

2024 EXHIBITION INDUSTRY & MARKET ANALYSIS

YTD Q3 2024 PERFORMANCE
12 Nov 2024

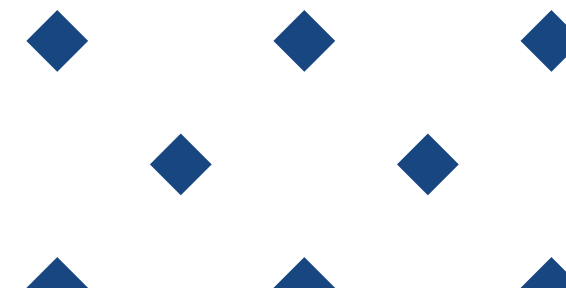


TABLE OF CONTENTS

01

EXECUTIVE SUMMARY

02

MARKET SIZE OF EXHIBITIONS

03

TYPE OF EXHIBITIONS

04

THE INDUSTRY CLASSIFICATION

05

EXHIBITION ORGANISERS

06

OCCUPANCY RATE (%)

07

MARKET SHARE OF EXHIBITIONS BY VENUE

08

APPENDIX

- List of Industry Classification

EXECUTIVE SUMMARY

OVERVIEW

The comprehensive analysis **conducted by the Thai Exhibition Association (TEA)** offers insights into the exhibition market in 2024. Data gathered from 4 venues in Bangkok Metropolitan Area, including the Bangkok International Trade & Exhibition Centre (BITEC), Queen Sirikit National Convention Center (QSNCC), Impact Exhibition and Convention Center (IMPACT), and Paragon Hall, provides a detailed overview of the industry. However **There is no data in Q1 2024 from Paragon Hall beacause it was undergoing renovations.**

Information were **collected by representatives from each venue on a quarterly basis**, including event dates, names, no. of space used , types of events, and organisers. The aim of these report is to ensure stakeholders remain informed about the current situation of the exhibition industry and to publish through any communication channels.

1. YTD Q3 2024 EXHIBITION PERFORMANCE

Regarding the **industry market size** for **YTD Q3 2024** , it reveals that **a total of 141 exhibitions** and **occupied space total 19,029,591 square meters**. Among these, **trade exhibitions accounted for 62 events (6,497,747 square meters)**, while **consumer exhibitions held 79 events (12,531,844 square meters)**. The distribution between trade and consumer **directly correlated to each other &** events reflected a ratio of **44:56 in terms of the number of events** and **34:66 in terms of occupied space**.

Into **occupied space YTD Q3 2024 was up 12% YoY** while the number of exhibitions was **slightly higher at 8 exhibitions (+6 % YoY)**

Overall, **the type of exhibitions show a difference in percentage between local and international exhibitions, with 89 local exhibitions (63%) and 52 international exhibitions (37%)**. Furthermore, upon deeper analysis, it is revealed that

- **Trade Exhibition** accounted 15 local exhibitions (24%) and 47 international exhibitions (76%)
- **Consumer Exhibition** accounted 74 local exhibitions (94%) and 5 international exhibition (6%)

Into occupancy rate YTD Q3 2024, BITEC reached 52%, QSNCC with 41%, IMPACT with 24%, Paragon Hall with 8%

For market share YTD Q3 2024, 41% of market share was IMPACT, and BITEC gained 31%, QSNCC with 27% while Paragon Hall with 1%.

2. THE INDUSTRY CLASSIFICATION

For the **industry dimension** this report is categorizes industries into **8 main segments** which comprise;

- (1) S-curve industries, (2) Consumer Products, (3) Finance, (4) Other Industrials, (5) Property, (6) Services, (7) Technology, (8) Others

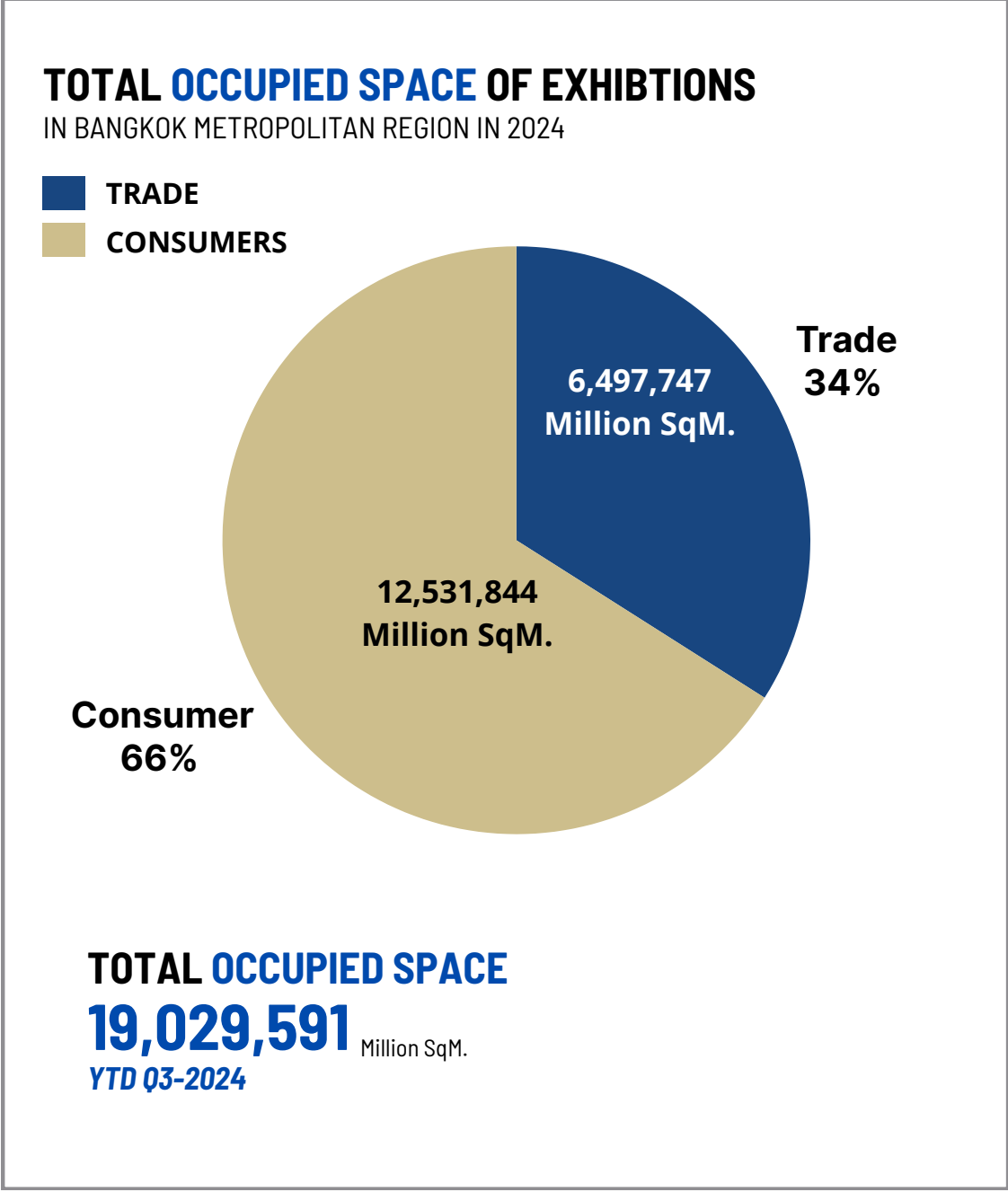
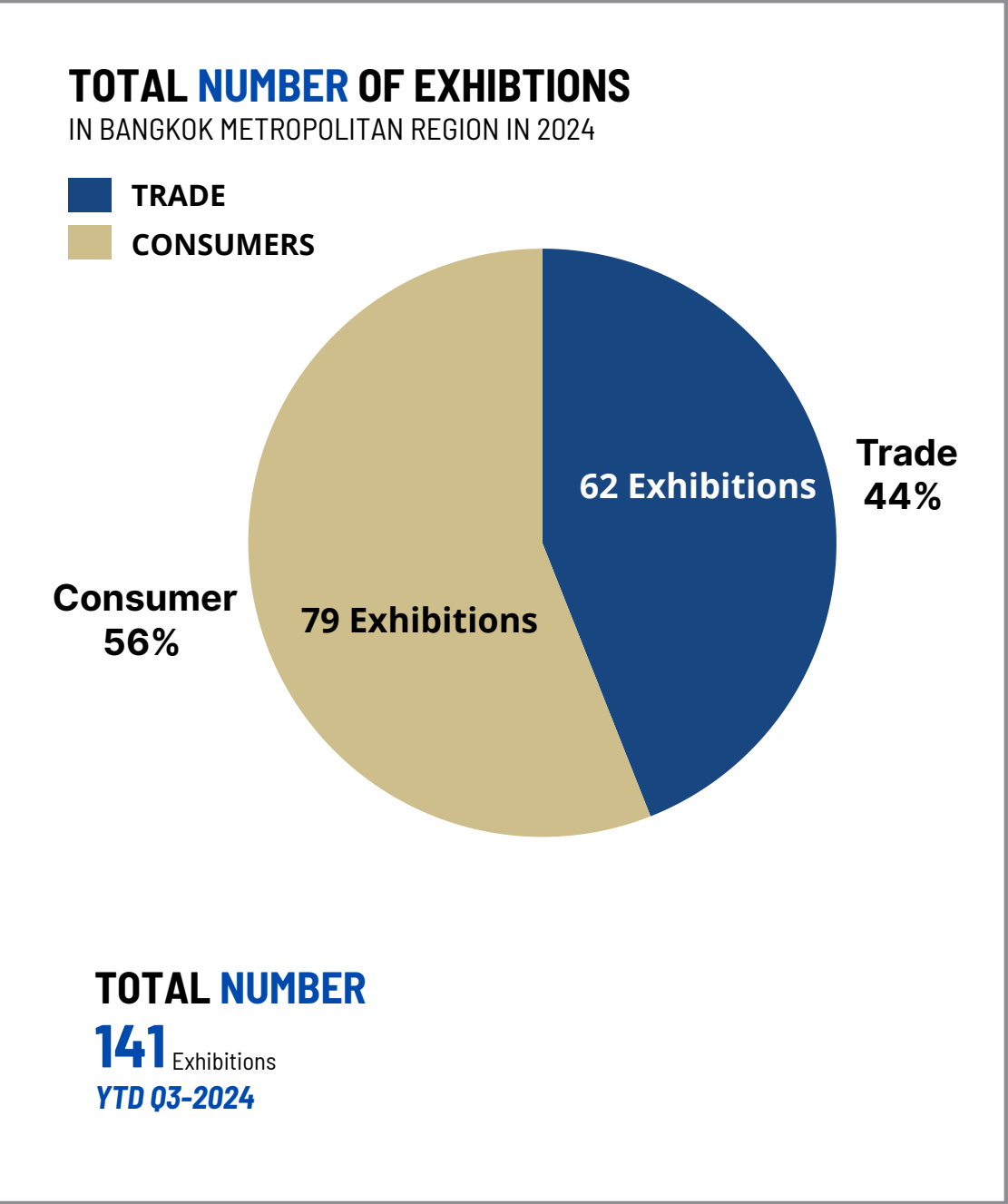
Interestingly, from the **overall market perspective YTD Q3 2024, industries lead by the consumer products sector occupied 48%** of the exhibition space. Additionally, **other industrials sectors apart from S-curves industries (such as oil and gas, and heavy industry, collectively occupied a significant portion of the space at 21%**, while the **services sector held 17 %** of the space. However, it is revealed that **the occupied space from Thailand's targeted S-curve industries**, which the country intended to support and drive industrial growth, **comprised only 5% of the total exhibition market**

3. EXHIBITION ORGANISER

For **overall organisers** data reveals there were **total 84 organisers** that 65 organisers or 77% were local, while 19 organisers or 23% were international.

