way of production reports or a pre-view in real time via live webcams, as this helps fulfill customer satisfaction from concept to completion.

Logistics

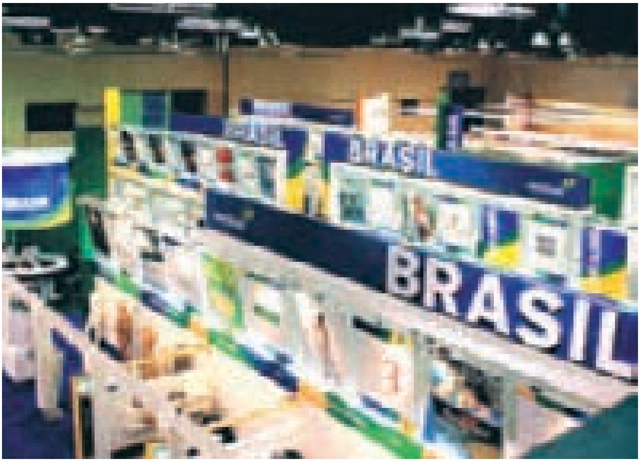
It is important to have proper support to manage all pre-show related arrangements such as the handling of freight or cargo for the exhibition, the importation of your product, exhibition service management, hotels, models, or the management of people qualified to deliver the required characteristics and fulfill the expectations of the show. This helps resolve any issues that may arise. In this way your company can succeed with good exhibition services from beginning to end. Finally, after the trade show it is essential to have support for sending samples and advertising material to the next trade show or back home. Proper planning helps manage these important aspects in advance.



*Diper Exhibitions/
ICE - WATCH
Circulo de la Moda
Bogotá, Colombia 2010*

Installation and Dismantle

Most countries in Latin America operate on a flat fee for installation and dismantling. Although there are no unions, all contractors must have a pass and must be registered in advance to be on the trade show floor during installation. You can connect your own lights and equipment. Drayage systems do not exist. In some convention centers it is advised that you use a platform to cover the floor, as they are not always level. In some convention centers the ceiling is not aesthetically pleasing, so covering it may be an option. If you have equipment that requires a 24-hour power or water service, you must request this specifically. The trade shows generally have three-day installation timeframes. Dismantling takes one day, depending on the country, convention center, or trade show organizer.



DIPER EXHIBITIONS/ CONCEITO Pavillion, Expocomer Panama 2009

General Aspects

Below we have listed some helpful information:
Taxes: Colombia's Tax, which is called IVA, is 16 percent. Mexico also has IVA and is 15 percent. In Brazil it is called VAT and is currently 18 percent. **Garbage**: During installation the show organizers generally offer free clean up services. **Voltage**: Colombia and Mexico have 120V, Brazil has 110V and 220V. **Languages:** Spanish is spoken in most countries in Latin America, while Portuguese is spoken in Brazil. It is possible to hire interpreters in several languages. **Cell phones:** GSM and 3G work and it is possible to buy temporary cell phones. ■

Ivan Abad, *President Diper Exhibitions*
Edwin Bustos, *USA Marketing Director, Diper Exhibitions*

Venues and resources: Magazine Exhibitor

Tips for Negotiations with Latin American Business Partners

*Interview with Gerardo Müller Albán, CEO of INBEL – Intercultural Business Euro Latin, **www.inbel.eu**: on the differences between Germans and Latin Americans in business.*

■ Are all Latin Americans the same or are there differences? What about stereotypes?

One of the stereotypes of Latin Americans is that they are unpunctual, but, as we know, Germans and Swedes are not always on time. Therefore, one should be careful when generalizing about Latin Americans. There are greater disparities between Germans and people in the Caribbean, coastal and tropical regions than between Germans and people in the countries with a more European influence, such as Chile and Brazil. However, those who come with an open mind and do not adopt prejudices are on the right path to becoming interculturally competent.

■ Let us take a classic stereotype. What does the concept of time mean to a Latin American?

Appearing calm, cool and collected prevails over punctuality. The North European would rather appear punctually even if he risks looking disheveled. The Latin American on the other hand prefers to change his shirt in the hotel at the risk of being late. In Germany, respect and trust are acquired through punctuality. However, in Latin America people take particular care with regard to their appearance and believe in spending valuable time with business partners. This is how they gain respect and trust. It therefore goes without saying that one needs to have a flexible time schedule when doing business in Latin America.

■ To what extent are business relations influenced by social factors in Latin America?

Business and private life are more closely interwoven in South America. Having trust in one's business partner is based more on personal relationships than on technical expertise. Therefore, invitations to one's home and excursions with one's business partner are a key to success. My advice is to be open-hearted. This means, for example, bringing small gifts for your business partner and some photos of your family with you. Praising the foreigner's country and finding something you have in common with your partner will be most appreciated. Be very careful not to appear arrogant by criticizing some of the country's weaknesses, such as the crime problem in Brazil or drug trafficking in Colombia, as this might be offensive.

■ What about hierarchy?

The hierarchical structures in Latin America are steeper than in many other cultures. It is wise to show authority in Latin America and not to rub shoulders with those of a lower standing. So it's important to keep's one distance to employees, such as a doorman, where a tap on the back would be out of place. It is even common to clearly demonstrate one's status. For example, staying in a five-star hotel is not a sign of extravagance but is a signal that you are showing respect to their country.

South Americans Love to Gesticulate.

Especially with high-context cultures body language is usually more important than the spoken word. Here are some examples in the photos.

Agreed! That's how we'll do it.

Be careful what you do. The partner wants to caution you.

Take care, this situation is extremely dangerous.

Tudo Bem - everything is great.

Tudo Bem is the most typical gesture in Brazil and means pure optimism – and not without a reason!

■ One often hears the affirmative 'yes' as opposed to a 'no' in a business context.

A 'yes' does not necessarily mean a 'yes'. Learn to read between the lines as Latin Americans tend to communicate indirectly. When in doubt, do not hesitate to ask diplomatic questions. The real key to getting on well with Latin Americans is a positive attitude. In case some kind of criticism is called for, a Latin American would invite his guest for a coffee, chat about football, tell him he's doing a great job and only then tell him what he could do better and how that could benefit everyone. Criticism should only be made in private, and neither in front of superiors nor subordinates, as a face-saving technique. The more direct style of communication prevalent in German comes over as too harsh for South Americans, who are much less direct.

■ South Americans are very spontaneous. What about planning and following up projects?

Spontaneity precedes any sort of planning in South America. Where many things are uncertain and where the political situation as well as private affairs could change from one day to the next, spontaneity is the norm. This may conflict with the German need to plan. This means you have to be creative, but it also means time buffers need to be built in with regard to appointments.

As anything can happen in South America, it is your responsibility to keep yourself informed at all times. The client needs to check up and have all agreements confirmed regularly. Unless there is close personal contact there is a danger that your business might fall prey to the saying: 'out of sight, out of mind'. ■

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INBEL provides training in intercultural communication and international project management. The company is specialized in training for negotiations and sales and marketing. On behalf of its customers, INBEL supports your company in establishing contact to potential clients and finding distributors in the various target markets.

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Communication in Latin-American Exhibitions

Juan Carlos Grassi
Director of Editorial
Ferias & Congresos S.A.

Fairs and exhibitions in Latin America are one of the best channels to communicate a product or service, to launching technological innovations, to do commercial networking, to obtaining distribution partners, and to promote business in general. In this particular historical moment, the region is at a time of economic growth and expansion of consumption; therefore it is a particularly favorable time to introduce products and services to satisfy an ever growing and dynamic demand.

The mere presence as an exhibitor in a Latin-American fair, implies in itself a communication campaign, getting with the clearest and most evident message that can be issued: showing the product or service to the potential consumer, through a direct communication, face-to-face, with the possibility of explaining functions, of experiencing performance, of testing capabilities, in essence, with the possibility of making the most from the multiple advantages of the personal encounters to be had at fairs and exhibitions, one of the most efficient vehicles of communications, precisely due to the particular characteristics mentioned above.

Press and advertising pieces must be part of the global marketing plan for entering a new market, professional surveys must be conducted to identify behaviors in that market, in order to know the territory, the target audience which could be willing to consume the product which is to be introduced in Latin America, considering the cultural characteristics, traditions and daily habits which will influence the decision of introducing one product or the other (for example, a beverage manufacturer would avoid introducing alcoholic products in countries where consuming alcoholic drinks is prohibited due to ancestral religious motives).

For this, it will be important to survey of the local picture, through a market investigation conducted by a local marketing agency, with polls, focus groups, studies, trend analysis, and consuming habits, which will help identify the most adequate product to take to the right fair or exhibition for that product.

Once we have decided to participate in the exhibition we consider the most appropriate to exhibit and disseminate our product or service, we must begin considering the press and communication actions, which are as important as the design of the stand and the proper display and exhibition of the product.

There is no absolute formula for success, but experience helps. Since the last decade of the 20th century, globalization brought the rise of the Internet as a tool for communication and broadcasting. The so-called information highway continued evolving and becoming richer in technical possibilities, at the same time it widened its massiveness and everyday usage.

The Internet's effect over the culture at the turn of the millennium can be compared to the incidence of the discovery of the printing press during Gutenberg's times.

Internet provides communication resources for everyday use, which allow and facilitate the contact and relationships between people and companies all over the world. E-mails allow, in a matter of seconds, to establish a communication between users from one hemisphere to another and from one corner of the world to the other.

On the other hand, the so-called web "pages" or "sites" have become a sophisticated and agile method for communication, and therefore, for advertising. A good web page, designed by an inspired Webmaster, allows bringing newspapers, magazines, radios, television news broadcasts and other mass media formats to the screen, accessible with the advantage of an unusual speed in the transmission of concepts.

The cyberspace offers, at the same time, the so called "search engines", these tools facilitate access and search for information -like an electronic reference encyclopedia or a great guide or directory-: by typing in a keyword, the web facilitates a wide list of electronic addresses with information related to each subject. Because of that, the use of Internet is fundamental, especially during the stage previous to the "landing" of a new product in a new market and from another country, as a way to shorten distances, both physical and cultural.

Once the moment of the exhibition arrives, together with the hiring of an architecture and design studio to oversee the correct construction and display of the stand, and a marketing agency to develop the contents and hire the staff for the exhibition space, it is of vital importance to also hire a press agency, in charge of the company's institutional communication during its participation in the exhibition, and to continue with the corporate communications once the exhibition has concluded.

The most Adequate Channel

If possible, it is a good idea to have the product be the protagonist of its own communication. There is no brochure, release, photograph, or merchandising element as convincing as the good performance of the product, to the view of the spectators and visitors in the event. The multiplier effect of that information, of that "testimony" is extraordinary.

On the other hand, brochures and informative material establish a direct bridge with the potential consumer, a bridge crossed even faster when the communication actions are enhanced by the press and advertising.

Of course, advertising in mass communications media - and in foreign publicity - is better left to the organizers of the event, who will work to attract the largest amount of professional visitors. But together with the marketing and consuming habit survey of the audience, prior to the participation, it is convenient to make a survey of communication media, thorough enough as to detect promotional opportunities through sectored graphic media aiming directly for decision-making audiences who will require large-scale operations to acquire or distribute our product in the new market.

For example, the magazine Ferias & Congresos - which I have run for 40 years - is an Argentinean graphic medium specialized in marketing for conventions, exhibitions, and corporate events, a true reference publication which product managers, directors, and decision makers from the leading companies in the Argentinean market trust to inform themselves and make decisions according to the received information. It is a good idea to invest in publicity in this type of graphic media which, for a smaller cost than in massive publications, reach a more selected audience, more eager to consume this product on a larger scale through their business-type decisions, meaning, it is a publicity which can strike a better costs-benefits balance, by aiming at a more professional audience at more convenient rates.

Many foreign companies use our magazine to announce beforehand that they will be in a specific fair or exhibition, because they know there they will find their primary consumers: those who will make the decision to distribute their product in the country so that the larger public may access it.

Once in the fair, the task of the press team consists in turning the exhibited product into news. Going back to the idea of the product itself being the protagonist of its communication campaign, if it is pens, it will be convenient to give them away to journalists from different media, in the case of food or drinking products, it will be indispensable to organize press meetings to let them taste it, when the exhibition is on services, it will be good to offer well established journalists the chance to transmit the experience of their use.

In that sense, an excellent practice is that of Fam-Tours or familiarization tours with which tourist spots achieve a great dissemination by inviting groups of journalists and photographers for them to later write or publish pictures of the place, in invitation articles usually published in corporate-type, targeted at people with high inquisitive power who tend to consume these tourist spots.

In a Latin American exhibition, that same informative virtuous circle for a product or service can be achieved by arranging high profile demonstrations, in such a way that the stand becomes news itself or an important part of the exhibitions news, or as we have ascertained in recent successful participations, with press and communication releases in practically real time, during the course of the exhibition, to be sent to the media and the established contacts with the potential consumers.

Some logistic matters to be taken into account are not arriving too close to the exhibition's opening, but some days before, which will allow for more personalized contact with the press and communications agencies, besides learning details about the culture and style of the place, which will simultaneously allow for adjusting the most adequate strategies to conquer that market. Hiring a translator will be indispensable in case of not knowing the local language, and it is a good idea to organize evening events to gather both journalists and high executives from companies who could be interested in acquiring or distributing for sale the product or service we intend to introduce in the country.

It is extremely important to facilitate the journalist's task to favor the rapid dissemination of what we wish the public to be aware of. For that reason, it is fundamental to hire a local press agency and take care of both elaborating and sending out the informative material and contents to the most adequate press media, in a form they can most rapidly process, to dedicate it as much publishing space as possible. If possible, it is good to prepare a brochure with photographic material in high resolution, stored in a CD or pen-drive, in a way that contributes to the chances for every comment about the product to include pictures.


Editorial
Ferias & Congresos
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→ Rural Exhibition Catalogue
→ Congresses & Conventions Guide
→ Social Events, Business Events and its suppliers Guide
→ Meeting Points Book
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+54 11 4863 5952 - publicidad@feriasycongresos.com.ar
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It is also a good strategy to produce the news, for example by participating in the conferences or academic program of a congress with an important exhibition, as has been the case in Argentina with the 24th World Gas Congress. In this way, the technological or academic innovation is covered as news and becomes related to the type of activity or service the exhibited product brings to this new market.

Introducing a new product or service in the target market demands a high degree of organization and methodical action, but also sharpness to rapidly assimilate the information and signals given to us by that market and society, to the effect of choosing most adequate instruments to bring the most effective message about the features, characteristics, and advantages of our product to the largest possible amount of people who qualify at the same time as potential consumers.

The best product in the world, if it does not achieve awareness from its potential consumers, will not reach product category, it will only occupy decoration space. Instead, a product with not such good features as the previous one, but which knows how to sell its advantages, will rapidly find communication channels that will translate into profitability and benefits. ■

Juan Carlos Grassi
Director of Editorial Ferias & Congresos S.A.

