

# The new opportunities for trade fair sectors – in...**Thailand**



INFRASTRUCTURE



THAILAND CONVENTION  
& EXHIBITION BUREAU

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Thailand Convention and Exhibition Bureau  
(Government Organization)**

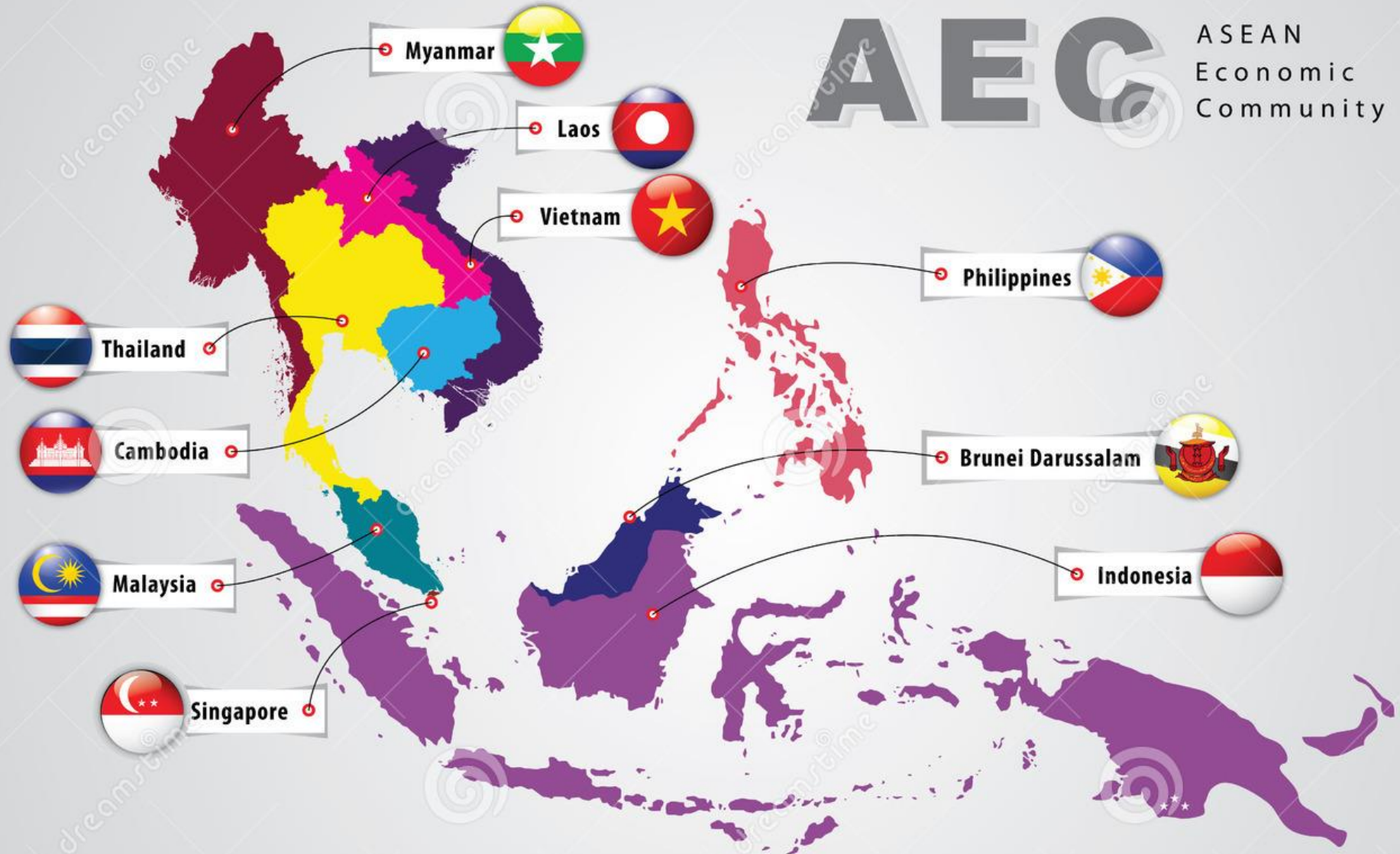
Credit Photo : VERB, campaign for the Prime Minister's Office

# AGENDA

- 
- ❖ **ASEAN and its importance**
  - ❖ **Why ASEAN – a new business opportunity for trade fair sectors**
  - ❖ **Staging your business in Thailand to accelerate growth in ASEAN**
  - ❖ **About TCEB and our supports**



