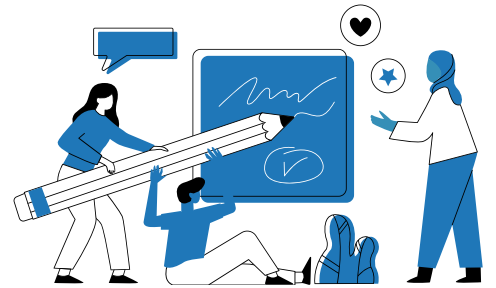




2023

EXHIBITION INDUSTRY & MARKET ANALYSIS

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EXECUTIVE SUMMARY



KEY FINDINGS, TRENDS, AND RECOMMENDATIONS

The 2023 exhibition landscape in Bangkok was marked by robust activity, with **183 exhibitions** attracting a diverse range of exhibitors and attendees. Consumer exhibitions dominated in terms of quantity, while trade shows commanded a larger share of exhibition space. Key trends observed in 2023 include:

- **Consumer-Driven Demand:** The strong performance of consumer exhibitions underscores the growing appetite for engaging, experiential events among the Thai public.
- **Untapped Potential:** Occupancy rates below 50% across major venues highlight the opportunity for further growth and development within the sector.
- **S-Curve Industries:** While the government's emphasis on S-curve industries is evident, their representation in the exhibition market remains relatively low, signaling untapped potential.



BASED ON THESE FINDINGS, THE TEA RECOMMENDS THE FOLLOWING ACTIONS:

- **Focus on S-Curve Industries:** Organizers are encouraged to prioritize events aligned with Thailand's 10 S-curve industries to drive economic growth and innovation.
- **Optimize Venue Utilization:** Venue operators should implement creative strategies to boost occupancy rates and maximize the value of their spaces.
- **Government Support:** Policymakers should consider incentives and initiatives to stimulate investment in emerging industries and solidify Thailand's position as a leading exhibition destination

“The TEA is committed to **supporting the growth and development of the exhibition industry in Thailand**. By working together, we can unlock the full potential of this dynamic sector.”

02 INTRODUCTION

The Thai Exhibition Association (TEA) is proud to present its 2023 exhibition industry report, a comprehensive analysis designed to empower our members with valuable insights and strategic guidance. This report serves as a compass for navigating the dynamic exhibition landscape in Bangkok and its surrounding metropolitan area.



PURPOSE OF THE REPORT:

This report aims to provide TEA members **with a clear understanding of:**

- **The current state of the exhibition industry in Bangkok**, including market size, trends, and key players.
- **The performance of different exhibition types** (trade vs. consumer) **and industry sectors.**
- **The challenges and opportunities facing the industry**, along with actionable recommendations for growth.

“By arming our members with this knowledge, we empower them to **make informed decisions, capitalize on emerging trends, and drive their businesses forward.**”



OVERVIEW OF THE THAI EXHIBITION ASSOCIATION (TEA):

The TEA is **a leading advocate for the exhibition industry in Thailand**, representing a diverse membership of organizers, venues, contractors, and suppliers. We are **committed to fostering collaboration, promoting best practices, and championing policies** that support the sustainable growth of the sector.



DATA COLLECTION METHODOLOGY AND SCOPE:

This report is **based on a rigorous data collection process conducted throughout 2023.** Our dedicated team gathered quarterly data from four major exhibition venues in the Bangkok metropolitan area:

- **BITEC:** Bangkok International Trade & Exhibition Centre
- **QSNCC:** Queen Sirikit National Convention Center
- **IMPACT:** IMPACT Exhibition and Convention Center
- **RPH:** Royal Paragon Hall



THE DATA COLLECTED ENCOMPASSES A WIDE RANGE OF METRICS, INCLUDING:

- **Market Size of Exhibition:** Number of exhibitions and occupied space that breakdown of trade and consumer exhibitions
- Overall **Market Share**
- Performance of S-curve industries
- Leading organizers

This comprehensive dataset provides a solid foundation for **understanding the nuances of the exhibition market and identifying areas for future development.**

2023 EXHIBITION PERFORMANCE:

A COMPREHENSIVE OVERVIEW (1/3)