2024 MARKET SIZE OF EXHIBITIONS

(From 4 main exhibition venues in Bangkok Metropolitan Area)

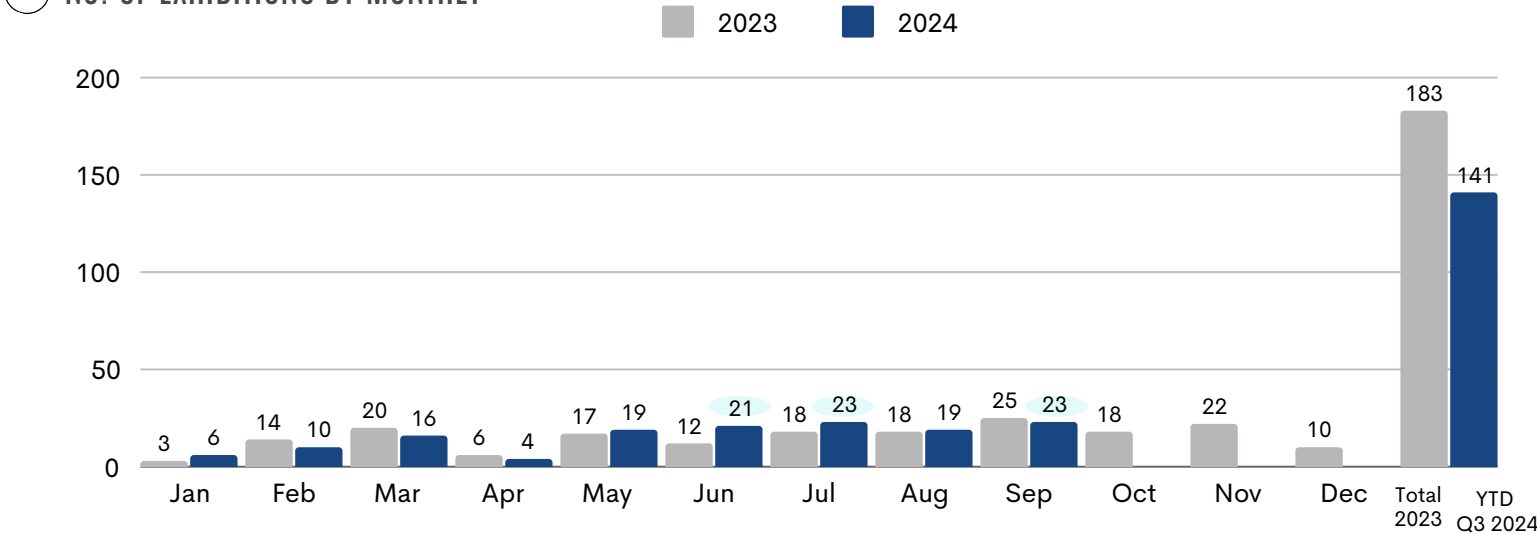


- YTD Q3 - 2024 , There were 141 exhibitions in Bangkok Metropolitan Area’s main exhibition venues.
- Consumer exhibition accounted for the largest propotion of the market 56% (79 Exhibitions)
- Trade exhibition accounted 44% of the market (62 Exhibitions)
- The market size of total occupied space was 19,029,591 sq.m.
- Consumer exhibition reached for the largest propotion of the market at 66% (12,531,844 sq.m.)
- Trade Exhibition accounted for 34% of the market (6,497,747 sq.m.)

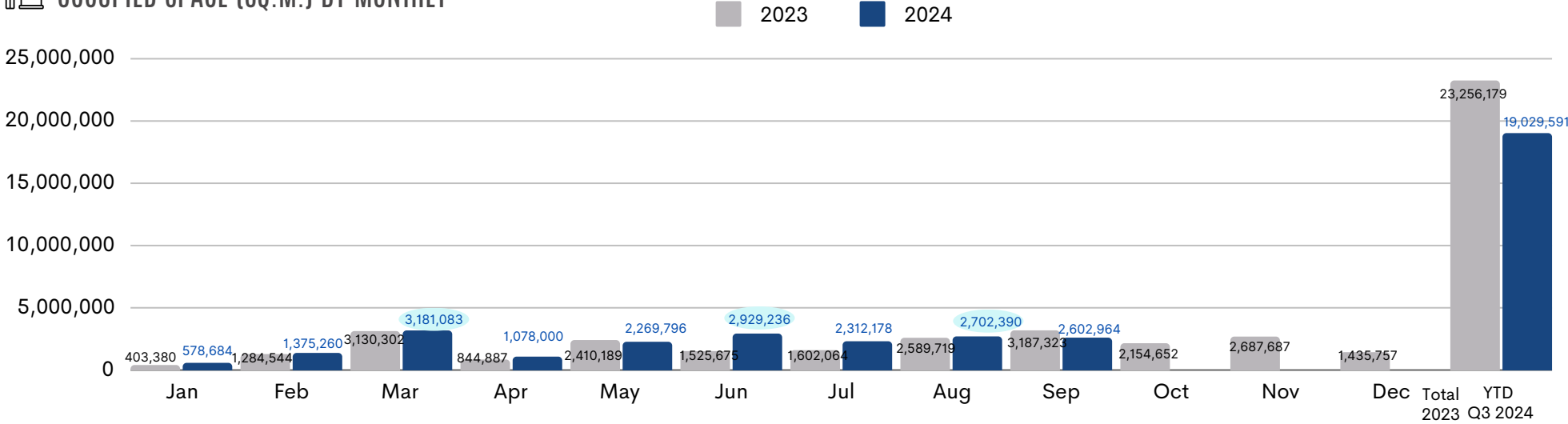
2024 MARKET SIZE OF TOTAL EXHIBITIONS

(From 4 main exhibition venues in Bangkok Metropolitan Area)

