

A SNAPSHOT OF THE INDIAN EXHIBITION INDUSTRY

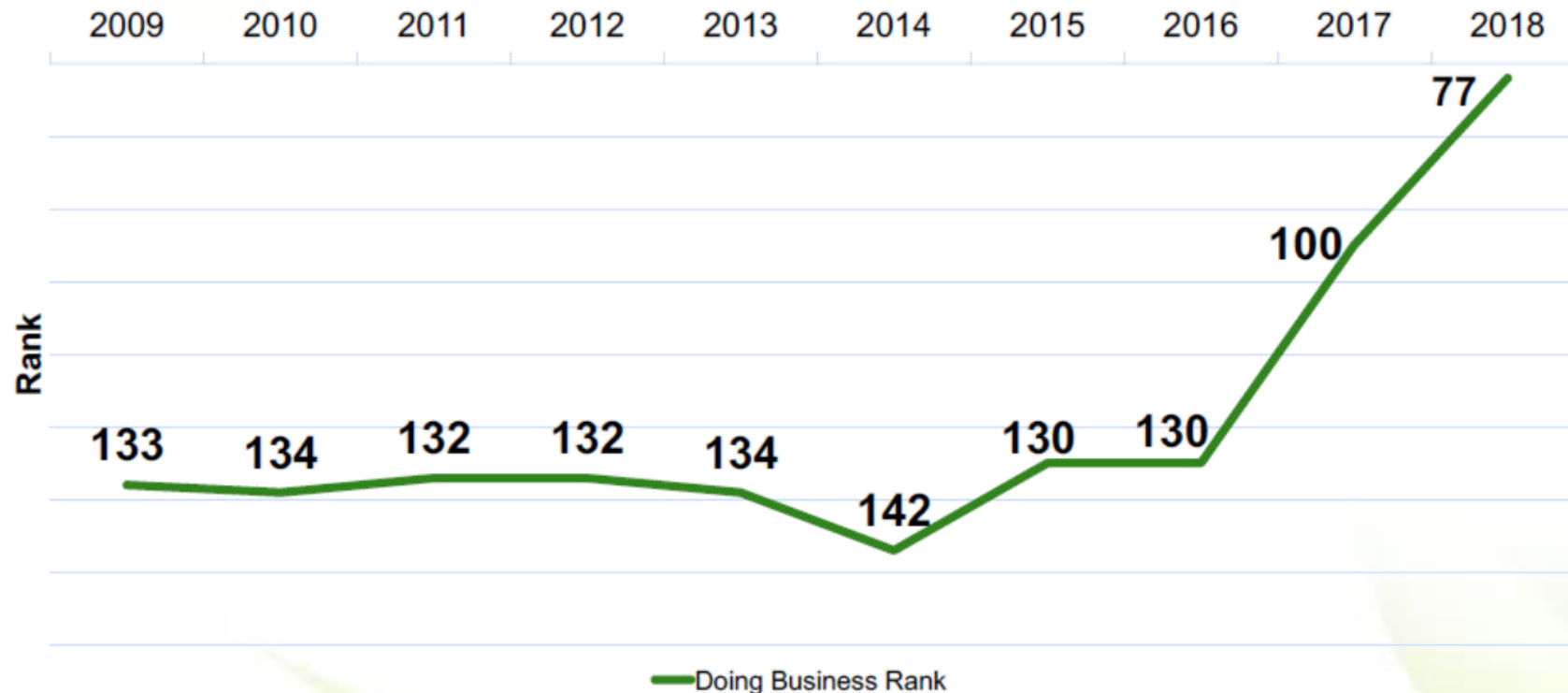
By: NIDHI SHARMA, EXECUTIVE DIRECTOR, IEIA

India to remain the fastest growing major economy amidst heightened concerns over global trade war and oil price concerns

Country	Growth (% y/y)	Period
United States	2.9	Q2-18
Euro Area (EA 19)	2.2	Q1-18
Japan	1.3	Q2-18
United Kingdom	1.3	Q2-18
China	6.7	Q2-18
India	8.2	Q2-18

Country/Region	2018	2019
World	3.9	3.9
United States	2.9	2.7
Euro Area	2.2	1.9
Japan	1.0	0.9
United Kingdom	1.4	1.5
China	6.6	6.4
India	7.3	7.5

Doing Business (DB) – India successively scales greater heights



Note: Data as published in respective Doing Business reports

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DB 2019 | India Highlights



23 rank improvement
in current year



Highest improvement (53
rank) in 2 years by any
large country since
2011



India recognized among
top 10 Improvers for the
second consecutive
year



First BRICS and South
Asian country to be
recognized as top
improver in consecutive
years