# 1. WHY ASEAN?



# The New Economic Powerhouse

Single market and  
production base

Competitive economic  
region



Equitable economic  
development

Fully integrated region in  
the global economy

# Fast Facts about ASEAN



Indicators	AEC	Comparison
Market size (2013)	<b>625 million</b>	<b>&gt; EU's (507 mil.)</b>
(Combined) GDP	<b>Euro 2 trillion</b>	<b>&gt;India's, &gt;Russia's</b>
Real GDP Growth (2013)	<b>5.2%</b>	<b>&gt; EU's (0.1%)</b>
International Merchandise Trade	<b>Euro 2.2 trillion</b>	
FDI inflow	<b>Euro 104 billion</b>	
International tourist arrivals	<b>98 million</b>	<b>= Thailand is ranked as no.10 international tourism destination</b>

# ASEAN's Major Trading Partners

## Top ten ASEAN trading partner 2013

Value in million Euro

Trade partner country/region	Value			Share to total ASEAN trade		
	Exports	Imports	Total trade	Exports	Imports	Total trade
ASEAN	296,000.7	249,333.3	545,334	26.0	22.4	24.2
China	136,697.2	177,396.1	314,093.4	12.0	16.0	14.0
EU-28	111,506.4	109,140.7	220,647.2	9.8	9.8	9.8
Japan	110,098.7	105,654.6	215,753.3	9.7	9.5	9.6
USA	102,613.1	82,751.7	185,364.8	9.0	7.4	8.2
Korea	47,335.1	73,606	120,941.1	4.2	6.6	5.4
Taiwan	31,784.4	59,340.3	91,124.7	2.8	5.3	4.0
Hong Kong	73,556.9	11,771.2	85,328	6.5	1.1	3.8
Australia	40,796.3	20,190.6	60,986.9	3.6	1.8	2.7
India	37,578.5	23,233.1	60,811.6	3.3	2.1	2.7
Total top ten trade partner countries	987,967.3	912,417.4	1,900,384.8	86.7	82.1	84.4
Others	151,100.75	199,104.5	350,205.4	13.3	17.9	15.6
Total	1,139,068.1	1,111,522	2,250,590	100.0	100.0	100.0

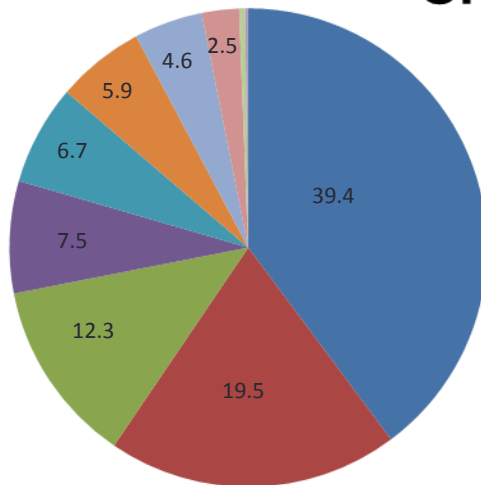
Source from [www.aseansec.org](http://www.aseansec.org)

# Trade between EU and ASEAN

## EU imports from ASEAN

SITC Codes	SITC Sections	Value (Millions of euro)	Share of Total (%)	Share of total EU Imports
<b>TOTAL</b>		<b>93 203</b>	<b>100,0%</b>	<b>5,5%</b>
SITC 7	Machinery and transport equipment	36 709	39,4%	8,4%
SITC 8	Miscellaneous manufactured articles	18 160	19,5%	8,5%
SITC 5	Chemicals and related prod, n.e.s.	11 475	12,3%	7,5%
SITC 0	Food and live animals	7 033	7,5%	8,4%
SITC 6	Manufactured goods classified chiefly by material	6 274	6,7%	3,4%
SITC 2	Crude materials, inedible, except fuels	5 540	5,9%	7,2%
SITC 4	Animal and vegetable oils, fats and waxes	4 276	4,6%	49,7%
SITC 3	Mineral fuels, lubricants and related materials	2 350	2,5%	0,5%
SITC 9	Commodities and transactions n.c.e.	394	0,4%	1,3%
SITC 1	Beverages and tobacco	191	0,2%	2,7%