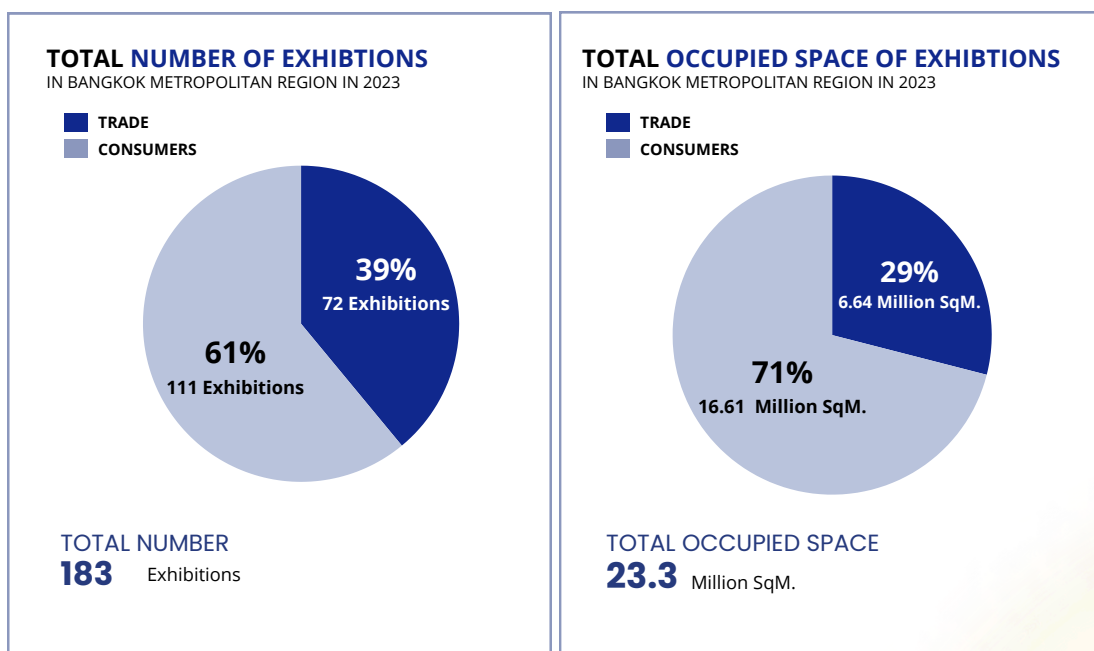
Bangkok's exhibition industry demonstrated resilience and growth in 2023, **hosting a total of 183 exhibitions that collectively occupied an impressive 23.2 million square meters of space.** This performance underscores the city's prominence as a regional hub for trade shows and consumer events.



MARKET SIZE AND COMPOSITION:

Total Exhibitions and Occupied Space: The 183 exhibitions held in 2023 spanned a diverse range of industries and interests, attracting a wide audience of exhibitors and attendees. The total occupied space of 23.2 million square meters reflects the substantial scale and impact of these events.

Trade vs. Consumer Exhibitions: Consumer exhibitions outnumbered trade shows in terms of quantity, with 111 consumer events compared to 72 trade shows. However, trade shows commanded a larger share of occupied space, highlighting their significance in driving business transactions and industry connections.



(From 4 main exhibition venues in Bangkok Metropolitan Area)

2023 EXHIBITION PERFORMANCE:

A COMPREHENSIVE OVERVIEW (2/3)



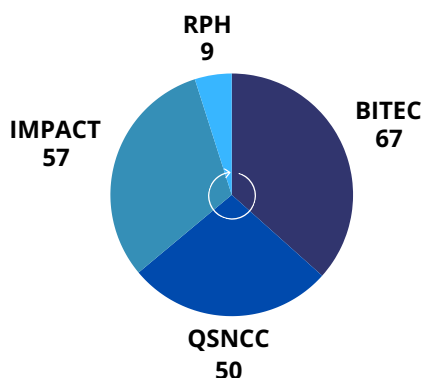
MARKET SIZE OF EXHIBITIONS BY VENUE:

Market Size by Venue: BITEC led the pack with 67 exhibitions, followed by IMPACT (57), QSNCC (50), and RPH (9). However, IMPACT dominated in terms of occupied space, boasting 11.4 million square meters, while BITEC followed with 6.8 million square meters.

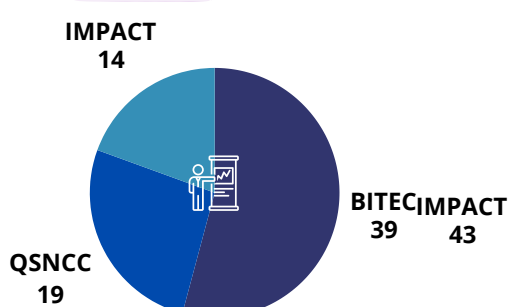
VENUE PERFORMANCE:

- **Number of Events:** BITEC's leadership in the number of events showcases its versatility and appeal to a wide range of organizers.
- **Occupied Space:** IMPACT's dominance in occupied space reflects its capacity to host large-scale exhibitions and its popularity as a premier venue for both trade and consumer events.
- **Occupancy Rate:** Despite the impressive figures, all venues experienced occupancy rates below 50%, indicating significant potential for growth and optimization of space utilization.
- **Focus on Trade vs. Consumer:** BITEC established itself as a hub for trade shows, accounting for 45% of the total trade exhibition space. In contrast, IMPACT solidified its position as the preferred venue for consumer exhibitions, capturing a 57% market share. RPH exclusively focused on consumer shows.