India is now ranked 1st
among South Asian
countries compared to 6th
rank in 2014



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UNPARALLELED OPPORTUNITY

ECONOMIC

Huge Consumer Market

\$3.6 by 2025
(BCG Study)
Trillion

Substantial GDP Growth

\$20 by 2025
(PPP)
Trillion

SOCIAL

Youngest Nation

29 Average age
in 2025
Years

Upward mobility

150 more added
to middle
class by 2025
Million

Skilled work force

99%

POLITICAL

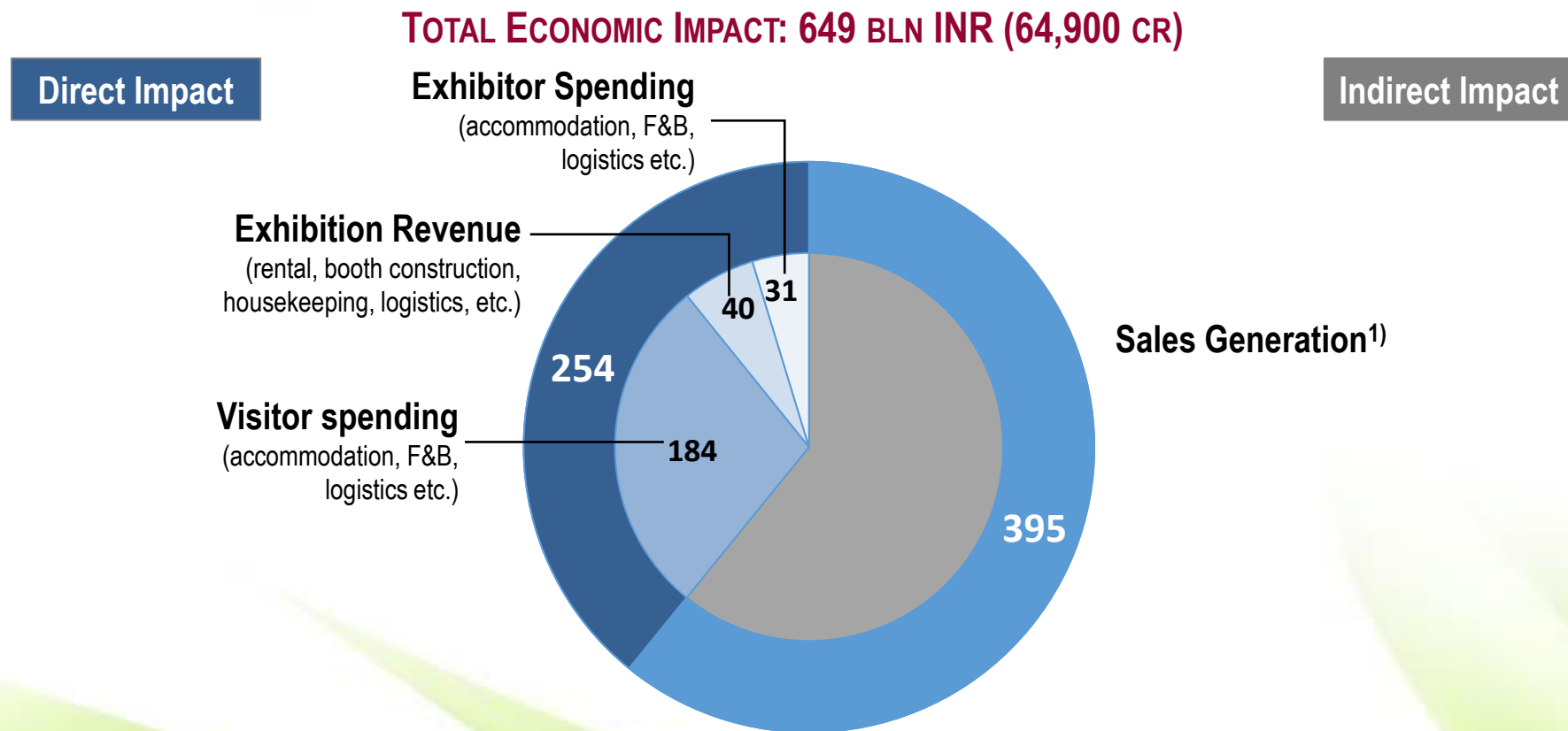
Inclusion in Banking system

241 accounts
opened under
'Banking for all'
Million

Deregulation

1000+ Archaic laws
repealed to
reduce red-tape

INDIAN EXHIBITION INDUSTRY – OVERALL ECONOMIC IMPACT



11 thsd permanent jobs and 107 thsd temporary jobs created

1) Additional sales generated by company through exhibitions

INDIAN EXHIBITION INDUSTRY – SNAPSHOT

745 events conducted every year, average event size of 9.8 thsd gross sqm and high focus on B2B events