Juan Carlos Grassi is a specialized journalist, advertiser and communication businessman. Since 1970, he directs Editorial Ferias & Congresos S.A., which publishes Ferias & Congresos magazine, the Rural Exhibition Catalogue, Congresses & Conventions Guide, Social Events, its Providers and Suppliers Guide, Advertising Industry Guide. All these publications were awarded by the Association of Specialized and Technical Press of Argentina (APTA), an association he presided between 1996 and 2000. He was consultant, for over 30 years, of the Buenos Aires International Book Fair, and the Argentinean Rural Society for over ten years. Cofounder of the Argentinean Association of Organizers and Suppliers of Exhibitions and Conferences (AOCA) and director of the International Exhibition of Advertising Industry since 1975. Owner of a historical museum of advertising with more than 3,000 pieces, plus a collection of Universal Exhibitions pieces from 1851 to 2010. He edited the book “Meeting Points” on the conventions industry and he gives seminars and conferences about fairs, exhibitions and conference organization in Latin America.

Logistics to Latin America – a Path for Growth

Vivek Luthra
Logistic Consultant

Companies looking at growth paths in today's economic conditions, find the erstwhile not so attractive markets, opening new doors. And so these markets gain new importance. Global Trade assumes new dimensions, but venturing into new markets is not easy and understanding the dynamics of Logistics, can be a strong enabler.

When one thinks of Latin America as a continent of diverse countries, its size is about the same as that of European Union from a population perspective. The focus countries of Brazil and Mexico, apart from Colombia, Argentina and Peru – going primarily by the size of population, are indicative of the potential markets. Brazil is seen as a major emerging economy in the BRIC nation's grid. It is also seen as a manufacturing hub as well. The strategic location of Mexico next to the consuming neighbor North America puts it in an enviable position. So these countries present many opportunities, to supply to and source from and grow global business.

There are many aspects of business regulations that companies can benefit from – like the MERCUSOL, EU-Mexico Free-Trade-Agreement, US-Mexico Border Pact. For trading with specific countries in Latin America, the MERCUSOR laws govern the trade. Regulatory compliance of Customs and Taxation is important to formulate distribution success.

There are many aspects of business regulations that companies can benefit from – like the MERCUSOL, EU-Mexico Free-Trade-Agreement, US-Mexico Border Pact.

Some of the keys to successful distribution can be:

- Proximity to the markets: Speed to market is crucial in winning customer confidence and making your products successful. Many Logistics companies have satellite distribution centres, so the products can be made placed closest to the market of consumption, making the product available readily.

- In-house versus Out-source: A big challenge companies face is – to create their own distribution network or outsource? While there are multiple criteria for this, one of the important one is – scalability. With a partner, you can extend your distribution network and hence, market reach. Between the time of starting and developing the market, business needs may change. And knowing how to run this efficiently in an alien Market requires deep understanding. So why invest heavily initially, when the time scales require deferred growth? A logistics partner with a network across different countries can be a good ally.

- Local needs – Local Know-How: Just as Global Logistics companies have the reach and network, sometimes, it takes a specialist to do the job locally. So if your needs are localized, go with the local hero. They will be able to deliver value as well and know what works and what doesn't.

- Compliance: Regulatory compliance is a major factor in ensuring smooth business. Understanding how regulations are different, than your own home country, can make a difference. Aspects like the kind of invoice and paperwork, customs valuation and process at destination, can save both time and money and higher customer satisfaction.

- Infrastructure: Companies can rely on logistics infrastructure in new markets. Private Port operators, shipping, trucking and warehousing infrastructure is available in plenty.

While infrastructure for managing trade to Latin America is under focus and improvements are being made through various investments and financing of projects. Private Ports have shown better operability in Latin America. Some Logistics companies have invested significantly in facilities around Southern tips of USA (like Miami-Florida), to offer logistics services for exporting to Latin America.

They offer integrated, end-to-end logistics solutions covering:

- Air / Ocean transportation
- Trade documentation, customs clearance and delivery in Latin American countries
- Modern warehousing space on variable-cost basis
- Value-added services such as labeling and kitting for local requirements
- Track-n-trace visibility of goods to last mile
- Network of regional offices and distribution centers in Latin America.

Temporary admission of goods is allowed for products with suspension or proportional payment of taxes (1%) normally applicable per month of admission. This is useful for leasing agreements, testing, demo and fairs or for defectives repair. The extinction of this Temporary Admission Regime concludes with Re-exportation, consumption or local destruction. Penalty for non-compliance can be 10% of customs value.

The report “Connecting to Compete 2010: Trade Logistics in the Global Economy”, released by World Bank (Jan’10), ranked 155 economies in the Logistics Performance Indicators (LPI). The study based on the most comprehensive world survey of international freight forwarders and express carriers, showed Latin American countries such as Colombia and Brazil with significant improvement in performance between the last two surveys (2007 and 2010 LPI) as they implemented comprehensive logistics and trade facilitation reforms. The ranking* was Brazil 41, Argentina #48, Chile 49, Mexico 50, compared to Germany #1 and USA #15. So, Latin America offers new paths for growth to global business. Understanding the critical aspects can ensure smooth distribution of goods and market success. ■

While infrastructure for managing trade to Latin America is under focus, improvements are being made through various investments and financing of projects.

Vivek Luthra
Logistic Consultant

Vivek Luthra is a Logistics Consultant, having worked in commercial roles with multi-nationals like Shell, Ford and DHL internationally. He is a speaker at industry events for enabling trade and compliance. He is currently based in Bonn-Germany.
Email: vivek@tradeineu.com

**Source: World Bank Press Release, 15 January 2010.*

Trade Fair and Exhibition Logistics in Latin America – a Market for Professionals

Klaus Pauluschke
Area Manager Latin America,
BTG Messe-Spedition GmbH

Will you be participating at exhibitions in Latin America? If your answer to this question is „yes“, then you have made a very long-term decision, which can best be put into action together with a handful of experts. This increases your chances of success manifold.

The flights from Europe to Latin America take a long time. This gives you plenty of time to bid farewell to your normal habits and focus on your ability to learn. Activate your inquisitiveness. Oh, you've already been there often enough? Well then you already know how it is and you're no doubt looking forward to seeing some good old friends, experiencing many new surprises and taking on these very special challenges, which so enrich this continent. Latin America ticks differently and is at the same time modern: Standards and procedures of today won't necessarily be appropriate tomorrow.

But beware: Latin America is not the same everywhere. There are great regional differences. What's said in the north can be frowned on in the south and vice versa. Overall, however, our Latin American friends are very similar to us Europeans in one particular point. They are self-confident and want to be taken seriously. Perhaps they allow themselves to have a little more humour and vitality than Europeans. But it is a fact: As a European in Latin America you have to be reliable.

When you – as a reliable European – arrive at your booth on schedule, in order to carry out the last preparations before the opening day of an exhibition, then you will notice how efficient your partner has been. The stand-fitter has kindly waited for you to arrive, before he brings the furniture. The company logo has been sent back to the printers, because the complicated company name was not reproduced correctly. Shortly afterwards, a young man introduces himself as "logistics expert" and asks, when you would like to have your consignment delivered to the stand.

After having ordered various flower arrangements in passing and assigning a local cleaning service, you suddenly learn that your advertising material is still with the customs authorities, because your shipping department failed to fill out the shipping documents completely and accurately. The situation appears to be the same for your high-quality exhibits. The thoughtful stand-fitter returns just at this moment and offers you a comfortable chair and some mineral water. A cell phone rings. You realise that your Blackberry still hasn't found a network connection in this country.

The young "logistics expert" hangs up and tries to explain that your exhibits have in the meantime been cleared by the customs authorities, but that this didn't go quite as smoothly as planned. Your regular forwarding company had sent your consignment as a part of some groupage traffic and failed to observe the special address regulations for this exhibition. That's right, you remember now; at some later point you had to sign various forms, which you had never needed before in Asia. You once had a similar case in Russia.

It also proved to be a problem, that the shipping documents showed an incorrect consignment weight, which had been discovered on arrival

Behind the Exhibition Hall

at the customs office. Not only will you be paying for a higher volume of freight than what was actually transported, but also more expensive warehouse fees and a significant customs penalty await you.

Together with the stand-fitter you go through the order lists once again. He promises, he will swap the bar stools in the course of the evening. In the meantime, behind your back, your exhibit - still packed in its shipping box - has been parked in the corridor. Unfortunately, there seems to be nobody around to help you unpack the box.

Whilst unpacking, you ask yourself over and over again, who packed your exhibits in this way? The missing "logistics expert" could answer this question in detail. The customs agent repacked your consignment after checking the goods before customs clearance. Subsequently the goods were repacked in the presence of the customs officer, because due to the inaccurate shipping documents the customs authorities wanted to see every single item of the consignment. What was unfortunate for your consignment was that due to some discrepancies it had to be inspected once again and was then repacked one more time. The customs agent and the customs officers in this case were unfortunately not familiar with your internal company requirements for the handling of your high-tech products.

Customs examination Latin America

The company logo is back. You make a note on your return home to discuss among other things the correct transmission of the RAL colour codes to the local stand-fitter with your advertising and marketing agent.

From the corner of your eye you just see your box disappearing. The young "logistics expert" approaches you. You stop the uncontrolled collection. There must be still one component in the box. You are pleased to hear that your advertising materials are to be delivered. And then you just catch the word „Mañana". For you this means tomorrow, the first day of the exhibition. The meaning is the same for the "logistics expert" too... but tomorrow high-lighted from a completely different angle.

The stand-fitter draws your attention to the spotlights, which have just been installed and motions towards the exhibits and display cases. Yes the lighting is good. Amazing: the bar stools have been replaced, without you even noticing it. You realise that you should have ordered the cleaning service for today. When did the young man want to deliver the advertising materials to the stand?

Your Blackberry has finally logged on. It's impossible to call your secretary at this time of the day. But you can send her an email. You desperately need the advertising materials. The shipping department has to take care of this. They were the ones who sent the goods. They must know what to do about it. Why didn't they declare everything correctly? You're already thinking about your return flight home…

Do any of these details sound familiar? Eventually, you will be sitting on the plane again, enjoying the mobile-free zone and brooding over the fact that strangely enough everything does work in this country. In comparison to the apparent ease with which other people got things done, you begin to doubt your own preparation and planning. All the problems seem to have just affected you. Under most


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www.btg.de
BTG Expotrans S.A.
Azopardo 1337, 1st Floor
(C1107ADW) Buenos Aires
Argentina
Tel.: +54/11/4363-9350
Fax: +54/11/4363-9351
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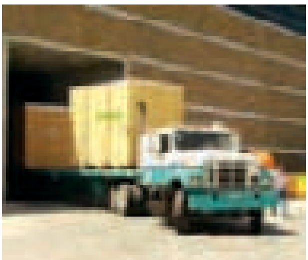
strenuous effort you have gathered a wealth of new experiences and paid a lot of money into the bargain; maybe too much money.

Others have experienced this before you. Benefit from the valuable experience of Latin American professionals. They are valuable because these experiences were expensive and these professionals can offer you invaluable market advantages.

Latin America can't be won over with an "out-of-the-way-it's-my-turn" mentality. This continent has reservations against colonisation. You must speak the language and master the most important rules. If you are doing business in various regions of Latin America then you have to be doubly careful. You will be amazed at how close and developed the international network between Argentina, Brazil, Chile, Mexico and the other countries is.

Listen carefully when the „Latino"explains or reports something. Don't believe that you understood what you want to, just because it sounds good. On this continent it's the details that are important.



Machine tool show Mexico City

Exactly these details are mainly the reason why your consignments to Latin America get stuck in the customs channels. If your shipping department doesn't pack accurately and complete the declaration forms exactly when under pressure, then you should be aware that the time and work they have saved themselves will cost you additional fees for customs and warehousing on arrival. Your consignment will have been shipped quickly, but it won't arrive at its destination with the same speed. A delay in delivery is inevitable. The European, for whom quality is of utmost importance, will see his image tarnished.

If your consignment is stuck in customs, then it's rarely a customs' problem but rather a consignment problem. Customs regulations are not negotiable. They are at the most interpretable and this is where the biggest danger lies, if the preconditions which guarantee a smooth handling of consignments are not ensured due to deficits in the consignment criteria. All of a sudden terms relating to corruption are mentioned. However to see corruption you don't have to look to Latin America.

In Latin America you can have some amazing experiences – not only in connection with the helpfulness of the people in the customs office. In Chile your consignment can go through customs clearance although it hasn't even arrived. It's just a formality. In Mexico the roller doors of the bonded warehouse at the airport often open, because a consignment is urgently needed at the fairground. A permit can't be signed, because the customs director has gone out for lunch. A telephone call at the right moment and a messenger drives to the restaurant with the document to get the missing signature. In Brazil over Easter there's a technical breakdown in the airport high rack warehouse. The exhibition opens tomorrow. The responsible technician is enjoying his day off at the Copacabana. Luckily he has his mobile phone switched on. The missing exhibit reached the stand on time. And in Argentina...

Deliveries

This all relates to Latin America. You cannot buy such dedication with money. Take note of the rules and manners of the people there. People are polite and courteous. Do you have a family? The Latinos do too. Just ask them. If you want, you can corrupt anything and anyone there. Just by showing some friendliness, honesty and openness.

One thing you should always have plenty of is time. You should plan just as much time as you would in Europe for meetings and visits, only you should plan double the amount of appointments in order to achieve something businesswise. Any decision-making should be set for the morning or even brought straight to the breakfast table. Always try to be on time. The infrastructure of Latin American mega-cities doesn't help. It is essential that you take your local partner's advice seriously regarding which areas and means of transport to avoid.

When you've made your decision to participate in exhibitions in Latin America and you invest time and effort in this market, then put your trust in the exhibition professionals for this region. We have been taking care of countless events in this region since 1988. These include major events in the field of the automotive and aerospace industry as well as the very memorable Technogerma 1994 in Mexico. In addition to our own offices in Mexico and Buenos Aires, we can count on the support of a tight and proven network of partners from Rio Bravo through Havana and Buenos Aires on to Tierra del Fuego.

Latin America – a market for professionals. Our market. ■

Klaus Pauluschke
Area Manager Latin America, BTG Messe-Spedition GmbH

Evaluation, Post–Show Marketing, Preparation of next Participation

Olaf Banse, Economist and Trade Show Marketing Expert

Great Booth, great show, and lots of nice visitors to your booth ... an all time high feeling: You think that all your pre-show efforts have helped achieve the best results possible; however, how do you know that your exhibition was a success? An easy question to ask, but not so easy to answer.

To begin finding the answer, sit down after the Latin American show you just finished and analyse the results with a cool head, perhaps a cool beer also, the same exercise that you should do after you've participated in an international trade show anywhere else in the world.

The issue is not so straightforward as it seems at first look. Companies that have participated for their first time at an event in Latin America and that also do not have local representatives have a complex task to capitalize on their investment they made by being at the show. We recommend that you use your space at the show as a platform not only to offer your organization's services and products, but also to receive offers from companies and / or people who potentially could become in the medium term, a representative or distributor in this region.

But back to the subject of your evaluation of participation as an exhibitor; these three steps will guide you in this task.

Evaluation

Take note of the hard facts, such as the location and layout of your booth, the flow of visitors through the corridors, the quantity of visitors and their quality, and of course, the competition - the location of their booths, along with their booth styles and the visitors they experience. Review the conference program and exhibition guide materials and compare them with a critical eye regarding whether the organizer has complied with the promises as he announced or advertised to you. At the same time, calmly analyse the origin and the job responsibilities of visitors to your stand by the records that you have developed during the fair. Not every manager that talked with you is the person who has purchasing authority or is involved in an investment decision. Learn to interpret the business cards.