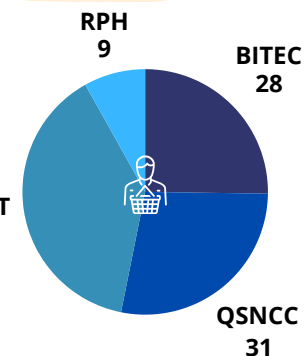
TOTAL NO. EXHIBITIONS



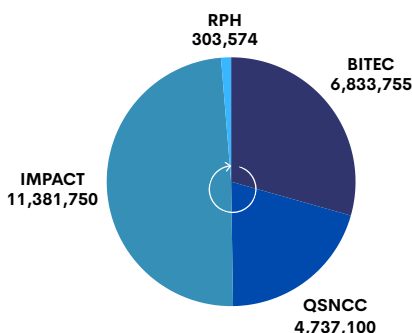
NO. OF TRADE EXHIBITIONS



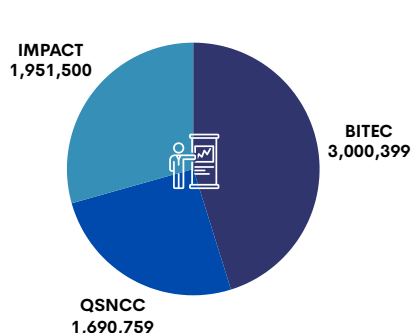
NO. OF CONSUMER EXHIBITIONS



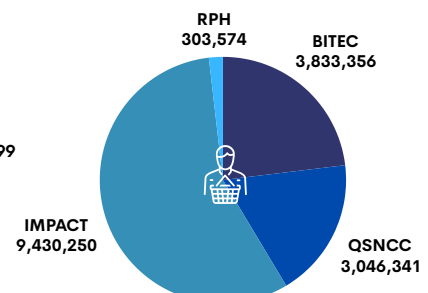
TOTAL OCCUPIED SPACE (SQ.M.)



TRADE EXHIBITION OCCUPIED SPACE (SQ.M.)



CONSUMER EXHIBITION OCCUPIED SPACE (SQ.M.)



2023 EXHIBITION PERFORMANCE:

A COMPREHENSIVE OVERVIEW (3/3)



MARKET SHARE OF EXHIBITIONS TYPE



- **Local vs. International:** Local exhibitions accounted for the majority of events (61%), underscoring the strength of the domestic market. However, international events played a crucial role, particularly in the trade sector, where they represented 93% of all trade shows. This highlights Bangkok's appeal as an international business destination.
- **Distribution across Sectors:** While consumer exhibitions dominated in terms of quantity, trade shows commanded a larger share of exhibition space, emphasizing their economic impact and importance for industry networking and knowledge exchange.

Overall, the 2023 exhibition performance in Bangkok paints a picture of a dynamic and growing industry. While **consumer exhibitions thrived in terms of numbers, trade shows made a significant impact on the overall market size**. The underutilized venue space presents a clear opportunity for expansion, while the strong presence of international events highlights Bangkok's global appeal.



By understanding these trends and leveraging the available data, organizers, venues, and policymakers can collaborate to further elevate Bangkok's position as a premier exhibition destination. **The focus should be on optimizing space utilization, attracting more international events, and nurturing the growth of S-curve industries** to ensure the continued success and diversification of the exhibition landscape.