## Share of total (%) (Million Euro)

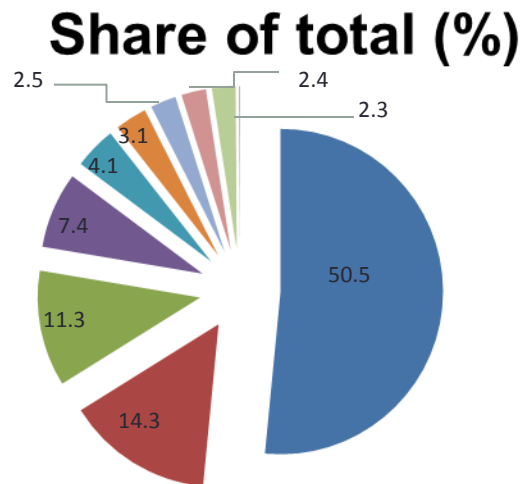


- Machinery and transport equipment (36,709)
- Miscellaneous manufactured articles (18,160)
- Chemicals and related products (11,475)
- Food and live animals (7,033)
- Manufactured goods classified chiefly by material (6,274)
- Crude materials, inedible, except fuels (5,540)
- Animal and vegetable oils, fats and waxes (4,276)
- Mineral fuel, lubricants and related materials (2,350)
- Commodities and transactions (394)



# Trade between EU and ASEAN

SITC Codes	SITC Sections	Value (millions of euro)	Share of Total (%)	Share of total EU Exports
<b>TOTAL</b>		<b>68 459</b>	<b>100,0%</b>	<b>4,5%</b>
SITC 7	Machinery and transport equipment	34 578	50,5%	5,3%
SITC 5	Chemicals and related prod, n.e.s.	9 814	14,3%	3,9%
SITC 6	Manufactured goods classified chiefly by material	7 705	11,3%	3,9%
SITC 8	Miscellaneous manufactured articles	5 050	7,4%	3,2%
SITC 0	Food and live animals	2 825	4,1%	4,4%
SITC 3	Mineral fuels, lubricants and related materials	2 102	3,1%	2,1%
SITC 9	Commodities and transactions n.c.e.	1 718	2,5%	3,9%
SITC 2	Crude materials, inedible, except fuels	1 634	2,4%	4,0%
SITC 1	Beverages and tobacco	1 572	2,3%	6,3%
SITC 4	Animal and vegetable oils, fats and waxes	76	0,1%	2,0%



Million Euro

- Machinery and transport equipments (34,578)
- Chemicals and related products (9,814)
- Manufactured goods classified chiefly by material (7,705)
- Miscellaneous manufactured articles (5,050)
- Food and live animals (2,825)
- Mineral fuel, lubricants and related materials (2,102)
- Commodities and transactions (1,718)
- Crude materials, inedible, except fuels (1,634)
- Beverage and tobacco (1,572)
- Animal and vegetable oils fates and waxes (76)



## **2. Why ASEAN – a new business opportunity for trade fair sectors**



# ASEAN Integration

**ASEAN is heavily investing in key industries to help its member states achieve full integration in order to maximize the AEC potential**

**Fragmented Markets**



**Single Market**



**Create foundational support towards realizing the vision of an integrated ASEAN Community**

- Enhance local economic and social development
- Enhance connections to economic centers and narrow the development gaps
- Enhance global competitiveness of ASEAN



## Priority Sectors for ASEAN Integration

### Physical Integration

- Transport
- Information and Communications Technology (ICT)
- Energy

### People-to-People Integration

- Education & Culture
- Tourism



## Physical Integration...

### Transport

- Support increased air traffic volume in trade from deeper economic integration of ASEAN Member States and with the rest of the world.
- Reliable shipping routes to help reduce transport costs, create new regional links and expand regional markets.

### Information and Communications Technology

- Support trade, facilitate investments and enlarge markets through information exchange, people connection, support delivery of services and reduce cost of business and trade-related transactions.

### Energy

- Plays crucial role in economic development and will remain critical to the continued economic growth of ASEAN region.
- Enhance energy security, accessibility and sustainability for the region with due consideration to health, safety and environment, i.e. renewable energy

## People-to-People Integration...

### Education and Culture



- Greater importance placed on education and has driven many to take initiatives in crafting policies for human resource development
- The need to address the anticipated increase in foreign investments with need for skilled labor and the to develop rural and eradicate poverty

### Tourism



- Forecasted intra-ASEAN travel will increase at an average of 8% yearly, while travel between ASEAN and other regions only 6%, as group of consumers who are willing to pay for their satisfaction and pleasure are expanding