It is not easy to interpret the behaviour of a professional visitor from another culture. Not all professional visitors who passed by your booth had a sincere interest in your company's products. Enjoy your trip to the country and stay additional days there, if possible. Use this time to learn more about the region and to make inquiries about the people and companies who showed interest and might become your new customers.

Post-Show Marketing

Communications in Latin America are usually made by phone. Personal and direct contact between service providers and their clients is very important. Writing long letters or sending faxes is not as common as in other regions, such as Northern Europe and in the United States. The email has become a valid alternative for visitors to use to send a message of thanks or convey the same with a phone call.

Wait a few days after the show to connect with your booth visitors. If within a month, you do not receive a response, then likely the person you contacted is not interested in entering into a serious business relationship with your company.

It is important to follow up with answers to any technical questions that were left open and follow up with sending any sample or quotations that were ordered within three weeks, or within the time frame specified.

If time permits, you should take advantage of being in the region to visit the factories or facilities of your potential / future customers. During this period, you should also attempt to enter into discussions with local professionals that might work with you as local representative. Another possibility, if resources permit, is to plan a subsequent trip to visit several companies and make site visits of the projects of your future clients. This will also provide you with first hand evidence of the seriousness of their plans for investment, learn the technical details of the projects, and meet the persons involved in both the project and decision making and purchasing processes.

Preparation of next Participation

Take advantage of your stay at the show-grounds to meet personally with the show organizers, particularly those involved with locating the exhibitors' booths in the floor plan. It is important to maintain a direct relationship with the executives of the fair organizing firm. Latin American people are used to being in good relationships between customers and suppliers.

After reviewing the business considerations and making decision to return to participate in the subsequent show, perhaps on the last day of the show, you should verbally book your booth for the next fair. Send a formal contract for participation or confirm the reservation by email a few months later. Take note that most trade shows in Latin America are not marketed as fast as other leading shows elsewhere in the world. For this reason, for most trade shows here, you can still get an exhibition space a few months prior to the event, although the prime spaces will likely be taken.

Please remember that personal contact is the best way to treat people in Latin America, so perhaps a regular phone call to the organizers will keep you in touch with them and they'll be appreciative of this. A phone call helps you open doors and hearts. Do your preparations in a timely manner and your participation in the event will be more productive for you.

A few weeks before you travel to the next edition of the show, you should contact your previous visitors and invite them to attend this year's booth. Send them a courtesy entry to the show and inform them about your new products and services, and other important information related to your company and relevant to this potential customer. A couple of days before the exhibition, call them to refresh the contact and renew the written, advance invitation.

Latin America is a very interesting region with many business opportunities. Be prepared for, and to do, a good business. ■

Olaf Banse
AUMA, Latin America

Olaf Banse, 48, is graduated as Economist and Trade Show Marketing Expert from the Ravensburg Business University, Germany, and knows the Latin American trade show industry since 1989. He has been working in several countries as an international show organizer. Since 2001 he is related to AUMA. From 2004 on as the AUMA correspondent for Latin America.

Exhibition Market Latin America 2011 | 2012

4. Trade Promotion Programs and Services

Latin America – a Favourite Scenario for Italy's International Economic Relations

Umberto Vattani, President of the Italian Institute for Foreign Trade-ICE

The Italian Institute for Foreign Trade (I.C.E., Istituto nazionale per il Commercio Estero) is the Italian government agency entrusted with the promotion of trade, business opportunities and industrial co-operation between Italian and foreign companies. It supports the internationalisation of Italian firms and their consolidation in foreign markets.

Its activities are financed by public and private funds from the Ministry of Economic Development (which establishes directives and has a supervisory role) and the companies, which use its services for advice, information and assistance.

The acquisition of information about the Italian market and business opportunities is the first step foreign companies must take in order to select areas and forms of intervention in Italy. The Italian Institute for Foreign Trade, with its network of 116 Italian Trade Commissions in 87 countries around the world, can provide information and assistance to all those foreign companies that wish to develop business with their Italian counterpart. ICE gathers offers and requests coming from foreign companies interested in developing business with Italian partners. All submitted requests and offers are stored in a database that can be accessed by sector and market enabling Italian companies to consider the various proposals. Foreign companies can also find details of trade fairs and exhibitions held in Italy throughout the year.

Investments of Italian SMEs in Brazil Have Tripled in the Last Years

Interview with Umberto Vattani, President of the Italian Institute for Foreign Trade-ICE about the activities of this Organisation in Latin America.

▪ Which role is Latin America playing in the Italian economy?
Latin America and Italy are linked by special historical ties in which the human element plays a central role. Italians are in fact a fundamental part of Latin American societies, of which they are a living and creative reality. This is why Latin America has always been a favourite scenario for Italy's international economic relations.

▪ How is the presence of Italian companies in Latin America developing?

Italian companies, even small and medium sized, have now received and assimilated the idea that a „hit and run“ approach to international markets is no longer profitable. It is increasingly important to begin to take shape, to develop medium to long term plans to be present on foreign markets and withstand international competition.

For this reason, an increasing number of Italian companies have been joining in the last few years the Italian Trade Commission-ICE promotion activities, economic cooperation and trade in Latin America, especially in Brazil, where it is important to note that investments of Italian SMEs have tripled in the last years, covering various fields of production and services. Even Chile, for the quality of its services and its geographic location, can be a strategic platform to reach the Pacific Area.

▪ Which programs is the Italian Trade Commission–ICE offering to Italian companies willing to exhibit at trade fairs in Latin America? Have the Italian SME any special need (organization, logistics) when going to Latin America as exhibitor?

Our program in Latin America is to provide initiatives for all sectors of Made in Italy. Beyond participating to major local exhibitions, ICE organizes seminars, conferences, trade missions and all that can bring exporting companies closer to foreign markets. In addition, ICE provides local traders the opportunity to participate to the most important Italian fairs, workshops and training courses in Italy, visiting the main productive realities of our country. We have a network of 116 Trade Commissions around the world, 5 of which are in Latin America: in Argentina, Brazil, Chile, Mexico and Venezuela. They can offer to the local business communities all the necessary information to work with Italy, and to our companies a full range of services to get in contact with possible counterparts.

Small and medium enterprises have some advantages when participating in international fairs with ICE and their needs are mainly logistics, on-site assistance and interpreting services, but these are actually needs that small and midsize businesses have in every country. I must admit however that over the years, thanks to ICE's certified training activities - which annually prepares new Italian export manager intended to work in small and medium enterprises - they are starting to move very well for themselves.

■ At which trade fairs in Latin America will ICE be participating in 2010/2011?

Every year we take Italian companies to some international trade fairs in Sao Paulo, such as: Revestir (in March), Agrishow and Fimec (in April), Glass South America and Mecanica 2010 (both in May), Fispal (June), Rio Oil and Gas (in September). In 2010 we also organize an Italian pavilion to the M&M in Bogotá (Colombia) and to FIHAV in La Habana (Cuba), Expo Pack in Mexico City and SITEVI in Argentina. They deal with machinery (for agroindustry, packaging, ecc.) ceramics and tiles, chemical and farmaceutical industry.

■ Which trade fairs in the region are the most important ones for the Italian SMEs?

As you see, most of Latin America's trade fairs and promotions take place in the city of Sao Paulo, a real gateway to both the Brazilian market and South America in general, for all sectors. ■

Italian Institute for Foreign Trade-ICE

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French SMEs on their Way to Latin America

UBIFRANCE AND THE FRENCH TRADE COMMISSIONS

www.ubifrance.fr

UBIFRANCE is the French agency for international business developement, comes under the aegis of France's Ministry for the Economy, Industry & Employment. UBIFRANCE lies at the heart of France's public-sector export support framework. With 64 Trade Commissions in 44 countries, UBIFRANCE offers a comprehensive range of products and services aimed at accompanying French-based companies in their development on export markets.

One example of the UBIFRANCE Trade Commissions is the Mission Economique au Brés*il*, which helps French companies in their international projects of development or implementation in the Brazilian market. According to this Commission, there is a remarkable presence of French companies in the country through direct invesments. In 2009, there were in Brazil 419 French settlements and although most of them are major groups, the number of French SMEs present in the country is increasing.

French presence in Colombia is characterized by an important sectoral diversification that goes from retail, oil, automobile industry to food-processing, pharmaceuticals, cosmetics and industry.

French presence is characterized in this country by an important sectoral diversification:

	Sectors	Sector importance within the French offer in Brazil
1	Aeronautics, Space, TIC, Electronic	17,3%
2	Consumer Goods	13,9%
3	BTP-Transports, Engineering, Environment	12,6%
4	Banking, Insurance, Financial services	10,6%
5	Agriculture	10,5%
6	Metalworking, Plastics and Rubber processing, Glass processing	8,4%
7	Automobile	7,3%

Source : Mission Economique de Sao Paulo

Mexico is the 13th world economy and the Mission Economique de Mexico is representing UBIFRANCE in this country, which is an important business partner for French companies because of its demografical and economical importance, its huge domestic market, its geografic situation and its privileged acces to the north-american market. French companies, specially SMEs, have still a small presence in Mexico. During these past years, thanks to the Free Trade Agreement between the European Union and Mexico, European (and French) exports and investments have strongly increased. Today, there are 300 French subsidiaries in Mexico. But it seems that a threshold has been reached, because the SMEs are still having difficulties to access the market. That is why the Mission Economique de Mexico is concentrating a lot of efforts to help French SMEs to export and to be present in this market.

Colombia is another important market for French companies: The French Mission Economique has identified hundred of French settlements in this country, where French presence is characterized by an important sectoral diversification (retail, oil, automobile industry, food processing, pharmaceuticals, cosmetics, industry, etc...) and by the presence of a growing number of SMEs alongside major groups.

French Pavilion on the Mobile World Congress

Moreover, France is the largest foreign employer in Colombia, with approximately 80.000 direct jobs and 240.000 indirect jobs related to its commercial activities. These investments are not restricted to financial issues as they are made through a productive logic which incorporates the concern that French presence, thought as a sustainable and responsible relationship, can add value to the Colombian society. French companies are characterized by the quality of their working environments, and the development of social programs that have a significant impact in reducing poverty in areas where they are installed.

The attendance at trade fairs is one of the most important tools UBIFRANCE is using to achieve that French small and medium size exporters and investors have a first contact with the markets in Latin America. Some of the events where UBIFRANCE is organizing French Pavilions in 2010 are FENASUCRO & AGROCANA 2010, RIO OIL & GAS'2010, São Paulo Boat Show and EQUIPOTEL 2010 in Brazil, International Fair Trade in Bogotá 2010 or FIGAP / VIV AMERICA LATINA'2010 in Mexico. ■

UBIFRANCE
Missions Economiques
www.ubifrance.fr

Presentations at Foreign Trade Fairs supported by the Federal Government of Germany

Marco Spinger, Director Division Global Markets, AUMA

The foreign trade fair program is a key instrument in the promotion of foreign trade by the Federal German government. This program facilitates cost-effective fair participation, particularly for small and medium-sized companies within the context of joint stands abroad. Thus, in both 2010 and 2011 the Federal Ministry of Economics and Technology (BMWi) will be organizing approximately 230 "German Pavilions" worldwide in cooperation with AUMA – the Association of the German Trade Fair Industry. More than 6,000 predominantly small and medium-sized German exhibitors benefit from this commitment each year with regard to their activities in new growth markets.

The decisions on the program are taken by the Foreign Trade Fair Participations Working Group at AUMA, the members of which are export-oriented trade associations, the leading organizations of the German industry and the public authorities involved. The trade fairs are selected on the basis of proposals made by the associations of the German industry and after a specialist technical examination by AUMA. As a result, the program is particularly demand oriented. China, Russia and the Arabic region remain the top three regions of the program, but it seems that Latin America is experiencing a comeback for more and more medium sized enterprises. Latin America, and Brazil in particular, have increased their importance as a target region in the last few years.

With respect to the Latin American market, the signals from the industry are becoming louder: the region is to become more of a focal point for the foreign trade fair program.

In 2010, 5.4 percent of the program's events are being held in Latin America, while this figure jumps to 8.4% for 2011. Of the 12 events on the 2010 foreign fair program in this region, 6 will be held in Brazil. In 2011, 18 participations are planned in Latin America, of which 11 will be held in Brazil.

Most of the foreign trade fair participations of the BMWi are conducted with associated joint company presentations. The minimum requirement here is the participation of at least ten companies. There is a philosophy behind this strategy which has proved its worth: the joint presentation of several German companies under the umbrella brand "made in Germany". This sign of quality, which continues to be valid in

Latin America in particular, ensures that the right message is promoted at the respective trade fairs and that there is a pull-factor for fair visitors.

The implementation of the "German Pavilions" is based on many years of know-how on the part of professional exhibition companies. In addition to the advantage of inexpensive participation prices which are oriented towards the economic situation of the sector concerned and towards the costs and significance of the respective trade fair venue, the technical organizational assistance provided by the trade fair organizers represents important support for small and medium-sized exhibitors. In a new and very distant trade fair market like Latin America, in particular, this factor is of special importance.

The joint participations are usually accompanied by supporting measures such as Internet presentations (***www.german-pavilions.com***) which communicate the trade fair presence in the specific market. The budget for the trade fair participation program of the Ministry of Economics and Technology, which covers almost every industry sector, has been set at € 40 million in 2010 and will probably be set at € 41.5 million in 2011.

In addition, there are also special trade fair programs aimed at supporting the export of technologies in the area of renewable energies and energy efficiency. In 2010, participations are scheduled to take place at approximately 20 foreign and international domestic trade fairs. AUMA is playing its part in this arrangement also in this program as the trade fair expert of German industry and a consultant of the government. It can be assumed for the future that the share of Latin America in the foreign trade fair program will continue to grow. It remains a central objective of the foreign trade fair program that our small and medium-sized companies permanently benefit from the business opportunities throughout the entire region and can make targeted and efficient use of the instrument of trade fair participation.

The federal states of Germany have their own trade fair participation programs in addition to the program of the German federal government. Furthermore, some states grant financial support for single exhibitors as well. The conditions for supporting exhibitors vary from state to state. To avoid overlapping support for exhibitors, the federal government and the federal states coordinate their programs with the participation of AUMA. ■

Marco Spinger
Director Division Global Markets,
AUMA, Association of the German Trade Fair Industry

MECANICA - International Machinery and Industrial Supplies Trade Fair, 11.5.-15.5.2010, São Paulo

Bavarian 'Discoverers' Set a Course for Latin America's Markets

Sieglinde Sautter, Managing Director Fairs and Exhibitions Bayern International GmbH

Bavaria's small and medium-sized companies may not have the size of some of the others comprising Germany's business community, but they are as internationally-minded. The SMEs earn no less than 30% of their revenues abroad. The need to operate successfully in such important markets as Latin America thus drives them as strongly as such giants as Siemens, Audi, BMW, Faber Castell and KSB, all of which are highly active in this region. Meeting this need constitutes, however, a much greater challenge for the SMEs than for their larger-sized counterparts.

