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THE ETHIOPIAN TRADE SHOW AND EXHIBITION SECTOR

ASSESSMENT AND POTENTIAL IN THE CONTEXT OF
GLOBAL AND REGIONAL SECTORAL DEVELOPMENTS



INCLUSIVE AND SUSTAINABLE INDUSTRIAL DEVELOPMENT



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I. ACRONYMS

AI	Artificial Intelligence
AUMA	Ausstellungs- u. Messe-Ausschuss der Deutschen Wirtschaft (Association of the German Trade Fair Industry)
AAXO	Association of African Exhibition Organizers
ASFW	Africa Sourcing and Fashion Week
AACCSA	Addis Ababa Chamber of Commerce and Sectoral Associations
ACITF	Addis Chamber International Trade Fair
AGRIFEX	Agricultural and Food Exhibition
AAEC	Addis Ababa Exhibition Centre
BOT	Built-Operate-Transfer
BOOT	Build-Own-Operate-Transfer
CAG24	24th Colloquium of African Geology
CIFIT	China International Fair for Investment & Trade
CSR	Corporate Social Responsibility
ECCSA	Ethiopian Chamber of Commerce and Sectoral Associations
EMECA	European Major Exhibition Association
FTE	Full Time Equivalent
FDI	Foreign Direct Investment
GERD	Grand Ethiopian Renaissance Dam
GTP	Growth and Transformation Plan
IFO	Institut für Wirtschaftsforschung (Economic Research Studies)
ICEGD	International Conference on Engineering Graphics and Design
IPS	Industrial Projects Service
MICE	Meetings Incentives, Conference, Exhibition
MATEX	Manufacturing & Technology Trade Fairs and Exhibition
PPP	Public-Private Partnership contracts
QUT	Queensland University of Technology
ROI	Return on Investment
SDGs	Sustainable Development Goals
SISO	Society of Independent Show Organizers
TIME	Tigray International Manufacturing Expo
UNCTAD	United Nations Conference on Trade and Development
UAE	United Arab Emirates
UFI	Global Association of the Exhibition Industry
UNECA	United Nations Economic Commissions for Africa

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1. INTRODUCTION AND OBJECTIVES OF THE REPORT

Globalization, which transforms the world in a common market with no national boundaries, necessitates new sales and promotion techniques. The promotion of products or services has become a very important factor in sales along with quality. With the development and utilization of transportation and communication tools in trade, market competition is no longer limited to certain regions but extends to global markets. Building capacity and enhancing competitiveness in overseas markets is based on producing competitive products and promoting these products on international markets.

Trade shows and exhibitions refer to one of the most useful methods to introduce products in other markets and it has developed into an important sector in today's business world. The interest of countries around the world in organizing trade fairs is quite strong as these events are considered to be the most efficient means to obtain visibility in the global market and to attract business partners, to promote foreign direct investments and to facilitate the transfer of know-how for sector-specific industrial development. For these reasons, many developing countries also regard trade fairs as an important vehicle for trade promotion.

Trade shows and exhibitions are time-limited activities, generally held regularly at same periods of the year at the same location.¹ Regularity of the exhibition enhances the awareness and effectiveness of these events. Trade shows and exhibitions typically host large number of participants who have the opportunity to exhibit their products from different sectors to buyers and to showcase the latest technological and innovative developments whilst engaging in future discourse relative to sector and industry trends and outlook. Exhibitions provide valuable information about the market availability and pave the way for the establishment and development of commercial cooperation between different enterprises. Increasingly trade shows and exhibitions represent an important policy tool for countries for them to integrate their enterprises into global value chains and thus aspire to increase their competitiveness and market presence.

The scope of this report is to provide a brief analysis of the trade show and exhibition sector in Ethiopia placing it in the context of the global and regional scenarios. Ethiopia's Growth and Transformation Plan (GTP) II, under its GTP II Section "Culture and Tourism", makes reference, albeit only indirectly, to the relevance of the Meetings Incentives, Conference, Exhibition (MICE) sector. Accordingly, the plan sets out for the country to organize 237 national cultural exhibitions and 272 national tourism trade shows. GTP II underpins the need to attract additional foreign direct investments and to boost the country's exports to enhance its balance of payments position. A functioning MICE industry is closely related to this broader objective of the GTP II as many business deals and leads (exports, FDI, sourcing, technology transfer) are generated during industrial fairs and trade shows. This report seeks to present a preliminary assessment of trade show annual offerings (incl. background and information on organizers) in Ethiopia and in the region as well as an analysis of existing business/trade fair facilities in Addis Ababa. It also provides some observations on sectoral growth prospects in view of expected demand for business/trade fair events in the country and region.

¹ The terms trade shows, fairs, exhibitions and events are used interchangeably throughout the report to refer to the same broad type of activities representing the sector.

The report consists of the following sections. Section 2 provides an overview of some basic elements and concepts in any general trade show and exhibition sector discussion. Section 3 makes reference to the global and the African regional trade show markets and industries, respectively. Section 4 focuses on the trade show sector and market in Ethiopia, assessing the current status, identifying key challenges as well as opportunities for further growth and development.² The report ends with key conclusions and recommendations presented in section 5.

The assessment is based on international available secondary data and information, primary data gathered by UNIDO during field visits and missions in Addis Ababa during 2018 as well as other information emanating from various sources in the country. It has to be highlighted that this report does not purport to be complete in as much as providing a comprehensive assessment of the trade show and exhibition business in Ethiopia. Available information is sometimes fragmented and data is not always made publicly available. Nevertheless, all attempts have been made to use all available information to present a realistic assessment of the sector challenges and prospects.³

2 The study does not incorporate trade shows provided by the regional chambers due to non-availability of related information.

3 Several stakeholders refrained from providing basic related information.

2. TRADE SHOWS AND EXHIBITION SECTOR: A GENERAL OVERVIEW

The roots of today's trade shows trace back to the 12th century in late medieval Europe, a time which saw the beginnings of merchant capitalism. Under merchant capitalism, farmers, craftsmen, and merchants would visit towns and come together for trading fairs in order to showcase and sell their products. This form of capitalism continued to grow over the centuries, experiencing significant economic force in the 16th century and giving way to industrial capitalism by the beginning of the 19th century. But even then, the practice of trade shows continued, especially in Europe and North America, so that industry leaders could showcase the latest advances being made in manufacturing and technology.

Despite the rapid development of electronic communication in the last decades, exhibitions continue to evolve as one of the most dynamic and effective elements of sales and marketing. In today's modern economy, trade exhibitions provide the most suitable environments for establishing personal and long-term business contacts. Producing high-quality goods is not enough to achieve success and make sales. There is a vast amount of alternatives of goods or services which consumers and producers can select from. This intense competition in all markets brings forward the importance of marketing and promotion activities. The process of globalization, the rapid developments in information and communication technologies, the expansion of production facilities, the rapid, high-quality and low-cost production opportunities, as well as new standards and quality demands for goods and services, increase the importance of marketing globally.

Participation in trade fairs offers significant advantages to companies and enables them to carry out marketing and promotional activities, to meet their existing or future customers and to develop business relations. Specialized exhibitions bring many enterprises together belonging to the same sector, thus enabling them to share information and establish business partnerships. Exhibitions offer important opportunities for marketing research, pricing and distribution and act as platforms for the showcasing of quality standards of products.

The organizational success of exhibitions is based on a number of important criteria, for example:

- the quality of the available infrastructure, e.g. modern transportation infrastructure, multi-function exhibition areas and exhibition venue capacity;
- the geopolitical location of the host city venue as well as the proximity to local and regional markets;
- the quality of services delivered by fair organizers;
- cooperation with market partners including communication between organizers and participants combined with an effective market research;
- the prominence of exhibitions in the overall industrial policy of the country, in particular with regards to sector and value chain targeting;
- effective coordination and information exchange amongst institutional stakeholders operating in the exhibition sector;
- the development of digital infrastructure.

2.1 KEY CONCEPTS

This section provides a brief overview of the main terminologies used to describe activities and events held in the trade show and exhibition sector. Figure 2.1 provides an illustration of main terminologies frequently utilized in the sector.

Fairs refer to gatherings of people held at regular intervals for the sale of goods and services, often with shows or entertainment, at a place and time fixed by custom. Fairs refer to the earliest form of direct market selling. At the highest end, the Universal Exposition (also called World Fair and World Expo) is the largest undertaking.

Expositions and exhibitions combine the interaction of buyers and sellers with the display of goods and products. While most fairs contain exhibitions, not all exhibitions are fairs (e.g. artworks and museum displays for public viewing).

Trade fairs have been the primary marketing medium of exporting countries through international expositions for specialized segments of an industry or industries and its products and services. Initially, trade fairs were horizontal in their organization, with various products and/or services in specified industry groupings. A vertical organization is more commonplace today with the exhibits being confined to one industry or a specialized segment of a specific industry. Buyers are usually business members of an industry and often must be pre-qualified to attend the trade fair. Trade fairs are mainly business-to-business (B2B) events.

Trade shows are generally open to the public and are attended by company representatives and members of the press. Historically, trade shows have been conceived as vehicles of communication with company exhibits fulfilling an advertising and display function. Over time, this view has been challenged and replaced with the view that trade shows are primarily events where products and services are sold, and/or contracts and rights signed. However, in some instances, product or service offerings and buying processes are regarded as too complex to permit full assessment or commitment to be made on-site. In such situations, trade shows are likely to generate sales leads to be followed up afterwards. Trade shows do have certain distinguishing characteristics that set them apart from consumer or combined shows. The exhibitor is typically a manufacturer or distributor of products or services specific or complementary to those industries authorized to the show. The typical buyer is an industrial end user, or another distributor, within the industry segment hosting the exposition. An access or registration fee may also have to be paid prior to admission to the event. Trade show events may be as short as a single day or as long as seven to ten days depending on the markets being served. Some are held semi-annually. Most are held annually, a few biennially. Some large-scale industrial expositions are held once every three to seven years.⁴

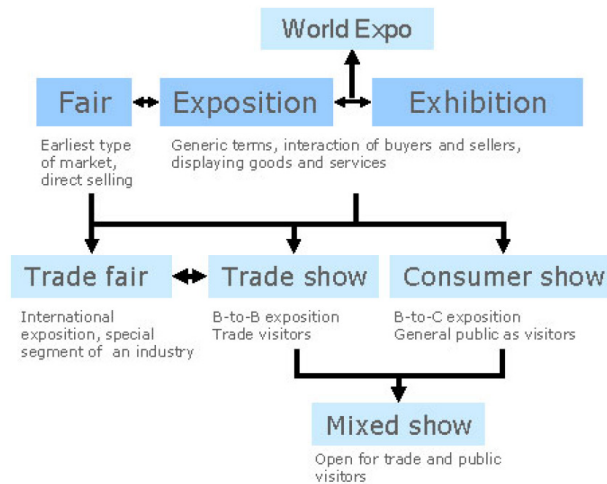
Consumer shows are business-to-customer (B2C) expositions, serving as a collection of temporary stores, such as bazaars, where vendors present their goods and services for sale to interested customers. Such events are open to the general public and provide sellers and buyers with an opportunity for direct, fast selling and deal closing.⁵

Mixed shows are shows that focus on B2B and B2C transactions at the same time, thereby combining aspects of trade shows and consumer shows. They are usually open to the public.

4 For more detailed definitions refer to UFI, the Global Association of the Exhibition Industry, *The Role of Exhibitions in the Marketing Sector*. Available online: https://www.ufi.org/archive/ufi-online-course/UFI_education.pdf (Last accessed on July 8, 2019).

5 Consumer shows and bazaars are interchangeable concepts. For more information please refer to Smith, S.A. Mark, *Trade Shows, Consumer Shows; Know the Difference and Profit*. Available online: <http://www.presentation-pointers.com/showarticle/articleid/352/> (Last accessed on July 8, 2019).

Figure 2.1. Main terminologies utilized in the sector



Source: UFI and University of Ravensburg, Germany

2.2 FUNCTIONS OF TRADE FAIRS

Of all marketing instruments, trade fairs have by far the broadest range of functions. They directly affect business administration, national economies and society as a whole, as per following themes.

Marketing and know-how exchange functions

Trade fairs serve to establish and maintain customer relations, to find business partners and personnel, and to position companies and even countries as a whole. Trade fairs can also act as market research instruments in order to test new products inside the confined and temporary “market” of a trade show, acquire new customers and forge contacts with the press. They enable companies to improve name recognition levels, analyze competitive environments and promote products and services. Visiting trade fairs can help young start-up companies to gain a better overview of technological progress or the degree of competition to be expected in specific service or product segments.⁶

Successful companies have clear goals, which they follow with equally clear strategies. On their road to success, they use a mixture of marketing tools. Amidst this interplay of suitable tools, trade fairs cover by far the widest range of functions. For companies that exhibit at trade fairs, these activities are their most important B2B communication tools.

Overall economic functions

Trade fairs benefit their exhibitors and visitors, but also the economies around their host cities and even the host country as a whole. They generate strong secondary effects, especially for the hotel, restaurant and transport sectors. They are also very beneficial to companies that provide valuable services to trade fair organizers and exhibitors, in fields such as stand design and construction, logistics, translation and interpretation, and hosting. These economic spill-over effects can be much larger than the profits generated by the trade fair organizers alone, especially if the exhibition venues have a strong international focus.

⁶ Cf. Josefson, Sachel Colin (2016), *Tradeshow exhibits as places of Learning: A case study of an exhibit house in the Midwest*, PhD Dissertation, University of North Dakota.

BOX 2: THE CASE OF GERMANY

Budget allocation for trade fairs

In 2019–2020, German companies plan to spend around 47% of their communications budgets on trade fairs. The major role played by trade fairs in B2B communications is also evident from another perspective. More than a quarter of German exhibiting companies (29%) plan to increase their investment in trade fair participations, both at home and abroad. Trade fairs are consequently considered as important communication instruments for companies. For around 83% of the exhibitors, trade fair participation is regarded as important or very important⁷.

Economic impact

According to a study by the IFO Institute of Economic Research on expenditures at German trade fairs, German exhibitors account for the majority of expenditures and invest a total of 9.6 billion EUR per year to participate in trade fairs in Germany alone. Some 30% of this total, 2.9 billion EUR, go to stand construction and complementary services, followed by stand rental including incidental expenses (21.2%), personnel (15.6%) and accommodation/meals (13.5%). Visitors to German trade fairs spend 4.7 billion EUR a year. Their major expenditures are for accommodation (26.1%), followed by travel (21.6%) and catering (21.5%). The same report suggests that trade fairs induce an annual total of 28 billion EUR into the German economy, which is estimated to generate 4.5 billion EUR of tax revenue. Trade fairs in Germany account for the creation of 231,000 full-time jobs. More than half of the jobs generated by trade fairs, are in the service sector, led by the hotel and restaurant industries (31%). Retail and transportation account for 49,100 jobs and the manufacturing sector for 46,800.

2.3. MAIN STAKEHOLDERS OF TRADE SHOWS

Trade shows are faced with a broad range of stakeholders. Main categories include their organizers and participants, of which the latter can further be split into exhibitors and visitors of trade shows.

2.3.1 ORGANIZERS OF TRADE SHOWS

Trade fair organizers act upon mandate, permission or concurrence of the local or national government and are bound to the local rules governing exhibition activities. The main tasks of an organizer would broadly refer to the following elements:

- Conducting market research on the targeted industry sectors (i.e. potential exhibitors and buyers);
- Creating a marketing concept for the trade show, including the promotion of the show's organization, name, date, venue, promotion channels (online and offline), budget, service partners, sales activities, etc.;
- Elaborating a task list with a time scheme including a monitoring system to ensure that all activities are done at the right time;

⁷ Association of the German Trade Fair Industry (AUMA) Messetrend 2019, highlights available online: <https://www.auma.de/en/facts-and-figures/trade-fairs-as-central-marketing-instruments> (Last accessed on July 8, 2019)

- Training and preparing the staff and determining responsibilities amongst team members⁸;
- Logistics and post-trade follow up.