## 4 Trends



## Rise of the Middle Class

**A new class has emerged from freer labor mobility with higher purchasing power than locals, while Indonesia, Malaysia, Thailand, Vietnam and Cambodia will be dominated by middle class in 10 years time.**





## Growth of Aging Population

**Retired population of ASEAN with high purchasing power will increase from the current 9% to 12% in the next 10 years.**



## SMEs Spur Intra-ASEAN Trade

**Promote innovative, competitive and resilient ASEAN SMEs as the new engine of growth that would contribute to the equitable and sustainable economic growth.**

4

## High Value-Added Boom

**70% of FDI in ASEAN derives from service sector, as manufacturing sector is reaching its peak. ASEAN is in a new stage of growth, and service sectors aim to support existing manufacturing.**





# 3. Staging business in Thailand to accelerate growth in ASEAN



INFRASTRUCTURE

## BUILDING BRIDGES



With an ambitious US\$74 billion infrastructure programme underway, Thailand is quite literally building bridges with some of the region's most booming economies. As well as better connecting us with our neighbours, the state-of-the-art high-speed rail and road system will boost growth right across the country, shuttling goods such as our famously fresh fish from source to market, or river to restaurant, more efficiently than ever.

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**70 Million Populations**



**Thailand**

TRADE



**Strong Macroeconomic Fundamental**

**Capable & Skilled Labor**

**Good Infrastructure**

**Competitive  
Corporate income tax**

**Strong government support**

**Ranked 106<sup>th</sup> of World's GDP  
(Per Capita)**

**Center of many strategic industries**

**FIRST PORT  
OF CALL**



At Laem Chabang, one of the world's busiest seaports, it's easy to see why Thailand is such a dynamic nation. Within the region and across the seas. Entrepreneurial by nature, and boasting a multi-skilled workforce, we're busy making sure that vital goods get to market on time, every time. With the third lowest unemployment rate in the world, it's our all-hands-on-deck approach that's made us the globe's fifth largest container-shipping nation.

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**World's Ease of Doing Business No 18**