Bavaria's Number one Developer of International Business: Bayern International GmbH

Facilitating its SMEs' expansion into new markets has long been one of the main objectives of the state of Bavaria's business development policies. These policies have led the state to create a wide-ranging portfolio of programs and institutions. Prime among these instutions of export promotion is Bayern International GmbH. Founded 15 years ago and headquartered in Munich, it has been given the brief of helping the state's SMEs set forth their track record of purposefully and effectively entering into and expanding in markets around the world. To achieve this, Bayern International implements projects providing an optimal level of support for each phase of 'its' companies' making of international sales. Augmented and extended by those undertaken by the members of Bayern International's network, these projects free the SMEs from nearly all risks arising from the on-site pursuing of business. In addition to delegation trips led by the senior political figures at Bavaria's economics ministry, Bayern International offers a wide range of other export-promotion services. Nearly all of them are subsidized. One of these highly successful services is operating the program enabling Bavarian companies to participate in international trade fairs.

Bavaria's Trade Fair Participation Program: the Uncomplicated and Low-Cost Way of Taking Part in Leading International Trade Fairs

Featuring financial (from Bavaria's economics ministry) and organizational (from Bayern International and from such partners as the state's chambers of commerce and business associations) support, this program enables Bavarian companies to cost and time-efficiently participate in some 50 trade fairs a year, all held outside Germany, and each involving a cutting-edge sector and an important market. In addition to meeting the above criteria, these trade fairs are selected so as to facilitate Bavarian companies' entries into markets. The fairs include both ones of key and long-standing importance to their sectors and new and promising ones. Regularly-conducted surveys reveal that 80% of companies exhibiting at the trade fairs would not have done so had the participation program not existed.

Latin America: a Market for Bavaria's Cutting-Edge Technologies

Of especial interest to Bavaria's exporters in this regions are currently Brazil, Argentina, Chile, Mexico and, increasingly, Cuba, with Peru, Colombia and Venezuela set to follow suit in the years to come.

Working on a commission from Bavaria's economics ministry, Bayern International will enable companies in the industrial engineering, medical technologies, broadcast, security technologies, environmental engineering, and transport and logistics sectors to participate in trade fairs held in Latin America in 2011. Brazil's size and level of economic development make it a centerpiece of these activities.


The Bavarian Pavilion is a great opportunity for companies to present themselves.

Brazil: Latin America's Role Model for Economic Success

The strong growth currently being turned in the country will be augmented by the staging in 2014 of football's FIFA World Cup and in 2016 of the Olympics in Brazil. As these are the world's two largest sporting events, a large number of investments will be made in and by the country.

Brazil: Exposec – Trade Fair for Electronic Security Systems

These two sporting events will stoke the growth of Brazil's fast-growing market for electronic security technologies. These prospects led the state government to include Exposec, which will be held in May 2011 in São Paulo, in its lineup of trade fairs to which it is supporting participation by state companies. This participation by Bavarian security technology companies is being organized by Bayern International, along with ZVEI (Germany's Association of the Electronics Industry), vbw (Association of Bavarian Business) and BVSW (Bavarian Association for Business Security).

Brazil: Intermodal South America – Trade Fair for the Transport and Logistics Sector

Brazil's large volume of international trade causes its transport infrastructure to experience bottlenecks. To eradicate these, the government has allocated a large amount of funding. It also plans on enabling private investors to participate in such projects. With a nearly 60% share of goods transported, the country's road grid is its major mode of transport. The conditions and accessibility of these roads show a high degree of region-by-region variation. To permit Bavarian companies to play their part in the upgrading of this grid to the level required to meet the ever-greater demands placed upon it, Bayern International organized a multi-exhibitor stand at the April 2010 staging of Intermodal South America. This trade fair is one of the largest held in South America, and is the most important one in the field of transport and logistics on the continent. Bavarian companies will also be able to showcase their wares at the multi-exhibition stand being organized for the 2011 event.

Brazil: FIMAI – International Trade Fair for Environmental and Energy Technologies

In addition to logistics, the government of Bavaria is also providing support to the state's environment technologies sector. This support takes the form of organizing a multi-exhibitor stand at FIMAI, the trade fair (the largest in Latin America) staged in São Paulo to promote environmental protection and sustainability. The fair was staged for the twelfth time in 2010. It was the fourth time in a row that the state of Bavaria was represented by a multi-exhibitor stand at it.

Mexico: Expo Manufactura – International Trade Fair for Manufacturing and Automation Technologies and Robotics

Now showing signs of recovering from the global economic crisis, Mexico has become an important market for Germany's industrial engineering sector. The Mexican sector's low level of development is responsible for the country's large-sized purchases of such products from manufacturers located outside the country. To take advantage of the resultant opportunities, the government of Bavaria organized a multi-exhibitor stand for the state's companies at Expo Manufactura, which was held in Monterrey, Mexico in March 2010. Such a stand is planned for the 2011 staging of the trade fair.

Agentina: ExpoMedical – International Trade Show for the Healthcare Sector


Bavarian Pavilion on international trade fairs.

Argentina's economy has quickly recovered from the crisis gripping it at the beginning of the decade. This recovery has stoked demand for medical technologies. German suppliers are highly successful in the market's upper echelons. ExpoMedical offers an overview of this market—and access to the executives (including public and private-sector hospital and laboratory heads) and staff members comprising it in southern South America. Also attending the 2010 edition of the trade fair, which will be held from October 13-15 in Buenos Aires and which is expected to experience 20% rises in exhibitors and visitors, will be corporate agents, wholesalers and importers. The state of Bavaria will have a multi-exhibitor stand at the fair. Such a stand is also planned for the 2011 one.

Argentina: Caper – International Trade Fair for Radio, TV, Cable and Satellites

ICT (information and communication technologies) is one of the strongest growing sectors in Argentina's economy. The country has the greatest accessibility to TV via cable and satellite links of any country in Latin America. Argentina also has more than 1,500 radio stations. The promulgation of a law has enabled the setting forth of the decentralization of control over the media. This could cause a further rise in the number of service providers in this sector, which is served by the Caper trade fair. Offering a one-stop opportunity to get to know the sector, the fair is of interest to companies forming parts of the film, TV, video equipment, Internet-based multimedia applications, satellite and cable technologies, radio and audio equipment, post-production and consumer electronics sectors. To enable the state's companies to have unimpeded access to this market, the government of Bavaria had a stand at the 2009 edition of Caper. A stand is also planned for the 2011 fair.

Cuba: FIHAV – International Trade Fair for Manufacturing Technologies

Cuba's economy needs to be modernized. The country has instituted policies promoting détente with the West. These trends have given rise to the prospects of the industrial countries'--and especially their industrial engineering and medical technologies sectors--being able to do business with Cuba. Held annually in Havana, FIHAV is a wide-ranging trade fair providing companies producing everything from machines to consumer goods with an opportunity to showcase their products on the Cuban market. The government of Germany has been participating in FIHAV since 1999. In 2009, Bayern International set up an information stand at the country's facility at the event. This stand provided Bavarian exhibitors with a full range of services. These will also be available at the stand at the 2011 trade fair.

The State of Bavaria's Representatives: the People for you to Get in Touch when Doing Business in Latin America

In the mid 90s, the government of Bavaria began forging a world-spanning network of representative offices. Now comprising 22 of them (including three in Latin America - those in Brazil, Mexico and Cuba), these offices meet all needs for export-related services, information and contacts.

Further information on Bayern International, on its services and programs and on Bavaria's other export promotion instruments and institutions is available at ***www.bayern-international.de***. ■

Sieglinde Sautter
Managing Director Fairs and Exhibitions
Bayern International GmbH

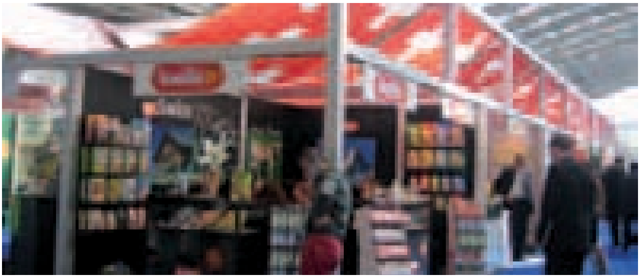
Osec – the Competence Centre for Swiss Foreign Trade Promotion

Thomas Foerst, Consultant South America, Osec

Osec informs, advises and supports firms in their international business ventures. To this end, it networks companies, specialists and private and public organisations all over the world, enabling effective foreign trade promotion. As well as advancing exports, Osec also promotes Switzerland as a location and undertakes import and investment promotion activities for the benefit of selected developing and transitional countries. Additional foreign trade promotion activities are made possible thanks to the temporary government stabilisation measures to support the export trade. As part of its foreign trade promotion work, Osec coordinates a compact network (Business Network Switzerland) with competent partners both in Switzerland and abroad. In Switzerland, Osec works in collaboration with cantonal chambers of trade, commerce and industry and with the cantonal departments of economic affairs and economic development agencies. Abroad, the network includes 16 Swiss business hubs, located in growth and focus markets in Swiss consulates and bilateral chambers of commerce. There are now 16 such Swiss business hubs in Austria, Brazil, China, France, Germany, Great Britain, India, Italy, Japan, Poland, Russia, South Africa, Spain, the US and the ASEAN and GCC regions. Osec maintains a global network of specialists (pool of experts) with various competencies in the fields of exports and internationalisation both in Switzerland and abroad.

Osec's Mandate Includes the Following Activities:

Export promotion: The services of Export Step-by-Step are geared towards the customer's degree of internationalisation. As part of the initial information process, SMEs receive free information about their export vision. Four different sources of information are available for this purpose. During the basic consultation, Osec works with the company to analyse its specific export plans, enabling, the SME to benefit from the Osec advisors' long-standing experience in exports and targeted use of efficient analysis tools. These results serve as a basis for the detailed consultation, where the company is advised individually on its internationalisation ventures. Typical services include market analyses and evaluations, assistance in finding a business partner and a presence at leading international trade fairs abroad at the joint "SWISS Pavilion". More services have been added to support the export trade since 2009 as part of the stabilisation programme.



Typical services include the presence at leading international trade fairs abroad at the joint "SWISS Pavilion".

Location promotion: Through its measures to promote Switzerland as a corporate location, Osec is helping foreign companies make the move to Switzerland. This is a task coordinated by both the government and cantons. In this respect, Osec ensures a standardised image abroad, the exchange of information between foreign companies and cantons, coordination of marketing activities and smooth relations with the cantons in terms of foreign companies moving to Switzerland.

Import promotion: The SIPPO mandate promotes access to the markets of Switzerland and Europe for SMEs from selected developing and transitional companies and the competitiveness of production in these countries. The SIPPO services particularly focus on distributing (market) information to importers in Europe and exporters in developing countries to boost trade relations between exporters and importers and marketing and product consultation.

Investment promotion: This mandate aims to promote investment in selected countries in sub-Saharan Africa. Osec supports local location promotion agencies in preparing and promoting local investment options internationally with the help of a local match-making event, among other things. In Switzerland, Osec also highlights business opportunities in these countries. The mandate is limited to three years and is to be completed at the end of 2010.

For Osec the Latin American Market is very Important

Interview with Thomas Foerst about the activities of Osec in Latin America.

▪ Mr. Foerst, is the Latin American market important to Osec?

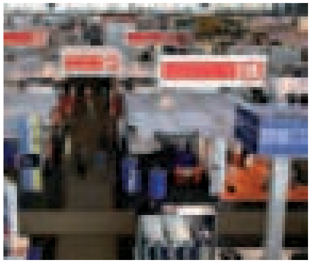
Yes, the Latin American market is a very important export destination for Swiss companies. Brazil is the largest such country with the prospect of rapid growth where we are seeing a dynamic demand among Swiss companies that come to Osec. In addition, countries such as Chile, Columbia and Peru, with which Switzerland will soon have signed free trade agreements, are an interesting alternative in the region. These countries are of particular strategic value to our customers.

■ What does Latin America offer Swiss companies?

Latin America offers a multitude of alternatives, as there is a demand for Swiss products and our quality and technology are valued greatly. Swiss companies are encountering significant business opportunities in the fields of pharmaceutical and medical technology, renewable energies and precision technology. Thanks to Swiss know-how, Swiss products also enjoy an outstanding reputation in Latin America.

■ What should companies do if they would like to expand to Latin America?

First of all, they need to prepare well. Swiss SMEs not only have to analyse the various markets in terms of their sales, they also need to consider regional differences and hurdles too. It's here that appropriate market analyses through our network are particularly beneficial in identifying the right country. Selecting a local partner is also decisive in finding a match. Companies need to be able to get an idea of their potential market and should invest sufficient time in the partner relationship. In South America, personal contacts and a realistic time frame are key to success.



Osec Swiss Pavilion

■ How important are trade fairs?

Trade fairs are a good way to test initial contacts with potential customers and interested individuals. Attending a fair under "SWISS Pavilion", which is organised by Osec in collaboration with the Swiss Chamber of Commerce in Brazil, is a popular starting point. This enables SMEs to demonstrate their presence in the country.

■ Is Osec represented at trade fairs in Latin America? If so, which ones?

Yes, mainly in Brazil. The largest dental fair, CIOSP, the HOSPITALAR for hospitalization and health market or the FEIMAFE mechanical engineering fairs are among the most important in the region. Osec is also currently looking to provide support to companies attending fairs in Chile. ■

Patrick Djizmedjian
Corporate Communications, Osec
www.osec.ch

EMECA Supports Al-Invest Aid Programme

JörnK ronenwerth
Secretary General,
EMECA - European Major Exhibition Centres Association

EMECA - European Major Exhibition Centres Association – is to continue its commitment to the implementation of the economic aid programme for Latin America – "America Latina-Invest" (Al-Invest).

The programme launched by the EU in 1995 makes it easier for small and medium enterprises (SMEs) from Latin America to exhibit at European exhibitions. The Al-Invest programme is managed by Eurochambres, the European Federation of Chambers of Commerce and Industry. More than 87,000 SMEs have participated in Al-Invest projects to date.

The EMECA Members:

- ***Belgium:*** *Brussels Expo*
- ***Germany:*** *Deutsche Messe (Hannover), Messe Frankfurt, NürnbergMesse, Landesmesse Stuttgart*
- ***France:*** *EUREXPO – Centre de Conventions e d'Expositions de Lyon, VIPARIS, Paris*
- ***Italy:*** *BolognaFiere, Fiera Milano, Rimini Fiera, VeronaFiere*
- ***The Netherlands:*** *Royal Dutch Jaarburs Utrecht*
- ***Portugal:*** *Feira Internacional de Lisboa*
- ***Switzerland:*** *MCH Group (Basel, Zürich, Lausanne), Geneva Palexpo*
- ***Spain:*** *Fira de Barcelona, IFEMA – Feria de Madrid, Feria Valencia*

www.emeca.eu

Al-Invest is divided into altogether four phases. The cornerstone of the current phase is the promotion of trade relationships through appearances at exhibitions. Traditionally, Latin America and the EU maintain close trade relations, but these almost exclusively cover a few large enterprises. For financial and logistic reasons, SMEs can seldom afford to appear at exhibitions abroad. The aim of the fourth phase of the programme is therefore to organize some 30 pavilions for Latin American SMEs at selected European exhibitions between 2009 and 2012. EMECA is responsible for the implementation. A company registering for the Al-Invest economic aid programme can exhibit at the exhibition as a co-exhibitor together with other companies from Latin America.