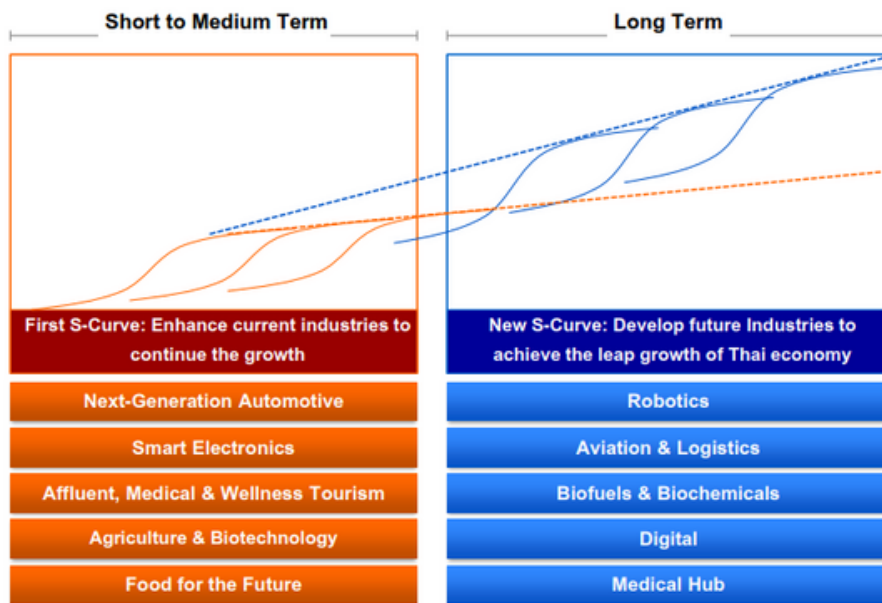


INDUSTRY CLASSIFICATION

10 THAI S-CURVE INDUSTRIES

Mechanism to Drive Economy for the Future (New Engine of Growth)

5 + 5 TARGETED INDUSTRIES



DEVELOPMENT OF 5 FUTURE INDUSTRIES

Robotics: Robots in Automotive, Plastic & Electronic Industries – Medical Robots – Underwater Robots (Remotely Operated Underwater Vehicles: ROV)

Aviation & Logistics : Services for Transport – Modern Logistics Service Centers – Aerospace Maintenance, Repair & Overhaul: MRO – Manufacture of Aerospace Parts (OEM) – High Value Business with Time-Sensitive Products – Aviation Training Centers

Biofuels & Biochemicals : Second Generation Biofuels – Biochemical Industry by Developing Midstream Industry – Bioplastics – Lead to BioEconomy

Digital : Embedded Software, Enterprise Software & Digital content – E-commerce (SellBuy-Pay-Deliver) – Consumer Insight Analytics and Data Centers – Cloud Computing – Cyber Security – Internet of Things: Enabled Smart City – Creative media and animation

Medical Hub : Telemedicine to Follow, Consult, Diagnose & Treat – Manufacture of Remote Health Monitoring Devices – Biologics & Biosimilars

Source by : Minister of Industry

https://www.boi.go.th/upload/content/Presentation%20by%20Minister%20of%20Industry_89274.pdf

10 Industry S-Curves:

The Thai government has identified 10 S-curve industries as key drivers of future economic growth. These sectors include next-generation automotive, smart electronics, affluent, medical and wellness tourism, food for the future, robotics, aviation and logistics, biofuels and biochemicals, digital, and medical hub.

5 Other Industries :

The remaining exhibition space was distributed across five additional categories:

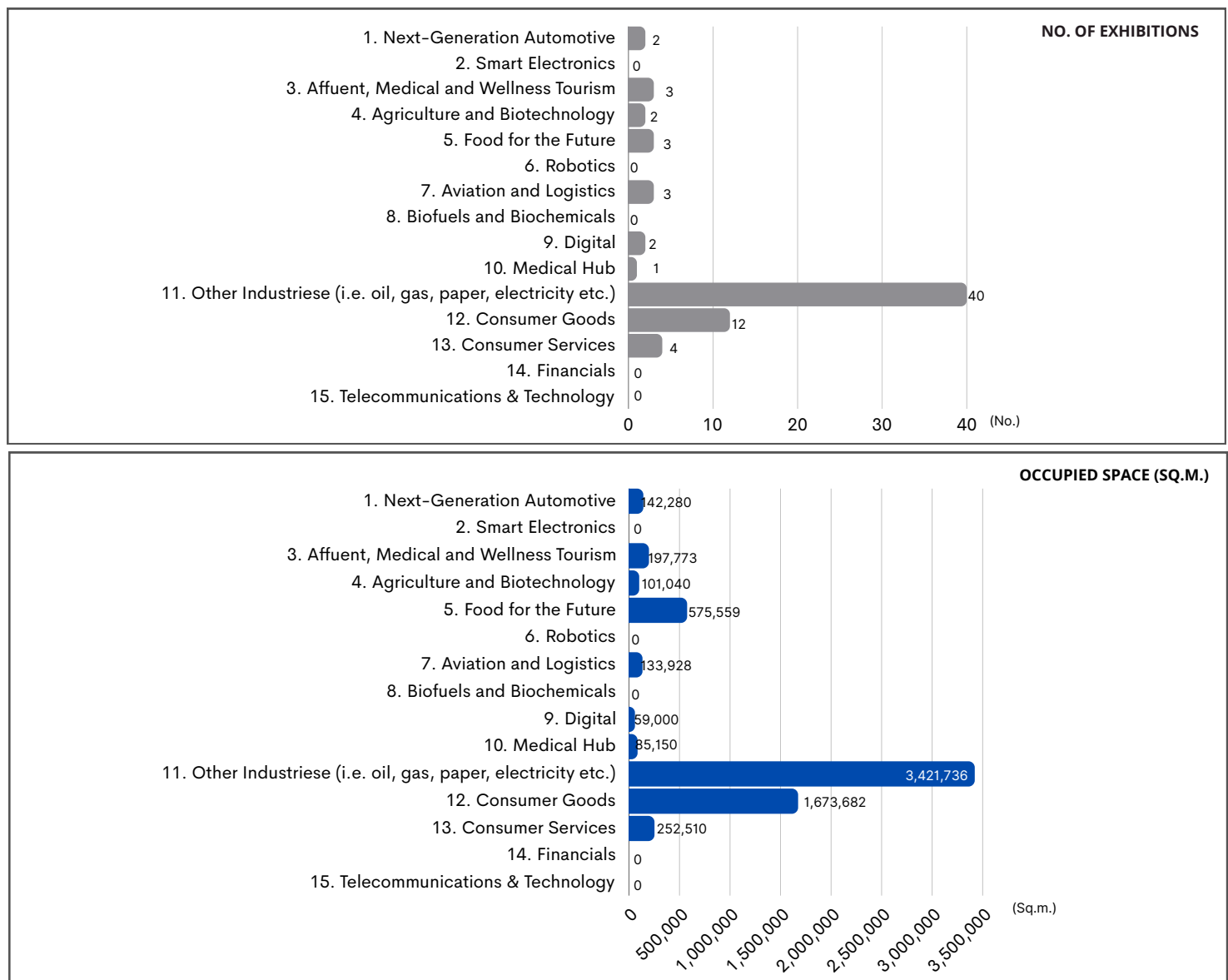
1. Consumer goods
2. Consumer services
3. Financials
4. Telecommunications and technology
5. Other industries not classified within the S-curves



INDUSTRY CLASSIFICATION

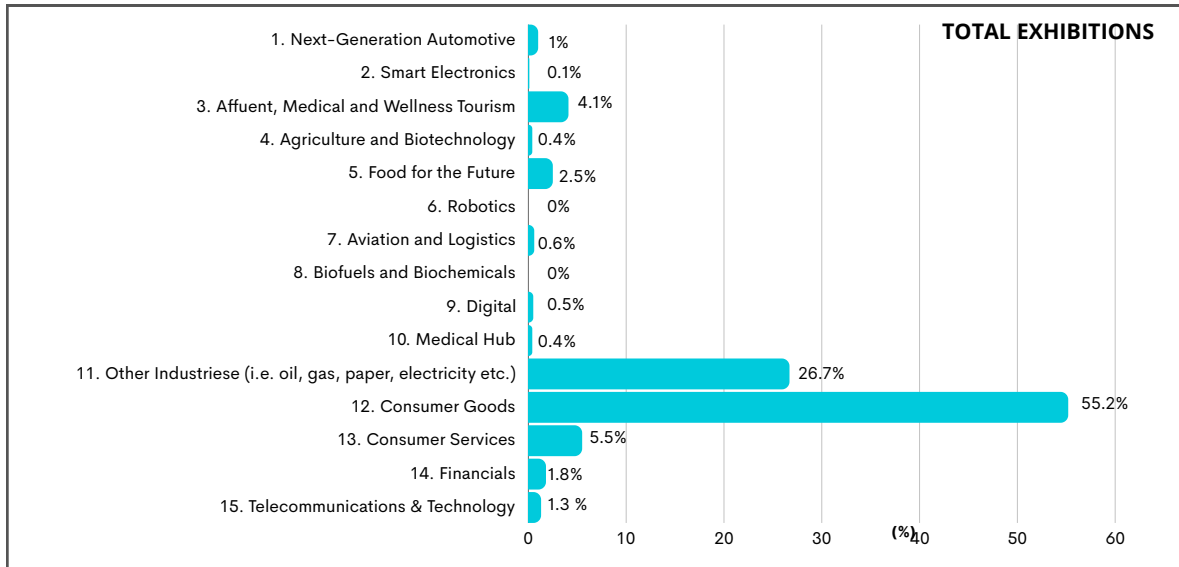
A closer look at the industry classification of exhibitions held in 2023 reveals interesting insights into the market's composition and potential for growth.