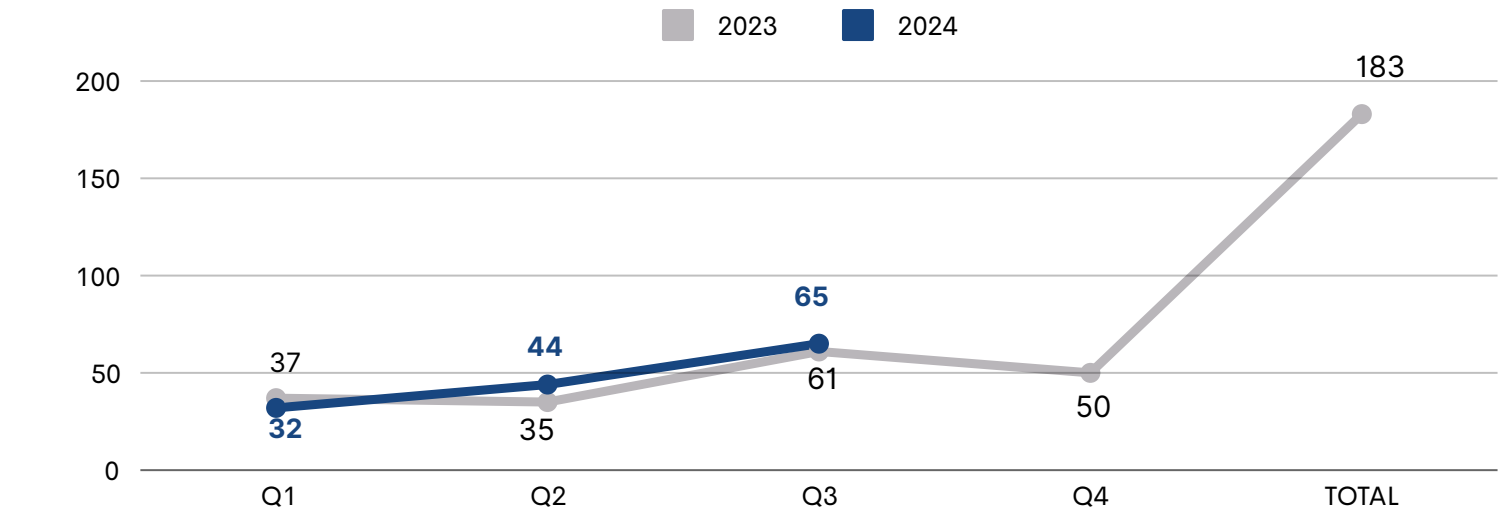
NO. OF EXHIBITIONS BY MONTHLY



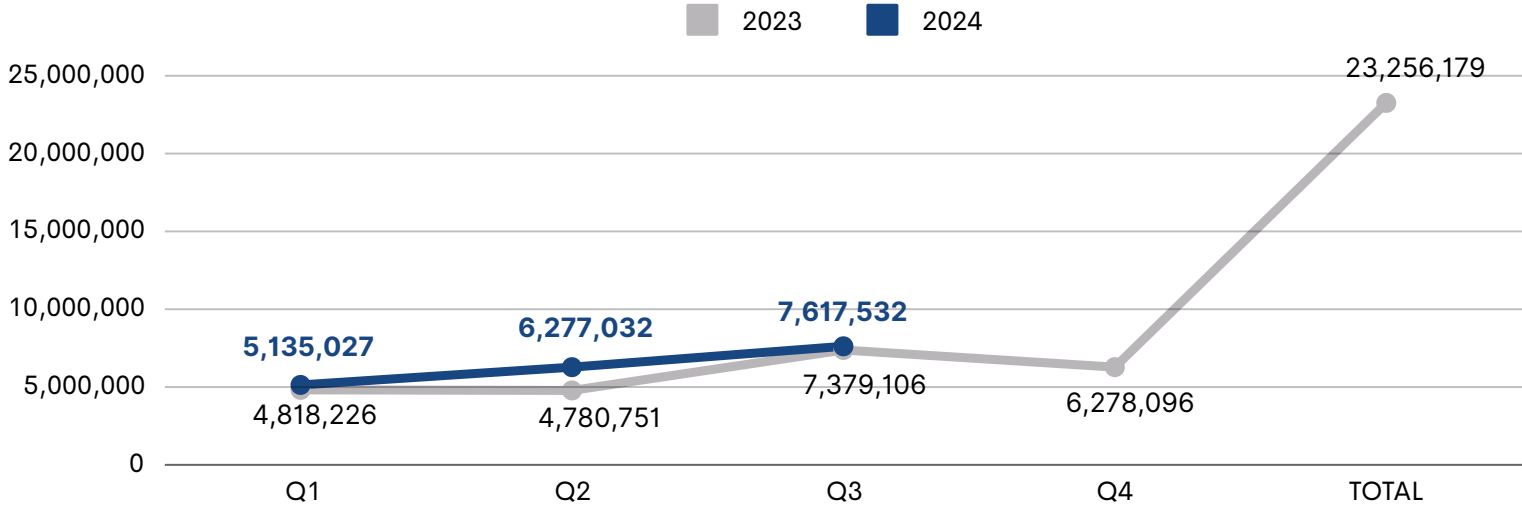
OCCUPIED SPACE (SQ.M.) BY MONTHLY



NO. OF EXHIBITIONS BY QUARTERLY



OCCUPIED SPACE (SQ.M.) BY QUARTERLY

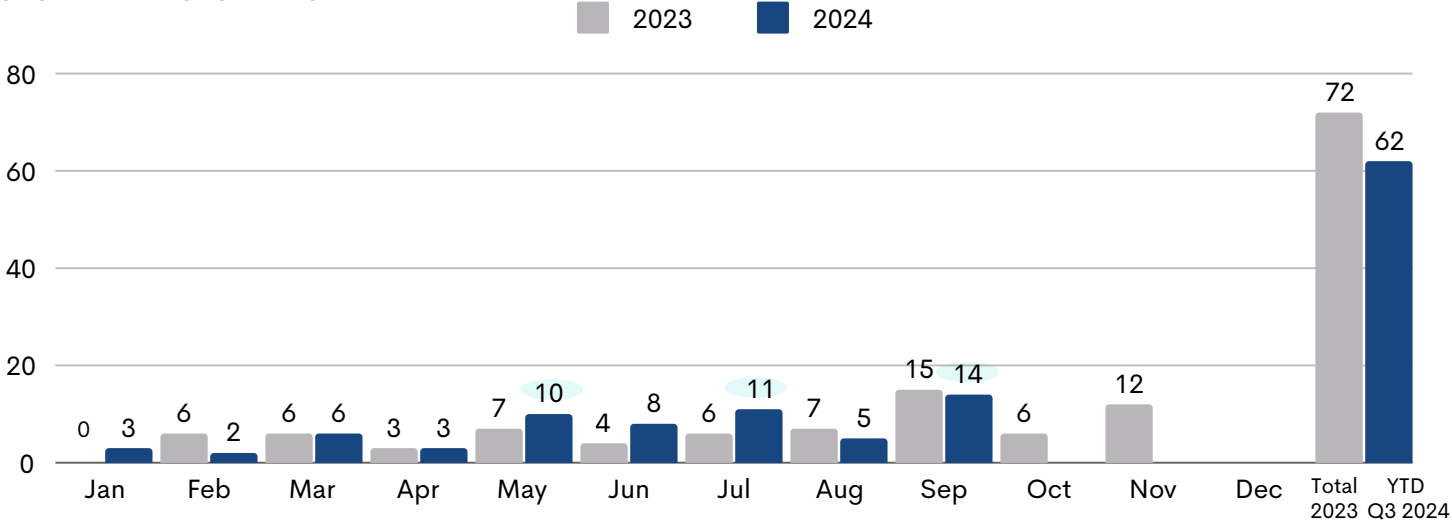


- Q1-Q3 Y2023 there were 133 exhibitions while **in overall last 9 months in Y2024 there were 141 exhibitions, The number of exhibitions was slightly higher at 8 exhibitions (+6% YoY),**
- Number of occupied space in Q1-Q3 2023 was 16,978,083 sq.m., **For YTD Q3 2024 was 19,029,591 sq.m., up 12% compared to YoY**
- Number of **occupied space were highest in March 2024, followed by June and August respectively**

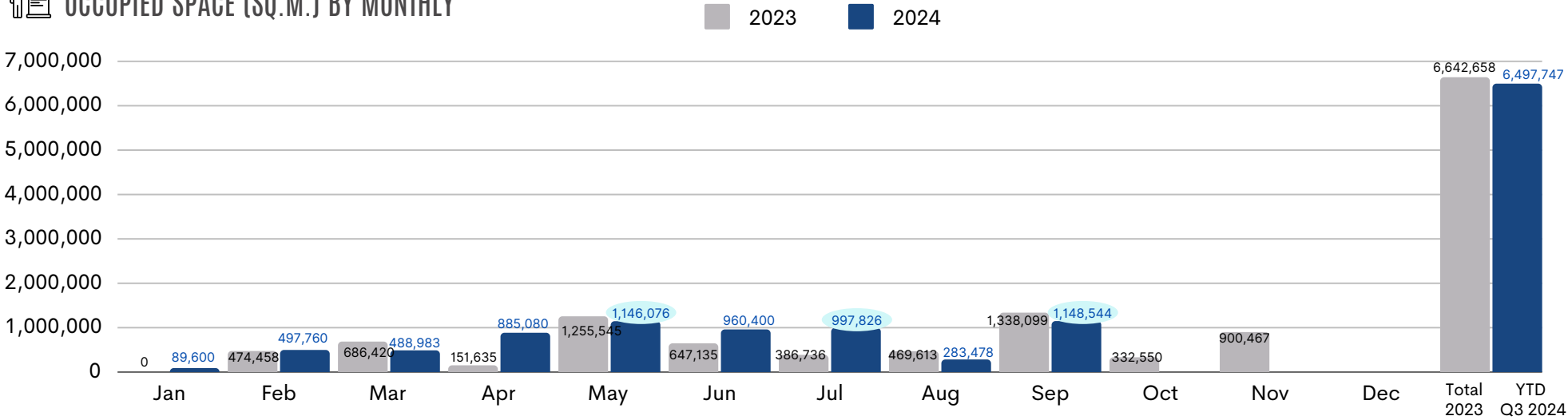
2024 MARKET SIZE OF TRADE EXHIBITIONS

(From 4 main exhibition venues in Bangkok Metropolitan Area)