This is the first time that an exhibition organisation has participated in an EU-programme of this type. EMECA advises Eurochambres on the selection of exhibitions qualifying for support, taking into account the special needs and requirements of the Latin American SMEs. The exhibitions selected are those of great importance for their respective sector and which attract many international exhibitors and visitors. The following ten sectors are supported by the Al-Invest aid programme: craft trades, food industry, environment and energy, information and communication technologies, service sector, textile industry, forestry, biotechnology, building industry and agriculture.

Entry Point to the European Market

Jörn Kronenwerth, Secretary General, EMECA - European Major Exhibition Centres Association, discusses its central components, investments and the branches that profit from it.

- Mr. Kronenwerth, the Al-Invest programme has existed since 1994 and now (2009–2012) finds itself in its fourth stage. What does that mean in real terms?

The Al-Invest programme aims to promote business and technological exchange between Latin-American and European SMEs. A central pillar of the initiative is to give Latin-American companies an entry point to the European market through taking part in trade fairs. This also offers them the opportunity to make contact with European companies and to build long-lasting business relationships. To date, over 87,000 SMEs have taken part in the programme. Al-Invest IV is a continuation of the previous phases and is set to run until 2012. The cornerstone of the current round is explicitly to promote trade relations through representation at trade fairs. For logistical and financial reasons, taking part in trade fairs abroad is something that SMEs can rarely afford to do.

- How is EMECA integrated into the EU's funding programme?

The activities that take place within the Al-Invest IV framework are developed and led by a European consortium, under the supervision of the European Chambers of Commerce and Industry. Within the consortium, it is our job to organise the relevant trade fairs, thereby offering Latin-American companies an ideal platform on which to present their products.

■ How big is the budget and how does one access the funds? How large is the average grant?

The total programme investment for the four-year period is 62 million Euros, of which 50 million Euros come directly from the European Commission. These funds are there for the benefit of the Latin-American SMEs from which, for example, the cost of their participation at European trade fairs is paid.

■ Which branches profit particularly from this arrangement?

The branches that do best are those that are already strongly established in Latin-America, or which are in the process of developing. The Latin-American trade associations for these branches actively seek exchange and internationalisation opportunities for their members. Examples include consumer goods, foodstuffs, nutrition, tourism, agriculture, IT, construction and the automobile industry.

■ What does this programme mean for EMECA members?

For EMECA members, this programme represents a great opportunity to present themselves to Latin-American companies as efficient trade show organizers, with the ability to bring the right players together in a business context. At the same time, the businesses themselves benefit from being able to exploit the opportunity of using leading trade fairs as their entry point into the European market. ■

EMECA - European Major Exhibition Centres Association

About EMECA

The 18 EMECA venues organize some 1,200 exhibitions a year with around 388,000 exhibitors and 43.5 million visitors on a gross rented display area of about 36 million square metres.
According to their own estimates, the exhibiting companies generate a turnover of some 800 billion euros through exhibitions. A KMPG study shows that the economic effects initiated by exhibitions at the EMECA venues amount to some 16 billion euros and secure over 360,000 jobs in Europe.

www.emeca.eu

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References

- Latin-America Conferences 2001-2007, Munich, Frankfurt, Essen

Hannover Messe

- Global Business & Markets, 1998-2011
- Partner Country Russia 2005
- Partner Country India 2006
- Partner Country Turkey 2007
- Partner Country Italy 2010
- CeBIT Flat World Forum 2009-2011
- CeBIT Bilisim: Eurasian Business Forum, Istanbul 2008

- Koelnmesse: spoga+gafa 2008-2009
- CCME: China Sourcing 2005-2006
- Reed Exhibition: Export21, Frankfurt 2004

local global GmbH
Marienstraße 5 | 70178 Stuttgart
Tel.: +49 711 22 55 88 -0
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Exhibition Market Latin America 2011 | 2012

5. Trade Fair Schedule in Latin America

GTQ German Trade Fair Quality Abroad

German trade fair organizers belonging to AUMA make their in-depth knowledge of events and industry available to customers not only in Germany but also around the world. The concepts of these events are based on established international trade fairs in Germany, thus enabling exhibitors to take on distant markets with "made in Germany" quality standards.

Every year AUMA members organise around 220 trade fairs abroad. The AUMA trade fair database lists these trade fairs under the heading of GTQ. Furthermore, every autumn AUMA publishes the dates of next year's trade fairs held abroad by German organizers, in a calendar in two languages, entitled German Trade Fair Quality Abroad.

Argentina, Buenos Aires	01.09.-03.09.2010	**Intersec Buenos Aires** Security, Safety	MF
Argentina, Buenos Aires	21.09.-24.09.2010	**TECNO FIDTA** Food Technology	MF
Argentina, Buenos Aires	02.10.-04.10.2010	**COSMESUR Beautyworld Buenos Aires** Perfume, Cosmetics	MF
Argentina, Buenos Aires	03.11.-06.11.2010	**Automechanika Argentina** Automotive Design, Maintenance, Recycling	MF
Argentina, Buenos Aires	01.09.-04.09.2011	**Expo Ferretera** Hardware, Tools	MF
Argentina, Buenos Aires	October 2011	**COSMESUR Beautyworld Buenos Aires** Perfume, Cosmetics	MF
Argentina, Buenos Aires	08.11.-12.11.2011	**BIEL Light + Building Buenos Aires** Electrical Engineering, Electronics, Lighting	MF
Brazil, Caxias do Sul	19.10.-22.10.2010	**MERCOPAR** Subcontractors, Industrial Integration	DMAG
Brazil, Caxias do Sul	October 2011	**MERCOPAR** Subcontractors, Industrial Integration	DMAG
Brazil, Curitiba	24.05.-28.05.2010	**FEMADE** Machines, Equipment & Products for the Woodworking & Furniture Industry	DMAG
Brazil, Curitiba	13.09.-16.09.2011	**FEMADE** Machines, Equipment & Products for the Woodworking & Furniture Industry	DMAG
Brazil, Porto Alegre	10.05.-12.05.2011	**BITS Business IT South America - a CeBIT Event** Information Technology, Telecommunications	DMAG

Brazil, São Paulo	09.03.-12.03.2010	**Kitchen & Bath** Kitchen & Bath Industry	NM
Brazil, São Paulo	09.03.-12.03.2010	**Revestir** Covering Materials	NM
Brazil, São Paulo	06.05.-08.05.2010	**Glass South America** Glass Technology & Design	NM
Brazil, São Paulo	25.05.-27.05.2010	**FCE COSMETIQUE** Cosmetic Industry	NM
Brazil, São Paulo	25.05.-27.05.2010	**FCE PHARMA** Pharmaceutical Industry	NM
Brazil, São Paulo	14.09.-16.09.2010	**TecnoBebida** Beverage Technology	NM
Brazil, São Paulo	06.10.-08.10.2010	**Pet South America** Pet Industry	NM
Brazil, São Paulo	03.11.-05.11.2010	**BioFach América Latina** Organic Products	NM
Brazil, São Paulo	03.11.-05.11.2010	**ExpoSustentat** Sustainable Products & Services	NM
Brazil, São Paulo	22.03.-25.03.2011	**Kitchen & Bath** Kitchen & Bath Industry	NM
Brazil, São Paulo	22.03.-25.03.2011	**Revestir** Covering Materials	NM
Brazil, São Paulo	04.04.-07.04.2011	**CeMAT SOUTH AMERICA** Materials Handling, Intralogistics	DMAG
Brazil, São Paulo	24.05.-26.05.2011	**FCE COSMETIQUE** Cosmetic Industry	NM
Brazil, São Paulo	24.05.-26.05.2011	**FCE PHARMA** Pharmaceutical Industry	NM
Brazil, São Paulo	June 2011	**electronicAmericas** Components, Assemblies, Electronics Production	MMI
Brazil, São Paulo	13.09.-15.09.2011	**ANALÍTICA Latin America** Analysis, Biotechnology, Laboratory Technology, Quality Control	NM
Brazil, São Paulo	04.10.-06.11.2011	**TUBOTECH** Tubes, Fittings, Components	MD
Brazil, São Paulo	October 2011	**Pet South America** Pet Industry	NM
Brazil, São Paulo	November 2011	**BioFach América Latina** Organic Products	NM

Brazil, São Paulo	November 2011	**ExpoSustentat** Sustainable Products & Services	NM
Chile, Talca	02.09.-04.09.2010	**INTERVITIS INTERFRUCTA Sudamérica** **Wine Technology**	MSI
Mexico, Mexico City	14.07.-16.07.2010	**PAACE Automechanika Mexico** Automotive OE, Aftermarket, Remanufacturing	MF
Mexico, Mexico City	23.03.-25.03.2011	**Waste & Recycling Expo Mexico** Waste & Recycling Technology	MF
Mexico, Mexico City	July 2011	**PAACE Automechanika Mexico** Automotive OE, Aftermarket, Remanufacturing	MF

For futher information please contact the organizers

DMAG Deutsche Messe
Messegelände
30521 Hannover • Germany
Phone +49 (0)511-89 0
Fax +49 (0)511-89 32 626
info@messe.de
www.messe.de

MD Messe Düsseldorf
Messeplatz
40474 Düsseldorf • Germany
Phone +49 (0)211-45 60 01
Fax +49 (0)211-45 60 668
info@messe-duesseldorf.de
www.messe-duesseldorf.de

Deutsche Messe
Hannover • Germany

Messe
Düsseldorf

MF Messe Frankfurt
Ludwig-Erhard-Anlage 1
60327 Frankfurt/Main • Germany
Phone +49 (0)69-75 75 0
Fax +49 (0)69-75 75 64 33
info@messefrankfurt.com
www.messefrankfurt.com

MMI Messe München International
Messegelände
81823 München • Germany
Phone +49 (0)89-949 20 72 0
Fax +49 (0)89-949 20 72 9
newsline@messe-muenchen.de
www.messe-muenchen.de

MSI Messe Stuttgart International
Messepiazza 1
70629 Stuttgart • Germany
Phone +49 (0)711-185 60 21 71
Fax +49 (0)711-185 60 25 55
international@messe-stuttgart.de
www.messe-stuttgart.de

NM NürnbergMesse
Messezentrum
90471 Nürnberg • Germany
Phone +49 (0)911-86 06 86 99
Fax +49 (0)911-86 06 86 94
info@nuernbergmesse.de
www.nuernbergmesse.de

messe frankfurt

Messe München International

Messe Stuttgart
Key to markets

NÜRNBERG MESSE

Keywords for Industrial Classification

Trade Fairs by Industrial Sectors

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01 General Trade Fairs for Capital and Consumer Goods

10.07.-25.07.2010	**Expo** - International Agricultural and Industrial Fair	Mariano Roque Alonso, Paraguay
22.07.-03.08.2010	**RURAL** - International Agricultural and Industrial Fair	Buenos Aires, Argentina
08.09.-19.09.2010	**EXPO PRADO** - International Cattle and Agricultural, Industrial and Trade Exhibition	Montevideo, Uruguay
17.09.-26.09.2010	**EXPOCRUZ** - International Industrial and Agricultural Trade Fair	Santa Cruz, Bolivia
01.11.-06.11.2010	**FIHAV** - Havana International Fair	Havana, Cuba
November 2010	**FIES** - International Trade Fair	San Salvador, El Salvador
February 2011	**EXPOCARIBE**	Santiago de Cuba, Cuba
23.0.3.-26.03.2011	**EXPOCOMER** - International Commercial Trade Fair	Panama, Panama
April 2011	**FIC** - International Fair	Cochabamba, Bolivia
June 2011	**TIC** - Trade & Investment Convention	Port of Spain, Trinidad and Tobago
July 2011	**RURAL** - International Agricultural and Industrial Fair	Buenos Aires, Argentina
July 2011	**Expo** - International Agricultural and Industrial Fair	Mariano Roque Alonso, Paraguay
September 2011	**EXPO PRADO** - International Cattle and Agricultural, Industrial and Trade Exhibition	Montevideo, Uruguay
September 2011	**EXPOCRUZ** - International Industrial and Agricultural Trade Fair	Santa Cruz, Bolivia
28.10.-02.11.2011	**FIAM** Expoamazonia - Amazon International Fair	Manaus, Brazil
October 2011	**ExpoAlemania** - Expoalemania	Santiago de Chile, Chile
November 2011	**FIHAV** - Havana International Fair	Havana, Cuba

02 Trade Fairs for Capital Goods			
09.08.-13.08.2010	**FEBRAMEC** - Brasilian Exhibition for Mechanical and Electronical Equipment	Caxias do Sul, Brazil	
04.10.-08.10.2010	**Feria Internacional Industrial de Bogotá**	Bogotá, Colombia	
May 2011	**FIBCA** - International Exhibition for Industrial Equipment	Lima, Peru	
July 2011	**INTERTOOLING** - International Tooling Technology Exhibition	São Paulo, Brazil	
August 2011	**FEBRAMEC** - Brasilian Exhibition for Mechanical and Electronical Equipment	Caxias do Sul, Brazil	
03 Trade Fairs for Consumer Goods			
02.09.-19.09.2010	**HOME FAIR** - Sales Exhibition	Bogotá, Colombia	
September 2011	**HOME FAIR** - Sales Exhibition	Bogotá, Colombia	
08 Banking, Investments, Real Estate			
09.06.-11.06.2010	**CIAB FEBRABAN** - Exhibition and Congress of Information Technologies for Financial Institutions	São Paulo, Brazil	
April 2011	**Expo Vivienda** - Real Estate Exhibition	Santiago de Chile, Chile	
June 2011	**CIAB FEBRABAN** - Exhibition and Congress of Information Technologies for Financial Institutions	São Paulo, Brazil	
09 Building Technology and Machinery, Interior Construction			
01.06.-05.06.2010	**BATIMAT EXPOVIVIENDA** - Exhibition for Construction and Housing	Buenos Aires, Argentina	
08.06.-10.06.2010	**Concreto Latinoamerica** (World of Concrete Mexico) - International Construction Event focusing on Concrete & Cement Construction	Mexico City, Mexico	
18.08.-19.08.2010	**EXPOELEVADOR** - Elevators and Escalators Services and Industries Fair	São Paulo, Brazil	
06.10.-09.10.2010	**FEMATEC** - International Exhibtion on Building Materials and Construction Machinery	Buenos Aires, Argentina	
22.03.-25.03.2011	**Revestir** - Brazilian Coverings Exhibition	São Paulo, Brazil	GTQ

April 2011	**FEICON** - International Construction Industry Trade Fair	São Paulo, Brazil
May 2011	**EXPOCONSTRUCCION & EXPODISEÑO** - International Fair for Construction and Design	Bogotá, Colombia
May 2011	**Concreto Latinoamerica** (World of Concrete Mexico) - International Construction Event focusing on Concrete & Cement Construction	Mexico City, Mexico
June 2011	**BATIMAT EXPOVIVIENDA** - Exhibition for Construction and Housing	Buenos Aires, Argentina
October 2011	**FEMATEC** - International Exhibtion on Building Materials and Construction Machinery	Buenos Aires, Argentina