The main categories of different organizers at trade shows include political actors, industrial associations and private investors.

Governments

Governments and politicians in general, have an interest in participating in the organization of fairs. The economic benefits they generate, helps further developing the economic development of a region. The influence of the government into the trade show business is considerably strong and exhibition venues are also used as platforms, where government can promote trade and investment policy reforms to an international audience.

Industrial associations

Whilst the primary goal of sectoral industrial associations is to contribute to sectoral development, an increasing number has been able to establish trade shows that have since become their core activity. Through their proceeds, they have financed the associations' growth and even subsidized other activities and services. Subsidiary goals of an industrial association or a chamber of commerce, when organizing a fair, can be to promote membership, raise its profile internationally and improve its network for joint initiatives. A motive for foreign sectoral associations to participate in organizing a fair, can be the opportunity presented by the national industry, to visibly position itself in a promising national or regional area and to create sustainable business ties (supplier match-making, forward linkages/beneficiation, joint ventures, technology transfer, etc.) with indigenous firms in that sector.

Private investors

Given the potential ability of generating profit, a trade show can also be the business project of a private investor or a group of investors. In a number of occasions, this format has proven to be successful. It allows positioning and developing the trade show clearly in relation to actual private sector demand as opposed to wider local industry promotion objectives, which is often the main focus of industrial associations or chambers of commerce.

In some cases, multiple different stakeholders will be involved in organizing a trade show. Public-private partnership contracts (PPP) are increasingly being signed for trade fair venues, to share ensuing risks. The aim is that venues are developed and managed through PPP arrangements and trade shows organized by private enterprises.

⁸ In emerging economies, trade show organizations could provide jobs for young and well-educated people, who have good organizational skills, are fluent in at least one foreign language and flexible in working hours. Also lateral entry employees from the hotel industry and gastronomy as well as from logistics are recommended for positions in the trade fair industry, because of similarities in job profiles and required skills sets. The opportunities in a growing segment like the trade show business or venue management can be particularly promising for female job seekers compared to other office jobs.

BOX 2.2: PPP FOR TRADE FAIR AND EXHIBITION VENUES

PPPs are formed to establish management and ownership of new venues. 'Built-Operate-Transfer' (BOT) or 'Build-Own-Operate-Transfer' (BOOT) can be used for this purpose. BOT is a form of project financing, wherein a private entity receives a concession from the private or public sector to finance, design, construct, own, and operate a facility stated in the concession contract. This enables the project proponent to recover his or her investment and the operating and maintenance expenses in the project within a specified period of time. As the building of venues involves intensive capital investment and long-term operational and management expenses, PPPs offer promising financing alternatives compared to public financing alone. Especially venue operation has inherent complexities and requires private sector knowledge and creativity which may not exist within government structures. A study by Liu and Wilkinson undertaken on two sites in Hong Kong Special Administrative Region and New Zealand provides an example: It found that PPPs in large scale venue projects were successful if the contract leverages the private partner's expertise and skills in the venue operation stage.⁹

2.3.2 PARTICIPANTS: EXHIBITORS AND VISITORS

Possible target participants of trade fairs include manufacturers, traders, agents, suppliers of industrial inputs, suppliers of components and accessories, suppliers of services, research and training institutes, professional associations, trade promotion organizations, technical cooperation agencies, institutions, press and other media.

Participants may already be party to the development of concepts before trade shows are planned or held. As a result, exhibitors and visitors can heavily influence the organizers' strategic and operational objectives. At specialized trade fairs, i.e. during events that deal with a specific sector and that are restricted to professional communities, the general public is not commonly admitted. These communities comprise national and foreign professionals, working for example for sector-specific associations, chambers of commerce and industry or investment promotion agencies. The participants often have significant decision-making authority in terms of purchase or initiation of partnership negotiations.

There is an important distinction between exhibitors and visitors. During trade shows, business contracts are not only made between the exhibitors and visitors but also between the exhibitors. Business between exhibitors is even quite common, especially if they are located and operating in different tiers of the production process.

Furthermore, the segmentation of domestic and foreign participants is crucial, since a high percentage of foreign participation would automatically determine the recognition of the fair as being "international". Otherwise, the trade fair remains a national or even local event, supported by the domestic industry.

⁹ Cf. Liu, T., Wilkinson, S., *Large-scale public venue development and the application of Public-Private Partnerships (PPPs)*, International Journal of Project Management (32), p. 88-100.

From the point-of-view of an exhibitor, the driving motivation for the participation in a trade fair is the opportunity to:

- showcase its products or services and to reach a targeted audience in one single location;
- create or reinforce the visibility and raise the awareness and interest about the company's supply capacity;
- attend to inquiries and disseminate information;
- identify new potential customers or strengthen relations with the existing ones;
- establish backward and forward business linkages;
- identify agents;
- negotiate offers which may result in actual orders;
- develop and expand the network of business relations;
- meet potential partners that can lead to business alliances;

Participation in a trade fair is not only linked to a motive of improving supplier-client relation, but it also has many aspects of a more horizontal nature, such as:

- exploring the market and observing the trends;
- exchanging experiences, keeping abreast of product and industry innovations, knowledge of competitors, learning about latest sales and promotion techniques;
- comparing quality, price, and marketing mix performance;
- attending technical sessions/conferences/symposia and other similar functions organized within the trade fair as side events;
- visiting local industry;
- seeking and finding employees;
- finding investors or joint-venture partners;
- motivating staff;
- learning intercultural skills;
- showing support to government initiatives and/or to umbrellas business associations;

Some of the motivations of exhibitors can also be shared by the visitors. The definition of visitors is rather heterogeneous. Visitors come from any of the categories mentioned above. Visitors can also be suppliers, who decided not to participate as exhibitors due to time or cost reasons. A company can also switch between the status of a visitor in one year and that of an exhibitor in another year, and vice versa.

2.3.3 COMMUNICATION, MARKETING AND SALES

In order to successfully market trade fairs, the following promotion activities should be considered:

Direct marketing: This constitutes the bulk of any promotion campaign. A database must be set up which typically constitutes a fundamental tool for promotion. The database should encompass the domestic target (enterprises, institutions, private sector organizations, institutes, etc.) as well as the foreign enterprises and entities to be reached. As for the foreign data, the database can be compiled from different sources, such as: already existing clients of local exporters, lists available in the national trade promotion organization and private sector associations, catalogues of international trade fairs that can be requested from the organizers, printed or online directories, web portals and the result of individual websites search on the

internet. The database should be selectively compiled based on the scope of the planned trade fair (target markets) and expected profiles of exhibitors and visitors. As part of promotion, other means can be put in place by the organizer, with the support of stakeholders: inviting overseas journalists and selected buyers, offering special packages to overseas industry associations, inviting overseas experts, with the view of positioning the trade fair in the international context. Newsletters are also important means with which to remain in contact with the exhibitors or visitors of previous editions of the trade show and to reward these for their loyalty through e.g. discounted "early bird" offerings.

Websites of trade show organizers: Today it is indispensable that trade show organizers invest heavily in modern homepages and that they keep their websites up-to-date. Especially in the case where foreign exhibitors or visitors are being invited, they have to directly get relevant information online. Professional trade show organizers add all requested forms electronically and offer regular content information based on newsletters or blogs. Matchmaking and advertising tools are to be uploaded together with travel and service information. Searchable exhibitor directories are also becoming common features on the websites of trade show organizers. One of the major problems of marketing of trade shows in developing countries is the lack of suitable online information systems. Although the production and acceptance of online applications for all facets of life is growing rapidly, the quality of websites often lags behind.

Promotion at international trade fairs and other events of the sector: A stand where inquiries can be attended and publicity material handed over can be an influential promotion means as the walk-in visitors may pertain to the same target group of the planned trade fair. Similarly, announcements made on the occasion of sectoral symposia or meetings can substantially contribute to promotion. Such participation can be planned at a fairly early stage of the trade fair project and possibly repeated at a more advanced stage of the promotion campaign. In the latter case, applications for participation can already be collected.

Visits to trade groups: Meetings with foreign trade associations for discussing possible cooperation in promoting the trade fair can also be occasions for presenting the trade fair project to representatives from the local industries.

Media coverage: Articles in the magazines of foreign trade promotion organizations and industry associations in the target markets constitute effective means of promotion. Press releases and other information material can complement this effort. This is part of the collaboration to be developed and established with such bodies for them to act as relays of communication and multipliers of communication to their members. If obtainable, the same bodies in their own websites can also insert a link to the trade fair website. In addition or in substitution of the articles and web links, specific advertisement spaces can be acquired in the same media.

Overseas agents: The organizer of a typical trade show may also appoint promotion agents in selected target markets. Overseas agents can for example be located in foreign chambers of commerce abroad.

3. GLOBAL TRADE SHOW INDUSTRY

It is estimated that, at the global level, approximately 31,000 exhibitions are organized each year, attracting over 260 million visitors and featuring 4.4 million exhibiting companies. Exhibitors and visitors combined spend an aggregate USD 109 billion every year on exhibitions, making exhibitions a significant global industry. The industry directly generates 680,000 FTE (full time equivalent) jobs. When adding the impact on other 'tourism related' activities, such as transport, accommodation, logistics, transportation, the number of generated jobs is estimated to rise to 1.8 million.¹⁰

Despite the emergence of a plethora of online trading and B2B platforms in all parts of the world, the gross turnover expectations of the "classical" exhibition industry remain largely positive (see Figure 3.1 below). According to the 2018 "UFI Global Exhibition Barometer", most exhibition companies maintained a good level of performance in 2017 and more than 40% of companies from all regions declared an increase in profit of more than 10% compared to 2016.¹¹

The 2018 UFI Global Exhibition Barometer highlights that the main performance driver of the global exhibition sector is the economic stability of the home market where the exhibitions are taking place (see Figure 3.2).¹² Other important performance determinants are related to competition within the industry or sector and with online B2B offerings and social media platforms. The sector also suffers from internal challenges with 17% of respondents indicating that the lack of human and financial resources constitute inhibiting factors to the sector's further growth. In recent years, digitization has also impacted the exhibition industry and, unsurprisingly, exhibition industry firms make attempts to respond to customer digitization needs with the advent of new digital products offered as well as enhanced internal organizational processes using latest technologies. The industry also saw the advent of virtual trade shows which are less costly than physical trade shows but suffer from their own challenges ranging from technological problems, the difficulties in effectively finding customers and the lack of face-to-face relationship-building.¹³

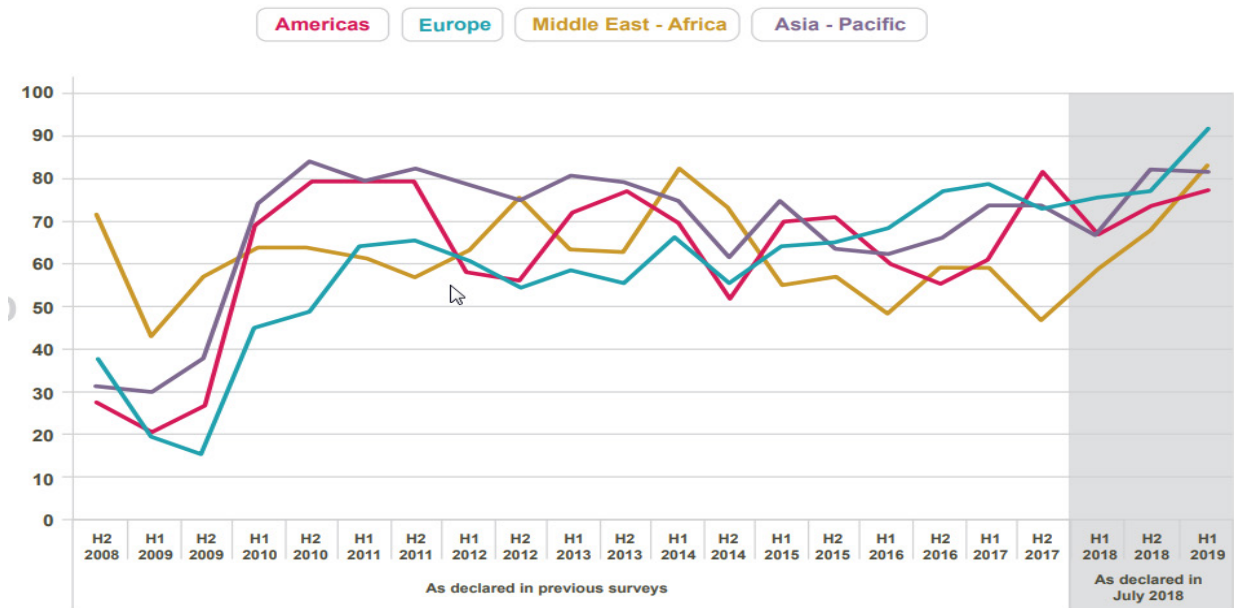
10 Otherwise stated, data and figures mentioned and referred to in this section pertain to The Global Association of the Exhibition Industry (UFI) studies and statistics. For more information, please refer to their website under <https://www.ufi.org> (Last accessed on July 8, 2019).

11 The highest proportions of companies declaring a profit increase are observed in India (72%), Germany and the USA (70% respectively); on the opposite side, the lowest proportions are in Russia (21%), South Africa and some countries in Asia/Pacific other than China, India or Indonesia.

12 24% of respondents of the 2018 "UFI Global Exhibition Barometer" flagged this to be the most important business issue.

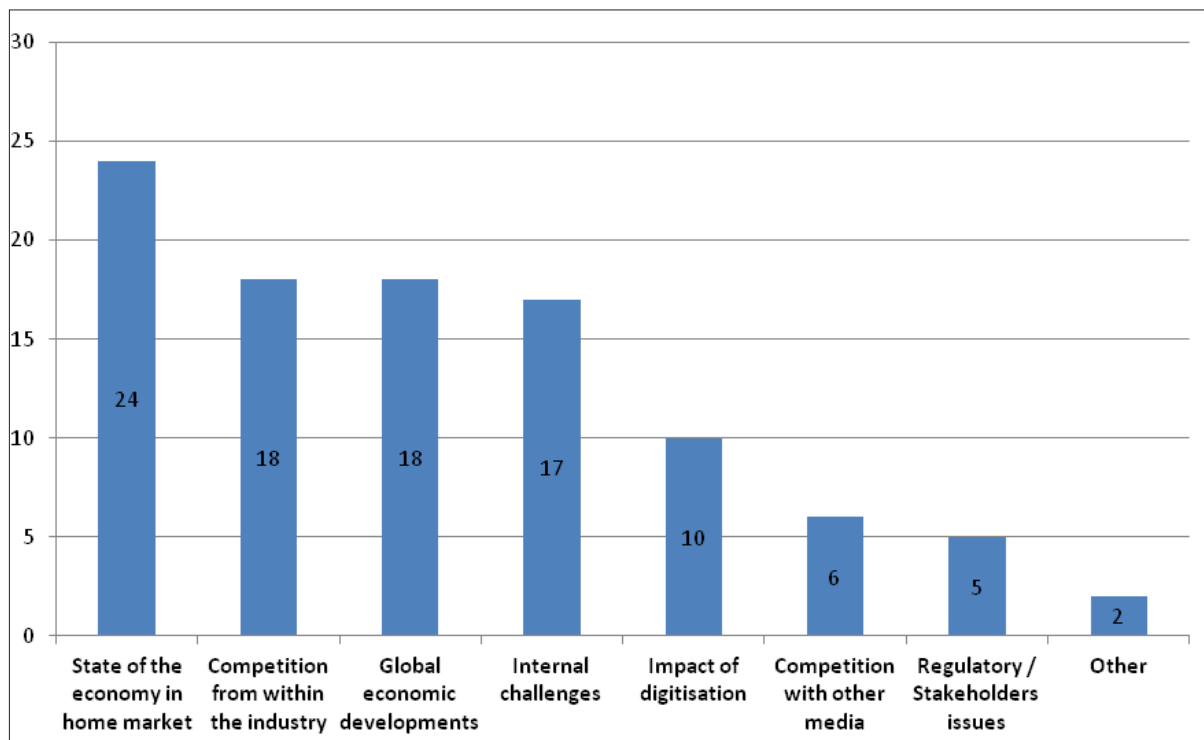
13 Cf. Gottlieb, Udo; Bianchi, Constanze (2017), *Virtual trade shows: exhibitors' perspectives on virtual marketing capability requirements*. Electronic Commerce Research and Applications, 21(2017), p.17–26.