**Ease of Doing Business No. 5 in East Asia & Pacific**

# Thailand update political situation

Phase I: To achieve national reconciliation

Phase II: To appoint interim PM, cabinet's member and draft new constitution

Phase III: A general election under a democratic system

# Strategic location





**BIMSTEC**  
(Bangladesh, Bhutan, India,  
Myanmar, Nepal, Sri Lanka, and  
Thailand)  
Populations 1.3 Billion

**GMS**  
Greater Mekong Sub Region  
(Myanmar, Cambodia and Vietnam)  
Populations 320 million

**ACMES**  
The Ayeyawady - Chao Phraya - Mekong  
Economic Cooperation Strategy  
(ACMECS)

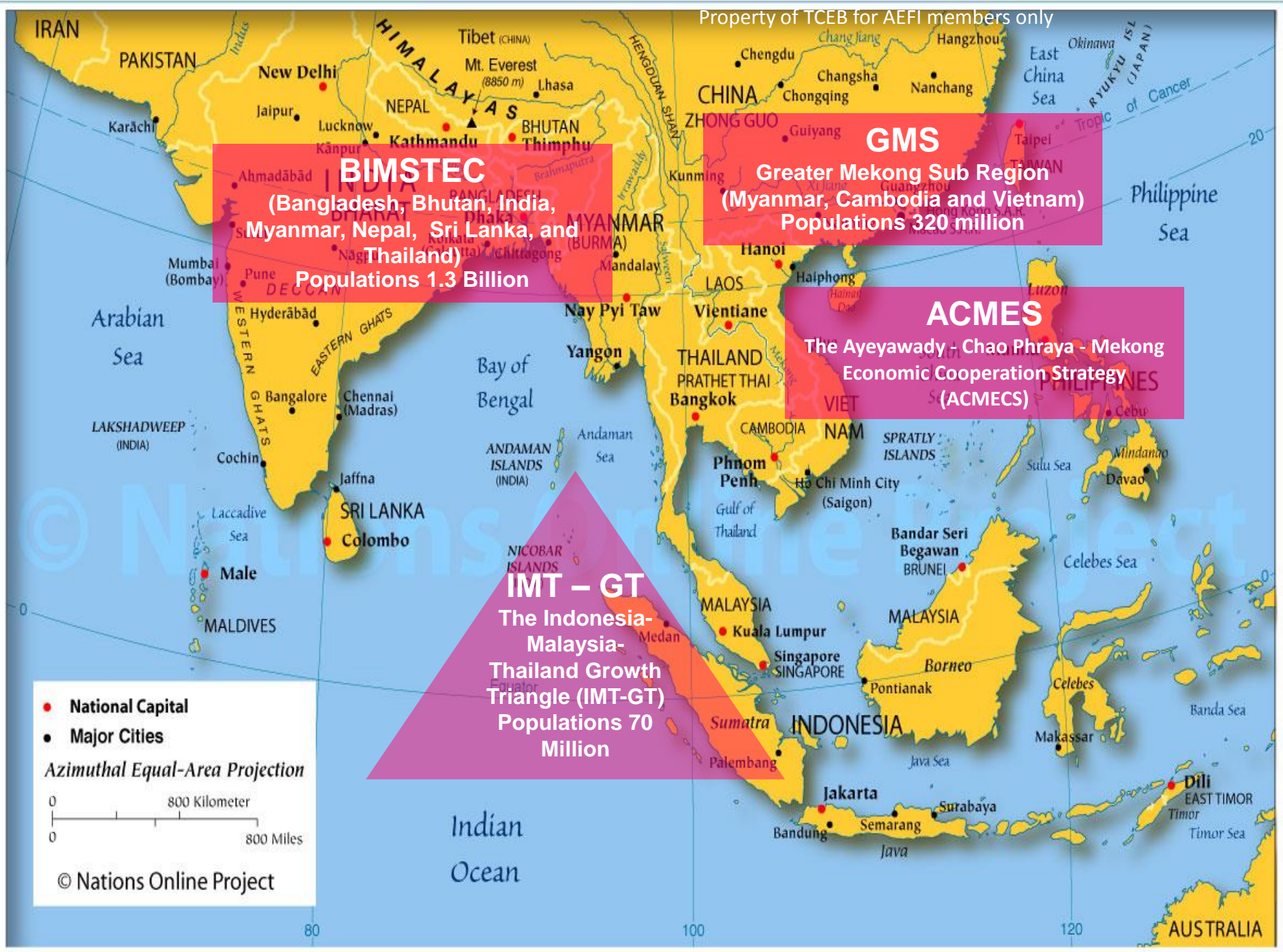
**IMT – GT**  
The Indonesia-  
Malaysia-  
Thailand Growth  
Triangle (IMT-GT)  
Populations 70  
Million

● National Capital  
● Major Cities

Azimuthal Equal-Area Projection

0 800 Kilometer  
0 800 Miles

© Nations Online Project











**Thailand**

HOSPITALITY

# Next destination for leading regional trade fairs

## BUSINESS CLASS



Thailand's hospitality extends far beyond unwinding at luxurious spas and pristine beaches. This year alone, 750,000 international business travellers are expected to touch down here for meetings or events, hosted at some of the region's largest and most modern facilities by our famously welcoming people. So from cosy conferences to colossal conventions, our world-class infrastructure, convenient geographic location and commitment to service make Thailand the ideal place to do business.

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# ASEAN's Major Trade Fair Markets by Estimated Net M<sup>2</sup> Sold and Estimated Revenues in 2013

Country	Estimated Annual Size in M <sup>2</sup>	Percentage	Estimated Annualized Revenues (EUR)	Percentage
Thailand (77)	506,250	30.7%	156,291,540	29.2%
Singapore (93)	329,250	20.0%	177,142,629	33.1%
Malaysia (77)	300,000	18.2%	92,534,800	17.3%
Indonesia (51)	203,000	12.3%	44,517,301	8.3%
Vietnam (57)	158,750	9.6%	42,292,489	7.9%
Philippines (44)	151,250	9.2%	22,348,933	4.2%
ASEAN's Total (399)	1,648,500	100.0%	535,127,694	100.0%