10 Clothing, Fashion

20.06.-22.06.2010	**Salao Lingerie Brasil**	São Paulo, Brazil
28.07.-30.07.2010	**COLOMBIAMODA** - Fashion Fair	Medellín, Colombia
January 2011	**FENINVER** - Brazilian Garments and Fashion Accessories Fair	São Paulo, Brazil
February 2011	**Salón de la Moda** - Fashion and Textile Exhibition	Bogotá, Colombia
01.04.-03.04.2011	**EXPO-AICACYP** - International Trade Show for Hunting, Shooting and Fishing Sports, Outdoor and Accessories	Buenos Aires, Argentina
June 2011	**FENIT** - International Textile Industry and Fashion Trade Fair	São Paulo, Brazil
July 2011	**COLOMBIAMODA** - Fashion Fair	Medellín, Colombia
August 2011	**Salao Lingerie Brasil**	São Paulo, Brazil

12 Mining, Geodesy, Geoinformation

13.07.-15.07.2010	**GEO** Summit Latin America incl. Expo **GPS** - International Geoinformation Congress and Exhibition	São Paulo, Brazil
06.10.-08.10.2010	**Colombia Minera** - Colombia Mining	Medellín, Colombia
04.05.-06.05.2011	**ARMINERA** - International Mining Exhibition	Buenos Aires, Argentina
June 2011	**EXPONOR** - International Exhibition for the Latin American Mining Industry	Antofagasta, Chile

July 2011	**GEO** Summit Latin America incl. Expo **GPS** - International Geoinformation Congress and Exhibition	São Paulo, Brazil
September 2011	**EXTEMIN** - Mining Technology Exhibition (part of PERUMIN - Mining Covention)	Arequipa, Peru
September 2011	**Exposibram** - Brazilian Mining Congress and Exhibition	Belo Horizonte, Brazil
September 2011	**Colombia Minera** - Colombia Mining	Medellín, Colombia

14 Books, Prints, Liparites

22.07.-01.08.2010	**FERIA INTERNACIONAL DEL LIBRO** - International Book Fair	Lima, Peru
11.08.-22.08.2010	**International Book Fair of Bogotá**	Bogotá, Colombia
12.08.-22.08.2010	**Bienal do Livro** - Book Fair	São Paulo, Brazil
27.11.-05.12.2010	**FIL** - International Book Fair	Guadalajara, Mexico
February 2011	**FILH** - International Book Fair	Havana, Cuba
April 2011	**Feria Internacional del Libro de Buenos Aires** - International Book Fair of Buenos Aires	Buenos Aires, Argentina
July 2011	**FERIA INTERNACIONAL DEL LIBRO** - International Book Fair	Lima, Peru
August 2011	**International Book Fair of Bogotá**	Bogotá, Colombia
September 2011	**BIENAL DO LIVRO** - International Book Fair	Rio de Janeiro, Brazil
26.11.-04.12.2011	**FIL** - International Book Fair	Guadalajara, Mexico

15 Office Equipment, Office Supplies

30.08.-02.09.2010	**ESCOLAR** - Paper - Nacional Exhibition for Stationary and Go-To-School Products	São Paulo, Brazil
August 2011	**ESCOLAR** - Paper - Nacional Exhibition for Stationary and Go-To-School Products	São Paulo, Brazil

19 C-Technologies, Factory-Automation, Measuring and Control Engineering

10.08.-13.08.2010	**FIEE Minas** - International Electrical, Energy and Automation Industry Trade Fair	Belo Horizonte, Brazil

01.03.-03.03.2011	**EXPO MANUFACTURA** - International Metalworking/Manufacturing Exhibition featuring Machine Tools, Automation, Assembly Technology, Quality Manufacturing, CAD/CAM, Robotics, Software, Coil-Winding and Welding Technologies	Monterrey, Mexico
March 2011	**ISA Expo Contro**	Mexico City, Mexico
May 2011	**FENAINST** - National Exhibition for Automation and Instrumentation	Salvador, Brazil

20 Dental Medicine, Dental Technology

04.08.-07.08.2010	**EXPODENT**	Buenos Aires, Argentina
02.09.-05.09.2010	**FDI** - World Dental Congress/Dental Trade Exhibition	Salvador, Brazil
24.09.-26.09.2010	**EXPO ARIC DENTAL** - Dental Industy Show	Guadalajara, Mexico
03.11.-07.11.2010	**ExpoDental AMIC International** - Expo Dental AMIC	Mexico City, Mexico
29.01.-02.02.2011	**CIOSP** - São Paulo International Dental Meeting	São Paulo, Brazil
April 2011	**ExpoDental AMIC International** - Expo Dental AMIC	Mexico City, Mexico
May 2011	**The Chilean Dental Show** - Salón Dental Chile	Santiago de Chile, Chile
14.09.-17.09.2011	**FDI** - World Dental Congress/Dental Trade Exhibition	Mexico City, Mexico
September 2011	**EXPO ARIC DENTAL** - Dental Industy Show	Guadalajara, Mexico
November 2011	**ExpoDental AMIC International** - Expo Dental AMIC	Mexico City, Mexico

21 Hardware, Tools

02.09.-04.09.2010	**EXPO NACIONAL FERRETERA** - National Hardware Show	Guadalajara, Mexico
March 2011	**Tools & Hardware Fair**	São Paulo, Brazil
01.09.-04.09.2011	**Expo Ferretera** - International Trade Fair for Hardware, Bathroom Fittings, Paint and Construction Materials Supplying Companies	Buenos Aires, Argentina GTQ

September 2011	**EXPO NACIONAL FERRETERA** - National Hardware Show	Guadalajara, Mexico	
22 Electrical Engineering, Electronics			
02.06.-04.06.2010	**EXPO ELECTRICA**	Mexico City, Mexico	
10.08.-13.08.2010	**FIEE Minas** - International Electrical, Energy and Automation Industry Trade Fair	Belo Horizonte, Brazil	
June 2011	**EXPO ELECTRICA**	Mexico City, Mexico	
June 2011	**electronicAmericas** - International Trade Fair for Components, Assemblies and Electronics Production and Laser Technology	São Paulo, Brazil	GTQ
08.11.-12.11.2011	**BIEL Light + Building Buenos Aires** - Biennial International Trade Fair for Electrical Engineering, Electronic and Lighting	Buenos Aires, Argentina	GTQ
23 Energy (conventional and renewable Energies)			
10.06.-12.06.2010	**R-energy Argentina**	Buenos Aires, Argentina	
02.06.-04.06.2010	**EXPO ELECTRICA**	Mexico City, Mexico	
15.06.-17.06.2010	**LAPS** - Latin American Petroleum Show	Maracaibo, Venezuela	
10.08.-13.08.2010	**BIO Tech Fair**	Curitiba, Brazil	
18.08.-21.08.2010	**ExpoEnergia Renovável** - Renewable Energy Exhibition	São Paulo, Brazil	
13.09.-16.09.2010	**RIO OIL & GAS EXPO** - Rio Oil & Gas Expo and Conference	Rio de Janeiro, Brazil	
28.09.-30.09.2010	**the Green Expo** (formerly PowerMex) - International Exhibition and Conference for Environmental Technology and Recycling, Mexico's Energy and Power-Related Industries	Mexico City, Mexico	
28.09.-30.09.2010	**Enviro Pro** - International Environmental Technology and Recycling Exhibition with Conference	Mexico City, Mexico	
09.11.-11.11.2010	**FIMAI E SIMAI** (Environment Brazil) - International Exhibition on the Environment Industry	São Paulo, Brazil	
June 2011	**R-energy Argentina**	Buenos Aires, Argentina	

June 2011	**EXPO ELECTRICA**	Mexico City, Mexico
August 2011	**BIO Tech Fair**	Curitiba, Brazil
August 2011	**ExpoEnergia Renovável** - Renewable Energy Exhibition	São Paulo, Brazil
September 2011	**the Green Expo** (formerly PowerMex) - International Exhibition and Conference for Environmental Technology and Recycling, Mexico‘s Energy and Power-Related Industries	Mexico City, Mexico
September 2011	**Enviro Pro** - International Environmental Technology and Recycling Exhibition with Conference	Mexico City, Mexico
October 2011	**AOG-ARGENTINA OIL & GAS EXPO** - International Oil, Gas and Related Products Exhibition	Buenos Aires, Argentina
October 2011	**LAPS** - Latin American Petroleum Show	Maracaibo, Venezuela
November 2011	**FIMAI E SIMAI** (Environment Brazil) - International Exhibition on the Environment Industry	São Paulo, Brazil

24 Food and Beverage

01.06.-03.06.2010	**Alimentaria México** - International Food and Beverage Exhibition	Mexico City, Mexico
07.06.-10.06.2010	**Fispal Food Service** - International Foodservice Show	São Paulo, Brazil
08.06.-12.06.2010	**ALIMENTEC** - International Trade Fair for Food, Kindred Products, Food Technology and Packaging Machines, Shop and Catering Equipment, Hotel Requisites	Bogotá, Colombia
03.08.-06.08.2010	**CONFITEXPO** - International Candy Show	Guadalajara, Mexico
25.08.-27.08.2010	**SIAL Mercosur** - International Exhibition of Food and Beverages of Mercosur	Buenos Aires, Argentina
01.09.-03.09.2010	**MexiAlimentos** (Expo Alimentos) - Food Industry Technology, Machinery and Equipment Exhibition	Monterrey, Mexico
14.09.-16.09.2010	**TecnoBebida** - International Trade Show Of Solutions and Technology For Beverage Industry	São Paulo, Brazil GTQ
21.09.-23.09.2010	**FITHEP MERCOSUL BRASIL** - International Exhibition of the Technology and of Raw Materials for the Production of Ice-Cream and Confectionery	São Paulo, Brazil

27.09.-29.09.2010	**FRUIT & TECH** - Fruit and Vegetable Industry Exhibition	São Paulo, Brazil	
21.10.-23.10.2010	**Food Ingredients South America** - International Exhibition on Food Ingredients, Product Development and Quality Control	São Paulo, Brazil	
03.11.-05.11.2010	**BioFach América Latina**	São Paulo, Brazil	GTQ
April 2011	**CONFITEC ANDINA**	Bogotá, Colombia	
April 2011	**Vivavinho/Expovinis Brasil** - International Wine Fair	São Paulo, Brazil	
May 2011	**FIAR** - International Exhibition for Food and Food Processing	Rosario, Argentina	
May 2011	**APAS** - International Exhibition for Supermarkets	São Paulo, Brazil	
13.06.-17.06.2011	**FITHEP MERCOSUR** - International Fair for Ice Cream, Confectionery, Chocolates and Bakery Products Processing	Buenos Aires, Argentina	
June 2011	**Alimentaria México** - International Food and Beverage Exhibition	Mexico City, Mexico	
June 2011	**Fispal Food Service** - International Foodservice Show	São Paulo, Brazil	
July 2011	**VINITECH AMERICA LATINA** - International Exhibition of Technologies for the Wine Growing Industry	Santiago de Chile, Chile	
August 2011	**SIAL Mercosur** - International Exhibition of Food and Beverages of Mercosur	Buenos Aires, Argentina	
August 2011	**CONFITEXPO** - International Candy Show	Guadalajara, Mexico	
September 2011	**FRUIT & TECH** - Fruit and Vegetable Industry Exhibition	São Paulo, Brazil	
November 2011	**BioFach América Latina**	São Paulo, Brazil	GTQ

28 Cars, Commercial Vehicles, Motorcycles, Caravans, Parts and Accessories

14.07.-16.07.2010	**PAACE Automechanika Mexico** - The International Trade Exposition in Latin America for Automotive OE, Aftermarket and Remanufacturing	Mexico City, Mexico	GTQ
08.09.-10.09.2010	**EXPO RUJAC** - Automotive-Parts and Spare Equipment Exhibition	Guadalajara, Mexico	

28.10.-07.11.2010	**S.A. Salao do Automovel** - International Automobile Trade Show	São Paulo, Brazil	
03.11.-06.11.2010	**Automechanika Argentina** - International Automotive Trade Fair from Design to Maintenance and Recycling	Buenos Aires, Argentina	GTQ
05.04.-09.04.2011	**AUTOMEC** - International Auto Parts, Equipment and Services Trade Fair	São Paulo, Brazil	
July 2011	**PAACE Automechanika Mexico** - The International Trade Exposition in Latin America for Automotive OE, Aftermarket and Remanufacturing	Mexico City, Mexico	GTQ
August 2011	**EXPO RUJAC** - Automotive-Parts and Spare Equipment Exhibition	Guadalajara, Mexico	
30 Photography, Film, Audio-Visual			
10.08.-12.08.2010	**PHOTOIMAGEBRAZIL** - International Image Trade Fair	São Paulo, Brazil	
March 2011	**EXPOIMAGEN**	Buenos Aires, Argentina	
May 2011	**Digital Image** - Premedia & Print Solutions	São Paulo, Brazil	
August 2011	**PHOTOIMAGEBRAZIL** - International Image Trade Fair	São Paulo, Brazil	
33 Hotel and Catering Equipment, Shop Fittings			
13.09.-16.09.2010	**NOVA EQUIPOTEL** - International Fair of Equipment, Products and Services to Hotels, Motels, Restaurants, Fast-Foods, Snack Bars, Industrial Kitchens	São Paulo, Brazil	
13.10.-15.10.2010	**GONDOLA** - Exhibition for Supermarkets and Department Stores	Cartagena, Colombia	
September 2011	**NOVA EQUIPOTEL** - International Fair of Equipment, Products and Services to Hotels, Motels, Restaurants, Fast-Foods, Snack Bars, Industrial Kitchens	São Paulo, Brazil	
November 2011	**GONDOLA** - Exhibition for Supermarkets and Department Stores	Cartagena, Colombia	
34 Gifts, Watches & Clocks, Jewelry, Crafts, Festive Articles			
14.08.-17.08.2010	**House & Gift Fair South America**	São Paulo, Brazil	

13.10.-16.10.2010	**JOYA** - International Jewellery, Silversmiths & Watchcrafts Exhibition	Guadalajara, Mexico
December 2010	**FIART** - International Handicrafts Exhibition	Havana, Cuba
25.01.-27.01.2011	**JOYA** - International Jewellery, Silversmiths & Watchcrafts Exhibition	Mexico City, Mexico
March 2011	**GIFT FAIR** - São Paulo International Gift Fair	São Paulo, Brazil
April 2011	**JOYA** - International Jewellery, Silversmiths & Watchcrafts Exhibition	Guadalajara, Mexico
May 2011	**Toys, Parties & Christmas Fair South America** - São Paulo International Toys, Parties & Christmas Fair	São Paulo, Brazil
May 2011	**Feiarte** - International Handicraft Fair	Curitiba, Brazil
August 2011	**House & Gift Fair South America**	São Paulo, Brazil
October 2011	**JOYA** - International Jewellery, Silversmiths & Watchcrafts Exhibition	Guadalajara, Mexico
December 2011	**FIART** - International Handicrafts Exhibition	Havana, Cuba

35 Foundry, Mould, Metallurgy, non-ferrous Metals

14.09.-17.09.2010	**Metalurgia** - International Trade Show of Technology for Foundry, Siderurgy, Forging, Aluminium and Services	Joinville, Brazil
September 2011	**FENAF/CONAF** - Congress and Fair for Foundry, Inputs and Equipment	São Paulo, Brazil