Figure 3.1. Percentage of exhibition companies declaring an increase in turnover



Source: UFI Global Exhibition Barometer (July 2018)

Figure 3.2. Most important performance determinants of the exhibition sector



Source: UFI Global Exhibition Barometer (July 2018)

Exhibition space in the world increased by an annual average of 1.2 % between the 2011 to 2017 period. In addition to the exhibition spaces, the number of venues also increased. It is estimated that, globally, there are currently 1,212 exhibition venues with a minimum of 5,000 sq m of gross exhibition space. Additional venue space has become available in almost all regions of the world and substantial venue investments and upgrades have taken place to increase venue capacities. Total indoor exhibition space in these venues increased by 2.3 million sq m between 2011 and 2017, reaching 34.6 million sq m. The majority of this increase resulted from increasing the capacity of existing venues as opposed to the construction of entirely new venues. 17 new venues were constructed between 2011 and 2017.¹⁴ Concerning regional distribution, Table 3.1 highlights the European continent's high ranking in terms of the number of venues as well as the total indoor exhibition space. European countries constitute respectively 40.9% and 45% of the total number of exhibition venues and indoor exhibition space available in the world. In comparison, the figure for Middle East & Africa¹⁵ is only 4.9% for number of venues and 4.1% for indoor exhibition space.

Table 3.1. Regional venue and exhibition space availability 2017

Region	EXHIBITION VENUES		INDOOR EXHIBITION SPACE	
	No. of venues	Share of total	Indoor Exhibition Space (million sq m)	Share of total
Europe	496	41%	15,6	48%
North America	389	33%	7,9	24%
Asia/Pacific	184	15%	6,6	20%
Central/South America	70	6%	1,3	4%
Middle East	33	3%	0,8	2%
Africa	25	2%	0,5	2%

Venues with a minimum of 5,000 sq m indoor exhibition space. Source: UFI World Map (December 2011)

Table 3.2 highlights the fact that the leading 15 countries account for 80% of the global indoor exhibition space. These same 15 countries also account for the lion's share of the total increase of indoor exhibition space between 2011 and 2017.

¹⁴ Cf. UFI, The Global Association of the Exhibition Industry (2018), *World Map of Exhibition Venues. 2017 Edition*. Available online: https://www.ufi.org/wp-content/uploads/2018/06/UFI_World_Map_of_Venues_2017_revJune18.pdf (Last accessed on July 8, 2019).

¹⁵ UFI does not disaggregate figures between Middle East and Africa. It is therefore not possible to disaggregate figures for Sub-Saharan Africa.

Table 3.2. National exhibition space availability in 2011

	Country	Total (in sq m)	Share in world total %
1	USA	6.712.342	21
2	China	4.755.102	15
3	Germany	3.377.821	10
4	Italy	2.227.304	7
5	France	2.094.554	6
6	Spain	1.548.057	5
7	The Netherlands	960.530	3
8	Brazil	701.882	2
9	United Kingdom	701.857	2
10	Canada	684.175	2
11	Russia	566.777	2
12	Switzerland	500.570	2
13	Belgium	448.265	1
14	Turkey	433.904	1
15	Mexico	431.761	1

Venues with a minimum of 5 000 sq m indoor exhibition space. Source: UFI World Map (December 2011)

Overall, between 2011 and 2017, the total indoor exhibition space grew most in the Asia Pacific Region (+38%), followed by Middle East & Africa (+16%); Europe (+7%), Central & South America (+7%) and North America (+5%). There was a decrease of 6% in total indoor exhibition space in the African continent. The increase in exhibition space in the Asia-Pacific region is mainly due to very large investments occurring in China. Between 2011 and 2017, China registered a 21% increase reaching a total of 5,753,724 sq m.

Globally, there are 61 venues larger than 100,000 sq m, of which 37 are located in Europe followed by 16 in the Asia/Pacific region (see Table 3.3)

Table 3.3. Number of venues by size in 2011

	Europe	North America	Asia/Pacific	Central/ South America	Middle East	Africa
≥ 100,000	36	6	12	-	1	-
50,000 to 99,999	37	26	28	5	3	1
20,000 to 49,999	119	65	70	17	10	9
5,000 to 19,999	304	292	74	48	19	15

Venues with a minimum of 5 000 sq m indoor exhibition space. Source: UFI World Map (December 2011)

3.1 NORTH AMERICA

In the case of North America, UFI lists a total of 394 venues with an indoor exhibition space of 8.17 million sq m, making this region the second most important location for global exhibitions after Europe. The USA trade show industry represents a substantial contributor to the US economy. Exhibitions and trade shows in the USA are often organized and held together with congresses or conferences. Trade shows in the USA are the meeting point of the respective industries. Generally speaking, conference and congress programmes accompanying trade shows in the USA are as important as the trade fair itself. While trade fairs in Europe developed from markets, trade shows in the USA developed from meetings of salesmen travelling in the country. To date, the majority of visitors, who attend trade shows in the USA come from the USA or neighboring countries. For more than 100 years, trade shows in the USA have been organized as so-called "conventions" by the trade associates of each respective industry. The main focus of trade shows in USA is to share experiences and to meet up with potential customers. Generally, trade shows in the USA are very strict in terms of admission. Only registered trade visitors are permitted access to many specialized trade shows.

The average duration of trade shows in the USA is often shorter than for example in Germany. In contrast to European countries, stand building and design tend to be less relevant. However, an essential feature of all trade shows in the USA is an open stand design. Another peculiarity is that fairs in the United States are often location-independent, as US exhibition organizers do not operate on their own grounds. As a result, there are several types of "walking" trade shows where terrain, city or region is changed. As a result, even established trade fairs with fixed locations can react flexibly to economic and other framework conditions.

According to the US trade show magazine "Trade Show Executive", around 4 million sq m of space are leased to around 120,000 exhibitors annually at the 100 largest US trade fairs. Around 3.6 million trade visitors are registered each year (AUMA, 2016). The largest venues in the USA are the McCormick Place in Chicago (241,548 sq. m), the Orange County Convention Center in Orlando (195,096 sq. m) and the Las Vegas Convention Centre (180,290 sq. m). These venues rank in the 10th, 18th and 21st place, globally.¹⁶

3.2 ASIA AND PACIFIC

The aggregate indoor exhibition space has reached 8.22 million sq. m in the Asia and Pacific region (covering venues of more than 5,000 sq. m). According to UFI, the exhibition space capacity grew by 24.4% between 2011 and 2017 which translates into an increase of global market share of Asia and the Pacific of 3.3%, mainly at the expense of market shares from Europe, and North America. According to the "Trade Fair Industry in Asia Annual Report" forecast, by the end of 2018, the venue capacity in Asia is estimated to have reached over 9 million sq. m and the number of venues operating in Asia to have increased from 203 to 230.

In terms of net space sold, during 2011 and 2017, Asian exhibitions, increased their turnover by 7% to reach 22 million sq. m. More than half of the total net space was sold in China (58%), amounting to 13 million sq. m, which is over six times the amount of space sold in Japan, Asia's second largest trade fair market (2 million sq. m). Cambodia was the fastest growing small market, with net space sold soaring by 28%, while India was the fastest growing large market, up 11% from 1.07 million to 1.18 million sq. m. Several other large markets reported less significant

¹⁶ Cf. UFI, The Global Association of the Exhibition Industry (2018), *World Map of Exhibition Venues. 2017 Edition*. Available online: https://www.ufi.org/wp-content/uploads/2018/06/UFI_World_Map_of_Venues_2017_revJune18.pdf (Last accessed on July 8, 2019).

growth. Net space sold expanded by 5.1% in Australia and 4% in Taiwan. Other Southeast Asian markets that exceeded the regional average included Malaysia (12.1%), the Philippines (8%), Thailand (7.6%) and Singapore (7.5%). Vietnam (7%) and Indonesia (6.7%) experienced growth in line with the regional average. For the first time, Korea surpassed one million net sq. m sold, with a market increase of 4.4%. Japan's market expanded by 2.9%, while space constraints limited Hong Kong's growth to 2.2%, bringing it close to 1 million net sq. m sold (967,750 sq. m). In 2019, the opening of a new venue in Shenzhen, China, will add 400,000 sq. m of gross indoor capacity to the regional total causing this figure to rise again. The Asia trade fair industry sold more than 20 million sq. m in 2016, representing a year-on-year rise of 5.5%. The forecasts see further incremental growth in future years as additional venue capacity in markets such as China, Malaysia, India, Thailand and Australia is increasing. Asia is thus strongly positioned to remain one of the most attractive trade fair markets worldwide.

3.3 EUROPE

Europe is the leading place for global trade fairs, with more than 90% of the world's leading trade shows being held in Europe. Germany and Italy are the top countries leading trade show development, with other important countries for trade shows in Europe being France, Spain and Russia. Trade shows in Europe are characterized by a long trade fair tradition, which has developed over centuries. Among the 45 largest trade show venues in the world having more than 100 000 sq m of exhibiting space, 34 venues are held in Europe. Some 18 of these European trade show venues are members of the European Major Exhibition Association (EMECA). On average, there are more than 1,200 fairs held at venues of EMECA members. On aggregate, about 388.000 exhibitors occupy a space of 36 million sq m which are visited by 43.5 million visitors. While in Germany the organization of trade shows and the ownership and management of exhibition venues is mostly incorporated in one and the same company, the situation is different in many other parts of Europe. For example, in the United Kingdom where venue holders and trade show organizers are often separate business entities.

Two British trade fair organizers are leading the global turnover statistics (2017 figures): Reed Exhibitions (1,264 million Euros) and UBM (979 million Euros) – see Table 3.4 below. Messe Frankfurt ranks third with sales of 669 million Euros, followed by Informa (UK) with sales of 631 million.¹⁷ Four additional German businesses ranked 7th to 10th: Messe Düsseldorf with 367 million Euros, Koelnmesse with 357.9 million Euros, Deutsche Messe Hanover with 356.4 million Euros and Messe München with 332.6 million Euros¹⁸.

In Europe, one can observe two different business models driving turnover levels. On the one hand, the UK trade show market does not provide a sufficient basis for growth in turnover. As a result, British organizers, originally coming from the trade publishing sector, have invested heavily in overseas trade shows mostly based on mergers and acquisitions (M&A). The German local trade show market ranks number three worldwide (after China and the USA) providing enough substance for domestic income (< 50%). But the annual growing rates are modest, ranging between 3-4%. In this case, the strategy is to expand with overseas trade shows either by "geo-cloning" own brands (e.g. Automechanica¹⁹) to other countries or by M&A.

17 UBM has meanwhile been purchased by Informa, which is now the new leading trade show organizer worldwide.

18 Cf. AUMA (Association of German Trade Fair Industry), <https://www.auma.de/en/facts-and-figures/trade-fair-sector-key-figures> (accessed on 15 July 2019)

19 For more information please refer to the website of "Automechanica". Available online: <https://automechanika.messefrankfurt.com/frankfurt/en.html> (Last accessed on July 8, 2019).

Table 3.4. Revenues of exhibition companies (in million €) by AUMA 2018

	2017	2016	2015
Reed Exhibitions (UK)	1,264.00	1,277.40	1,183.0
UBM plc (UK)	979,0	830,6	855,5
Messe Frankfurt (D)	669.1	647	647.8
Informa (UK)	631.1	358.3	356.1
GL Events (F)	481.9	452.6	456
MCH Group (CH)	421.8	410	384.5
Messe Düsseldorf (D)	367	442.8	302
Koelnmesse (D)	357.9	274	321.2
Deutsche Messe (D)	356.4	302.3	329.3
Messe München (D)	332.6	428.1	277.4

Note 1: numbers differ either through M&A (mainly British organizers), or due to 2 or 3 years cycles of the shows

3.4 MIDDLE EAST AND AFRICA

The Middle East Region and Africa are evaluated together in the records held by the UFI. In the Middle East & African region, there are 59 venues, 31 of which were between 5,000 and 19,999 sq m (refer to Table 3.3). According to statistics, total exhibition rentable space in South Africa ranked first in the Middle East and Africa region, standing at 229,504 sq m (refer to Table 3.5). South Africa's indoor exhibition space represents almost 29% of the total African indoor exhibition rentable space, standing at 213,700 sq m gross ranking second behind the UAE. Table 3.6 ranks African countries according to their availability of indoor exhibition space.

Table 3.5. Countries with more than 500 sq m of total venue space available and regional market share

Number	Country	Total Venue Space	Regional Market share
1	South Africa	229,504	16.30%
2	UAE	215,491	15.30%
3	Iran	196,334	13.90%
4	Qatar	78,8	5.60%
5	Syria	76,5	5.40%
6	Iraq	59,917	4.30%
7	Saudi Arabia	51,5	3.70%
8	Algeria	50,0	3.60%

Source: The Exhibition Industry in the Middle East & Africa 2011-2012 Executive Summary

The study “The Exhibition Industry in the Middle East & Africa 2011-2012 Report” published by UFI in 2013 identified 55 purpose-built exhibition venues in 40 capitals and major cities in 25 African nations. South Africa leads with 15 venues in 6 cities representing 27% of the total number of African venues included in this report. The high number of venues in this country is exceptional on a continent where many countries have no exhibition venues at all. At the northern tip of Africa, Tunisia represents an outstanding exhibition capacity with seven purpose-built venues in five cities and a number of smaller venues. Morocco has three venues. Algeria, Egypt, Ethiopia, Kenya, Nigeria, Namibia, Zambia and Zimbabwe each have 2 venues and there is one venue in each of the following countries: Angola, Botswana, Burkina Faso, Ghana, Libya, Madagascar, Malawi, Mozambique, Senegal, Sudan, Swaziland, Togo and Uganda. The documented gross indoor exhibition rentable space in these 25 countries is 737,968 sq m. Outdoor space is 535,306 sq m, and total rentable exhibition space is 1,273,274 sq m. The Johannesburg Expo Center is the largest venue in Africa in terms of gross indoor exhibition rentable space with 52,000 sq m. It is followed by the Algiers’ Palais des Expositions with 50,000 sq m, and then LE KRAM/The International Tunisian Fairs Company Fairground and the Tshwane Events Center in Pretoria with 40,000 sq m, respectively (refer to Table 3.6).

In the year 2011, UFI documented 433 trade shows or exhibitions in Africa. South Africa and Algeria managed almost half of these exhibitions. Kenya and Ethiopia are important host venues in Eastern Africa, hosting 30 and 22 events, respectively (see Table 3.7).