MARKET SIZE OF EXHIBITIONS BY VENUE



The exhibition space was dominated by consumer goods, which sprawled across **1,673,682 square meters**, showcasing Thailand's thriving retail landscape and strong consumer demand. Industries outside the targeted S-curves also commanded a substantial **3,421,736 square meters**, emphasizing the diverse range of sectors present in the Thai market, such as oil and gas, heavy industry, and energy. While not as expansive, consumer services still occupied a **significant 252,510 square meters**, reflecting a steady interest in exhibitions focused on this sector.

INDUSTRY CLASSIFICATION



MARKET SHARE OF EXHIBITIONS BY VENUE

Consumer goods emerged as the dominant sector, accounting for 55.2% of the total exhibition space. This reflects the strong demand for consumer products and the thriving retail landscape in Thailand. **Industries outside the targeted S-curves also occupied a significant portion of the market, representing 26.7% of the total space.** This category encompassed diverse sectors such as oil and gas, heavy industry, paper, energy, and others. **Consumer services, while not as dominant, still held a notable 5.5% share,** indicating a steady interest in exhibitions focused on various service industries.

Focus on S-Curve Industries

Despite their strategic importance, S-curve industries occupied only 9.6% of the total exhibition space in 2023. Within this group, affluent, medical, and wellness tourism emerged as the leading sector, accounting for 4.1%. This was followed by food for the future (2.5%) and next-generation automotive (1%).

Performance of Targeted Sectors

While the representation of S-curve industries in the exhibition market was relatively modest, the performance of certain sectors, such as affluent, medical, and wellness tourism, indicates promising potential. These sectors align well with Thailand's strengths in tourism and healthcare, and their growth in the exhibition space could contribute significantly to the country's economic development.

RECOMMENDED



To foster **the growth of S-curve industries in the exhibition sector**, the TEA recommends the following:

- **Targeted Promotion:** Encourage organizers to develop and promote exhibitions specifically tailored to S-curve industries.
- **Government Support:** Provide incentives and resources to attract investment in S-curve-related exhibitions.
- **Collaboration:** Foster partnerships between industry stakeholders, research institutions, and government agencies to create a supportive ecosystem for S-curve exhibitions.



"By focusing on these strategic actions, **Thailand can unlock the full potential** of its exhibition industry and **leverage it as a powerful engine for economic growth and innovation.**"

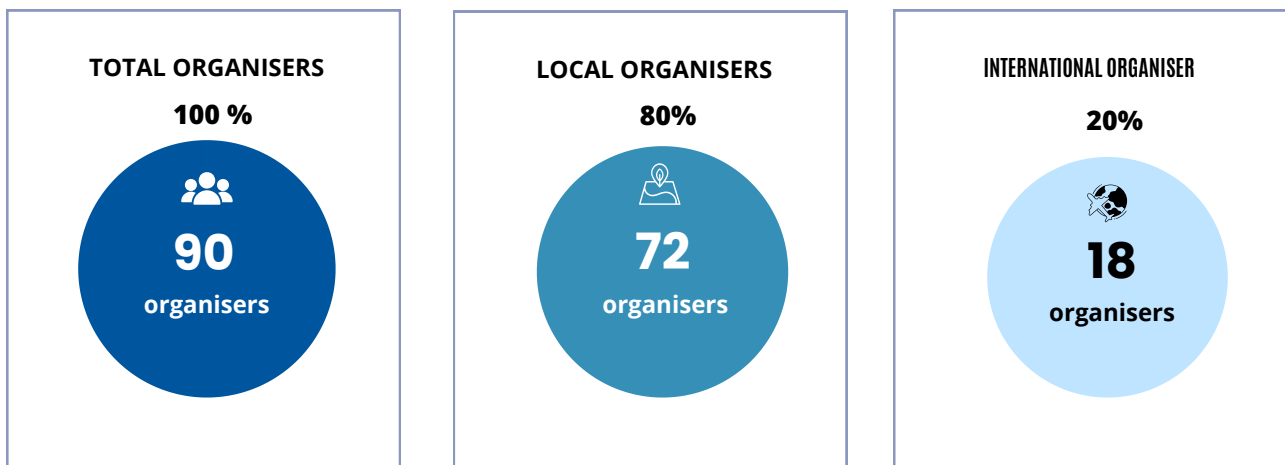
EXHIBITION ORGANISERS

EXHIBITION ORGANISERS: DRIVING THE MARKET'S SUCCESS

The exhibition industry in Bangkok thrives on the expertise and innovation of a diverse range of organizers, who play a crucial role in curating engaging and impactful events.

OVERALL ORGANISER LANDSCAPE

A total of **90 organisers** contributed to the vibrant exhibition scene in 2023. This landscape is dominated by **local organisers**, who **accounted for 80%** of the total, demonstrating the strength and capability of Thailand's event management sector. The remaining **20% were international organisers**, bringing global perspectives and expertise to the market.