**Source: Adjusted from UFI, the trade fair industry in Asia 10<sup>th</sup> edition**



**BITEC = 36,000 sqm.**



**IMPACT = 137,000 sqm.**



**CENTARA = 5,403 sqm.**



**PARAGON HALL = 7,800 sqm.**



**QSNCC = 13,971 sqm.**



**PEACH = 6,925 sqm.**



**PSUICC = 4,880 sqm.**



ศูนย์ประชุมและแสดงสินค้านานาชาติ  
เชียงใหม่  
จังหวัดเชียงใหม่



**CHIANG MAI = 8,505 sqm.**

# Thailand's Exhibition Industry (Hall Capacity)

## Exhibition centres in Thailand

	Exhibition Centre	City	2012 Gross indoor size	2013 Gross indoor size	2014 Gross indoor size	Establishment year	No. of Halls
1	IMPACT Arena, Exhibition and Convention Center	Bangkok	137,000	137,000	137,000	1998 / 2005	13
2	Bangkok International Trade & Exhibition Centre (BITEC)	Bangkok	36,000	36,000	36,000	1997	6
3	Queen Sirikit National Convention Centre	Bangkok	13,971	13,971	13,971	1991	2
4	Royal Paragon Hall	Bangkok	7,800	7,800	7,800	2006	3
5	Central World	Bangkok	5,403	5,403	5,403	2008	1
6	Chiang Mai International Convention and Exhibition Centre (CICEC)	Chiang Mai	8,505	8,505	8,505	2012	
7	Prince of Songkla University International Convention Center	Hat Yai	4,880	4,880	4,880	2008	2
8	Pattaya Exhibition and Convention Hall (PEACH)	Pattaya	6,925	6,925	6,925	1999	1
9	Royal Phuket Marina International Exhibition & Convention Center	Phuket	2,500	2,500	2,500	2008	
		Total	222,984	222,984	222,984		

Source: BSG research &amp; analysis



# Oversea visitors Ranking by nationality

**2012**

**2013**

**2014**

1. Malaysia
2. India
3. Singapore
4. Japan
5. Vietnam

With over 2,000 kilometres of superb coastline and pristine coral reefs, Thailand's attractiveness to beach-lovers and seafarers is well known. The country's most remote attractions are. The country is served by 38 airports and thousands of miles of rail and road. With a raft of options, any traveller can set sail for some island- (or jungle-) hopping in modern Thailand.

Visit Modern-Thailand.com

1. Malaysia
2. Japan
3. India
4. Vietnam
5. China

1. Japan
2. Malaysia
3. China
4. Singapore
5. India

**Thailand**  
MANUFACTURE

# Wheels of opportunities, right here!

**MAKING TRACKS**

As well as producing more of the world's rubber than any other country, Thailand is also the place where it's turned into peerless products – including superior handmade Specialized tyres that propel many Tour de France cyclists across the finish line. With Thailand's rich supplies of the raw material, advanced manufacturing facilities, excellent incentives for business and expert, multi-skilled technicians, it's little wonder that some of the world's best-known brands, from Michelin to Challenge, come here to get things rolling.

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# ASEAN Economic Community ( Business )

**Singapore**

**Thailand/  
Malaysia/  
Indonesia/  
Philippines/  
Vietnam**

**Brunai  
Cambodia  
Laos  
Myanmar**

**Service**

**Production**

**Resource**

- : **Financial Services**
- : **Education**
- : **Tourism and Aviation**
- : **Fashion**
- : **Food**
- : **Automotive**
- : **Logistics/Transportation**
- : **Agriculture and Fisheries**
- : **Wood**
- : **ICT and Healthcare**
- : **Electronics**
- : **Rubber**
- : **Energy**
- : **Construction**



# ASEAN 5 Priority Industries to AEC

Transportation

ICT

Energy

Education & Culture

Tourism

## Thailand Potential Industries

Food/  
Agri/Agro/Ru  
bber

Automobile & Auto  
Parts  
/Transportation/Log  
istics

Construction/Arch  
itect

Energy

Machinery

Jewelry

Tourism

ICT

Medical

## ASEAN Future Trend

Growth of Aging  
Population

SMEs spur intra-ASEAN  
Trade

High Value Added Boom

Rise of the Middle Class

# Matched Industry between Italy - Thailand

## Thailand Potential Industries

Food/  
Agri/Agro  
/Rubber

Automobile &  
Auto Parts  
/Transportation  
/Logistics

Construction  
/Architect

Energy

Machinery

Jewelry

Tourism

ICT

Medical

## Italy Potential Industries

Food  
processing

Automobile/  
Aerospace

Textiles/  
footwear

Energy

Machinery

Jewelry

Tourism

IT

Medical/  
chemicals

# International players in Thailand

Name	Profile	Country of origin
Thaifex	Food& Beverage, Food Technology and retail & franchise	Germany – Messe Cologne & Department of International Trade Promotion
Bevtec Asia	Drink Manufacturing	Germany – Messe Dusseldorf
T- Plas	Plastic & Rubber Manufacturing	Germany- Messe Dusseldorf
Packprint International	Packaging& Printing Machinery	Germany – Messe Dusseldorf
Medical Fair Thailand	Hospital, Medical & Rehabilitation Equipment & Supplies	Germany – Messe Dusseldorf
Wire & Tube Southeast Asia	Wire & Cable, Tube Manufacturing	Germany – Messe Dusseldorf