39 Woodworking, Furniture Production

18.08.-21.08.2010	**TMI** - Tecno Mueble Internacional	Guadalajara, Mexico
19.01.-22.01.2011	**ExpoPromueble** - International Exhibition of Machinery, Woodworking and Supplies for the Furniture, Wood and Forestry Industry	Mexico City, Mexico
21.03.-25.03.2011	**FIMMA** - International Exhibition for the Furnishing Industry	Bento Gonçalves, Brazil
March 2011	**EXPOFOREST** - International Fair for Woodworking and Forestry	Santa Cruz, Bolivia
April 2011	**FENAM** - International Woodworking Machinery Fair	Curitiba, Brazil
August 2011	**Salao Abimóvel** - International Furniture Sale and Export Show	São Paulo, Brazil

August 2011	**TMI** - Tecno Mueble Internacional	Guadalajara, Mexico	
13.09.-16.09.2011	**FEMADE** - International Exhibition for Machines, Equipment and Procucts for the Woodworking and Furniture Industry	Curitiba, Brazil	GTQ
November 2011	**EXPOCORMA** - International Exhibition and Demonstration Fair of Forestry Products and Machinery	Concepcion, Chile	

42 Information Technology, Telecommunication

30.06.-04.07.2010	**COMPU Guayaquil - International Data Processing Exhibition**	Guayaquil, Ecuador	
09.06.-11.06.2010	**CIAB FEBRABAN** - Exhibition and Congress of Information Technologies for Financial Institutions	São Paulo, Brazil	
21.09.-24.09.2010	**EXPO COMM Argentina** - International Telecommunications, Networking, Internet and Wireless Technologies Exhibition and Conference	Buenos Aires, Argentina	
20.10.-24.10.2010	**COMPU** - International Fair of Informatics	Quito, Ecuador	
27.10.-29.10.2010	**Caper** - International Trade fair for Broadcast, Cable, Cine and Multimedia	Buenos Aires, Argentina	
22.02.-24.02.2011	**EXPO COMM MEXICO** with B3 Forum - International Telecommunications, Networking, Internet and Wireless Technologies Exhibition and Conference	Mexico City, Mexico	
10.05.-12.05.2011	**BITS Business IT South America** - a CeBIT Event - South America‘s Exhibition and Conference for Business IT	Porto Alegre, Brazil	GTQ
June 2011	**COMPU Guayaquil** - International Data Processing Exhibition	Guayaquil, Ecuador	
June 2011	**Costa Rica Technology Insight** - Costa Rica Technology Insight	San José, Costa Rica	
June 2011	**CIAB FEBRABAN** - Exhibition and Congress of Information Technologies for Financial Institutions	São Paulo, Brazil	
September 2011	**EXPO COMM Argentina** - International Telecommunications, Networking, Internet and Wireless Technologies Exhibition and Conference	Buenos Aires, Argentina	

October 2011	**Caper** - International Trade fair for Broadcast, Cable, Cine and Multimedia	Buenos Aires, Argentina	
October 2011	**COMPU** - International Fair of Informatics	Quito, Ecuador	
44 Cosmetics			
26.08.-29.08.2010	**Belleza & Salud** - Beauty & Health	Bogotá, Colombia	
02.10.-04.10.2010	**COSMESUR Beautyworld Buenos Aires** - International Hair Styling, Perfume, Cosmetics, Aesthetics and Beauty Fair	Buenos Aires, Argentina	GTQ
March 2011	**Beauty Congress and Tradeshow**	Mexico City, Mexico	
March 2011	**HAIR BRASIL** - International Beauty, Hair and Esthetics Fair	São Paulo, Brazil	
24.05.-26.05.2011	**FCE COSMETIQUE** - International Exhibition of Technology for the Cosmetic Industry	São Paulo, Brazil	GTQ
May 2011	**Belleza & Salud** - Beauty & Health	Bogotá, Colombia	
May 2011	**NATURAL TECH** - Natural Tech Feira Internacional de Produtos Naturais e Medicina Complementar	São Paulo, Brazil	
September 11	**COSMETICA** - International Beauty Trade Fair	São Paulo, Brazil	
October 2011	**COSMESUR Beautyworld Buenos Aires** - International Hair Styling, Perfume, Cosmetics, Aesthetics and Beauty Fair	Buenos Aires, Argentina	GTQ
45 Public Services, Cleaning, Water Technology, Waste Disposal			
06.10.-08.10.2010	**ExpoUrbano**	Rio de Janeiro, Brazil	
06.10.-08.10.2010	**Expo Estadio**	Rio de Janeiro, Brazil	
20.11.-24.11.2010	**Soccerex** - Annual Football Convention and Exhibition	Rio de Janeiro, Brazil	
23.03.-25.03.2011	**Waste & Recycling Expo Mexico** - International Trade Show for Waste Management, Collection and Recycling Technologies	Mexico City, Mexico	GTQ
March 2011	**EXPOLAV** - International Laundry and Drycleaning Machinery, Equipment, Products and Services Trade Fair	São Paulo, Brazil	
October 2011	**ExpoUrbano**	Rio de Janeiro, Brazil	

October 2011	**Expo Estadio**	Rio de Janeiro, Brazil	
November 2011	**Soccerex** - Annual Football Convention and Exhibition	Rio de Janeiro, Brazil	

47 Plastics and Rubber Processing

23.08.-27.08.2010	**Interplast** - Plastic Technology Trade Show and Conference	Joinville, Brazil	
01.09.-03.09.2010	**CHILEPLAST** - International Plastic Industry Fair	Santiago de Chile, Chile	
09.05.-13.05.2011	**BRASILPLAST** - International Exhibition for the Plastic Industry	São Paulo, Brazil	
June 2011	**Plasticos** - International Exhibition of the Plastics Industry	Buenos Aires, Argentina	
12.09.-16.09.2011	**INTERMACH** - International Fair of Technology, Machinery, Equipment and Services for the Metal-mechanic and Plastics Industry	Joinville, Brazil	
04.10.-07.10.2011	**PLASTIMAGEN** - International Plastic Industry Equipment Exhibition	Mexico City, Mexico	

49 Agriculture, Forestry, Horticulture, Viniculture, Fisheries, Animal Breeding

16.06.-18.06.2010	**HORTITEC** - Horticultural Exhibition	Holambra, Brazil	
23.06.-25.06.2010	**AVICOLA-PORCINOS** - International Poultry and Swine Exhibition held in Conjunction with the International Poultry and Swine Conference	Buenos Aires, Argentina	
22.07.-03.08.2010	**RURAL** - International Agricultural and Industrial Fair	Buenos Aires, Argentina	
28.08.-05.09.2010	**EXPOINTER** - International Trade Fair for Livestock	Porto Alegre, Brazil	
02.09.-04.09.2010	**INTERVITIS INTERFRUCTA Sudamérica** - International Fair of Technology Wine Growing	Talca, Chile	GTQ
23.09.-25.09.2010	**AGRIFLOR** - International Flower Trade Show	Quito, Ecuador	
September 2010	**Expo Forestal** - International Forestry Trade Show	Guadalajara, Mexico	
06.10.-10.10.2010	**FIAGROP** - Feria Internacional Agropecuaria Comercial	Havana, Cuba	
06.10.-08.10.2010	**Pet South America** - International Trade Show For Suppliers To The Latin American Pet Industry	São Paulo, Brazil	GTQ

02.03.-05.03.2011	**EXPOAGRO** - International Agricultural Exhibition	not yet determined, Argentina	
14.03.-18.03.2011	**Expodireto Cotrijal**	Não Me Toque/RS, Brazil	
March 2011	**EXPOFOREST** - International Fair for Woodworking and Forestry	Santa Cruz, Bolivia	
March 2011	**FEINCO** - International Trade Fair for Cattle Raising	São Paulo, Brazil	
April 2011	**AGRISHOW** - International Exhibition of Agricultural Technology	Riberao Preto, Brazil	
April 2011	**AGROPECRUZ** - National Agriculture and Cattle Raising Fair	Santa Cruz, Bolivia	
May 2011	**Bio Brazil Fair** - International Organics and Agroecology Products Fair	São Paulo, Brazil	
27.08.-04.09.2011	**EXPOINTER** - International Trade Fair for Livestock	Porto Alegre, Brazil	
June 2011	**HORTITEC** - Horticultural Exhibition	Holambra, Brazil	
July 2011	**AGROEXPO** - International Agricultural Trade Fair	Bogotá, Colombia	
July 2011	**VINITECH AMERICA LATINA** - Internati-onal Exhibition of Technologies for the Wine Growing Industry	Santiago de Chile, Chile	
July 2011	**RURAL** - International Agricultural and Industrial Fair	Buenos Aires, Argentina	
October 2011	**Pet South America** - International Trade Show For Suppliers To The Latin American Pet Industry	São Paulo, Brazil	GTQ
10.11.-12.11.2011	**EXPO PESCA & ACUIPERU** - Specialized Exhibition for Fishery and Fish Processing	Lima, Peru	
November 2011	**EXPOCORMA** - International Exhibition and Demonstration Fair of Forestry Products and Machinery	Concepcion, Chile	

50 Leather, Leather Goods, Shoes

05.07.-08.07.2010	**FRANCAL** - Shoe and Leather Goods Fair	São Paulo, Brazil
September 2010	**CALZADO MODAMA** - National Footwear and Leather Goods Fair	Guadalajara, Mexico
23.09.-26.09.2010	**SAPICA** - National Shoe Fair	Leon, Mexico

17.01.-20.01.2011	**COUROMODA** - International Shoes, Sportsgoods and Leathergoods Fair	São Paulo, Brazil
February 2011	**ANPIC** - Show of the Suppliers, Machinery and Fashion Preview for the Leather and Footwear Industries	Leon, Mexico
April 2011	**CALZADO MODAMA** - National Footwear and Leather Goods Fair	Guadalajara, Mexico
April 2011	**SAPICA** - National Shoe Fair	Leon, Mexico
April 2011	**FIMEC** - International Exhibition for the Leather, Chemicals, Components and Machinery for Footwear & Tanneries	Novo Hamburgo, Brazil
July 2011	**FRANCAL** - Shoe and Leather Goods Fair	São Paulo, Brazil
September 2011	**CALZADO MODAMA** - National Footwear and Leather Goods Fair	Guadalajara, Mexico
September 2011	**SAPICA** - National Shoe Fair	Leon, Mexico
September 2011	**FENAC** - Festa Nacional do Calcado - Footwear and Leathergoods Fair	Novo Hamburgo, Brazil

51 Leather Processing and Shoe Machinery

28.09.-30.09.2010	**COUROVISÃO** - International Fair of Synthetics, Leather, Chemicals, Components and Accessories for Footwearand Manufactured Goods	Novo Hamburgo, Brazil
17.01.-20.01.2011	**COUROMODA** - International Shoes, Sportsgoods and Leathergoods Fair	São Paulo, Brazil
February 2011	**ANPIC** - Show of the Suppliers, Machinery and Fashion Preview for the Leather and Footwear Industries	Leon, Mexico
April 2011	**FIMEC** - International Exhibition for the Leather, Chemicals, Components and Machinery for Footwear & Tanneries	Novo Hamburgo, Brazil
September 2011	**COUROVISÃO** - International Fair of Synthetics, Leather, Chemicals, Components and Accessories for Footwearand Manufactured Goods	Novo Hamburgo, Brazil

52 Teaching Material and Learning Aid, Aducation, Training, Start-up

30.08.-02.09.2010	**ESCOLAR** - Paper - Nacional Exhibition for Stationary and Go-To-School Products	São Paulo, Brazil

August 2011	**ESCOLAR** - Paper - Nacional Exhibition for Stationary and Go-To-School Products	São Paulo, Brazil	
53 Aerospace, Airport Technology			
December 2011	**Aero Expo** - International Aviation Exhibition and Convention	Acapulco, Mexico	
55 Materials Handling, Logistics, Gears and Drives, Conveying and Storage			
10.08.-13.08.2010	**Expo Logisti-K**	Buenos Aires, Argentina	
04.04.-07.04.2011	**CeMAT SOUTH AMERICA** - International Trade Fair for Materials Handling and Logistics	São Paulo, Brazil	GTQ
56 Medical Technology, Health, Pharmacy			
04.06.-06.06.2010	**EXPOFARMACIA** - Specialized Exhibition for Pharmaceutical Products	Buenos Aires, Argentina	
13.10.-15.10.2010	**ExpoMedical** - International Show for Products, Equipment and Services for the Healthcare Sector	Buenos Aires, Argentina	
April 2011	**ExpoFarma/Interphex** - International Exhibition for the Chemical and Petro-Chemical Industries	Mexico City, Mexico	
24.05.-26.05.2011	**FCE PHARMA** - International Exposition of Technology for the Pharmaceutical Industry	São Paulo, Brazil	GTQ
May 2011	**NATURAL TECH** - Natural Tech Feira Internacional de Produtos Naturais e Medicina Complementar	São Paulo, Brazil	
May 2011	**HOSPITALAR** - International Fair of Products, Equipment and Services for Hospitals, Health Clinics and Laboratories	São Paulo, Brazil	
May 2011	**Diagnóstica** - International Fair for Products, Services and Equipment for Clinical Analysis and Pathology	São Paulo, Brazil	
June 2011	**EXPOFARMACIA** - Specialized Exhibition for Pharmaceutical Products	Buenos Aires, Argentina	
October 2011	**ExpoMedical** - International Show for Products, Equipment and Services for the Healthcare Sector	Buenos Aires, Argentina	

57 Metalworking, Welding Technology			
01.03.-03.03.2011	**EXPO MANUFACTURA** - International Metalworking/Manufacturing Exhibition featuring Machine Tools, Automation, Assembly Technology, Quality Manufacturing, CAD/CAM, Robotics, Software, Coil-Winding and Welding Technologies	Monterrey, Mexico	
25.03.-30.03.2011	**EMAQH** - International Machine Tool Exhibition	Buenos Aires, Argentina	
May 2011	**FEIMAFE** - International Machine Tools and Integrated Manufacturing Systems Trade Fair	São Paulo, Brazil	
12.09.-16.09.2011	**INTERMACH** - International Fair of Technology, Machinery, Equipment and Services for the Metal-mechanic and Plastics Industry	Joinville, Brazil	
18.10.-21.10.2011	**CCM** - Corte & Conformacao de Metais	São Paulo, Brazil	
04.10.-06.11.2011	**TUBOTECH** - International Trade Fair for Tubes, Fittings and Components	São Paulo, Brazil	GTQ
58 Furniture, Interior Design			
14.08.-17.08.2010	**House & Gift Fair South America**	São Paulo, Brazil	
18.08.-21.08.2010	**EXPO MUEBLE INTERNACIONAL** - Wholesale Furniture Manufacturer's Tradeshow	Guadalajara, Mexico	
16.02.-19.02.2011	**EXPO MUEBLE INTERNACIONAL** - Wholesale Furniture Manufacturer's Tradeshow	Guadalajara, Mexico	
22.03.-25.03.2011	**Kitchen & Bath** - International Trade Show and Conference for the Kitchen & Bath Industry in South America	São Paulo, Brazil	GTQ
August 2011	**EXPO MUEBLE INTERNACIONAL** - Wholesale Furniture Manufacturer's Tradeshow	Guadalajara, Mexico	
August 2011	**House & Gift Fair South America**	São Paulo, Brazil	
August 2011	**Salao Abimóvel** - International Furniture Sale and Export Show	São Paulo, Brazil	
59 Music			
22.09.-26.09.2010	**EXPOMUSIC** - Music Exhibition	São Paulo, Brazil	
September 2011	**EXPOMUSIC** - Music Exhibition	São Paulo, Brazil	