INDUSTRY OVERVIEW

- 60% share of regional / local player
 - ▶ Number of exhibition organizers: ~220
 - ▶ Number of organized player: 40%
- Average exhibition size is <10,000 sqm (gross area)
 - ▶ Number of events: 745
 - ▶ Total gross area: 7.3 mio sqm
 - ▶ Average exhibition size (gross): 9.8 thsd sqm
- High focus on B2B events with 76% share

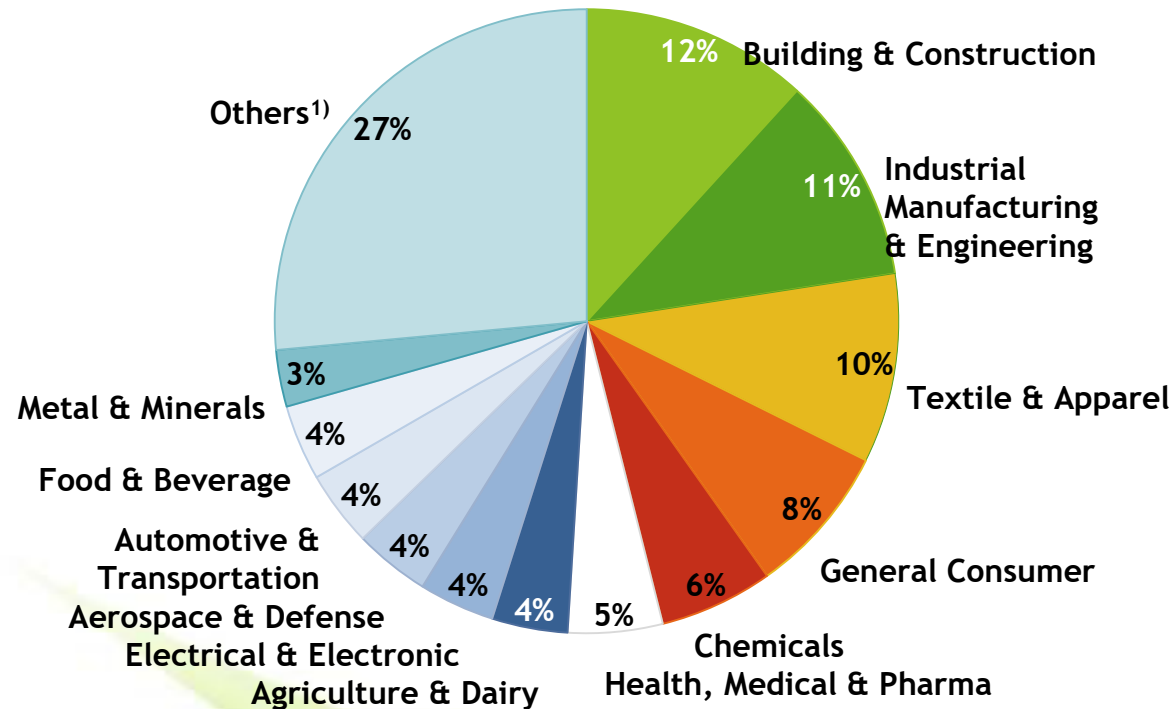
INFRASTRUCTURE HIGHLIGHTS

- ▶ Total indoor exhibition area: 460 thsd sqm
- ▶ Total outdoor exhibition area: 729 thsd sqm
- Lack of exhibition venue with >100 thsd sqm indoor exhibition area
- 73% of exhibition area within Western and Northern region
 - ▶ Western (38%), Northern (35%), Southern (24%), Central (2%), Eastern (1%)

Sector split of Indian exhibitions reflects its high relevance to government Make in India program; most of the target sectors are represented by exhibition industry

