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Media Release: China and U.S. Top New Exhibition Market Ranking as France Overtakes Germany

- **Data and analysis by jwc shows why exhibition markets can no longer be judged by size alone**
- **India takes the lead for Market Attractiveness, China the top spot for Competitive Opportunities**
- **Singapore leads the world in Business Ecosystem Ranking**

Cologne, March 3, 2026 - China and the U.S. rank as the world's most attractive exhibition markets in a new country-level ranking introduced by jwc, while France places ahead of Germany in third position, underscoring how market size alone no longer determines competitive strength.

The ranking, published for the first time, applies a multidimensional framework that assesses demand fundamentals, competitive dynamics, venue capacity, ecosystem readiness, and business conditions across major exhibition markets. After the top four, Spain, Italy, the United Arab Emirates, India, the Netherlands and Singapore complete the top ten.

Global Top 10 Exhibition Markets 2025

Assessed across Market Attractivity, Business Ecosystem Quality and Competitive Opportunity

-  1. China
-  2. United States
-  3. France
-  4. Germany
-  5. Spain
-  6. Italy
-  7. United Arab Emirates
-  8. India
-  9. Netherlands
-  10. Singapore

Source: jwc GIPR Report. Composite index across 33 markets. www.jwc.eu.com

Segment rankings reveal distinct market strengths

Beyond the overall results, the new 'jwc Top-10 exhibition markets tables' include three scored-criteria rankings that identify clear segment leaders and reveal how markets can excel for very different strategic reasons. All rankings and corresponding analysis are a new part in jwc's regular "GIPR" report, out now.

In the **market-driven segment**, which prioritises market size and growth outlook, **India** ranks first, reflecting strong demand fundamentals and expansion potential. **China** and the **U.S.** follow, highlighting the continued importance of scale in markets driven primarily by volume and growth expectations.

The **competition-driven segment**, which assesses openness, fragmentation and competitive accessibility, is led by **China**, followed by **Bahrain** and

Kuwait. The results show how competitive structure and regulatory conditions can create opportunity even in comparatively small markets.

In the **ecosystem-driven segment**, **Singapore** ranks first, reflecting its highly institutionalised operating environment, international connectivity and administrative efficiency. **Spain** and **Germany** follow, underscoring the role of infrastructure, logistics performance and business conditions in supporting exhibition activity.



'These segment rankings show why simplified headline league tables can be misleading,' said Jochen Witt, Executive Chairman at jwc. 'Markets can be highly attractive for very different reasons. Some benefit from sheer scale, others from competitive openness or ecosystem maturity. A multidimensional approach makes those trade-offs visible rather than averaging them away.'

Why a multidimensional framework matters

Exhibition markets are not homogeneous. They operate at different stages of development and combine scale, growth and ecosystem maturity in very different ways. Some markets are large but structurally constrained, others are smaller yet highly efficient, while a growing group is scaling rapidly on the back of targeted investment and policy support.

According to the analysis, this diversity of market profiles makes single-metric comparisons increasingly inadequate. By distinguishing between market size, competitive dynamics, venue capacity, ecosystem readiness and business conditions, the new jwc framework enables a more nuanced comparison of markets with very different development paths.

The results also illustrate that strong overall performance can be achieved through different profiles. Markets may compensate for limitations in one dimension with strengths in another, but no market dominates across all criteria.

'The findings reinforce that market attractiveness depends on strategic objectives,' says Lorenzo Garbujo, jwc project lead. 'Organisers face multiple options and this framework is designed to guide them in prioritising markets.'

Reading rankings in context

The divergence between the overall and segment rankings highlights where bottlenecks exist and why markets with similar scale can offer very different strategic profiles. Market-driven rankings tend to favour large economies with strong demand fundamentals, while competition- and ecosystem-driven rankings elevate markets where operational friction is lower or competitive opportunity remains more accessible.

Taken together, the analysis shows that no single exhibition market is universally optimal. Instead, attractiveness depends on how scale, growth,

competition and ecosystem conditions interact - and on how those interactions align with specific strategic priorities.

About jwc:

Founded in 2007, jwc is the leading management consultancy specialising in the exhibition, trade fair and conference industry. The firm works with organisers, venue owners, service providers, investors, governments and industry associations across Europe, Asia and the Middle East. In addition to advisory work, jwc produces industry benchmarks and market analyses, including the Global Industry Performance Review (GIPR) and the co-published UFI World Map of Exhibition Venues, which are used by industry executives, investors and policymakers for market comparison and strategic decision-making.

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