61 Foodprocessing and Packaging Machinery

01.06.-03.06.2010	**Alimentaria México** - International Food and Beverage Exhibition	Mexico City, Mexico	
08.06.-11.06.2010	**FISPAL Tecnologia** - International Fair of Packaging and Processes for the Food and Beverage Industries	São Paulo, Brazil	
08.06.-12.06.2010	**ALIMENTEC** - International Trade Fair for Food, Kindred Products, Food Technology and Packaging Machines, Shop and Catering Equipment, Hotel Requisites	Bogotá, Colombia	
22.06.-25.06.2010	**EXPO PACK/PROCESA** - International Packaging Exhibition and Conference	Mexico City, Mexico	
14.09.-16.09.2010	**TecnoBebida** - International Trade Show Of Solutions and Technology For Beverage Industry	São Paulo, Brazil	GTQ
14.09.-17.09.2010	**MercoAgro** - International Fair of Meat Business, Processing and Commercialization	Chapecó, Brazil	
21.09.-23.09.2010	**FITHEP MERCOSUL BRASIL** - International Exhibition of the Technology and of Raw Materials for the Production of Ice-Cream and Confectionery	São Paulo, Brazil	
21.09.-24.09.2010	**TECNO FIDTA** - International Fair of Food Technology	Buenos Aires, Argentina	GTQ
25.10.-26.10.2010	**TecnoCárnicos andina** - Specialized Exhibition and Conference for Meat Processing	Bogotá, Colombia	
November 2010	**FIPACH LATIONOAMERICA** - International Bakery, Pastry-Making, Chocolate, Ice Cream, and Refrigeration Industries Fair	Santiago de Chile, Chile	
22.02.-24.02.2011	**EXPO EMPAQUE** - Exhibition for the Packaging Industry	Monterrey, Mexico	
April 2011	**CONFITEC ANDINA**	Bogotá, Colombia	
May 2011	**FIAR** - International Exhibition for Food and Food Processing	Rosario, Argentina	
13.06.-17.06.2011	**FITHEP MERCOSUR** - International Fair for Ice Cream, Confectionery, Chocolates and Bakery Products Processing	Buenos Aires, Argentina	
June 2011	**FISPAL Tecnologia** - International Fair of Packaging and Processes for the Food and Beverage Industries	São Paulo, Brazil	

June 2011	**EXPO PACK/PROCESA** - International Packaging Exhibition and Conference	Mexico City, Mexico	
June 2011	**Alimentaria México** - International Food and Beverage Exhibition	Mexico City, Mexico	
05.07.-07.07.2011	**Brasil Brau** - International Fair of Beverage Technology	São Paulo, Brazil	
20.09.-23.09.2011	**ENVASE** - International Exhibition for the Packaging Industry	Buenos Aires, Argentina	
10.10.-11.10.2011	**TecnoLácteos andina** - Exhibition and Conference for the Dairy Industry	Bogotá, Colombia	
08.11.-11.11.2011	**ANDINA-PACK** - Packaging Exhibition	Bogotá, Colombia	
10.11.-12.11.2011	**EXPO PESCA & ACUIPERU** - Specialized Exhibition for Fishery and Fish Processing	Lima, Peru	
63 Surface Treatment			
May 2011	**QUALIDADE** - International Quality Control Trade Fair	São Paulo, Brazil	
13.09.-15.09.2011	**ANALÍTICA Latin America** - International Exhibition of Laboratory Technology, Analysis, Biotechnology and Quality Control	São Paulo, Brazil	GTQ
67 Paper- and Printing Industry, Media Production			
23.06.-29.06.2010	**Expoprint Latin America** - Prepress, Printing and Converting Expo	São Paulo, Brazil	
May 2011	**Digital Image** - Premedia & Print Solutions	São Paulo, Brazil	
70 Plumbing, Heating, Refrigeration, Air Conditioning			
26.10.-28.10.2010	**AHR EXPO-Mexico** - Air Conditioning, Heating and Refrigerating Exposition	Mexico City, Mexico	
22.03.-25.03.2011	**Kitchen & Bath** - International Trade Show and Conference for the Kitchen & Bath Industry in South America	São Paulo, Brazil	GTQ
September 2011	**FEBRAVA** - International Refrigerating, Air Conditioning, Ventilation, Heating and Air Treatment Trade Fair	São Paulo, Brazil	
71 Shipbuilding, Port Equipment, Offshore Technology			
30.11.-03.12.2010	**EXPO NAVAL** - The Maritime Defence Exhibition & Conference for Latin America	Valparaiso, Chile	

June 2011	**BRASIL OFFSHORE** - International Offshore Oil & Gas Trade Show and Conference	Macae, Brazil	
72 Safety and Security			
25.08.-27.08.2010	**FISP** - International Safety and Protection Fair	São Paulo, Brazil	
01.09.-03.09.2010	**Intersec Buenos Aires** (formerly Seguriexpo) - South American Integral Security Fair	Buenos Aires, Argentina	GTQ
April 2011	**Mexico Fire Expo**	Mexico City, Mexico	
May 2011	**ExpoSec** - Specialized Exhibition on Electronical Security Systems	São Paulo, Brazil	
73 Toys			
April 2011	**ABRIN** - International Toy Fair	São Paulo, Brazil	
May 2011	**Toys, Parties & Christmas Fair South America** - São Paulo International Toys, Parties & Christmas Fair	São Paulo, Brazil	
74 Sporting Goods			
20.11.-24.11.2010	**Soccerex** - Annual Football Convention and Exhibition	Rio de Janeiro, Brazil	
01.04.-03.04.2011	**EXPO-AICACYP** - International Trade Show for Hunting, Shooting and Fishing Sports, Outdoor and Accessories	Buenos Aires, Argentina	
August 2011	**EXPOLAZER** - Swimming Pools, Sports and Leisure Exhibition	São Paulo, Brazil	
November 2011	**Soccerex** - Annual Football Convention and Exhibition	Rio de Janeiro, Brazil	
78 New Technologies, Inventions, Innovations			
November 2010	**Nanotec EXPO** - International Exhibition and Conference for Nanotechnologies	São Paulo, Brazil	
November 2011	**Nanotec EXPO** - International Exhibition and Conference for Nanotechnologies	São Paulo, Brazil	
80 Textiles, incl. Fabrics and Home Textiles			
10.08.-13.08.2010	**FEBRATEX / TECNOTEXTIL** - Brazilian Textile Industry Fair	Blumenau, Brazil	
January 2011	**COLOMBIATEX** - Textile Exhibition	Medellín, Colombia	

81 Textile and Clothing Machinery		
10.08.-13.08.2010	**FEBRATEX / TECNOTEXTIL** - Brazilian Textile Industry Fair	Blumenau, Brazil
03.11.-04.11.2010	**Textile Technology Symposium linked with the Symposium in Campinas**	Blumenau, Brazil
08.11.-09.11.2010	**Textile Technology Symposium linked with the Symposium in Blumenau**	Campinas, Brazil
82 Tourism		
06.06.-08.06.2010	**mpm meeting place mexico** - The Meetings and Incentives Market	Puerto Vallarta, Mexico
20.10.-22.10.2010	**ABAV The Fair of the Americas** - Tourism Exhibition and Brazilian Travel Agent Congress	Rio de Janeiro, Brazil
30.10.-02.11.2010	**FIT** - International Tourism Exhibition for Latin America	Buenos Aires, Argentina
February 2011	**Tourist Exhibition**	Bogotá, Colombia
June 2011	**mpm meeting place mexico** - The Meetings and Incentives Market	Puerto Vallarta, Mexico
October 2011	**ABAV The Fair of the Americas** - Tourism Exhibition and Brazilian Travel Agent Congress	Rio de Janeiro, Brazil
November 2011	**FIT** - International Tourism Exhibition for Latin America	Buenos Aires, Argentina
83 Transport and Traffic		
04.11.-15.11.2010	**Salón Internacional de Automóvil** - Internati-onal Automobile Fair	Bogotá, Colombia
10.11.-12.11.2010	**TRANSPOQUIP Latin America**	São Paulo, Brazil
09.11.-11.11.2010	**Business on Rails Show**	São Paulo, Brazil
14.03.-15.03.2011	**Andinatraffic** - Transportation Exhibition	Bogotá, Colombia
April 2011	**Intermodal South America**	Brazil
October 2011	**Fenatran** - International Transport Industry Trade Show	São Paulo, Brazil
November 2011	**Business on Rails Show**	São Paulo, Brazil
November 2011	**TRANSPOQUIP Latin America**	São Paulo, Brazil

86 Environmental Protection			
10.08.-13.08.2010	**BIO Tech Fair**	Curitiba, Brazil	
28.09.-30.09.2010	**Enviro Pro** - International Environmental Technology and Recycling Exhibition with Conference	Mexico City, Mexico	
28.09.-30.09.2010	**the Green Expo** (formerly PowerMex) - International Exhibition and Conference for Environmental Technology and Recycling, Mexico's Energy and Power-Related Industries	Mexico City, Mexico	
03.11.-05.11.2010	**ExpoSustentat**	São Paulo, Brazil	GTQ
09.11.-11.11.2010	**FIMAI E SIMAI** (Environment Brazil) - International Exhibition on the Environment Industry	São Paulo, Brazil	
August 2011	**BIO Tech Fair**	Curitiba, Brazil	
September 2011	**Enviro Pro** - International Environmental Technology and Recycling Exhibition with Conference	Mexico City, Mexico	
September 2011	**the Green Expo** (formerly PowerMex) - International Exhibition and Conference for Environmental Technology and Recycling, Mexico's Energy and Power-Related Industries	Mexico City, Mexico	
October 2011	**AmbientAL** (EXPO AGUA & AMBIENTE) - International Exhibition for Environmental Technology	Santiago de Chile, Chile	
November 2011	**FIMAI E SIMAI** (Environment Brazil) - International Exhibition on the Environment Industry	São Paulo, Brazil	
November 2011	**ExpoSustentat**	São Paulo, Brazil	GTQ

93 Defence Technology		
30.11.-03.12.2010	**EXPO NAVAL** - The Maritime Defence Exhibition & Conference for Latin America	Valparaiso, Chile
12.04.-15.04.2011	**LAAD** - International Exhibition and Conference on Aerospace & Defence Techology	Rio de Janeiro, Brazil

94 Marketing, Advertising, Trade Fairs, Conferences, Events

03.06.-05.06.2010	**MEXIGRAFIKA** - International Graphic Arts Exhibition	Monterrey, Mexico	
06.06.-08.06.2010	**mpm meeting place mexico** - The Meetings and Incentives Market	Puerto Vallarta, Mexico	
09.06.-12.06.2010	**ABF** - Franchising Expo	São Paulo, Brazil	
01.12.-03.12.2010	**ExpoSystems**	São Paulo, Brazil	
May 2011	**Feria Imaginna** - Design Trade Fair	Bogotá, Colombia	
June 2011	**mpm meeting place mexico** - The Meetings and Incentives Market	Puerto Vallarta, Mexico	
June 2011	ABF - Franchising Expo	São Paulo, Brazil	
December 2011	ExpoSystems Subcontracting	São Paulo, Brazil	

96 Subcontracting

19.10.-22.10.2010	MERCOPAR - Subcontracting and Industrial Integration Fair	Caxias do Sul, Brazil	GTQ
October 2011	MERCOPAR - Subcontracting and Industrial Integration Fair	Caxias do Sul, Brazil	GTQ

97 German Specialized Exhibitions

16.06.-20.06.2010	MADE IN GERMANY mit Lateinamerika-konferenz	Mexico City, Mexico

Authors

Ivan Abad
President Diper Exhibitions

Ligia Amorim
Managing Director, NürnbergMesse Brasil

Ana Maria Arango Medina
Executive Director of the International Association of Exhibitions in Latin America – AFIDA, Colombia

Olaf Banse
AUMA, Latin America

Gerd Bettermann
Department Global Markets, AUMA Association of the German Trade Fair Industry

Peter Buerstedde
GTAI, Germany Trade and Invest

Edwin Bustos
USA Marketing Director, Diper Exhibitions

Nathan Crooks
Senior Editor Energy, Business News Americas

Patrick Djizmedjian
Corporate Communications, Osec

Claudio Dowdall
Chief Executive Officer, La Rural, Exhibition Center of Buenos Aires

Oliver Döhne
GTAI, Germany Trade and Invest

Eric Duport Jaramillo
Director of the Chamber of Commerce of Pereira

Fernando Espinosa García
Deputy Director, Expo Guadalajara

Philipp Ferger
Messe Frankfurt Exhibition GmbH
Marketing Communications Automechanika / Independent Brands

Bruno Ferrari
CEO of ProMéxico

Juan Antonio Figueroa
Head of Investment Promotion Division
Chilean Economic Development Agency (CORFO)

Juan Carlos Grassi
Director of Editorial Ferias & Congresos S.A.

Dr. Andreas Gruchow
Member of the Board of Deutsche Messe

Mario A. Herrera Sánchez
General Director, Fexpocruz

Jörn Kronenwerth
Secretary General, EMECA - European Major Exhibition Centres Association

Nara Lima de Sá
São Paolo Turismo S/A

Andrés López Valderrama
President Corferias, International Exhibition Center of Bogotá
President of the International Association of Exhibitions in Latin America – AFIDA, Colombia

Vivek Luthra
Logistic Consultant

Matthew Malinowski
Reporter Telecom & IT, Business News Americas

Brock McCormack
Spokesman, International Fairs Deutsche Messe

Nubia Stella Martinez
President of PROEXPORT Colombia

Carl Moses
GTAI, Germany Trade and Invest

José Navarro
General Director of E.J. Krause Mexico

Dr. Peter Neven
Managing Director, AUMA Association of the German Trade Fair Industry

Patrick Nixon
Senior Reporter, Business News Americas

Dr. Beatriz Nofal
President of Argentina's Investment Development Agency

Klaus Pauluschke
Area Manager Latin America, BTG Messe-Spedition GmbH

María Cristina Rosas
Professor and researcher in the Political and Social Sciences Faculty, National Autonomous University of Mexico (UNAM)

Peter Rösler
Manager of the Lateinamerika Verein, the German Business Association for Latin America

Sieglinde Sautter
Managing Director Fairs and Exhibitions
Bayern International GmbH

Marco Spinger
Director Division Global Markets,
AUMA Association of the German Trade Fair Industry

Alessandro Teixeira
President of Brazilian Trade and Investment Promotion Agency (Apex-Brasil), President of the World Association of Investment Promotion Agencies (WAIPA)

Petra Wolf
Member of Management Board, Director International Operations NürnbergMesse Group

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