■ Exhibition Industry Sector Split

Total gross area: 7.3 mio sqm

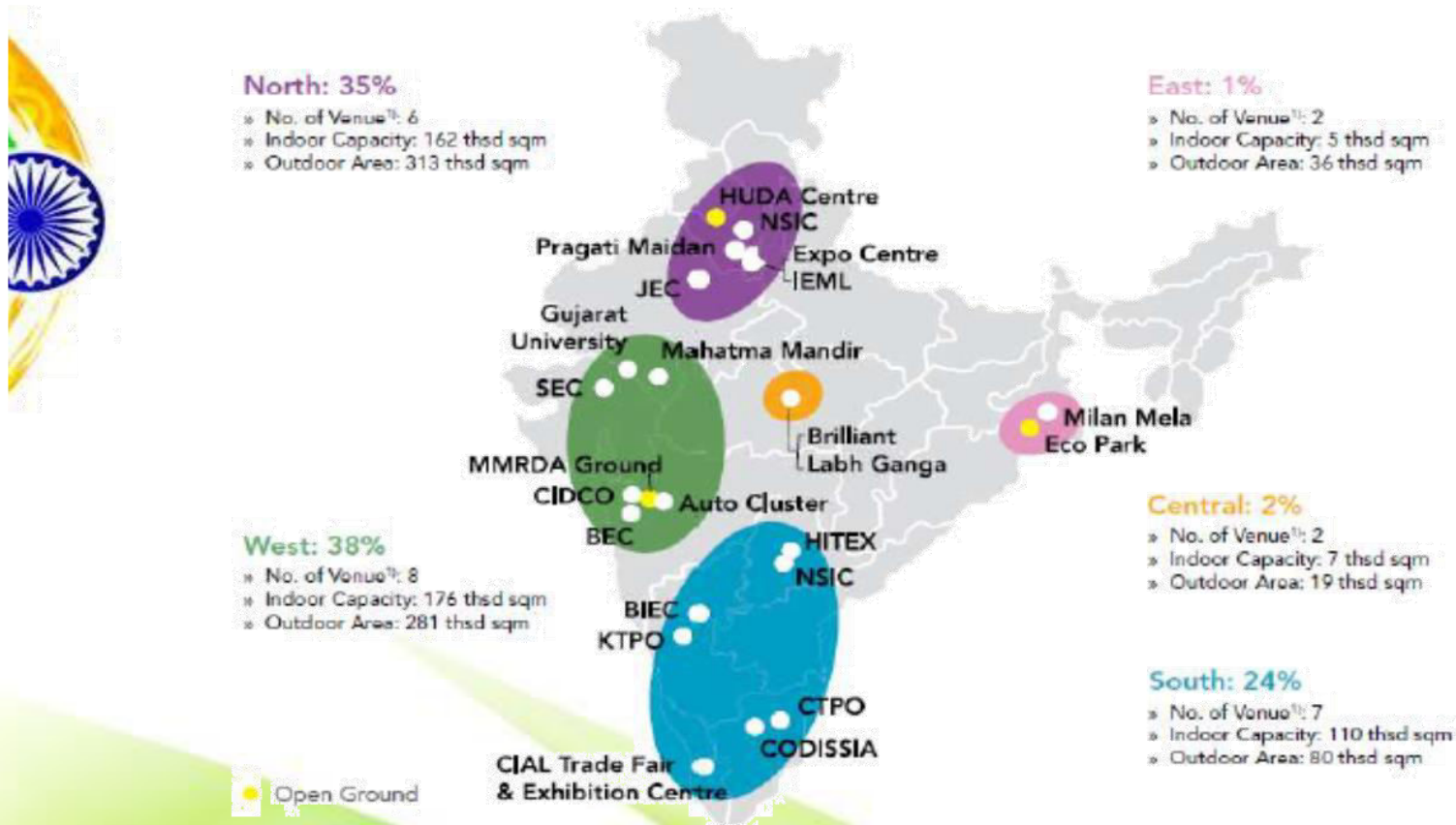


1) Includes printing and packaging, education, oil and gas, travel and tourism, energy & power, logistics, etc.

EXHIBITION INFRASTRUCTURE

India has 22 major exhibition centers with indoor capacity of 460 thsd sqm where north and west region account for 73% of total indoor area; temporary utilization of 3 open grounds as venue for large events