Table 3.6. Total indoor exhibition space (sq m) & country ranking in Africa

South Africa	213.700
Tunisia	83.000
Algeria	56.300
Nigeria	51.000
Tanzania	36.300
Morocco	31.000
Senegal	27.000
Zimbabwe	26.700
Togo	24.000
Mozambique	20.668
Angola	20.600
Libya	19.600
Ghana	18.000
Malawi	18.000
Zambia	16.700
Sudan	13.200
Madagascar	11.000
Namibia	10.000
Ethiopia	4.200
Kenya	1.400

Source: *The Exhibition Industry in the Middle East & Africa 2011-2012, 2nd Edition, UFI 2013*

Table 3.7. Capacity (gross) of selected African venues (Algeria to Togo)

COUNTRY	CITY	EXHIBITION CENTRE	GROSS EXHIBITION SPACE		
			AVAILABLE (SQ M '000)		
			COVERED	OPEN	TOTAL
Algeria	Algiers	Palais des Expositions (SAFEX)	50	25	75
	Oran	Palais des Expositions EMEC	6,3	4	10,3
Angola	Luanda	Feira Internacional de Angola/ FIL - International Fair of Luanda	20,6		20,6
Egypt	Cairo	CICC – Cairo International Convention and Exhibition Centre	23,6	15	38,6
		Cairo International Fairground - GOIEF	9,6	16	25,6
Ethiopia	Addis Ababa	Addis Ababa Exhibition Centre	4,2	2,2	6,4
Ghana	Accra	Ghana Trade Fair Co.	18		18
Kenya	Nairobi	Sarit Exhibitions	1,4		1,4
		KICC - Kenyatta International Conference Centre	2,4	7	9,4
Libya	Tripoli	Tripoli International Fairground	19,6	6,5	26,1
Madagascar	Antananarivo	Parc des Exposition, Forello Expo	11		11
Malawi	Blantyre	International Blantyre Exhibition Centre	18		18
Morocco	Casablanca	Office des Foires et Expositions de Casablanca (OFEC)	20	16	36
		Parc des Expositions de l'Office des Changes (OCEC)	8		8
	Agadir	Parc d'Expo – Agadir	3		3
Mozambique	Maputo	Facim – Maputo International Trade Fair	20,668	4,5	25,168
Namibia	Ongwediva	Ongwediva Town Council / Ongwediva Trade Fair Centre	10		10
Nigeria	Lagos	Main Arena, Tafawa Balewa Square.	50		50
	Abuja	Abuja International Conference Centre (AICC)	1		1
Senegal	Dakar	Centre International du	27	29	56
		Commerce CICES - Parc des Expositions			

COUNTRY	CITY	EXHIBITION CENTRE	GROSS EXHIBITION SPACE		
			AVAILABLE (SQ M '000)		
			COVERED	OPEN	TOTAL
South Africa	Cape Town	Cape Town International Convention Centre	11,3		11,3
		Good Hope Center	8,8	7	15,8
	Durban	Durban International Convention Centre (Durban ICC)	24,1	33,006	57,106
		Olive Convention Centre	3,2		3,2
	East London	East London ICC	2,3		2,3
	Johannesburg	Emperors Palace	2,7		2,7
		Gallagher Convention Centre	25,9	50	75,9
		JHB Expo Centre	52	100	152
		Sandton Convention Centre	10,4		10,4
		The Coca-Cola Dome	13,5	2	15,5
		Kaylami Exhibition & Conference Centre	7	7	14
		UNISA Ormonde CC	4		4
	KwaZulu Natal	Royal Showgrounds	7,3		7,3
	Pretoria	CSIR ICC	1		1
Tshwane Events Centre		40,2		40,2	
Sudan	Khartoum	Sudanese Free Zones & Markets Co. Ltd	13,2	50	63,2
Swaziland	Manzini	Mavuso Trade Centre			
Tanzania	Dar es Salaam	Mwalimu J.K. Nyerere Fair Grounds	30,3	4,7	35
		Agakhan Diamond Exhibition Centre	6		6
Togo	Lome	Le Centre Togolais des Expositions et Foires/ Togo Exhibition Centre	24	59	83

COUNTRY	CITY	EXHIBITION CENTRE	GROSS EXHIBITION SPACE		
			AVAILABLE (SQ M '000)		
			COVERED	OPEN	TOTAL
Tunisia	Gabes	Foire Internationale de Gabes / Gabes International Fairground	4		4
	Hammamet	Medina Events / Expo Centre	12		12
	Sfax	Association de la Foire Internationale de Sfax	10		10
	Sousse	Foire Internationale de Sousse	6		6
	Tunis	Centre International des Foires & Expositions de Tunis – LA CHARGUIA	6	3	9
		Société Foire Internationale de Tunis – LE KRAM / The International Tunisian Fairs Company Fairground	40	15	55
		Soukra Expo	5	1	6
Zambia	Lusaka	Zambian Agricultural and Commercial Fairground	15	35	50
	Ndola	Zambia International Trade Fair Exhibition Grounds	1,7	1,8	3,5
Zimbabwe	Bulawayo	Zimbabwe International Exhibition Centre	17,9	41,6	59,5
	Harare	Exhibition Park	8,8		8,8

Source: UFI 2011

Table 3.8. Number of events organized in Africa in 2011

COUNTRY	CITY	NO. OF EVENTS IN 2011	
Algeria	Algiers	69	102
	Oran	33	
Angola	Luanda	17	17
Botswana	Gaborone	2	2
Burkina Faso	Ouagadougou	1	1
Egypt	Cairo	30	30
Ethiopia	Addis Ababa	22	22
Ghana	Accra	4	4
Kenya	Nairobi (est.)	30	30
Libya	Tripoli	0	0
Morocco	Agadir	2	37
	Casablanca	29	
	Marrakech	3	
	Meknes	1	
	Tetouan	2	
Mozambique	Maputo	1	1
Namibia	Ongwediva	1	2
	Windhoek	1	
Nigeria	Abuja	2	7
	Lagos	5	
Senegal	Dakar	6	6
South Africa	Cape Town	15	112
	Durban	24	
	Johannesburg	69	
	Pretoria	4	
Sudan	Khartoum	16	16
Tanzania	Dar es Salaam	1	1
Tunisia	Bizerte	Not available	32
	Djerba	Not available	
	Gabes	Not available	
	Hammamet	3	
	Jarjis	Not available	
	Nabeul	Not available	
	Sfax	2	
	Sidi Bouzid	Not available	
	Sousse	Not available	
	Tunis	27	
Uganda	Kampala	2	2
Zambia	Lusaka	1	2
	Ndola	1	
Zimbabwe	Bulawayo	6	7
	Harare	1	

Source: Global Exhibition Industry Statistics 2014, UFI

In terms of sub-sectors, general trade is the most common exhibition in Africa, followed by home/office appliances and furniture, building and construction/housing, medical and healthcare events and industrial/engineering events (see Table 3.9).

Table 3.9. Top ten sectors in Africa

Business Sector	Number of Events
General Trade Fair	42
Home/Office Appliances & Furniture	24
Building and Construction/Housing	23
Medical, Healthcare and Pharmaceuticals	23
Industrial/Engineering	23
Consumer Goods and Product Exhibitions	22
Consumer Direct Sales Fair	20
Bridal	19
Agriculture	18
Automobile/Motor & Parts	17

Source: Global Exhibition Industry Statistics 2014, UFI

This information clearly presents a snapshot of the situation described earlier, that North and South Africa are leading far ahead and Sub-Saharan Africa is still struggling to develop a thriving trade show and exhibition sector. It has to be highlighted that these numbers only reflect trade shows which have been officially registered at the trade show directory of the Global Association of Fair Industry (UFI), AUMA and others, and therefore it may not reflect an accurate situation of trade shows in the respective countries. For instance the trade show number of Ethiopia varies according to different directories between 8 (per year) by AUMA and 19 shows registered by the specialized website "www.eventseye.com". Recent onsite research in Ethiopia unearthed further differing figures, ranging from 100 to 200 shows. One of the mayor problems is that the trade show venues do not provide serious data or even do not have their own website with actual show calendars. There is therefore an enormous need by all relevant stakeholders to conduct more in-depth field research to analyze the current status and the opportunities of trade shows. For example, research on the East African trade show industry could lead to better coordination of trade show dates between neighboring countries or even could be initiated a circulation of a specific show concept in those countries. Sometimes sharing is the better way to success and enhances scale and relevance of otherwise separately organized smaller fairs. International visitors would welcome such coordination, which works quite well in, for example, South East Asia.

There exists an Association of African Exhibition Organizers (AAXO), which is based in South Africa. Its aim is to build an African network of trade show organizers. This organization is currently dominated by overseas and South African members but works hard to find and include African show organizers. AAXO currently has 18 members.²⁰ AAXO's information about the exhibition industry is very limited and its "trend" analysis of the African exhibition industry remains anecdotal e.g. claiming that "the amount of people from Africa who express interest in B2B events across the continent has increased by a substantial 20 times in the last four years (that is a 40% year on year growth)" or that "within Africa itself, different regions are also gaining popularity for different categories in the exhibition industry. Egypt, for example, has built a reputation as an attractive destination for medical and pharmaceutical exhibitions, while Kenya is known for exhibitions in building and construction. Nigeria has become a powerhouse in the power and energy-related exhibition space, while South Africa is breaking new grounds as a food and beverage exhibition."

²⁰ Cf. The Association of African Business Advisors (2018), *Official Directory 2018*. AAXO, South Africa. Available online: <http://aaxo.co.za/wp-content/uploads/2018/03/AAXO-Directory-2018-eBook.pdf> (Last accessed on July 8, 2019).

4. THE TRADE SHOW SECTOR IN ETHIOPIA

This section specifically focuses on the trade show sector and market in Ethiopia, assessing the current state of play, identifying key challenges as well as opportunities for growth and development.

4.1 PUBLICLY PROMOTED TRADE SHOWS IN ETHIOPIA

In terms of the list of published trade shows in Ethiopia, the International Trade Show Directories name between eight (AUMA) and 21 (EventsEye) events in Ethiopia, specifically held in the political and business capital city of Addis Ababa. Table 4.1 lists information about these exhibitions forthcoming in 2019.²¹ According to www.eventseye.com, 15 of the forthcoming trade shows have been/will be organized in the Millennium Hall in Addis Ababa and six in the Addis Ababa Exhibition Centre.

Discussions with local trade show organizers (see next section for a summary list of key stakeholders) give a mixed, incomplete picture of the overall number of trade shows held in Addis Ababa as well as in other regions of the country. According to estimates, the number of trade shows and exhibitions conducted annually varies between 100 and 200 trade shows across various sectoral and business segments. There is no data and information regarding the type of trade shows, including the number of B2B events, B2C meetings held within trade show events or numbers of relative exhibitors and visitors. For example, in the discussions held during UNIDO technical missions in the country some evidence was collated from the management of the Millennium Hall, a trade show venue in Addis Ababa. Although no numbers were disclosed, it was mentioned that the venue has been fully booked for the entire year of 2018 and the first half of 2019. Tentatively, this translates into approximately 30 trade shows during a typical year.²²

It was confirmed during the interviews that the various member chambers of the Ethiopian Chamber of Commerce and Sectoral Associations, e.g. the Amhara Regional Chamber of Commerce and Sectoral Associations, the Oromia Regional Chamber of Commerce and Sectoral Associations, the Southern Regional Chamber of Commerce and Sectoral Associations; or the Tigray Regional Chamber of Commerce and Sectoral Associations also organize their own trade shows and exhibitions in their respective regions but inaccessibility of website information did not allow to further verify this information. Moreover, other emerging cities, such as Bahir Dar, are becoming increasingly relevant economic and trade centers and are starting to catch up as venues to similar events and activities as those organized in the capital.

21 For example, at least one known trade show is missing from the list, namely the Africa Sourcing and Fashion Week (ASFW), see <https://www.asfw-online.com/home>.

22 Provided the exhibition halls are in operation for a maximum of eleven months in a year and that only one trade show is being held at the same time with around five to six days' time (two days booth construction, two to three show days, one day dismantling), this would result in a maximum of 44 trade shows, although since the hall is also being leased by other events like weddings or other private and public events, 30 trade shows per year seems to be a more realistic indicator.

Table 4.1. Trade shows in Addis Ababa

EXHIBITION NAME	CYCLE	PLACE TITLE	NEXT DATE
ETHIO POULTRY EXPO - ETHIOPEX	unknown	Addis Ababa	18.10 - 20.10 2018
<i>Ethiopian Poultry Expo</i>		Millennium Hall	
AFRIWOOD EAST AFRICA - ETHIOPIA	unknown	Addis Ababa	21.03 - 23.03 2019
<i>International Wood & Furniture Manufacturing Exhibition. AFRIWOOD is the foremost exhibition that offers you a chance to meet wood and woodworking professionals and develop ideas for increasing the range and quality of one's business</i>		Millennium Hall	
AUTOEXPO AFRICA - ETHIOPIA	unknown	Addis Ababa	21.03 - 23.03 2019
<i>International exhibition for automotive, spare parts & accessories</i>		Millennium Hall	
BUILDEXPO AFRICA - ETHIOPIA	unknown	Addis Ababa	21.03 - 23.03 2019
<i>International Building, Construction, Municipal Equipment, Natural Stone, Machinery and Equipment Exhibition</i>		Millennium Hall	
DENTEXPO ETHIOPIA	unknown	Addis Ababa	21.03 - 23.03 2019
<i>International Trade Exhibition on Dental Products, Equipment, Instruments, Material and Service in Ethiopia</i>		Millennium Hall	
EITE - ETHIOPIA INTERNATIONAL TRADE EXHIBITION	once a year	Addis Ababa	21.03 - 23.03 2019
<i>Africa's Prime Multi-Sector Products, Equipment & Machinery Expo</i>		Millennium Hall	
FOODAGRO - ETHIOPIA	unknown	Addis Ababa	21.03 - 23.03 2019
<i>International Food, Hotel & Agricultural Products, Equipment & Machinery Trade</i>		Millennium Hall	
LIGHTEXPO AFRICA - ETHIOPIA	unknown	Addis Ababa	21.03 - 23.03 2019
<i>International Residential, Commercial & Industrial Lighting and Accessories Trade Exhibition</i>		Millennium Hall	
MEDEXPO ETHIOPIA	unknown	Addis Ababa	21.03 - 23.03 2019
<i>International Medical & Health Care Products & Equipment Trade Exhibition</i>		Millennium Hall	
POWER & ENERGY AFRICA - ETHIOPIA	unknown	Addis Ababa	21.03 - 23.03 2019
<i>International Trade Exhibition for the Power and Energy Sector</i>		Millennium Hall	
PPP - PLASTICS PRINTING PACKAGING - ETHIOPIA	unknown	Addis Ababa	21.03 - 23.03 2019
<i>International Plastic, Printing & Packaging Trade Exhibition</i>		Millennium Hall	
SOLAR AFRICA - ETHIOPIA	unknown	Addis Ababa	21.03 - 23.03 2019
<i>Solar Energy Exhibition in Ethiopia</i>		Millennium Hall	
CHINA TRADE WEEK - ETHIOPIA	unknown	Addis Ababa	02.05 - 04.05 2019
<i>China Trade Week - KSA is an essential opportunity for any business owners, professional buyers, wholesalers or import / export organizations who are seeking new sources for their products and services</i>		Millennium Hall	
ETHIOPIA AGRI, FOOD & PACK EXPO	once a year	Addis Ababa	06.05 - 13.05 2019
<i>International Trade Event for the entire Food, Beverage & Packaging industry</i>		Addis Ababa Exhibition Centre	
AGRO AGROTECH ETHIOPIA	unknown	Addis Ababa	09.05 - 11.05 2019
<i>Agro AgroTech Ethiopia focusses on agricultural technology and machinery, tractors, seeds, animal production, horticulture, greenhouse technology, service companies...</i>		Addis Ababa Exhibition Centre	
ETHIOPIA PLASTPRINTPACK	once a year	Addis Ababa	09.05 - 11.05 2019
<i>Ethiopia's International Plastics, Printing and Packaging Trade Show</i>		Millennium Hall	
ETHIOPIA BUILDING EXPO	once a year	Addis Ababa	20.09 - 24.09 2019
<i>Building & Construction expo in Ethiopia</i>		Addis Ababa Exhibition Centre	