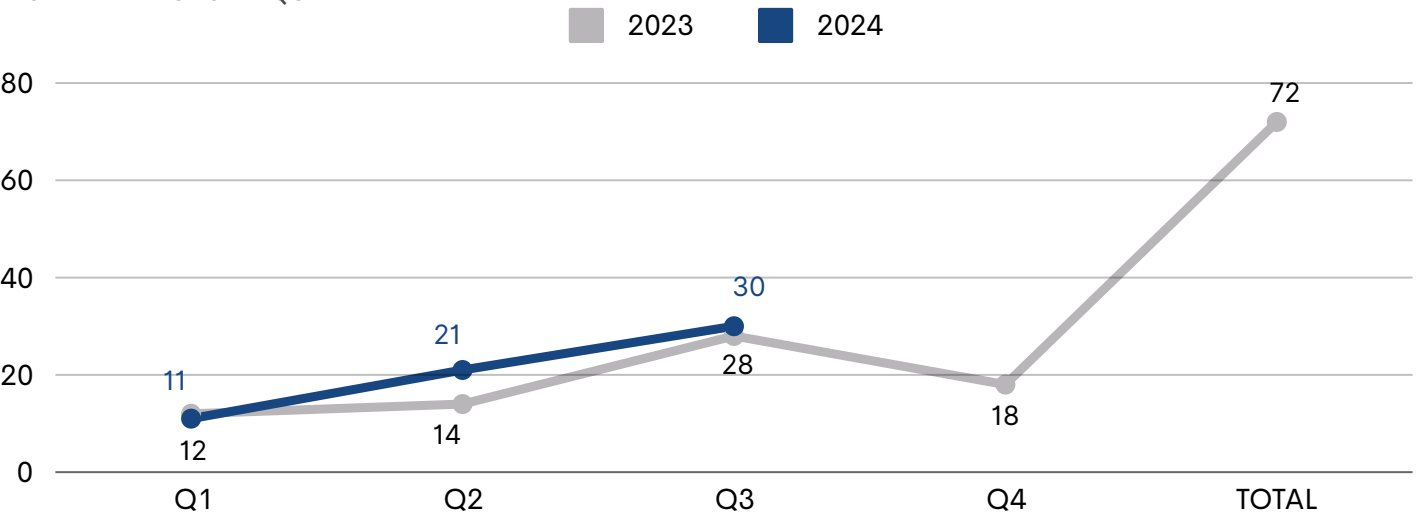
NO. OF EXHIBITIONS BY MONTHLY



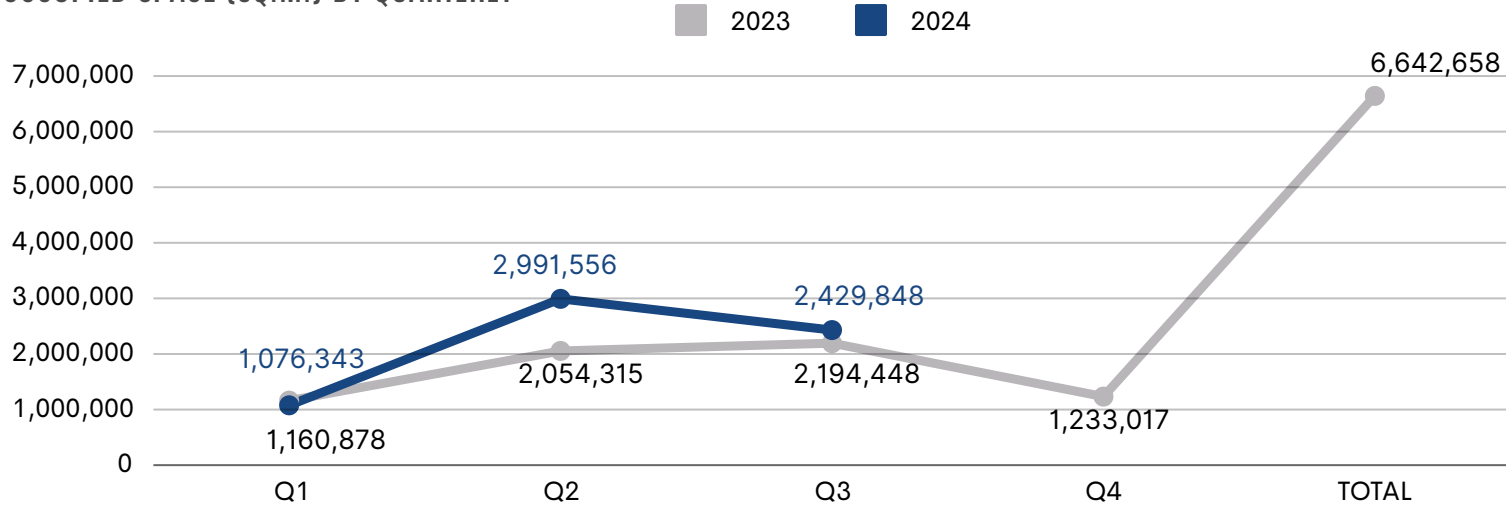
OCCUPIED SPACE (SQ.M.) BY MONTHLY



NO. OF EXHIBITIONS BY QUARTERLY



OCCUPIED SPACE (SQ.M.) BY QUARTERLY

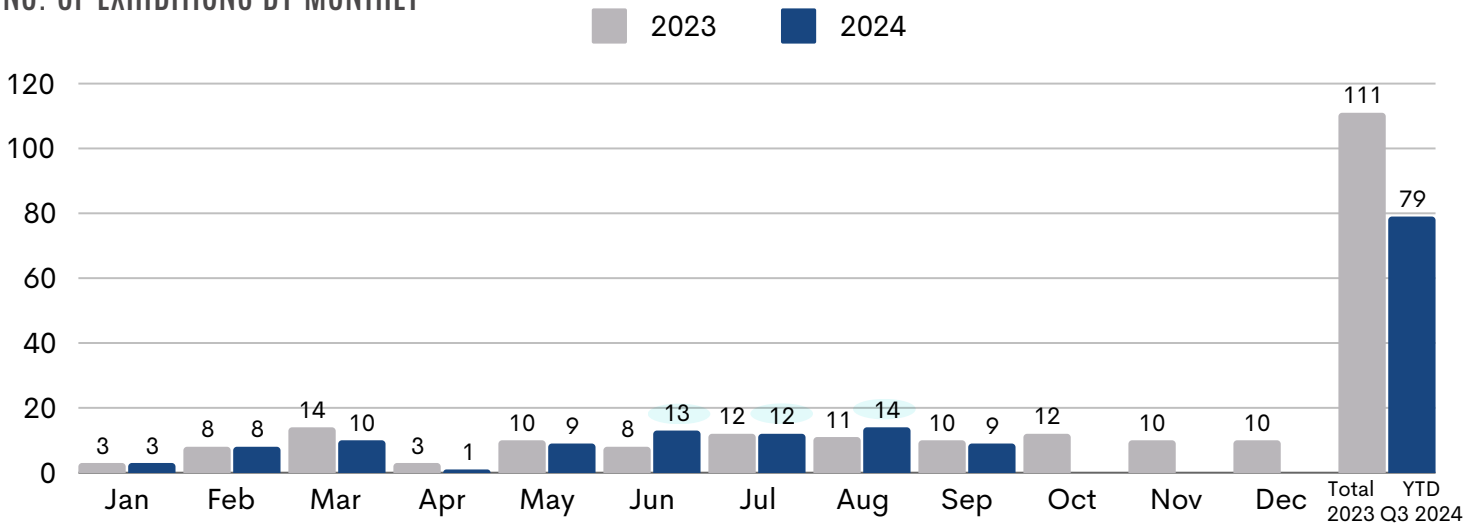


- In overall last 9 months in Y2024, The number of **trade exhibitions steadily increased from Q1 to Q3, reaching a peak of 30 exhibitions in Q3.**
- **Trade exhibitions in Q1-Q3 were set 54 exhibitions, YTD 2024 there were a total of 62 exhibitions that increase 8 exhibition (+15% YoY)**
- **Number of occupied space YTD Q3 2024 was 6,497,747 sq.m., marking a 20% increase (+1,088,106 sq.m.) compared to the previous year.**
- 2024 Number of **trade exhibitions was peaked in September (14 Exhibitions), with totaling 1,148,544 sq.m.**

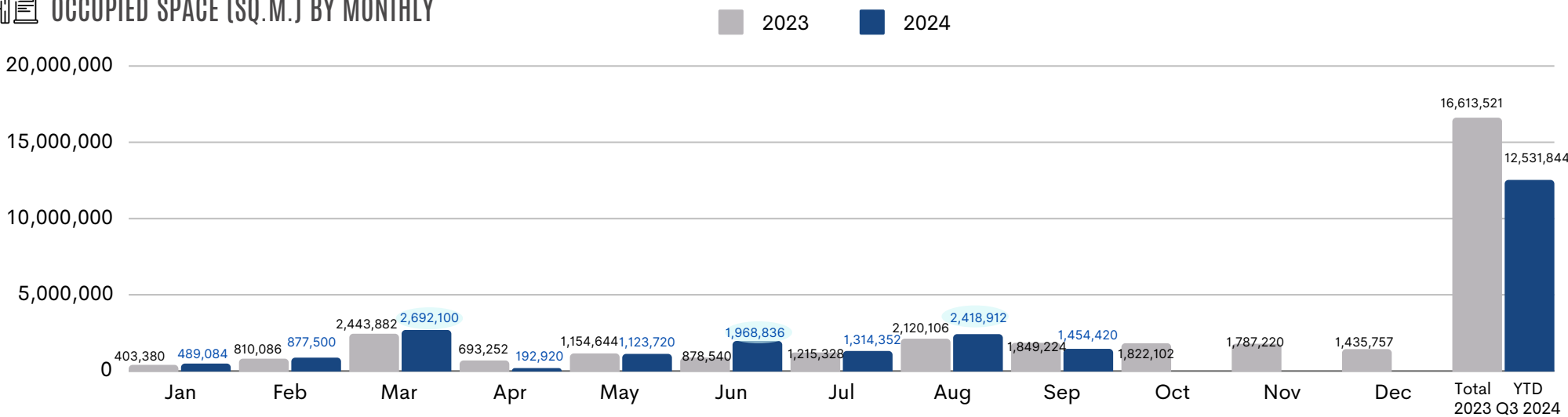
2024 MARKET SIZE OF CONSUMER EXHIBITIONS

(From 4 main exhibition venues in Bangkok Metropolitan Area)