TOP 5 ORGANISERS:

The following table highlights the top five organizers in terms of total occupied space, showcasing their significant contributions to the industry:

1. The Ministry of Interior (2,000,000 sq.m.)
2. Amarin Corporations Public Company Limited (1,764,153 sq.m.)
3. Ministry of Commerce (1,763,125 sq.m.)*
4. World Fair Co., Ltd. (1,307,877 sq.m.)
5. Inter-Media Consultant (1,200,000 sq.m.)

*Ministry of commerce including:

- The Sustainable Arts and Crafts Institute of Thailand (Public Organization) : สถาบันส่งเสริมศิลปหัตถกรรมไทย (องค์การมหาชน)
- Department of International Trade Promotion: สำนักพัฒนาและส่งเสริมธุรกิจบริการ
- Office of the Permanent Secretary of Commerce: สำนักงานปลัดกระทรวง กระทรวงพาณิชย์

EXHIBITION ORGANISERS

Top Organizers in Trade Exhibitions:

The Ministry of Commerce, a government body dedicated to promoting trade and economic development, emerged as the leading organizer in the trade exhibition sector. Other key players included:

- Informa Markets
- RX Tradex
- VNU Exhibition Asia Pacific Co., Ltd.
- Messe Düsseldorf Asia Pte Ltd

Top Organizers in Consumer Exhibitions:

The Ministry of Interior, responsible for various aspects of public administration, led the consumer exhibition sector. Prominent organizers in this space included:

- Amarin Corporations Public Company Limited
- World Fair Co., Ltd.
- Inter-Media Consultant
- Union Pan Exhibitions Co., Ltd.



The diversity and expertise of these organizers contribute significantly to the vibrancy and success of the exhibition industry in Bangkok. Their commitment to creating engaging and impactful events **attracts a wide range of exhibitors and attendees, driving economic activity and fostering knowledge exchange.**

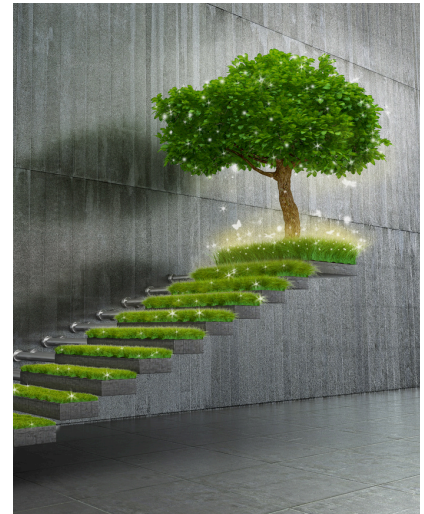


By recognizing the **contributions of these organizers and understanding the dynamics** of the organizer landscape, stakeholders can make **informed decisions, build strategic partnerships**, and unlock **new growth opportunities** in this dynamic industry.

06

RECOMMENDATIONS: DRIVING GROWTH AND INNOVATION

The TEA identifies key recommendations for each stakeholder group to unlock the full potential of Thailand's exhibition industry:



1) Prioritize S-curve Industries: Align your events with the government's 10 S-curve industries to contribute to Thailand's economic development goals. These sectors represent high-growth potential and are crucial for innovation and competitiveness.

2) Embrace Innovative Event Formats: Differentiate your events by incorporating cutting-edge technology, interactive elements, and experiential marketing strategies. This will attract a wider audience and enhance attendee engagement.

3) Foster Collaboration:

Partner with industry associations, research institutions, and government agencies to leverage their expertise and resources in organizing S-curve focused exhibitions.

4) Promote Sustainability:

Integrate sustainable practices into your events, from venue selection to waste management. This will appeal to environmentally conscious attendees and contribute to a greener future.



FOR VENUE

- 1. Strategic Pricing:** Offer flexible pricing models and incentives to attract a wider range of organizers, particularly those focusing on S-curve industries or niche markets.
- 2. Venue Marketing:** Invest in targeted marketing campaigns to showcase your venue's unique features, capabilities, and suitability for different types of events.
- 3. Data-Driven Decision Making:** Utilize data analytics to understand your target audience, optimize your event calendar, and identify areas for improvement.
- 4. Technology Upgrades:** Invest in modern technology infrastructure, such as high-speed internet, digital signage, and interactive kiosks, to enhance the attendee experience.