ADDIS AGROFOOD	once a year	Addis Ababa	09.10 - 12.10 2019
<i>Agriculture, Agricultural Machineries, Food, Food Technologies, and Packaging Exhibition in Ethiopia</i>		Addis Ababa Exhibition Centre	
ADDIS BUILD	once a year	Addis Ababa	09.10 - 12.10 2019
<i>International Construction & Construction Materials Exhibition</i>		Addis Ababa Exhibition Centre	
AGROFOOD PLASTPACK ETHIOPIA	once a year	Addis Ababa	Nov. 2019 (?)
<i>International Trade Show on Agriculture, Food, Beverage and Plastics & Packaging Solutions and Technology</i>		Millennium Hall	
ETHIOPIA TRADE EXPO	once a year	Addis Ababa	Nov. 2019 (?)
<i>International Trade Exhibition on all kinds of General, FMCG, Consumer & Industrial products, Machinery & Equipments etc</i>		Addis Ababa Exhibition Centre	

Source: www.eventseye.com

The review of available (feasibility) studies, hereunder not mentioned in greater detail or quoted explicitly, points to a rapidly growing demand for exhibition venues. This demand is determined by the overall economic context of Ethiopia which, according to the World Bank has generally seen GDP growth rates between 8-10% over the past decade.²³

Likewise, according to UNCTAD, the country now hosts more than 18 billion USD of foreign direct investment (FDI) stocks with new incoming FDI flows that surpassed 3 billion USD in 2016 and 2017.²⁴ The economic growth triggers an increased need for the market place function offered by trade shows in order to stimulate transactions between goods and services of various types. As concerns the city of Addis Ababa, it is estimated that its GDP is growing faster than the national economy i.e. at a rate of currently 14%. Its population has surpassed 10 million and is estimated to grow at an annual 3.8% per annum.²⁵

The 2013 demand for exhibition venues in Addis Ababa was estimated to be at a baseline of 457,707 sq m. On the assumption of a realistic demand projection of 10% in line with the overall economic activity in the country, it can be estimated that, in 2018, the demand for exhibition venues exceeded 700,000 sq m. to further double to 1.4 million sq m. by 2025.

4.2. STAKEHOLDERS IN THE TRADE SHOW BUSINESS

4.2.1 ORGANIZERS OF TRADE SHOWS

There is no official, publicly-available Ethiopian national trade show calendar nor a national register of exhibition organizers active in the country. The Ethiopian trade show industry is still considered to be in its infancy. Only a limited number of domestic trade shows are listed in the international show directories and therefore private organizers lack visibility outside the country. A number of private trade show and exhibition organizers have been interviewed in the preparation of this report. These entities have originally started their business either as event planners or as stand constructors. The first successes with small shows paved the way to invest more in this business. As there is no education or training offered in this direction, the

23 Cf. The World Bank Group (2018), *Ethiopia Country Profile*. Available online: <https://data.worldbank.org/country/ethiopia> (Last accessed on July 8, 2019).

24 Cf. UNCTAD (2019), *World Investment Report 2019. Special Economic Zones. Country Fact Sheet Ethiopia*. Available online: https://unctad.org/sections/dite_dir/docs/wir2019/wir19_fs_et_en.pdf (Last accessed on July 8, 2019).

25 Cf. World Bank (2015), *Addis Ababa – Enhancing Urban Resilience: city strength resilient cities program*. Washington, D.C. World Bank Group.

private organizers have to learn on the job and hire their staff from different business sectors. It is predictable that an improved business environment and venue situation would prompt more private organizers to enter this market.

A particular important role in the trade show and exhibition business in Ethiopia is played by the chambers of commerce, notably the Ethiopian Chamber of Commerce and Sectoral Associations (ECCSA) founded in 1943 and the Addis Ababa Chamber of Commerce and Sectoral Associations (AACCSA) founded in 1947. These two Chambers essentially determine the business life in Ethiopia. Both institutions are strongly committed to the organization of trade shows which as an activity is estimated to contribute to up to 30% of their respective overall revenue as private sector organizations.

One of the core tasks of ECCSA is organizing trade shows and exhibitions to promote trade and investment. Information emerging from discussions with key private sector representatives suggests that organizing trade shows is one of the ECCSA's strong areas where the Chamber is active to promote trade and investment in the country.

AACCSA sees itself as pioneer in organizing trade shows in Ethiopia. The Chamber organizes one general-international and three specialized trade fairs and exhibitions, including the Addis Chamber International Trade Fair (ACITF), other specialized fairs such as the Agricultural and Food Exhibition (AGRIFEX) Ethiopia and the Tourism and Travel, and Manufacturing & Technology Trade Fairs and Exhibition (MATEX).²⁶

It also provides trade fair related services, prepares a trade fair magazine, organizes trade fair missions outside Ethiopia and disseminates trade fair and exhibition programmes to members and international participants. The general international trade fair – ACITF – held every February, sees an average of 300 exhibitors, half of which are typically foreign exhibitors.²⁷ Annually, ACITF attracts between 20,000 and 50,000 visitors.²⁸

There are a few other private trade show organizers in the Ethiopian market mainly organizing small-scale trade fairs and exhibitions. These organizers are willing to expand their activities in what they see as growing and flourishing market. Such entities receive support from the Ethiopian Government i.e. MOTI, although it is not clear whether this support includes specific budget allocation.

There are other business associations who are organizers and are directly or indirectly involved in the organization of sectoral trade shows. These include, for example, the Ethiopian Tour Operators Association, the Ethiopian Horticulture Producer Exporters Association, the Ethiopian Coffee Exporters Association, the Ethiopian Seed Association, the Ethiopian Public Health Organization, the Ethiopian Pulses, Oilseeds, and Spices Processors Exporters Association, the National Livestock Association and the Ethiopian Association of Basic Metal and Engineering Industries. Other associations such as the Ethiopian Economic Association and the Ethiopian Marketing Professionals Association also have organized specific professional trade shows in the past.²⁹

²⁶ Since 2012, AACCSA has also been organizing an international tourism, travel and hospitality fair.

²⁷ Participation of foreign companies in these exhibitions is facilitated through registration at respective Embassies based in Ethiopia or by liaising directly with the Chamber. Foreign exhibitors can also register through overseas promotion and exhibition agencies authorized by AACCSA.

²⁸ Cf. 10Times (2019), *Addis Chamber International Trade Fair*. Available online: <https://10times.com/addis-chamber-trade-fair> (Last accessed on July 8, 2019).

²⁹ For example, as Ethiopia emerges as exporter of fresh cut flowers to the world flower market, the Ethiopian Horticulture Producer Exporters Association will host its 7th Edition of Horti Flora Expo in the capital on March 13th for three consecutive days. The objective of this expo is to mobilize industry players and attract potential foreign investment in the sector. The Expo is expected to attract buyers and investors from many parts of the world with consultations and meetings with stakeholders and actors in the industry. The year of 2018 saw the participation of over 120 local and international producers, input suppliers, consultants, buyers and other stakeholders in the sector.

In addition to Ethiopian organizers of trade shows and exhibitions a number of international organizers have shown interest in directly and indirectly tapping and supporting the local market. For example, Expogroup Dubai³⁰ is a company strongly committed to African markets and a principal organizer of B2B events in the region. Expogroup has 16 branded exhibitions, covering various industrial sub-sectors and has its main focus on four countries in the region, namely Ethiopia, Kenya, Rwanda and Tanzania. Expogroup runs 12 of these 16 branded trade shows in Ethiopia.³¹ The company acts as a sales agent for ECCSA and AACCSA to undertake the international promotion of respective trade shows and exhibitions, including the BUILDDEXPO, AUTOEXPO and FOODAGRO. In addition, the company actively promotes other trade shows and fairs in Ethiopia held during the calendar year.

Another international trade show organizer – Innovation Marketing & In Exhibition Org Group, Dubai – has a portfolio of trade shows in the East African region comprising Ethiopia, Kenya, Tanzania, Sudan and Uganda. Specifically in Ethiopia, this company contracts a number of sales representatives promoting forthcoming events such as the Agrifood and Pack Expo, the Ethiopia Beauty Expo, the Ethiopia Build Expo and the Ethiopia Foodpack Expo.

An internationally renowned trade show organizer in Ethiopia is the German Fairtrade GMBH. For 25 years, Fairtrade is specialized in conducting B2B trade shows in agro technology, packaging, ICT, energy, food and hospitality. Fairtrade started operating in Ethiopia in 2017 focusing on

an agro-food, plastic and printing packaging exhibition. Since then, this show has been held annually with an average number of 70 exhibitors and mobilizing around 2,700 participants.³²

4.2.2 EXHIBITION VENUES

Few trade show and exhibition venues are at the moment hosting trade shows in Addis Ababa and these are notably the Addis Ababa Exhibition Centre (AAEC) and the Millennium Hall. Beyond Addis Ababa, the capacity situation is weaker. The usual practice is to exhibit products and services either in big tents made of PVC sheets and similar makeshift materials or by temporarily renting space/halls from government or private organizations. Facilities secured in this manner are usually of poor standard; and hence, are liable to exposing displayed items to weather-induced damage as well as theft.

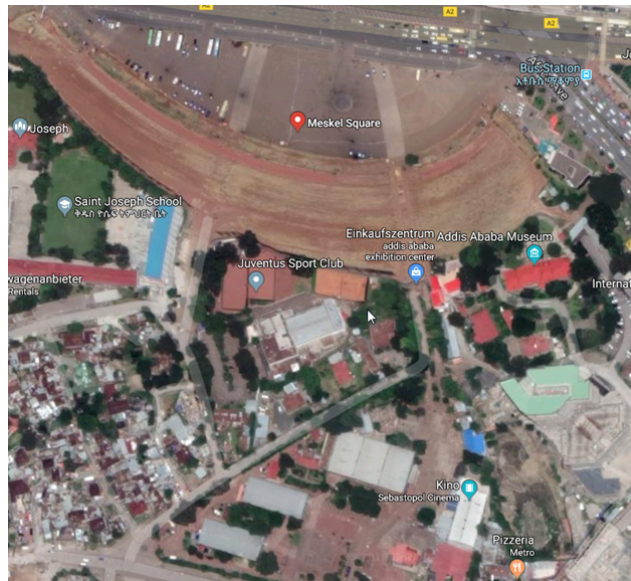
The AAEC is the oldest venue of Addis Ababa (36 years) and consists of a 24.000 sq m hall and outdoor capacity (refer to Image 4.1). It comprises three halls. Each hall can hold up to 90 booths and the open space has a capacity for 140 stalls.

30 Cf. Expo Group (no date) See Green. Dubai. Available online: https://expogr.com/EXPOGROUP_PROFILE.pdf (Last accessed on July 8, 2019).

31 Except the Oil & Gas Fair (only Kenya and Tanzania); INDUSMACH – Industrial Tools and Machinery (only Kenya and Tanzania); ITELEXPO – Multisector (only Kenya and Tanzania), Big3 Africa Show – Interior, builders hardware (Kenya).

32 For 2019, it is foreseen that the show will include a German pavilion to promote the new Africa policy of the German Government. Cf. AUMA (2018), Auslandsmesseprogramme der Bundesrepublik Deutschland und der Bundesländer. Germany. Available online: <https://www.auma.de/de/medien/publikationen/Documents/auslandsmesseprogramme-der-bundesrepublik-deutschland-und-der-bundeslaender/auma-auslandsmesseprogramm-2019.pdf> (Last accessed on July 8, 2019).

Figure 4.1. The area around Addis Ababa's Meskel Square with adjacent AAEC area



Source: Google Maps

Most trade shows organized by the AACCSA are held at the AAEC. The Addis Chamber International Trade Fair is one such event (Refer to Box 4.1). Anecdotal evidence suggests that the daily rate per sq m is much lower than the market leader, the Millennium Hall. Pertaining capacity indicators for the AAEC venue are highlighted in Table 4.2.

Complementary information collected for the present report indicates that the number of exhibition events annually organized in the Addis Ababa Exhibition Center increased from 19 in 2002 to 31 in 2013 registering an average annual growth of 8.1% over the past eleven years. During the same period, the center witnessed a drastic growth of spaces rented to events. The size of venues annually rented increased from 13,000 sq. m in 2002/03 to 279,374 sq. m in 2009/10 exhibiting an annual average growth rate of 9.2% during the recent five years.

A review of events organized at AAEC between July 2017 and July 2018 reveals that between 8 to 10% out of a total of 36 events (listed both as "tentative" and "fixed") have characteristics of a trade show. Other events comprise meetings, graduations, cultural exhibitions, anniversary celebrations and others. It is quite revealing that 32% of these events (i.e. eleven events) required space beyond the capacity of the three halls so that outdoor area had to be used. Some 15% (5) of the events occupied all three halls, 24% (8) required two of the three available halls and in 29% of the events one hall sufficed.

BOX 4.1: THE ADDIS CHAMBER INTERNATIONAL TRADE FAIR 2018

The 2018 edition of the Addis Chamber International Trade Fair was held on 21–28 February 2018 and was held at the Addis Ababa Exhibition Centre, co-organized by the AACCSA in collaboration with the Italian Trade Agency. The event saw the participation of exhibitors from 13 different countries including Egypt, China, India, Indonesia, Italy, Kenya, North Korea, Pakistan, Sri Lanka, Sudan, Sweden, Tanzania and the UAE. In total some 201 exhibitors participated in the event of which 109 were international exhibitors. Approximately 88% of exhibitors stated they would return for the 2019 event. The event attracted around 8,000 visitors covering mainly SMEs and large-scale business owners but also importers/exporters, state organizations, public associations, cooperatives, educational institutions and professionals. Post show reports suggest that, on aggregate, managers and company owners and other representatives represented the largest share of visitors to the fair (64% of the total). An intensive marketing campaign was undertaken to attract visitors to the event and which included institutional and media partnerships, extensive use of printed and online advertising (e.g. newspapers, SMS, email to companies), traditional media such as publicity on TV and radio, as well as promotion on social media platforms such Facebook, Instagram and Twitter.

Table 4.2. Exhibition venues in Addis Ababa Exhibition Center (AAEC)

Pavilions	Usable (M ²)	Path Way (M ²)	Total Area (M ²)
Pavilion No. 1	810	790	1600
Pavilion No. 2	378	377	755
Pavilion No. 3	405	350	755
Sub Total	1.593	1.517	3.110
Outdoor Area	2140	695	2835
Grand Total	3.733	2.212	5.945

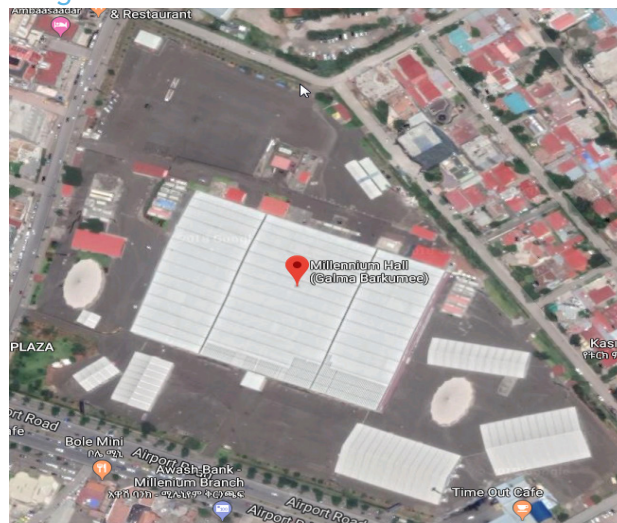
Source: Exhibition Centre and Market Development Enterprise

Typically, stands at AAEC are allocated on a first-come, first-served basis and pricing differs among various available categories including indoor and outdoor space. In the indoor space area, a single stand has an area of 9 sq m which is the minimum allocable space. There is no minimum area set for out-door space allocation. In terms of pricing, the price per sq m typically ranges from Ethiopian Birr (ETB) 150 per sq m for indoor space to ETB 100 for outdoor space. In addition, AACCSA provides various trade fair services including free-of-charge stand construction elements (e.g. furniture and lighting including electricity power supply), specialized communication services like telephone, fax and e-mail, promotional campaign using different media, free listing of exhibits and exhibitors in the exhibition magazine, regular stand cleaning, on-site security and free visa application assistance to exhibitors. Additional services include discounts on hotel room charges with AACCSA's partner hotels, provision of transport services to and from hotels to the exhibition center and the arrangement of reliable transit service with AACCSA designated transit companies.