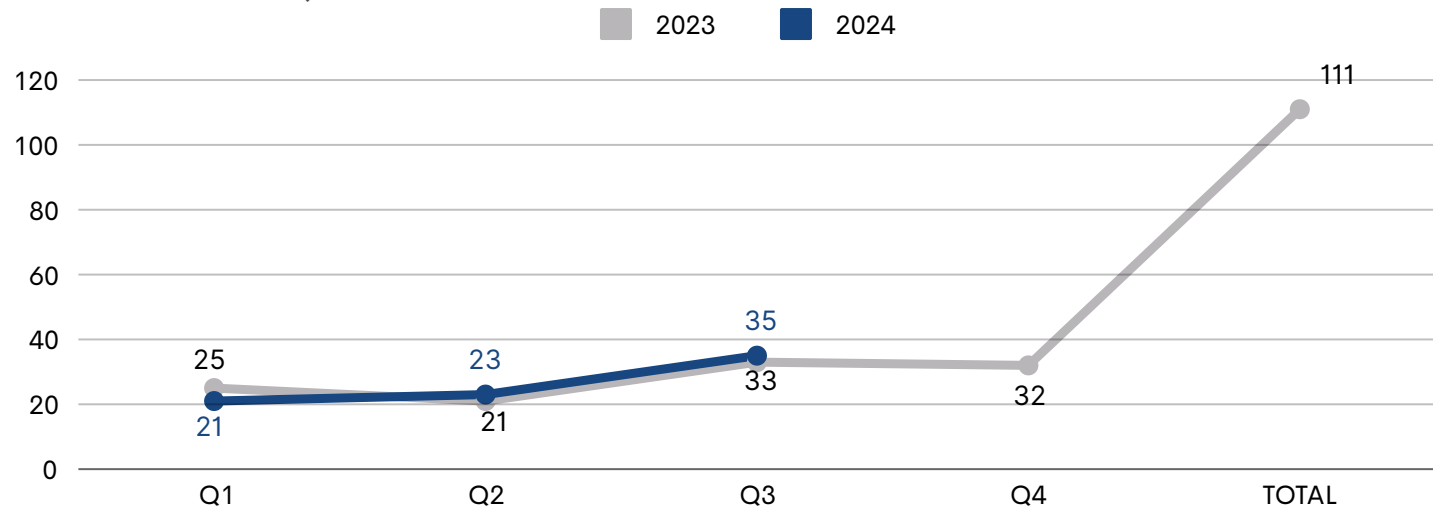
NO. OF EXHIBITIONS BY MONTHLY



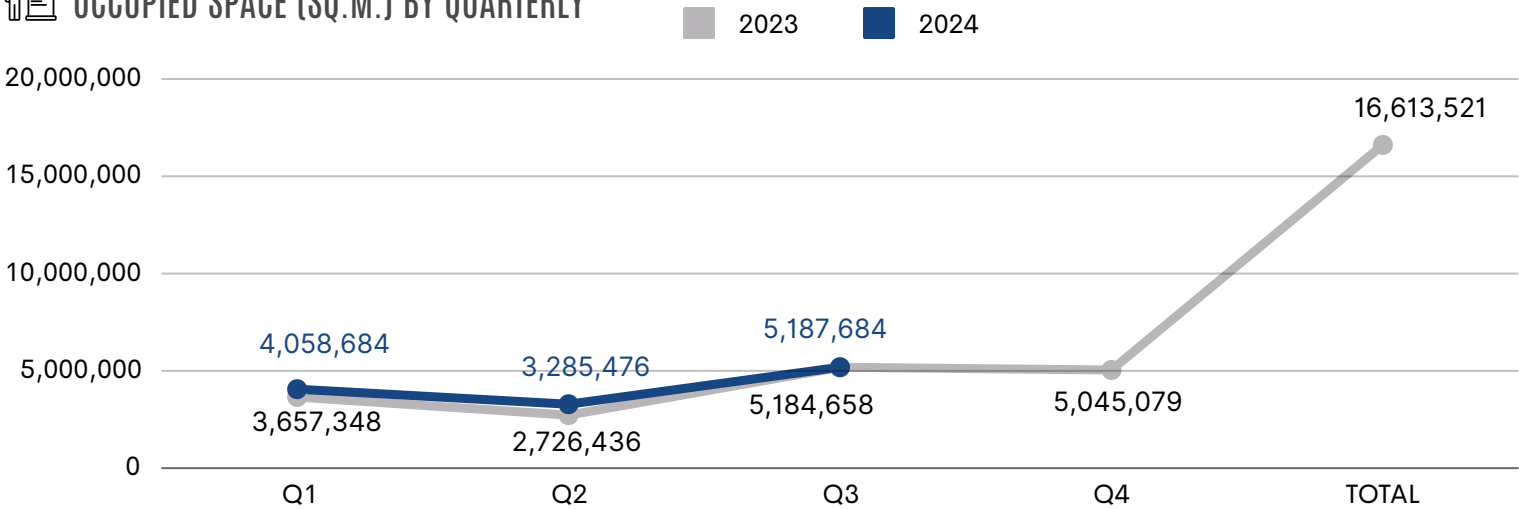
OCCUPIED SPACE (SQ.M.) BY MONTHLY



NO. OF EXHIBITIONS BY QUARTERLY



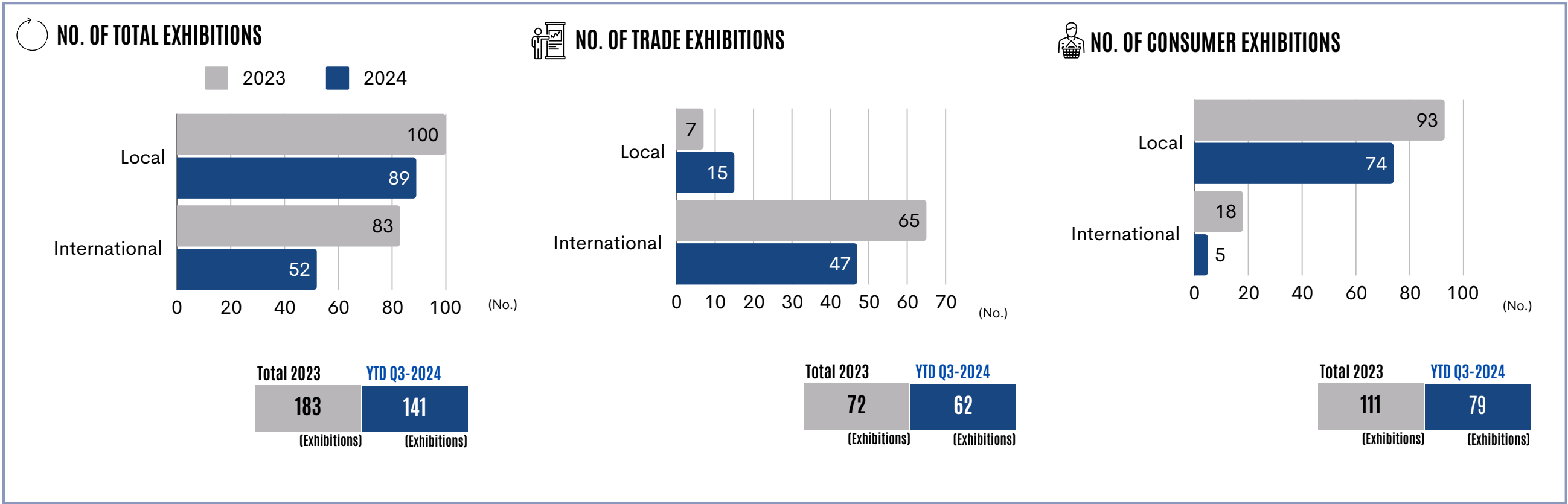
OCCUPIED SPACE (SQ.M.) BY QUARTERLY



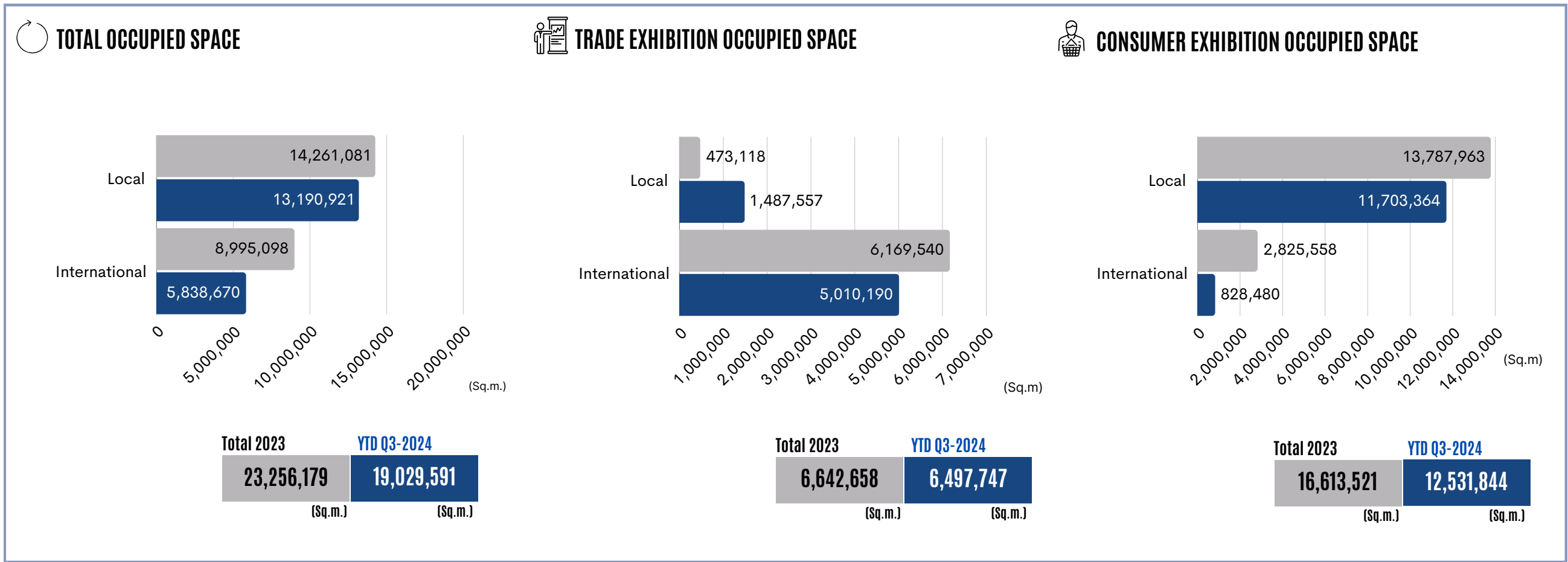
- In Jun-Aug 2024, **Consumer Exhibitions were the busiest consumer exhibition months** at 13,12,14 exhibitions respectively.
- The number of **consumer exhibitions in Q1-Q3 2024 remained consistent with the previous year, totaling 79 events**
- **Occupied space increased by 8% YoY**, from 11,568,442 sq.m. to 12,531,844 sq.m.

2024 TYPE OF EXHIBITIONS

(From 4 main exhibition venues in Bangkok Metropolitan Area)



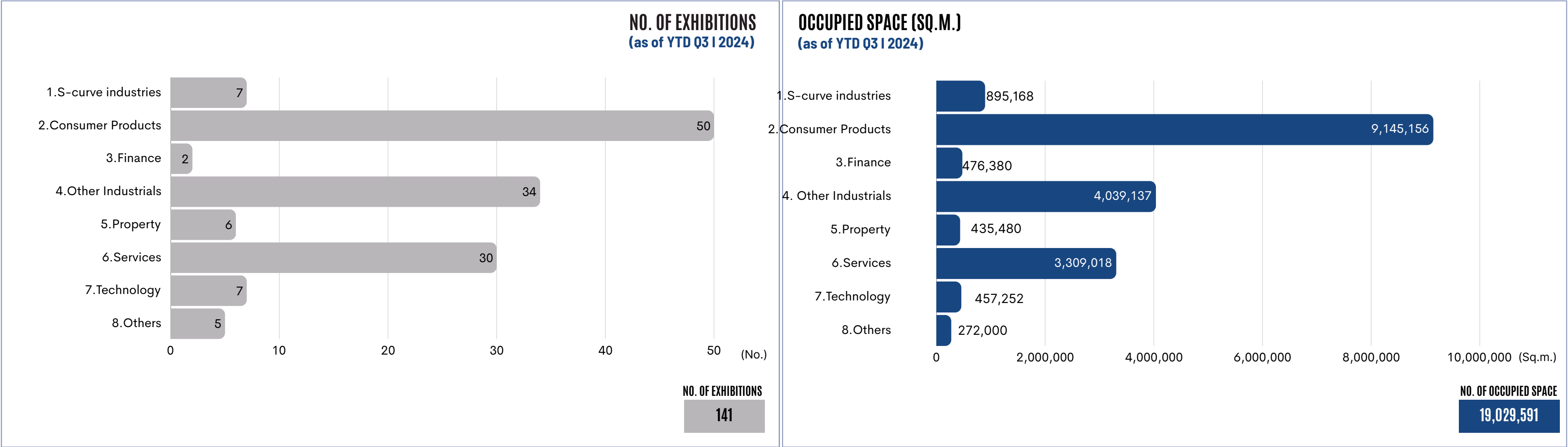
- From **total 141 exhibitions YTD Q3 2024**, There were reached **89 local exhibitions (63%)** and **52 international exhibitions (37%)**
- Trade Exhibition** accounted **15 local exhibitions (24%)** and **47 international exhibitions (76%)**
- Consumer Exhibition** accounted **74 local exhibitions (94%)** and **5 international exhibition (6%)**



- In YTD Q3 2024, **The majority of occupied space from total was local exhibition that hit 13,190,921 sq.m. (69%)** and the rest was **international exhibition at 5,838,670 sq.m. (31%)**
- Trade Exhibition;** Most exhibitions (77%) were **international exhibition (5,010,190 sq.m.)** only with 23% including some **local exhibition (1,487,557 sq.m.)**
- Consumer Exhibition;** The proportion of **local exhibition accounted 11,703,364 sq.m. (93%)** and **international exhibition accounted 828,480 sq.m. (7%)**

2024 INDUSTRY CLASSIFICATION OF TOTAL EXHIBITIONS

(From 4 main exhibition venues in Bangkok Metropolitan Area)



- **The exhibition industries with largest number** were **consumer products** which reached 50 exhibitions
 - **Top 3 popular exhibitions** as of YTD Q3 2024 comprised (i) consumer products (50 exhibitions), (ii) other industrial (34 exhibitions) and (iii) Services (30 exhibitions)
- **The majority of occupied space** from total was **consumer products** that counted **9,145,156 sq.m. (48%)** and following with **other industrials** reached **4,039,137 sq.m. (21%)** and **services** accounted **3,309,018 sq.m. (17%)**
 - While the **total of 10 Thai S-curve Industries** comprised only **895,168 sq.m. (5%)**

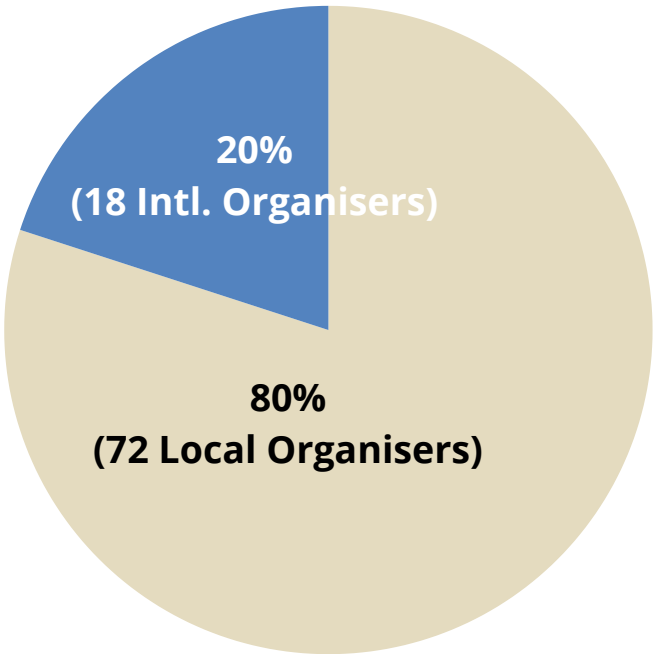
2024 MARKET SIZE OF ORGANISERS

(From 4 main exhibition venues in Bangkok Metropolitan Area)

2023 TOTAL NUMBER OF ORGANISERS

IN BANGKOK METROPOLITAN REGION

- LOCAL ORGANISERS
- INTERNATIONAL ORGANISERS (INTL.)