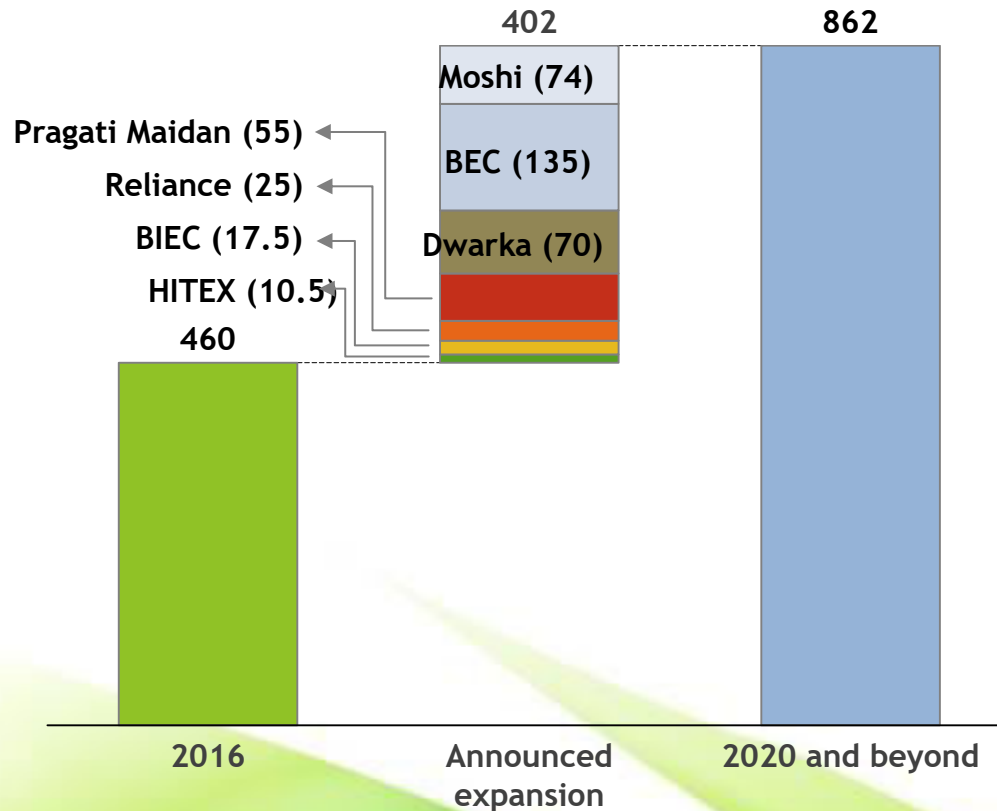
Total indoor capacity: 460 thsd sqm
Total outdoor area: 729 thsd sqm



FUTURE CAPACITY ASSESSMENT – EXPANSION PLANS

402 thsd sqm of new indoor capacity planned to be added in short to mid term, first phase of Pragati Maidan revamp expected to be operational by 2019/ 20

- Exhibition Indoor Capacity Development



COMMENTS

- PRAGATI MAIDAN REDEVELOPMENT PLAN HAS BEEN APPROVED BY GOVERNMENT. EXHIBITION SPACE WOULD GET MORE THAN DOUBLED TO ~125 THSD SQM IN 1ST PHASES (BY 2019) AND FURTHER 86.3 THSD SQM IN 2ND PHASE (BY 2030)

- DWARKA EXHIBITION CUM CONVENTION CENTRE (NEW DELHI) WITH INDOOR EXHIBITION AREA OF 250 THSD SQM, 60 THSD CONVENTION AREA AND 3,500 HOTEL ROOMS PLANNED. FIRST PHASE ESTIMATED TO HAVE 80 THSD SQM INDOOR AREA AND 60 THSD SQM CONVENTION AREA BY 2020

INDIAN EXHIBITION INDUSTRY – EMERGING TRENDS

International organizers are having strong influence on exhibition industry by bringing new concepts, improving quality and service, increasing international participation; new infrastructure also planned

Strong influence of international exhibition organizer

- **Shift in focus** from general event to specialized exhibition
- **Increasing emphasis** on quality of participants, better services
- **Industry consolidation** through acquisition of local organizer
- **Incorporation** of technology/ digitalization
- **Introduction** of global events
- **Rise in international participation** for exhibitions as well as visitors (~15% share)

INDIAN EXHIBITION INDUSTRY – EMERGING TRENDS

Focus on improving exhibition infrastructure through revamp/ capacity expansion/ greenfield projects

- 402 thsd sqm of additional exhibition capacity planned in short to mid term
- Revamp of Pragati Maidan which will double its indoor exhibition area to 125 thsd sqm
- 250 thsd sqm of new exhibition and convention center planned at Dwarka by Government of India
- **Private players** also planning expansion (HITEX, Bombay Exhibition Center, Bangalore International Exhibition Center)

WELCOME

9th



IEIA

**OPEN
SEMINAR
2019**



www.ieia.in

13 - 15, June 2019
Pragati Maidan, New Delhi

ABOUT IEIA

Apex body of the Indian Exhibition Industry representing all the segments of the exhibition industry in India including Organisers, Service Providers and Venues, with about 200 leading players as its members

www.ieia.in