The Millennium Hall is considered the main exhibition venue in Addis Ababa (see image 4.2). Its management does not provide any published information and the company maintains no website. Facilities total 86,858 sq m comprising one large hall and three (3) small conference rooms. The large hall, with about 6,000 sq m (gross), enables organizers to sell around 3,000 sq m booth space. For bigger shows there are additional temporary halls (tents) available. The Millennium Hall is owned by the Addis Park Development and Management PLC, a private company established in 2004. Facilities were built in 2006 by the Ethiopian business person Sheikh Mohammed Hussein Ali Al-Amoudi for the celebration of the Ethiopian Millennium. The

Hall is equipped with modern and state-of-the-art sound and light effect technologies as well as exhibition materials to meet the needs of modern conventions. Over the years, the Hall has hosted events of national, regional and international standing with thousands of delegates and visitors such as the Saudi-East African Investment Forum, the Indian Forum, the Annual All African Leather Fair, the 16th International Conference on Public Health, the State Dinner of the Africa World Economic Forum, the annual Diplomatic Charity Bazaar and the 24th Colloquium of African Geology (CAG24). The Millennium Hall was recently venue to the Ethio-Eritrea Reunion Ceremony held on 18 July 2018.³³ The price to rent the entire hall is estimated at ETB 400,000 (USD 13,786) per day.³⁴ According to information provided by the Addis Park management, in total some 76 events are scheduled to be organized in 2019. In 2018, 49 events have been held. Over the period 2011–2017, the Millennium hall hosted some 253 events of which around 60% referred to conferences (103 events) and exhibitions (50 events).

Figure 4.2. The Millennium Hall in Addis Ababa



Source: Google Maps

On the basis of information provided by a number of domestic private organizers, the rental fees for the AAEC and the Millennium Hall differ considerably. The daily rate at the Millennium Hall costs circa ETB 400.000 (USD 13,786), whereas the equivalent rate at AAEC amounts to ETB 100.000 (USD 3446.5).³⁵

In addition to AAEC and the Millennium Hall, other venues such as the Conference Centre of the United Nations Economic Commission for Africa (UNECA)³⁶ offer limited space for small-scale exhibitions to be organized complementary to international conferences that take place in one of the three main conference rooms with respective capacities of 864, 474 or 115 seats. The First International Agro-Industry Investment Forum (AIFE)³⁷ organized jointly by the Government of Ethiopia and UNIDO in 2016 took place in the

33 Cf. Ethio Channel (July 15, 2018), Ethio-Eritrea Reunion Ceremony - Millennium Hall, Addis Ababa, Ethiopia (Video file), available online: <https://www.youtube.com/watch?v=-rAFXAdaoEU> (Last accessed on July 9, 2019).3

34 For reference, according to the official UN Exchange Rate as of July 11, 2019 USD 1 equals ETB 29.0150.

35 Empirical evidence suggest that organizers are not entitled to rent for more than one year at one go. Instead they have to ask for new slots for the successive year after finishing their current booked show. Generally long standing customers are offered the same slot in successive years. The hall rental price is calculated at a daily rate (including not only show dates but also construction and dismantling days) which decreases the more days are booked. Competition clauses are not accepted by the Millennium management, so it is normal that within one year trade shows with the same topics are organized. On request the management may offer stand construction items and building services. The normal contract between organizers and the Millennium Hall consists of two days construction, two days move-in, three days show time, one day dismantling. The Hall offers the venue for all kind of events, not only for trade shows.

36 Cf. UNECA, Economic Commission for Africa 1958-2018 (2018), *Facilities*, Available online: <https://www.uneca.org/ecacc/pages/facilities> (Last accessed on July 9, 2019).

37 Cf. UNIDO (2016), *First International Agro-Industry Investment Forum Ethiopia*, 5-7 October 2016, Addis Ababa, Ethiopia, Available Online: <https://www.unido.org/events-agro-industry-investment-forum-ethiopia-aife/aife1-general-information> (Last accessed on July 9, 2019).

UNECA compound and also hosted an exhibition with space for 30 booths with a size of 6 sq m each as well as a B2B area of around 200 sq m in the main building. At other events such as for example the Third International Conference on Financing for Development (FfD3) and UNIDO's Third Inclusive and Sustainable Industrial Development Forum³⁸ in July 2015 tents for exhibitors outside the main building but still on the UNECA compound were rented. Generally, the strict security and entry regulations for the UNECA premises are not conducive to organize large-scale events with potentially ten thousands of visitors or exhibitors.

4.3 NEW EXHIBITION VENUES

A number of new exhibition venues have been projected with their development being in the pipeline:

Chamber Hub

ECCSA is in the planning stage of the so-called Chamber Hub. This hub development comprises an exhibition and convention center, a Chamber Academy, a building serving as premises for the Pan-African Chamber of Commerce and eventually also a hotel. Circa 15 hectares of land have already been requested from the government. A feasibility study for this project has been prepared.

Addis Africa International Convention and Exhibition Center (AAICEC)

A new exhibition venue project is entitled the Addis Africa International Convention and Exhibition Center (AAICEC) (Refer to Image 4.3). The AAICEC is planned to be a multi-purpose business center which will host a range of events including international conferences, conventions, trade fairs and exhibitions. The center will have four large size exhibition pavilions comprising a total of

27,300 sq m, of which 20,600 sq m is indoor and the remaining 6,700 sq m outdoor. The center will also serve as a venue for other related events such as exchange of business information, establishment of business contacts, undertaking of business deals, as well as short-term training activities on business development. The project comprises the construction of a multipurpose hall, planned to have a capacity of 5,000 guests, a conference hall with a capacity of over 3,000 seats, two auditoriums with 500 seats each and six small meeting rooms with capacities between 50 to 100 seats. The venue will also comprise a four star hotel and other support facilities including restaurants, a canteen, lounge space and playgrounds.

The AAICEC Share Company is registered with the former Ethiopian Ministry of Trade (now Ministry of Industry and Trade). Its major shareholders are the City Government of Addis Ababa (585 million ETB shares), the Ethio-South Investment S.C. (Ethiopian diaspora living in South Africa) owning 115 million ETB as shares, the Anbesa City Bus Service Enterprise (30 million ETB shares), the Addis Credit and Saving Institute (25 million ETB shares) as well as other financial institutions (Bank of Abyssinia, Dashen Bank) and corporations. AACCSA is only a minor stakeholder (10 million ETB) in this project.

³⁸ Cf. ISID Operation Platform (2015), *Third ISID Forum, Addis Ababa, Ethiopia, 14 July, 2015*, Available online: <https://www.unido.org/third-isid-forum> (Last accessed on July 9, 2019).

The AAICEC will occupy 11 hectares of land in the CMC area in the Eastern part of Addis Ababa in relative proximity to Bole Airport (7.5 km) – refer to Image 4.4. The land has been secured from the Addis Ababa City Government on a leasehold basis for a period of 90 years.

The official ground breaking ceremony took place on 3 June 2017. Construction works are contracted to the Chinese Company CGCOC which has won against other bidding companies from China, Ethiopia and the UAE. The first half of the venue is scheduled to be opened beginning of 2020 distributed among two halls. The costs for this first phase will be close to 1.17 billion ETB.

The second phase will comprise another two halls in the same size and a convention center. The total costs of the project will be over three billion ETB. Currently, the project is seeking additional investment, also perhaps in the form of a Public Private Partnership (PPP) arrangement and through the issuance of (diaspora) bonds. The IPS (Industrial Projects Service) undertook the feasibility study and has estimated a minimum of 23% rate of return on investment.³⁹ The AAICEC Project profile claims that “the project will generate profit throughout its operational life” with “return on Investment (ROI) 12% at the beginning of the project and projected to reach in the 15 years of the project to 36%”. Shares with a total volume of over 600 million ETB are still open for subscription. The minimum an individual/company can subscribe to is 25 shares with a share value of 1000 ETB (minimum 25,000 ETB) and there is no maximum limit. Shareholding is restricted to Ethiopian individuals or companies including Ethiopian diaspora. The financing modality shows parallels to the diaspora bond scheme of the Grand Ethiopian Renaissance Dam (GERD).⁴⁰

Figure 4.3. Addis Africa International Convention and Exhibition Center



Source: Addis-Africa International Convention and Exhibition Center (www.aicec.com)

39 Cf. AAICEC, Innovation Exchange Center (2013), FAQ, Available online : <https://www.aicec.com/index.php/faq> (Last accessed on July 9, 2019).

40 Cf. Mengste, Esseye (2018), *Ethiopia: Supporting GERD in Spirit of National Consensus*. The Ethiopian Herald. Available online: <https://allafrica.com/stories/201804051037.html> (Last accessed on July 9, 2019).

Figure 4.4. A Construction site of the Addis Africa International Convention and Exhibition Center



Source: Google Maps

Figure 4.4. B Construction site of the Addis Africa International Convention and Exhibition Center



Source: Addis Africa International Convention & Exhibition Center Facebook site (<https://www.facebook.com/aicec/>) 2019

Addis Ababa Exhibition Centre (AAEC)

The current real estate of the Addis Ababa Exhibition Centre (AAEC) is four hectares and is expected to be extended to ten hectares in a forthcoming project expansion. In the first phase of the proposed project, the old venue would still operate while construction works of the new buildings will commence. In a second phase, the old halls will be torn down and the new venue buildings are expected to be finished. The total occupied area is estimated at 24,000 sq m. According to the plans, the refurbished AAEC will comprise conference halls, a “seven-star” hotel, a flexible exhibition center and a parking lot that can accommodate over 2,500 vehicles as well as a museum.⁴¹ The planned auditorium and conference halls will sprawl over 17,000 sq m, while the total area designated for conference and exhibition space will be 57,000 sq m. The halls are designed to accommodate flexible spaces ranging from 4,000 sq m to 12,000 sq m.⁴²

The municipality of Addis Ababa will cover the costs of the new building and also maintenance while the exhibition management will be operated by a private company, based on a PPP contract modality. Construction costs are estimated at 11 Billion ETB. The municipality of Addis Ababa signed a Memorandum of Understanding with Fira Barcelona to provide a feasibility study for a new fairground. Fira Barcelona delivered this study in 2018, comprising a business plan and a design rendering for a new exhibition hall. Anecdotal evidence suggests that a number of investors from China, Turkey, Russia and Middle East have expressed interest in the project.

“La Gare” Project

At the end of November 2018, several press releases announced the planning of a 360,000 sq m project in the Addis district of “La Gare” in proximity to Bole Road (see Image 4.5.).⁴³ The developer is the Dubai-based property developer Eagle Hills. The masterplan of the project proclaims it to be primarily a social housing component “where residential units will be built to permanently accommodate the existing residents currently living in the project site”.⁴⁴ The masterplan foresees 4,000 mostly luxury residences “adding to the lifestyle choice of residents and catalyzing the economy as commercial, hospitality, retail and leisure attractions – all set in a gated community around a green park”.⁴⁵ The current masterplan foresees several four and five star hotels which may offer additional conference space and facilities.

41 Cf. Tadesse, Fasika (2018), Ethiopia: New 10b Br Convention Centre to Rise in Addis, Addisfortune. Available online: <https://allafrica.com/stories/201809200295.html> (Last accessed on July 9, 2019).

42 Cf. Ibid

43 Cf. Chapman, Sophie (2018), Eagle Hills Announces Plans for La Gare Project. Global Construction. Available online: <https://www.constructionglobal.com/major-projects/eagle-hills-announces-plans-la-gare-development-ethiopia-addis-ababa> (Last accessed on July 9, 2019).

Cf. The Ethiopian Herald (2018), Eagle Hills, an Abu Dhabi real estate development company to build a 360,000-sqm project in Ethiopia capital, Addis Ababa. Available online: <https://www.addisherald.com/eagle-hills-an-abu-dhabi-real-estate-development-company-to-build-a-360000-sqm-project-addis-ababa/> (Last accessed on July 9, 2019).

44 Cf. Eagle Hills (2018), Eagle Hills Abu Dhabi Expands To Ethiopia With The Launch Of “La Gare”. Available online: <https://www.eaglehills.com/newsroom/eagle-hills-abu-dhabi-expands-to-ethiopia-with-the-launch-of-la-gare/> (Last accessed on July 9, 2019).

45 Eagle Hills, La Gare Project. The Project. Available online: <https://www.lagare.com> (Last accessed on July 9, 2019).

Figure 4.5. The “La Gare” Project in Addis Ababa



Source: www.lagare.com

4.4 EXHIBITORS AND VISITORS OF ETHIOPIAN TRADE SHOWS

In order to be able to present some analysis on the market conditions, two brief surveys have been undertaken during recent trade shows held in Addis Ababa during the months of October and November 2018.⁴⁶ Key aspects emerging from the empirical evidence analyzed point to the following considerations:

- Anecdotal evidence seems to suggest that the current market conditions – characterized by a limited number of exhibition venues, small number of trade show organizers, huge demand by businesses in general – may be resulting in an uncompetitive, monopolistic market especially determining the level of service provided to clients and the associated costs of participating in trade shows. It is expected that, other things being equal, increasing and expanding the capacity of trade show and exhibition venues and facilities could potentially trigger a virtuous process of crowding-in the number of trade show organizers which in turn can lead to an improvement in the general level of service offered and contribute to raising the level of sector competitiveness to the ultimate benefit of exhibitors and visitors to future events.
- Trade show organizers acknowledge that government institutions are supporting the trade show and exhibitions sector by endorsement or even formal budgetary support. However, it has been repeatedly mentioned that the sector needs to be adequately and effectively regulated to control any current monopoly situation as well as to safeguard sector growth competitiveness in the medium to long-term. As things stand, the status quo is not conducive to long term sector growth but to short term gains made by existing trade show venue holders and organizers. In addition, the recommended way forward for sector development should be driven by a holistic strategy that seeks to complement projects aimed to expand or build new trade show facilities with an equally important, concerted effort to upgrade and/or develop the capability of all involved stakeholders to be able to organize shows that

⁴⁶ These fairs refer to the Ethiopian 11th Chamber Focus on Business, organized by ECCSA, held on AA exhibition center and the Great Ethiopian Run Expo held at AA exhibition center in Nov 12-18, 2018. A total of 30 one-to-one interviews have been held, mostly with exhibitors and participants to both events as well with a number of organizing officials and representatives.

meet international high standards, and as a result improve the overall type of service offered to exhibitors and visitors. Such holistic approach is crucial if any sector strategy is to lead to greater economic contribution. In turn this would have to be inextricably linked to the general upgrade of the sector resulting from improved service offer along the entire trade show business value chain.