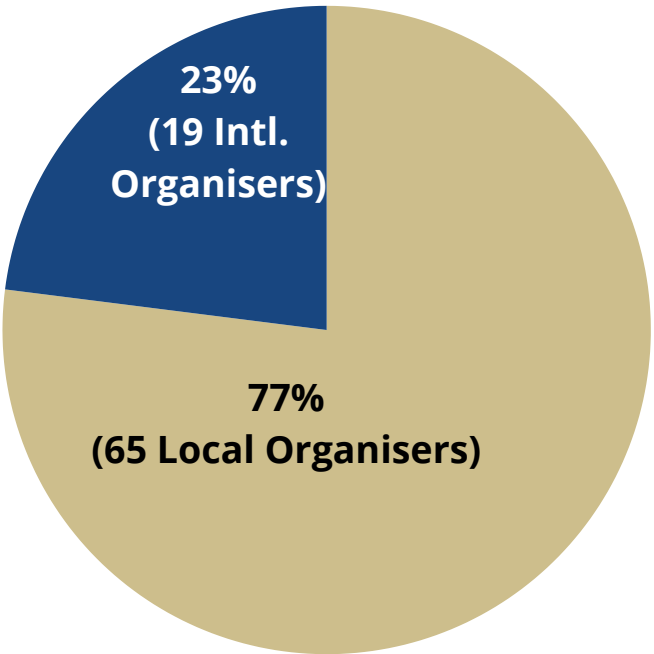


TOTAL NUMBER
90 Organisers

2024 TOTAL NUMBER OF ORGANISERS

IN BANGKOK METROPOLITAN REGION

- LOCAL ORGANISERS
- INTERNATIONAL ORGANISERS (INTL.)

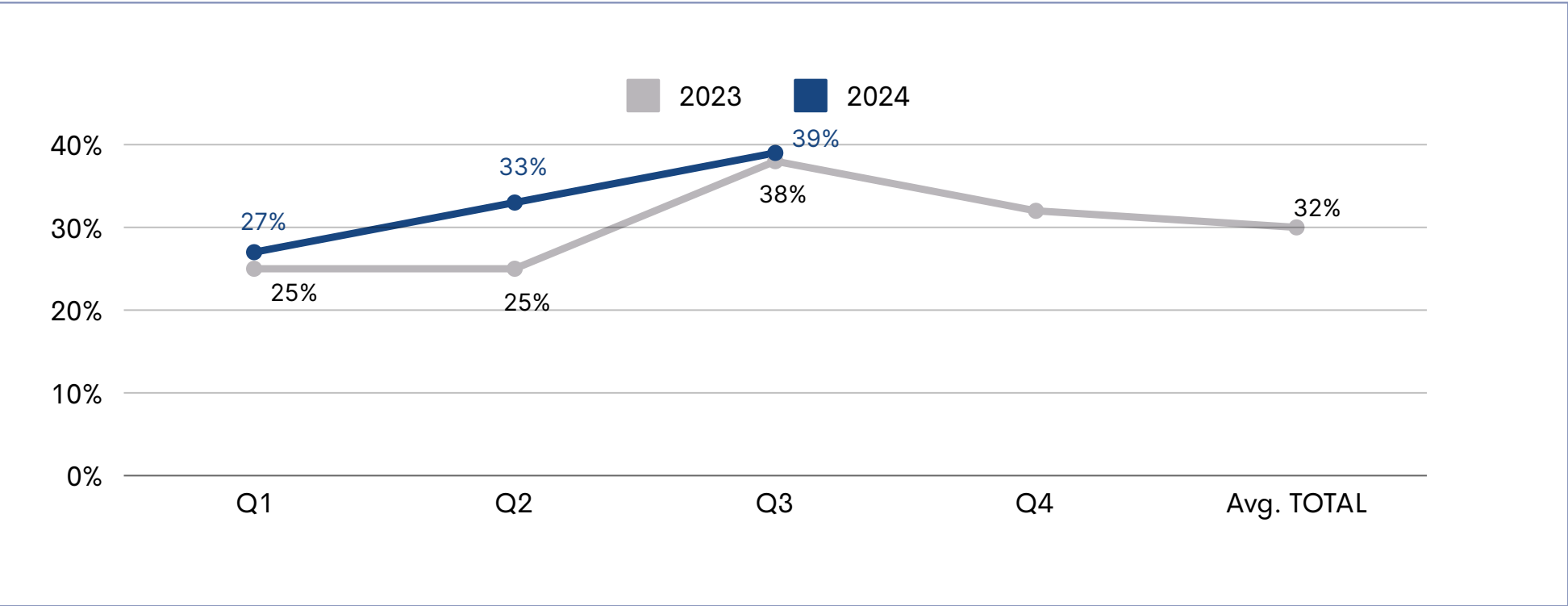
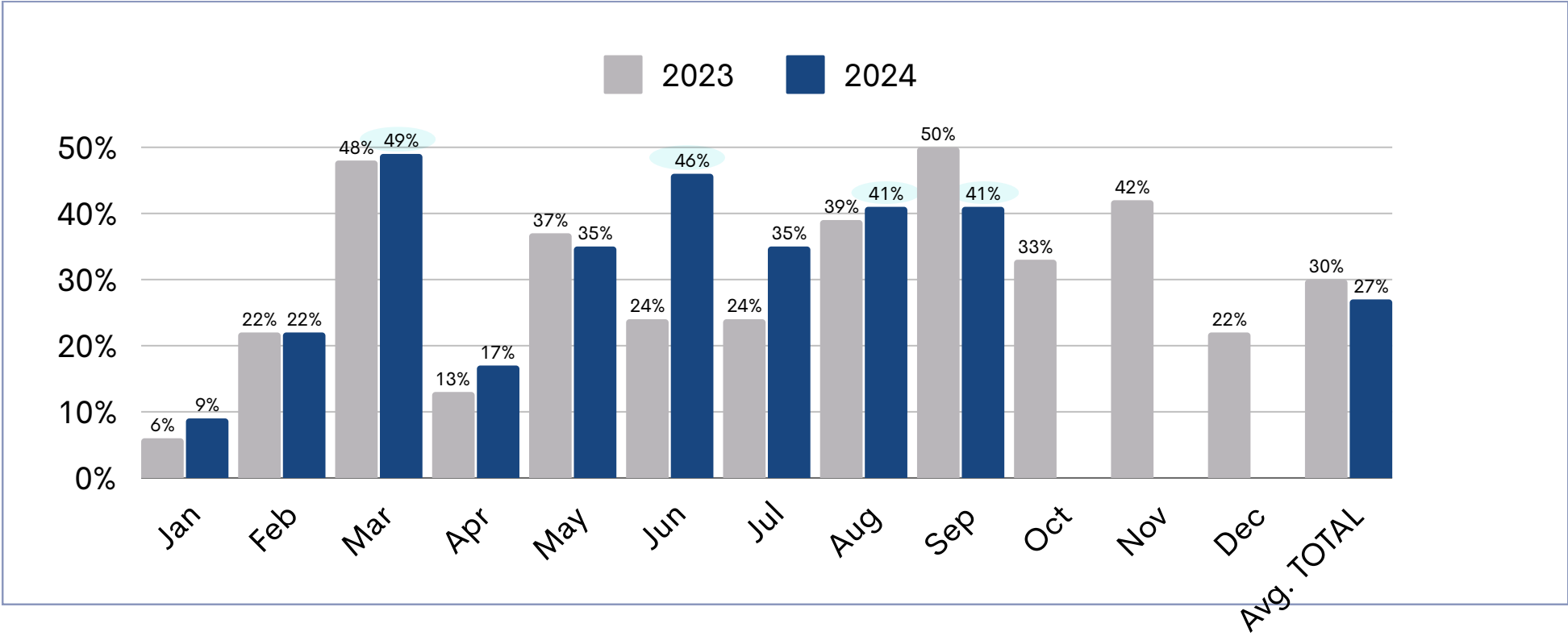


(as of YTD Q3 / 2024)
TOTAL NUMBER
84 Organisers

- In 2023, There were total 90 organisers including 72 local organisers and 18 international organisers which comprised 80% and 20% respectively
- For YTD Q3-2024, There are 84 organisers which devided 65 local organisers (77%) and 19 international organisers (23%)