# International players in Thailand

Name	Profile	Country of origin
SIMA ASEAN Thailand	Agriculture & Livestock	France – Paris (JV with IMPACT)
VIV Asia	Animal Husbandry & Processing	The Netherlands (JV with VNU)
ASEAN Power Week	Power Generation Industry	England
PULIRE ASIA Pacific	Cleaning Industry	Italy - Milan
Beyond Beauty Asean Bangkok	Beauty & Cosmetics	England - London

# PULIRE ASIA Pacific

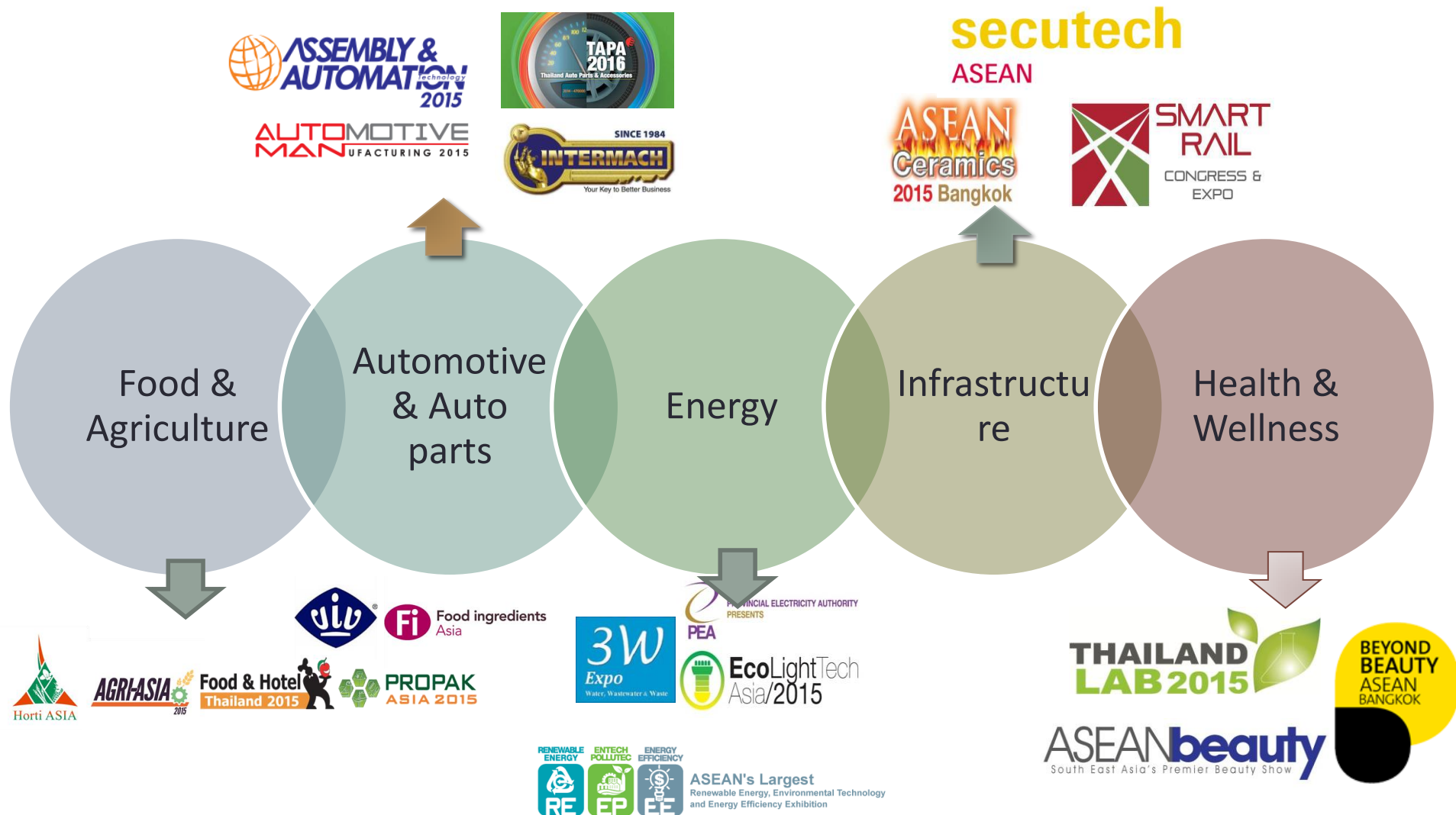


PULIRE ASIA Pacific 2016 (the 2<sup>nd</sup> edition) is a dedicated international exhibition industry platform showcasing the latest professional cleaning and hygiene technology, solutions and trends for the institutional and industrial cleaning sectors in the Asia Pacific region.