- Empirical evidence suggests that in general, the prevailing product/service offer provided to exhibitors falls short on many aspects especially so when compared with the overall cost of participation. There seems to be a general lack of support in terms of facility utilities, logistics and the general experience. All these elements represent important aspects which would need to be upgraded if the trade show sector is to be further developed for the benefit of all, organizers, exhibitors, visitors etc. In general, exhibitor support by the trade show organizer is generally low and limited throughout the entire cycle of pre-during-post event. Clearly a lot needs to be done to upgrade services offered by trade show organizers as well as other parties involved in facilitating shows such as stand construction, provision of logistic services etc. Promotion of events seem to be lacking, exhibitor care and support during the events seem to be missing. It is unclear whether follow-up with exhibitors is undertaken to evaluate results and outcome of participation as a basis for performance improvement action for subsequent years.
- The actual cost of participation (e.g. the rate of booth/stand, own resources engaged during the period of the fair) seems not to be nationally and internationally competitive especially taking into consideration the general lack of service offered to exhibitors. In particular instances, the cost of participation is assisted through a subsidy arrangement, which seems to work well as an incentive. Some respondents seem to suggest that indeed it is a crucial aspect for the final decision whether to participate or not as exhibitors. Such support is indeed welcome and represents an important aspect of the current trade show business.
- One can infer that SMEs, especially those engaged in traditional economic sectors where there is intensive market competition, tend to see a lot of validity in participating in trade shows and exhibitions, considering these events as an important way to get closer to their prospective new clientele and to enter new value chains. Other more established businesses may feel it is not really necessary to participate in such events as participation does not generate enough yields to justify the expense. It is therefore important that the trade show product in the country is expanded and improved to an extent that encompasses more specialized events able to cater for different types of industries as well as businesses and their respective positioning within global value chains.⁴⁷

Besides the findings from interviews undertaken by UNIDO for this report, the 2011 study of Tafesse and Korneliussen is interesting to look at. "The dimensionality of trade show performance in an emerging market" is also worth being mentioned in the context of this study.⁴⁸ Based on 59 valid responses by exhibitors to the 2008 Addis Chamber International Trade Fair (ACITF), the analysis indicates that exhibitors attach importance to the well-known factors of selling products and services as well as to maintain or build the company's image or brand. In addition to these two criteria, there is an apparent difference between emerging and industrialized country exhibitors in that the former leveraged the trade show to collect information about competitors and also to scan market opportunities. As a result, Ethiopian SMEs seem to regard trade shows as a substitute to the costly operationalization of stand-alone market research or intelligence units. This finding indicates that SMEs can indeed derive value from their participation to a trade show which goes beyond the mere selling of products.

47 Cf. Measson, Nadège; Campbell-Hunt, Colin (2015), *How SMEs use trade shows to enter global value chains*, Journal of Small Business and Enterprise Development, Vol. 22 Issue: 1, pp.99-126. Available online: <https://doi.org/10.1108/JSBED-09-2011-0025> (Last accessed on July 9, 2019).

48 Cf. Tafesse, W.; Korneliussen, T. (2011), *The dimensionality of trade show performance in an emerging market*. International Journal of Emerging Markets, Vol. 6(1), pp.38-49.

5. CONCLUSIONS AND RECOMMENDATIONS

This section serves to draw some conclusions, as well as list key recommendations tenable to the growth and development of the trade show and exhibition sector in Ethiopia. Any plausible and realistic recommendation to move the sector in Ethiopia forward needs to be considered in the context of the main characteristics and trends emerging in the global market. Particularly, with regards to pertinent and specific challenges faced by developing countries in this industry and what is required to overcome these. In view of this, the last section starts with an overview of key challenges and opportunities emerging at the global level to then zoom into the specific recommendations for the sector development in Ethiopia.

5.1 GLOBAL EMERGING TRENDS

Positive global outlook for the sector

Despite political tensions, a rise in protectionism, and a perceived fragility of free trade, both the global economy and the exhibition industry as a whole are growing at a higher rate than expected. Organizers of conferences and exhibitions are benefiting from a shift in the way marketing budgets are allocated, with various researches showing that companies are spending less on advertising and more on live events (and digital marketing). On the venue side, capacities are expanding – a very strong signal that (mainly public) investors are expecting the industry to deliver revenues and profits for many years to come.

Importance of technology and digitization

The importance of technology and the utilization of new material in booth design is another important emerging trend.⁴⁹ Trade show standards are being continuously developed to determine more innovative and customer-centric concepts. Revamped and more comfortable booth designs including more engaging technology or interactive enhancements are becoming the norm in modern trade shows and exhibitions.⁵⁰

The industry's resilience and adaptability has to be placed in the context of challenges and opportunities emerging from the continuous rise in the shift towards digitization. Key players in the trade show industry are promoting new business models based on data-driven marketing environments as well as the generation of new products and services. The trend is that investment in existing product offerings is waning as industry players thrive to directly interact with their customers, effectively cutting out whole segments of the traditional value chain.

An ever-changing trade show industry

Another major emerging trend which is expected to intensify in the coming years, is the blurring of the categorization between different event formats such as trade shows, exhibitions, congresses, and conferences. Driven by a need from digital communities to meet face-to-face, hybrid formats, like web summits consisting of part festival, part conference, part exhibition,

49 Cf. Neidoni, N.; Buzdugan, M. (2017), *A few considerations about trade fair stands design*, Papers of the International Conference on Engineering Graphics and Design ICEGD 2017, Vol. 12 (1), p. 183-188.

50 New technologies include virtual reality, multi-sensory engagement and technology-assisted storytelling. One example of this is virtual tour apps. These apps allow to turn the trade show exhibit into an interactive museum that tells the potential customers an engaging story, an experience that really resonates with people and offers a more personalized approach to marketing.

have evolved.⁵¹ More entertainment elements are being blended into B2B events, as these are adapting to changing audiences. As hybrid business events thrive, more consolidation and collaboration, maybe even mergers will characterize the trade show and exhibition market.

While traditionally trade show organizers sold space and later services, like catering or turn-key stands only, today this is no longer sufficient. New and younger clients (exhibitors and visitors) need refreshed or completely new concepts, which adapt to the different attention patterns of the new generation. New formats of trade shows and exhibitions are setting modern standards of trade shows. For example, as traditional shows like auto shows are increasingly criticized for the lack of innovative concepts, major original equipment manufacturers are starting their own events.⁵²

For a long time, trade show organizers focused their services and marketing on exhibitors only due to the fact that up to 90% income was generated exclusively from this group. Nowadays, the focus is shifting towards visitor marketing and services. Hosted buyer programmes are implemented to offer top buyers “red carpet” treatment including air fares/train tickets, hotel accommodation and complementary cultural programmes. Although in many countries, compliancy rules are getting tougher, trade show organizers now offer more services to visitors than simply an entry ticket. Thanks to the proliferation of artificial intelligence (AI), the visitor and exhibitor customer journey is now individualized in a way that customers feel the difference of service quality. Likewise, content driven marketing ensures that during the events, visitors get daily customized sector information including results surveys conducted by or for the trade show organizers and other related information. As a result, trade show outcome quality appears to be based to some extent on exposure to an appropriate mix of exhibitors, acceptable waiting times, and a general positive disposition toward the trade show experience⁵³.

Increasingly, decision makers on the visitor side do not have the time to see all relevant shows. As a result of cost cutting processes aimed also at reducing the carbon footprint, the overall time spent at trade shows is reduced considerably. On average, within a three to four day long trade show, the average visiting length for a typical decision maker is only 1.5 days. It is therefore all the more important to keep existing customers interested, while continuously building up the reputation of the trade show, which balances aspects of longevity and uniqueness with openness to innovative concepts.

Skills and capacity requirements

Trade fair organizers and venue holders are rethinking who they need to hire and what skills they need to add to their resource complements. The evolution of this business will increasingly be shaped by a new and somewhat younger group of managers. A significant number of talent programmes around the world are now offering additional opportunities for future leaders to stand out and be noticed. At the same time, education programmes still need to be developed to provide sufficient qualified talent for everyday needs, especially on the venue side. Simultaneously, the industry will focus even more on bringing in leadership and skills from other sectors, and will look to add more diversity to the top levels of management. The extant literature notes the importance of skills development: “the ability to acculturate through trade

51 Cf. Geigenmüller, A. (2010), *The role of virtual trade fairs in relationship value creation*, Journal of Business & Industrial Marketing, Vol. 25 (4), pp.284-292.

52 For example, Mercedes Benz is organizing the new event “me Convention” together with the organizers of the SXSW (www.me-convention.com) under the motto “The future begins today and not tomorrow”. Speakers and experts to this event are expected to come from various industrial and creative sectors. Increasingly, major auto shows, such as the IAA Frankfurt and the Detroit Automotive Show are coming up with new trade show concepts aimed to prevent more car brands from leaving the shows.

53 Cf. Gottlieb, U.; Brown, M.; Drennan, J. (2012), *The influence of service quality and trade show effectiveness on post-show purchase intention*. European Journal Of Marketing, 45(11/12), pp. 1642-1659.

fairs relies on the proficiency of the trade fair team, social and communication skills that are valuable for correctly perceiving, interpreting and understanding cultural norms and values become critical. Therefore, managers should assemble a trade fair team with appropriate social and communication skills in order to maximize their level of trade fair acculturation".⁵⁴

Increasing importance of CSR and SDGs

Corporate Social Responsibility (CSR) together with the Sustainable Development Goals (SDGs) are becoming increasingly important in the context of trade show organization.

In the European Union (EU) for instance all capital-market-oriented companies as well as credit institutions and insurance companies, which surpass a set number of workforce, balance sheet size or revenue, must publish a CSR report and provide information on environmental, employee-related and social issues, respect for human rights and the fight against corruption. For example, within the context of the management of trade show operations, more emphasis is being placed on energy efficiency and on analyzing the carbon footprint gap, defining the goals to be reached within a given period of time and undertaking compliance to certification procedures for ISO 14001, the specific ISO Standard 20121 for "Sustainable Events Management"⁵⁵ or other green event certifications. In the near future, companies who are major exhibitors at principal trade shows will only participate if trade show organizers and venues comply with the same standards and rules. In this regard, many show organizers have to implement a complete new working and certification process which at this moment is just at a starting point. CSR reports will be included into the regular business reports of trade show organizations and will become a competitive edge.

For example, the world's largest exhibition company, Reed Exhibitions, is member of the UN Global Compact and has formed an SDG Resource Center.⁵⁶ The third largest global exhibition company in terms of revenue, Messe Frankfurt, is likewise member of the UN Global Compact and publishes CSR progress reports on a regular basis.⁵⁷

Similarly, more attention is being given to gender mainstreaming within organizations at the forefront of the trade show and exhibition business. Data from the Society of Independent Show Organizers (SISO) and the International Association of Exhibitions and Events (IAEE) suggests that the exhibition industry employs more women than men. IAEE reports 57% of members to be female. Female workers make up 64% of the workforce at independent show organizations. Despite the high percentage of female staffers, SISO reports only 9% of these companies have a female CEO. Women represent 35% of senior-level management of those surveyed. At the same time, females hold 51% of mid-level management positions at independent companies. Yet, the industry is still subject to criticism as many exhibitors continue to hire mostly female promotion models to lure visitors to the stand.⁵⁸

54 Cf. Tafesse, W.; Skallerud, K. (2015), *Towards an exchange view of trade fairs*. Journal of Business & Industrial Marketing, Vol. 30 (7), pp.795-804.

55 Cf. ISO 20121 (2012), *Sustainable Events with ISO*. Available online: https://www.iso.org/files/live/sites/isoorg/files/archive/pdf/en/sustainable_events_iso_2012.pdf (Last accessed on July 9, 2019).

56 Cf. RELX Group Sustainable Development Goals (SDGs) Resource Centre (2019), *Climate Change Library – Mendeley*. Available online: <https://sdgresources.relx.com/> (Last accessed on July 9, 2019).

57 Cf. Messe Frankfurt, *Value-based approach – Messe Frankfurt's identity and outlook*. Available online: <https://www.messefrankfurt.com/frankfurt/en/company/corporate-social-responsibility.html> (Last accessed on July 9, 2019).

58 Cf. EventMB Studio Team (2017), *Ten Alternatives to Booth Babes*. EventMB. Available online: <https://www.eventmanagerblog.com/10-alternatives-to-booth-babes> (Last accessed on July 9, 2019).

5.2 SPECIFIC CHALLENGES AND PRIORITY ACTIONS FOR DEVELOPING COUNTRIES

It is important to highlight some of the specific challenges faced by developing countries in developing respective trade show and exhibition sectors as well as list what could be regarded as recommended priority actions aimed to address such challenges.

Infrastructure improvement

One of the main outstanding problems of the exhibition sector in developing countries is the lack of infrastructure and physical space within which to organize exhibitions, since the available exhibition area is positively correlated to the attendance at the trade show.⁵⁹

Typical sluggish trade show business performance and unsuccessful events characterized by low level of foreign participation mainly derive from the fact that exhibition areas in developing countries do not have sufficient capacities in terms of both size and technical infrastructure. Although there are some exhibition venues in some regions in developing countries, these areas do not have enough size and infrastructure to contribute to the development of the exhibition sector. Many projects are being developed in order to eliminate these problems. Construction work is being carried out to build new exhibition areas in various regions.

Emphasis on quality of service and capacity

The most important stakeholder in the exhibition business sector is the organizer of the show. Particularly in developing countries, the quality and capacity of the exhibition organizer's firm may not be up to the expected levels foreseen by more discerned clients as well as visitors to the show. The desire to make short-term profits instead of fostering long-term development of the sector is one major reason preventing the sector from developing. The standardization of services in the exhibition sector should become a basic element expected to have a positive impact on the future development of the sector. In addition, the exhibition organizers' companies have to improve their capacity and be ready for the exhibition organization requiring serious preparation. All concerned entities have to increase the quality of services and must be compliant with specific standards, including sustainability standards, if real development in the sector is to be realized.

Event specialization and professional targeting

Exhibition organizations are held in various sectors in the world, showing a wide range of content. In developing countries, the activities carried out in the exhibition sector need to become more professionally targeted. Keeping a too-wide sectoral focus for exhibitions, prevents the creation of an environment, where cooperation and synergies among different companies, organizations and entities can occur. Many trade shows in developing countries do indeed resemble unspecific market places or bazars, as exhibition organizers are rather concerned with renting out available space than maintaining scope and focus. Bringing together sectors not related to each other in a trade show setting, decreases the efficiency and positive results expected by organizers and participants. In addition to the exhibition contents, another important factor affecting the success of the fair is its date. In this sense, exhibitions having the same sector focus, covering the same or similar contents and held during the same date in one country, prevent the sector's ability to adequately reflect its economic importance. They also adversely affect efficiency and

⁵⁹ Cf. Tafesse, W. (2014), *Understanding how resource deployment strategies influence trade show organizers' performance effectiveness*. European Journal of Marketing, Vol. 48 (5/6), pp.1009-1025.

impact of the respective events. As a result, aspects of coopetition (i.e. cooperation amongst otherwise competing business entities to maximize common benefit) have entered the debate on trade show management, whereby trade show organizers bundle their resources to offer joint trade shows, especially when covering similar sectors or regions.⁶⁰ The longevity of trade shows is also important to create a positive perception about reliability and credibility in the eyes of existing or potential exhibitors and visitors.⁶¹ Announcing and subsequently postponing or cancelling trade shows – unfortunately a common phenomenon observable in developing countries – should be avoided as it can entail a detrimental effect whereby exhibitors or visitors either drop the trade show in their yearly calendars for good or they wait until shortly before the event to make any formal or financial commitment – making the planning (hall space allocation, catering, visitor management, etc.) of the trade show very difficult for the organizer.

Although not at the same pace as in developed countries, the transition from general trade fairs to more specialized fairs is increasingly becoming the norm in developing countries. Despite participation in some large general trade fairs continuing to take place, specialized exhibition organizations are the main trend.