2024 OCCUPANCY RATE (%)

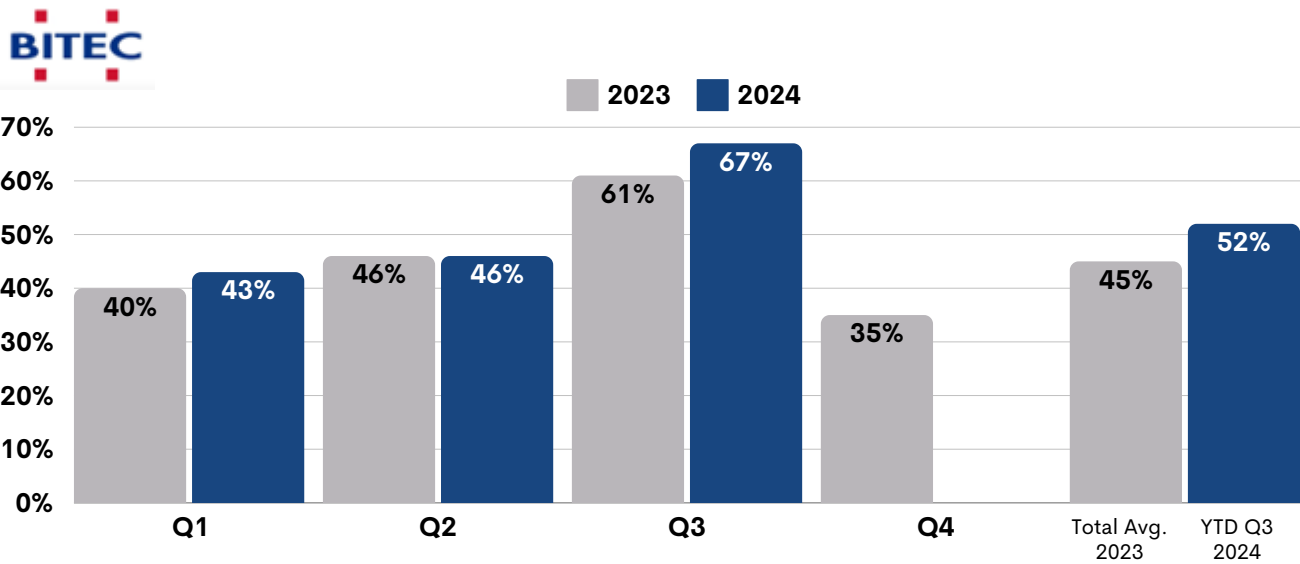
(From 4 main exhibition venues in Bangkok Metropolitan Area)



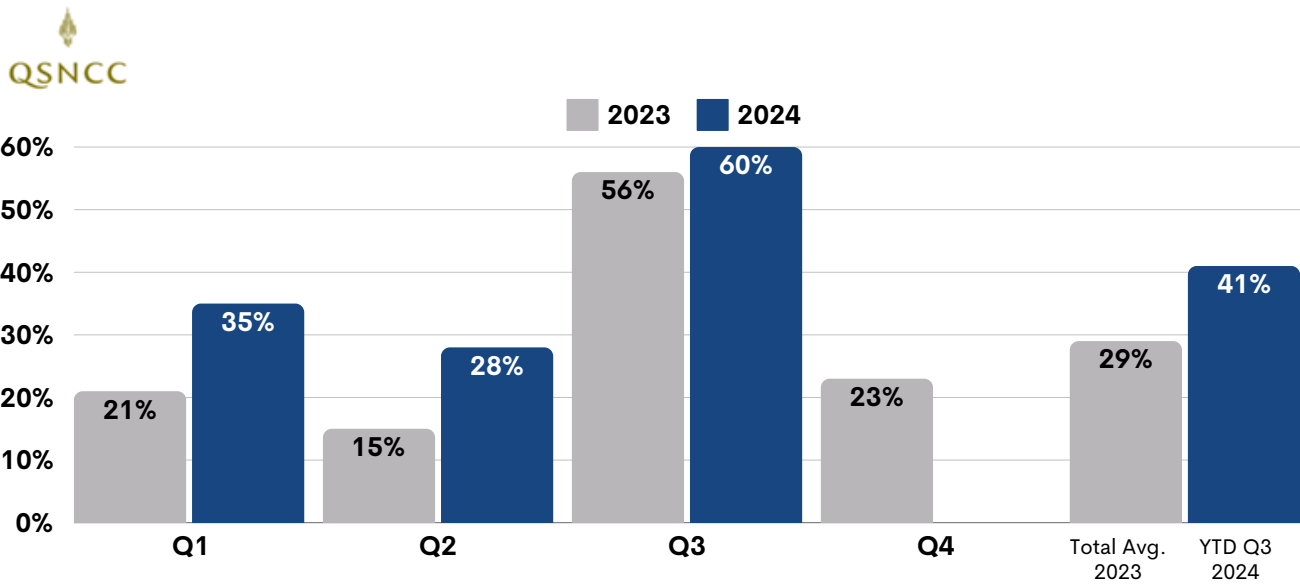
- YTD Q3 2024, There were total space for exhibition 57,970,728 sq.m., and **there was counted 33% (19,029,591 sq.m.) of total occupancy rate.**
- **Occupancy rates peaked at 49% in March 2024, followed by 46% in June and 41% in August and September.** they were slightly different except in Jun that increase 22% compared from the previous year.
- YTD Q3 2024, There was **significant increase** in occupancy rates compared to 2023
- Q3 of 2024 had the highest occupancy rate, reaching 39%

2024 OCCUPANCY RATE (%)

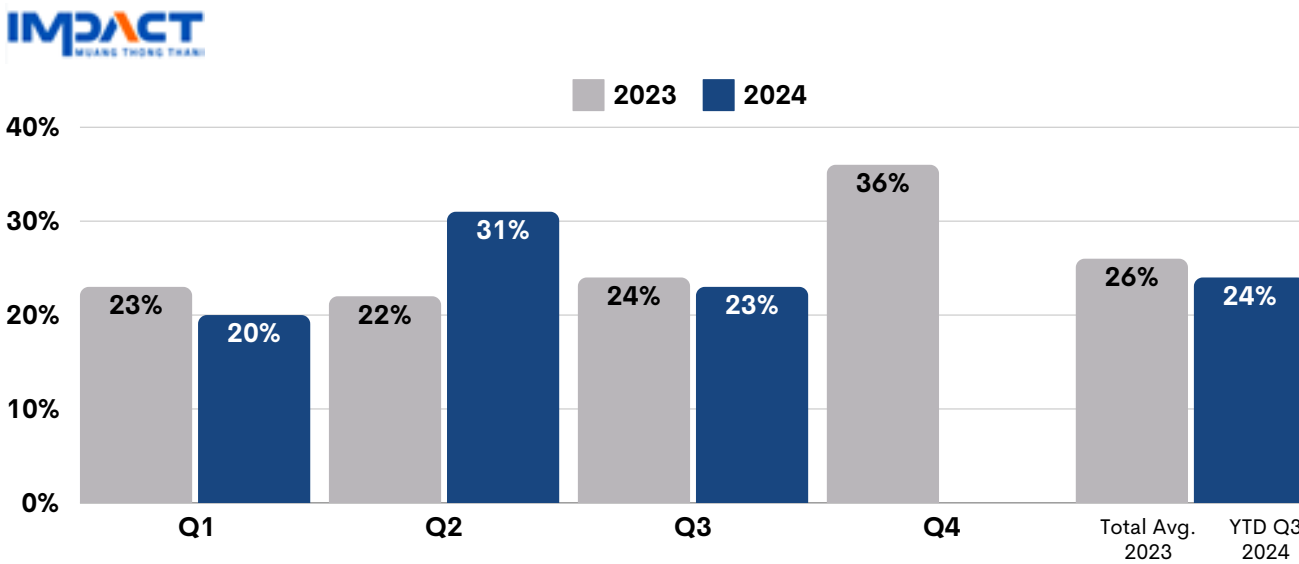
(Ratio of occupied space (sq.m.) by each venue from 4 main exhibition venues in Bangkok Metropolitan Area)



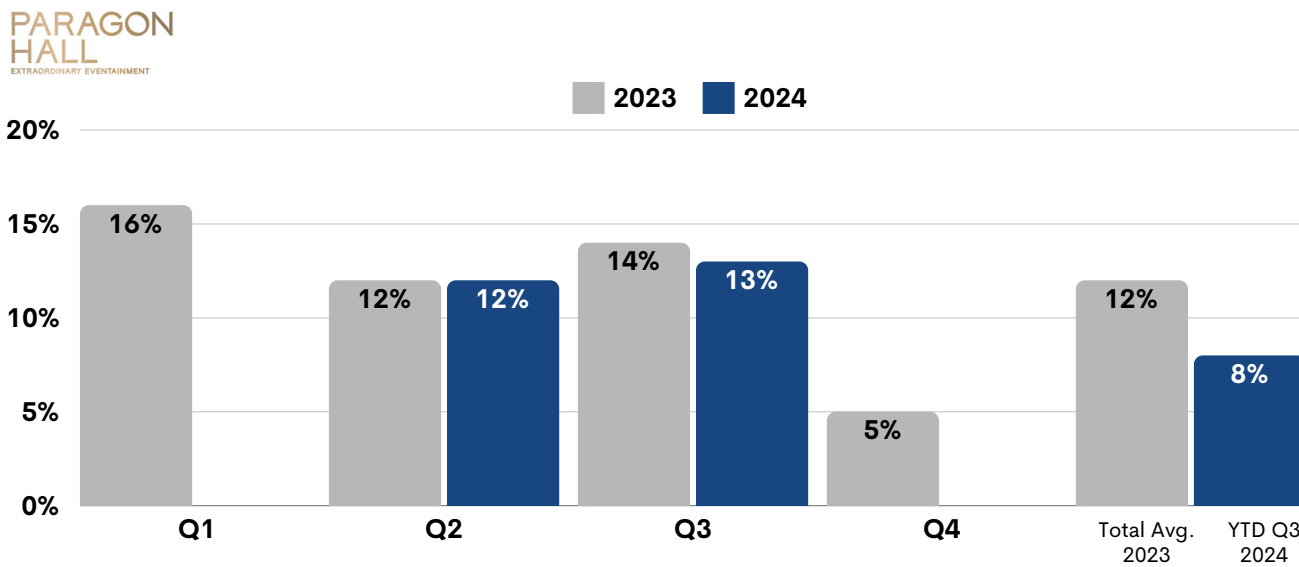
- BITEC, There were **total space for exhibitions in YTD Q3 2024 at 11,291,266 sq.m.**
- **Number of occupied space YTD Q3 2024 was 5,877,288 sq.m. (52%)**
- **Q3 2024 had the highest occupancy rate, reaching 67%.** (trade exhibition 25% and consumer exhibiton 42%). They were **slightly increase at 6% YoY**



- QSNCC, There were **total space for exhibitions in YTD Q3 2024 at 12,353,290 sq.m.**
- **Number of occupied space YTD Q3 2024 was 5,078,270 sq.m. (41%)**
- **Q3 2024 achieved a peak occupancy rate of 60%** (trade exhibition 28% and consumer exhibiton 33%), up to 4% YoY