Statistics: 7,764 visitors; 5,978 local and 1,786 International  
150 companies  
5,000 square meters

Organizer: Afidamp Servizi and IMPACT Exhibition Management Co., Ltd.

# Thailand's 5 focus industries





# 4. TCEB, your recipe for success in Thailand



HOSPITALITY

## RECIPE FOR SUCCESS



Thailand's famous hospitality is ingrained in our culture, from the warmest of welcomes to our culinary skill. That's why hospitality businesses like the world's best cooking school, Le Cordon Bleu, which opened its only Southeast Asian school in Bangkok, come to Thailand to sample our unique mix of exquisite cuisine, from French to Halal, and transcendent service.

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**TCEB : a government agency under Prime Minister's office dedicated to the promotion of Thai's MICE industry**

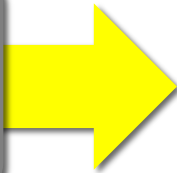
## **E&E Mission & Role**

**Driving country's trade & revenue through exhibitions & events platform**

More trade shows,  
More visitors,  
More trade volume

uplift Image of  
business platform  
in ASEAN

Industry  
development &  
competitiveness





# MICE PERFORMANCE 2014

TOTAL VISITORS

919,164

High Quality  
Visitors

TOTAL REVENUE

2.27

Billion  
Euro

*Thailand CONNECT*

Your Global Business Events Connection



# Performance 2014

17%

Contribution of total **MICE Visitors**

**382 Million Euro\***  
(- 13.17% from target)

Direct Spending of international trade visitor

\* (October 2013 – September 2014)

**157,996 pax**  
(- 1.18% from target)

\* (October 2013 – September 2014)

**3,148 Euro**

Average Spending per trip

**3 Times**

Almost, the amount of average  
tourist visitor spending

# Thailand CONNECT The World

**DESTINATIONS**



**BUSINESSES**



**PEOPLE**

GLOBAL BUSINESSES AND LOCAL EXPERTS  
LINK TO BOOST BUSINESS EVENTS SUCCESS





## NEW SHOW PACKAGE:

FIRST LAUNCH IN JAN 2015

*Thailand CONNECT*

Your Global Business Events Connection

# ONE TO GOAL PACKAGE

## YOUR SEAMLESS SOLUTIONS PARTNER



Matching businesses  
through expanded  
database



In-depth  
industry research



Networking  
opportunities



Breaking into  
a new market  
sector



Finding leads  
for organizers



Increasing visitor  
awareness and  
interest



Marketing arms  
in key ASEAN countries  
and India and China

## TCEB - YOUR BUSINESS SOLUTIONS PARTNER



The Thailand Convention and Exhibition Bureau (TCEB) is a government organization tasked with promoting and developing business events in Thailand.

We coordinate the efforts of government agencies and private sectors to ensure international exhibitions operate successfully. For international organizers, we are your strategic partner and one-stop shop in helping you deliver a most successful exhibition or event.



# OUR SUPPORT

## YOUR ONE STOP SHOP.

We'll do whatever it takes for your success.

### PREP YOURSELF

Tailor-made services and support schemes by international and local associations, corporations or agencies in the international trade shows



#### PARTNERSHIP LINKAGE

Facilitating new partnerships and strategic alliances among MICE operators



#### SITE INSPECTION

A guarantee of quality



#### FAST TRACK

Through immigration for VIP MICE travelers

### SUSTAIN YOUR SHOW WITH MAXIMUM MARKETING TOOL

To further your success, we run various campaigns to increase visitor numbers, business matching and transactions



#### CONNECT BUSINESSES CAMPAIGN

Financial incentive scheme to reward trade group of visitor brought to your trade show



#### SUBSIDY SCHEME

Financial support for international attendees



#### BE MY GUEST

Hosted buyer program



# THANK YOU

*Thailand* CONNECT

Your Global Business Events Connection