FOR GOVERNMENT

- 1. Incentives for S-curve Exhibitions:** Offer tax breaks, grants, or subsidies to organizers who host exhibitions related to S-curve industries. This will encourage investment and innovation in these priority sectors.
- 2. Promote Thailand as an Exhibition Hub:** Launch targeted marketing campaigns to position Thailand as a world-class destination for exhibitions, highlighting its strategic location, modern infrastructure, and diverse cultural offerings.
- 3. Streamline Regulations:** Simplify the process of obtaining permits and licenses for organizing exhibitions. This will reduce administrative burdens and attract more international organizers to Thailand.
- 4. Invest in Infrastructure:** Continuously invest in upgrading and expanding exhibition infrastructure, including transportation networks, convention centers, and support services.



By **working together and embracing these recommendations**, organisers, venues, and the government can create a **thriving and sustainable exhibition ecosystem** that **contributes to Thailand's economic growth and global competitiveness**.

LIMITATIONS & FUTURE DIRECTIONS



While **this report offers a comprehensive snapshot of the 2023 exhibition landscape**, it is important to acknowledge certain **limitations and outline potential avenues for future improvement**.

DATA SCOPE

The data collected for this analysis is **limited to the year 2023 and encompasses only four major exhibition venues in Bangkok**: BITEC, QSNCC, IMPACT, and RPH. While these venues represent a significant portion of the market, the exclusion of data from other venues and regions could limit the generalizability of the findings. In future reports, the **TEA aims to expand the data collection scope to include additional venues across Thailand**, providing a more comprehensive picture of the national exhibition landscape.

CLASSIFICATION CHALLENGES

The classification of **industries and event types presents inherent challenges** due to the **diverse nature of exhibitions**. The boundaries between **industry sectors can be fluid**, and **some events may cater to multiple audiences or combine elements** of both **trade and consumer** shows.

To address this, the TEA plans to **refine its classification methodology** in collaboration with industry experts. This will involve **developing clearer definitions and guidelines for categorizing exhibitions**, ensuring greater consistency and accuracy in future data collection.

NEED FOR ENHANCE DATA SHARING AND COLLABORATION

- **The exhibition industry thrives on collaboration and information sharing.** However, limitations in data availability and inconsistencies in reporting formats can hinder comprehensive analysis.
- **The TEA recognizes the importance of fostering a culture of data sharing within the industry.** We will actively engage with stakeholders to **encourage standardized data collection and reporting practices**. **By working together**, we can **create a more robust and reliable data ecosystem** that empowers all members to make **informed decisions and drive the industry forward**.
- By acknowledging these limitations and pursuing the outlined future directions, the TEA aims to **enhance the quality and scope of its future reports**. This will enable us to **provide even more valuable insights to our members**, ultimately contributing to the **continued growth and success of the exhibition industry in Thailand**.

CONCLUSION: FORGING A PATH TO EXHIBITION EXCELLENCE



The 2023 exhibition landscape in Bangkok showcased a **thriving industry with immense potential for growth**. Key findings from the TEA's comprehensive analysis reveal a vibrant market dominated by **consumer exhibitions in terms of quantity**, while **trade shows command a significant share of occupied space**. The diverse range of **organisers, both local and international, contributes to the dynamism of the sector**.

However, **challenges such as underutilized venue space and the underrepresentation of S-curve industries** underscore the need for strategic action. The industry must **leverage its strengths, address its weaknesses, and embrace opportunities** to ensure continued success.

OUTLOOK FOR THE INDUSTRY

The future of the exhibition industry in Bangkok looks promising, with increasing demand for both trade and consumer events. The rise of digital technologies and evolving consumer preferences present both challenges and opportunities for organizers and venues. To thrive in this evolving landscape, the industry must:

- **Embrace Innovation:** Explore new formats, technologies, and marketing strategies to engage audiences and deliver memorable experiences.
- **Prioritize Sustainability:** Integrate eco-friendly practices into all aspects of event planning and execution to appeal to environmentally conscious consumers.
- **Foster Collaboration:** Strengthen partnerships between organizers, venues, and government agencies to create a supportive ecosystem for growth.
- **Focus on S-curve Industries:** Promote and expand exhibitions related to Thailand's 10 S-curve industries to align with national economic goals.

CALL TO ACTION FOR STAKEHOLDERS

The TEA urges all stakeholders to take proactive measures to capitalize on the industry's potential:



Organisers: Develop innovative and impactful events that cater to diverse interests and industries.



Venues: Invest in technology upgrades, flexible pricing models, and targeted marketing to attract a wider range of events.



Government: Provide incentives and support for S-curve exhibitions, streamline regulations, and promote Thailand as a leading exhibition destination.



By working together, we can unlock the full potential of the exhibition industry in Bangkok, driving economic growth, fostering innovation, and creating unforgettable experiences for exhibitors and attendees alike.



THANK YOU