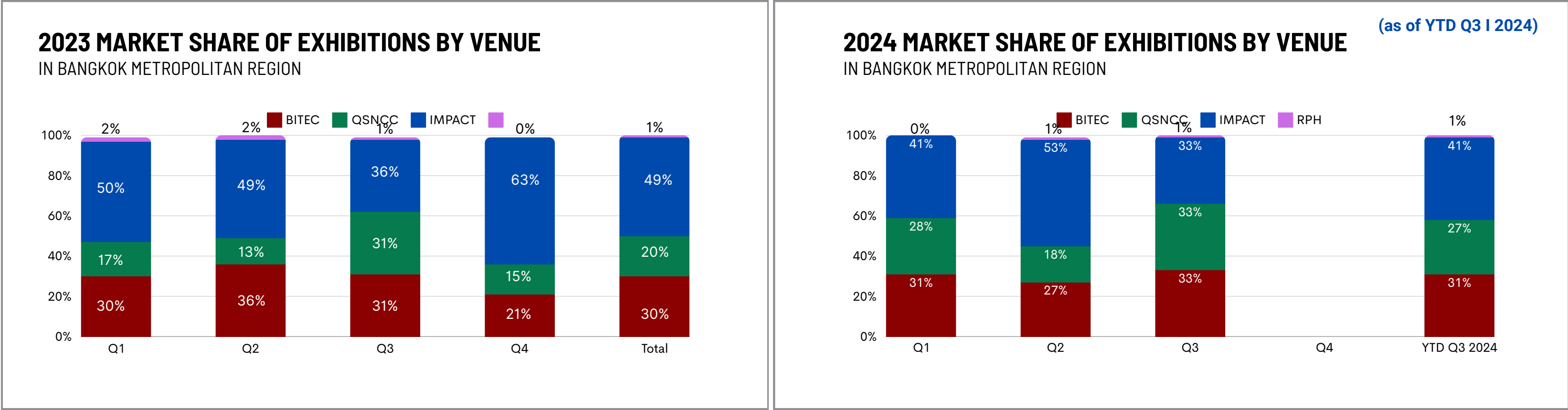
- IMPACT, There were **total space for exhibitions in YTD Q3 2024 at 32,377,210 sq.m.**
- **Number of occupied space YTD Q3 2024 was 7,910,833 sq.m. (24%)**
- **In Q2 2024, the occupancy rate reached its peak at 31%, marking a 9% increase YoY**
- **Q3 2024 reached 23%** (trade exhibition 3% and consumer exhibiton 20%)



- Paragon Hall, There were **total space for exhibitions in YTD Q3 2024 at 1,948,962 sq.m.**
- **Q1 2024 They have no occupancy rate due to under renovation**
- **Number of occupied space YTD Q3 2024 was 163,200 sq.m. (8%)**
- **There was stable in period Q2- Q3 at avg. 13%**

2024 MARKET SHARE OF EXHIBITIONS BY VENUE

(Ratio of occupied space (sq.m.) by each venue from 4 main exhibition venues in Bangkok Metropolitan Area)



- Total year 2023, The largest propotion of market share was **IMPACT that reached 49%** of the total occupied space, and following with BITEC at 30%, QSNCC with 20%, Paragon Hall only 1%.
- **IMPACT maintained a strong lead market share** every quarter, a peak of market share 63% in Q3 2023
- YTD Q3 2024, **41% of market share was IMPACT**, and BITEC gained 31%, QSNCC with 27% while Paragon Hall only 1%.
- **IMPACT** was consistently hols the largest market share almost each quarter.
- **QSNCC** was fluctuated throughout the year, **peaking at 33% in Q3**.
- **BITEC** was remained relatively stable across all quarters, slightly different within 4-6% range.



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APPENDIX

LIST OF INDUSTRY CLASSIFICATION

#	Main Industry	#	Sub Industry (Refer from TCEB)	Description
1	S-curve industries	1	Next-Generation Automotive	All automotive shows as all will have a with a nex gen element. Including Electric vehicle (EV) production, Power transmission parts, Automotive safety system parts.
1	S-curve industries	2	Smart Electronics	Integrated Circuit Manufacturing, Smart Appliances, Internet of Things , Microelectronics, Embedded Systems
1	S-curve industries	3	High-Value and Medical and Wellness Tourism	All tourism and medical tourism shows. Shows will generally all include an element of high value tourism
1	S-curve industries	4	Advanced Agriculture and Biotechnology	*Advanced agricultural technology business, such as using sensor systems , using advanced data analysis techniques (Advance Danalytics) , and automation (ธุรกิจเทคโนโลยีการเกษตรขั้นสูง เช่น การใช้ระบบเครื่องรับรู้ (Sensors) การใช้เทคนิคการวิเคราะห์ข้อมูลระดับสูง (Advance Danalytics) และระบบอัตโนมัติ)
1	S-curve industries	5	Food for the Future	Extracts/Products from Extracts, Speciality Foods (Vegan, Organic, Plant Based etc.). But not agriculture/
1	S-curve industries	6	Robotics	*Robots used in the automotive manufacturing industry, electronic, plastic injection molding production process, Specialized Robots (หุ่นยนต์ที่ใช้ในอุตสาหกรรมการผลิตยานยนต์, อิเล็กทรอนิกส์, หุ่นยนต์ที่ใช้ในกระบวนการผลิตอัดฉีดพลาสติก, หุ่นยนต์
1	S-curve industries	7	Aviation & Logistics	All Aviation & Aerospace focussed shows. Aviation: Aerospace Test Engineering, Aircraft Purchasing, Aircraft Manufaturing, Aircraft Maintenance, Aircraft Engine, Aircraft Interiors, Air Cargo Logistics: Modern Logistics and Supply Chain Management
1	S-curve industries	8	Biofuel and Biochemical	All Biofuel and Biochemical, including renewable energy (solar/wind/wave) . Including biochemical used for medical purposes (agricultural biproduct)
1	S-curve industries	9	Digital	IT, ICT, technology, software, vision / visual communication equipment, IT / Cyber security, IT hardware, data, CRM, data storage, software development, information security, IT infrastructure, Fintech, digisation of industrial processes, AI, interconnectivity, braodband
1	S-curve industries	10	Medical Hub	Telemedicine, Remote Health Monitoring Devices, Biological Products, Biosimilars (การแพทย์ทางไกล, ผลิตภัณฑ์ทางการแพทย์เพื่อวินิจฉัยและติดตามผลระยะไกล, ยาประเภทชีววัตถุต้นแบบ (Biologic) และชีววัตถุคล้ายคลึง (Biosimiar))
2	Consumer Goods	11	Beauty & Cosmetics	All beauty & cosmetics shows; Skincare, Fragrance, Makeup, Haircare, Equipment for cosmetics processing
2	Consumer Goods	12	Furniture & Interior Design	Interior Design, Furniture, Lighting
2	Consumer Goods	13	Jewellery, Watch & Accessories	
2	Consumer Goods	14	Medical and Comprehensive Healthcare	All Medical & Healthcare shows; Wellness, Medical Technology, Health Therapy, Pharmaceuticals, Life Sciences, Healthcare Management, Medical Education, Pharma Ingredients, Biotech, Pregnancy & Baby, Alternative Medicine, Bio Technology, Emergency Medical Services, Biopharmaceuticals, Drugstore, Eyecare, Laboratory Equipment, Physiotherapy, Biology, Health, Older People Care, Optics
2	Consumer Goods	15	Personal Goods (Textiles, Apparel, Fashion)	Home & Technical Textiles, Fabrics, Fashion including Clothing & Shoes & Accessories
2	Consumer Goods	16	Premium, Household, Gifts, Toys	Paintings, Clocks, Mirrors, Toys, Games, Houseware, Arts, Crafts (as items not as making), Antiques, Homelife, Stationery, Photography, Home accessories
3	Financials	17	Banking,Financial & Securities, Insurance	Financial Services, Insurance, Cards & Payments, Advisory

LIST OF INDUSTRY CLASSIFICATION

#	Main Industry	#	Sub Industry (Refer from TCEB)	Description
4	Other Industries -Exclude	18	Chemical & Plastics	Commodity Chemicals, Specialty Chemicals, Plastics
4	Other Industries -Exclude	19	Construction & Meterial	Building & Construction, Construction Machinery, Construction Services, Architecture, Infrastructure, Metals /
4	Other Industries -Exclude	20	Industrial Materials & Machinery,Engineering, Manufacturing	Manufacturing, Machinery Engineering, Tooling, Test Measurement Inspection, Quality Control, System Technology, Instrumentation, System Automation, Mechatronics, Green Manufacturing, Cleaning Machinery, Fabrication Technology, Photonics
4	Other Industries -Exclude	21	Paper, Printing, Packaging	Paper, Printing, Packaging
4	Other Industries -Exclude	22	Energy, Oil, Gas	Energy, Integrated Oil & Gas, Oil Equipment & Services , Renewable Energy, Alternative Fuels
4	Other Industries -Exclude	23	Agriculture, Forestry, Fishery, Pet for B2B	Agriculture, Forestry,Flowers, Gardening, Woodworking, Cattle, Horticulture, Vine Growing, Poultry, Pig Industry, Ornamental Fish, Poultry, Fishery, Pets Show (B2B)
4	Other Industries -Exclude	24	Food and Beverage	Food Service, Food & Beverage, Ingredients, Food processing (including food machinery processing, packaging, manufacturing, sorting), Beverage Technology, Restaurants
4	Other Industries -Exclude	25	Automotive	Automotive parts - automotive components or service, car maintenance
5	Property	26	Real Estate	Property, Real Estate & Residential
5	Property	27	Hospitality	All hotel shows, restaurants and catering, including suppliers to hotels.
6	Services	28	Education and Human Resource Development	HR & B2B Education (Does not include B2C Education Shows or Job Fairs)
6	Services	29	Environmental Protection	Environment, Waste Disposal & Recycling
6	Services	30	HR Service	Recruitment Agency, Job Fair
6	Services	31	Medias & Publishing	Books, Publishing, Broadcasting, TV, Bookfair, Digital Publishing, Direct Marketing, Promotional goods, Digital Printing, Event Organisation
6	Services	32	Recreational Services (Leisure, Hobby, Entertainment, Sport)	Leisure, sports, recreation, sports, spas, fitness & exrecise, welnness, lifestyle, horse, betting, gaming, amusements, sportswear, specialist wholesalers of sports wear, distributors of sportswear, boats, yachting
6	Services	33	Security, Fire Safety, Defence	Security, Safety, Physical Security, Electronic Security, Fire & Industrial Safety, Security Management, All Defense Related Shows
6	Services	34	Transportation	Marine, Transportation Building, Distribution, Logistics Supply Chain, Freight, Cargo Industries, Infrastructure, Transport Services, Transport Ticketing, Shipping
6	Services	35	Travel & Tourism	Airline, Hotel, Recreation Services, Trip Travel Service, Car Rental, Travel Agencies,
6	Services	36	Pets B2C	Pet Shows for B2C
7	Telecommunications & T	37	Electronic & Electrical Equipment	All electronics including Consumer Electronics, Electronic Appliances, Electric Components, Electronic
7	Telecommunications & T	38	Telecommunications	Information & Communication Technology; Fixed Line & Mobile Telecommunications
8	Others	39	Others	