UFI found that, between 2011 and 2017, the market shares in terms of indoor exhibition space increased by 3.3% globally, whereby Europe's and North America's market shares decreased by 2% and 1% respectively. This trend is opening up new opportunities for developing countries to attract the trade fair industry in line with increased South-South trade and investment flows.

Market proximity and consolidation

An exhibition venue's geographical location as well as its proximity to important markets, represent two of the most important factors positively contributing to the success of the exhibition. As a result, exhibitions which are largely popular with foreign participants are typically those which are close to big markets. Taking the example of Ethiopia, the country with the second largest population in Africa and an economy growing at circa 10% annually, its future attractiveness as a fair location appears evident.

Globalization has created a tough competition in trade. Cooperation among enterprises is considered a means for business to survive in this increasingly dynamic and competitive environment. The trade show and exhibition sector is also affected by this general trend and large exhibition organizers are in search of partners in different regions in order to be able to penetrate new markets made more profitable by burgeoning economic growth in emerging economies. A case in point is the recent takeover of the world's second largest event organizer, UK-based UBM PLC by the fourth largest event organizer, UK-based Informa, thereby creating the world's largest exhibition organizer with a portfolio of more than 500 leading exhibitions brands.⁶²

60 Cf. Proszowska A. (2018), *Coopetition in the operating of the trade fairs market*. International Journal of Contemporary Management, Vol. 17 (1), pp. 217–232.

61 Tafesse finds a positive relationship between trade show longevity and exhibitors' attendance levels, however not on visitors' attendance levels. Cf. Tafesse, W. (2014), *Understanding how resource deployment strategies influence trade show organizers' performance effectiveness*. European Journal of Marketing, Vol. 48 (5/6), pp.1009-1025.

62 Cf. Exhibition World (2018), *Informa Completes Acquisition of UBM*. Available online: <http://www.exhibitionworld.co.uk/2018/06/25/informa-completes-acquisition-ubm/> (Last accessed on July 9, 2019).

Enacting and enforcing regulation

In developing countries, it is necessary to prepare the legislation which constitutes the legal basis of the exhibitions. In many cases, private sector initiatives outpace developments at the regulatory level, which makes it challenging to introduce basic regulatory elements in the market. Such challenges are addressed by a concerted effort to have a broad stakeholder intervention framework within which key decisions impacting the sector are discussed and promulgated. Legislation and regulation specifically aimed to assist the trade and exhibition industry can be wide ranging and extensive e.g. related to customs regulations, immigration and visa, health and safety, logistics and infrastructure, etc. For example, several actors who were interviewed for this report indicated that exhibitors face cumbersome and discouraging customs procedures in relations to goods to be displayed or to be sold in the framework of the exhibition.

5.3 LIMITATIONS AND KEY RECOMMENDATIONS FOR MOVING FORWARD

This report attempted to examine the current state of the Ethiopian trade show and exhibition sector in the context of the emerging global and regional contexts and trends. From the empirical evidence available, the report provides a snapshot of the sector in terms of activities, performance, opportunities as well as challenges. To get more in-depth information regarding the operations of trade shows and the performance of trade show organizers, it is important to visit events and conduct interviews. To this end, when publicly available, official reports of the trade show organizers constitute an important channel through which event performance, results could be analyzed and market consideration on trade show venues, organizers, exhibitors and visitors could be inferred. As mentioned in the introduction, trade show and exhibition sector information available is fragmented, sporadically collected with extensive data and details not publicly available. Nevertheless, all attempts have been made to use all available information to present an adequately realistic assessment of the sector challenges and prospects. At the same time, through the support of the Ministry of Industry and Trade, all efforts have been made to collate further pertinent data and information from key stakeholders including private sector institutions and private sector players.

This final section summarizes what can be considered key recommendations to the Government of Ethiopia for moving forward. They serve to highlight key areas requiring immediate, medium and long-term solutions, if the sector is to develop and grow and its contribution to economic growth to be enhanced. There is indeed a need for a stronger resolve by the Government in taking the lead to propel trade shows, fairs and exhibitions as a mirror of the country's economic, industrial and business performance and capabilities. These events need to serve the country first rather than their organizers' short term gains. The trade show business should serve to enhance the perception of overseas investors and business about Ethiopia, enabling them to consider the domestic market environment, assist them to establish contact with local institutions and enterprises and ultimately help them develop a better understanding of market and economic potential offered by the country. There is a need for a better understanding of the interrelated interdependencies between trade shows, investment forums, specialized sector and industrial exhibitions etc., as all these converge towards a common objective of achieving a prosperity-driven, developed, internationally competitive domestic trade show and exhibition sector.

Key observations and recommendations are listed hereunder:

State-of-the-art Exhibition Venues as a means to achieve greater market competition

Although current trade show organizers seem to be quite satisfied with the current situation vis-à-vis the availability of exhibition venues and related prevailing infrastructure, it is clear that new and modern venues would be welcome. Currently, it seems that the pricing model operated by the owners of the two current operating venues in Addis Ababa, may be jeopardizing the opportunities for the start-up of trade show organizers and to position the country to become a leading hub for trade shows at the East African regional-level and, furthermore, at the global-level.

Based on the empirical evidence available, the current market conditions seem to be characterized by limited numbers of venues, generally low quality of infrastructural facilities, small numbers of trade show organizers and huge demand by businesses in general. This results in a highly uncompetitive, monopolistic market, which explains the high costs of organizing and participating in trade shows. Other things being equal, the market tends to benefit from increasing capacity of trade show facilities and venues, which could potentially trigger a virtuous process of crowding in trade show organizers and improve their general level of service offer. Whichever direction the sector and its actors take, one important recommendation to the Government is that the sector needs to be adequately and effectively regulated to control any current monopoly situation as well as safeguard sector growth competitiveness in the medium to the long-term. As things stand, the status quo is not conducive to long term sector growth but to short term gains made by trade show venue holders and organizers. Regulation would also be necessary to guard against the short-term profit-seeking behavior of some small-scale trade show. Guidelines and rules should be established that clarify and certify who can organize international trade shows in the country in terms of financial and technical capacity.

While competition of venues will eventually help to create a reasonable price level, there could still be a situation of overcapacity which would need to be closely monitored. In the first instance, it would be advisable to evaluate the situation after, for example, the first phase of the new AAICEC becomes operational, to evaluate an interim market impact analysis determined by increased capacity availability. Anecdotal evidence collected during the preparation of this report suggests that overseas investors for the potentially competing project, the refurbishing and construction of the Addis Ababa Exhibition Centre (AAEC), seem to have decided to wait and reevaluate the changed market situation after the phase 1 construction of the AAICEC. With an invested volume of 585 million ETB, the City Government of Addis Ababa is the main shareholder of the AAICEC Project, whereas it remains unclear whether, when and up to which volume the City Government of Addis Ababa is able or willing to invest into the AAEC refurbishment/expansion project. Although UNIDO had no access to the 2018 feasibility analysis undertaken by Fira Barcelona for the AAEC Expansion Project, it is reasonable to assume that certain underlying assumptions of this study have to be extensively revised in the light of ongoing physical infrastructure development of exhibition sites in the country, especially the AAICEC Project.

Capacity building to trade show stakeholders

Whereas commendable investment in enhancing and increasing venue capacity is currently underway, there is a lot that needs to be done in terms of capacity building for human resources engaged in trade show stakeholders. This includes management of events and provision of services to trade show venues, to reach and outperform relative capabilities found in competing neighboring countries. As suggested by empirical evidence, there seems to be a lack of

comprehensive support in terms of facility utilities and logistics provided to exhibitors before, during and after events with the level and quality of on-site assistance deemed unacceptable and below expectations, especially considering the cost of participation to these events.⁶³

Of major concern for most managers of the trade show industry is how to get specialized knowledge in managing a modern exhibition venue and professionally operate trade shows. From initial observations this is already a problem today and is expected to become more challenging in the future. A possible immediate solution could be the provision of workshops and specific trainings to representatives from business member organizations and governmental institutions involved in trade show organizing. Such trainings could be undertaken within the framework of a new, dedicated UNIDO Project, thereby harnessing UNIDO's formal partnerships with professional trade show organizers such as Deutsche Messe AG in Germany (owner of Hannover Messe) and/or the China International Fair for Investment & Trade (CIFIT) of Xiamen, China. At a later stage, specialized curricula for vocational training schools and for universities with marketing departments could be implemented. For instance, the curriculum on Marketing Management by the School of Commerce of Addis Ababa University⁶⁴ could be further assessed concerning its relevance and practicality for the exhibition industry. Internships or other forms of educational support could be offered by event management and trade fair organizers. Renowned university researchers in this particular area could be invited to share insights and experience and to support academic twinning initiatives between Ethiopian and international universities⁶⁵ in this domain. For example, applied training courses could include regular visits and exchange programmes with international venues and exhibition organizers.

A thriving competitive trade show and exhibition sector has the potential to generate substantial direct and indirect employment opportunities, increasing economic value addition along the event business value chain. Particularly, job opportunities for skilled hospitality and logistics educated young and female personnel, are expected to increase in line with the ever-increasing human resource requirements of a growing trade show business. Training requirements and interventions then need to be assessed and addressed in line with their direct and indirect linkages to other sectors such as tourism, the catering industry, etc.

Streamlining trade show organization through digital technologies

There is an increasing need to streamline the trade show organization process by investing in digital technologies. Activities like registration, payment and information provision and trade show support should be digitized and offered through organizers' websites or dedicated trade show websites. Likewise, trade show organizers should offer essential statistics about past trade show performance to prospective exhibitors and visitors through their websites. Creating prospective exhibitors' databases and contact addresses and making this information available to visitors and other exhibitors will also significantly enhance the appeal and value of trade shows.⁶⁶

63 In turn, this is determined by a lack of internal capacity from the exhibition organizers themselves some of which prioritize sales rather than service delivery.

64 Cf. Addis Ababa Website, *Marketing management Curriculum*. Available online: http://www.aau.edu.et/offices/v_president-office/office-of-the-academic-vise-president/undergraduate-programs-office/undergraduate-programs/college-of-business-and-economics/marketing-management/ (Last accessed on July 9, 2019).

65 Pertinent academic research contributions emanated from scholars based at e.g. the Queensland University of Technology (QUT), Australia; HHL Leipzig Graduate School of Management, Germany; Arctic University of Norway, Tromsø and others.

66 Part of the challenges for exhibition organizers is related to hindered access to new technology and materials to deliver shows akin to the most modern international events. This aspect ties back to access to foreign currency and for the sector to being seen as an economic priority by the Ethiopian government.

Prevailing trade show business and pricing model

The actual cost of participation (e.g. the rate of booth/stand, own resources engaged during the period of the fair) does not seem to be nationally and internationally competitive, especially taking into consideration the general lack of services offered to exhibitors. In some specific cases, costs of participation is assisted through a subsidy arrangement, which seems to work well as incentive. Some respondents suggest that it is indeed a crucial aspect leading to a decision to participate or not as exhibitor. Wherever such subsidies exist, these represent an important way to support various ends of the sector, directly the exhibitors and indirectly the venue organizers. Specific support programmes to enterprises could provide the much needed financial incentive to enterprises, particularly SMEs to actually participate in such events. It is also advisable that the government has a clear picture regarding all trade shows related to public spending in and outside Ethiopia, since this is bound to influence the market and the business model perpetuated by stakeholders.

Demand for trade shows

Other things being equal, future demand for exhibition venues is expected to grow rapidly in view of the emerging economic fundamentals exhibited by the Ethiopian economy. Anecdotal evidence based on 30 interviews undertaken with exhibitors and visitors during two events in October/November 2018, suggests that currently those SMEs operating in traditional economic sectors, characterized by intensive market competition, may see a lot of validity in participating in such events as a way to get closer to their markets. Other more established businesses may feel less interested in trade shows since the products and services offered and expenses involved, do not generate enough yields to justify participation. The great majority of venues are located in Addis Ababa. As the city will host more world class trade shows and exhibition venues, the attraction of international events should not be difficult for the city and the country. Anecdotal evidence from various stakeholder interviews points towards the fact that the regional and international significance of Addis Ababa together with its geographical proxy to the Middle East is believed to provide a strong competitive advantage in drawing a substantial share of venue markets from neighboring countries and regions in the Sub-Saharan African continent as well as the Middle East. Unsurprisingly, two of the largest trade show organizers in Addis Ababa are from the United Arab Emirates (UAE). Addis Ababa is host to the African Union as well as the United Nations Economic Commissions for Africa (UNECA). Positive spill-over effects on the exhibition sector can be expected in line with the general trend amongst international organizations to not only organize international conferences for political and institutional stakeholders but also with and for the private sector with ensuing outcomes on investment - or trade-related business transactions. The First and the Second International Agro-Industry Investment Forums jointly organized by the Government of Ethiopia and UNIDO in 2016 and 2018 were leading examples in that respect.⁶⁷ Overall, there needs to be a clear resolve to support and facilitate the proliferation of exhibitions organized by both international and local business interests so as to equitably harness the spillover effects of organizing international events by renowned global industry players whilst promoting homegrown events which should primarily focus on promoting Ethiopian exports and linkages with international buyers.

⁶⁷ Cf. UNIDO (2016), *First International Agro-Industry Investment Forum Ethiopia, 5-7 October 2016, Addis Ababa, Ethiopia*. Available online: <https://www.unido.org/events-agro-industry-investment-forum-ethiopia-aife/aife1-general-information> (Last accessed on July 9, 2019).
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Need for joint private–public sector approach

Empirical and anecdotal evidence highlights a strong will from all stakeholders involved to develop the quality and quantity of trade shows exhibition offering in the country. As mentioned quality and quantity rest on various considerations taking into account capacity as well as capability of key stakeholders in bolstering the sector to new heights. There is consensus on the fact that the current facility and services offered by organizer(s) do not constitute an optimal basis for trade show sector growth. Therefore, the government needs to move forward in a structured way and take the initiative in this regard. As the Government of Ethiopia is serious about developing

and facilitating the growth of the trade show sector, it should rally all stakeholders (including chambers but also other private sector entities) to identify reforms and steer development in the appropriate direction. The role and relevance of private sector associations such ECCSA and AACCSA cannot be emphasized enough as they have a long-term history of organizing trade shows in the country. Likewise, their respective mandates provide them with the means to engage swiftly and effectively with their members which is imperative for the mobilization of visitors and exhibitors.

In this sense a joint private-public sector approach could be an important aspect to consider for the future. A recommended way forward could be the establishment of a national task force mandated to develop a strategy for the sector and to chart a way forward for strategic implementation. Such a task force could comprise representatives of the major stakeholders in the country – organizers, private sector associations, venue holders and other interested parties – to be engaged in thoughtful deliberations on how to move and develop the trade show sector forward and in doing so developing a set of recommendations that can be taken up by stakeholders. The task force would also serve to better organize the convergence and annual service product offering in line with envisaged strategic guidance and policy and mitigate the effects of excessive and potentially harmful competition between various actors in the country. It would be argued that such a task force would spearhead synergies among stakeholders in strategic as well as operational matters.⁶⁸

⁶⁸ For example, a specific role for the task force would be to identify lists of international trade shows where local producers could participate in, with the objective to enter new export markets. Such participation (either individual or within a national pavilion) is typically subsidized by the national government. Companies having participated at trade shows abroad are to be invited by the Task Force on regular experience meetings to inform those who are planning to apply for overseas trade shows. This exchange of experience normally helps to prepare and train other companies and even helps to upgrade the participation at domestic events. Also local organizers should attend to learn how to develop the level of services provided. For exhibitors who received government subsidies for participating at trade shows abroad these “know-how transfer” meetings should be mandatory. This would lead to the elaboration of an educational concept aimed to build capacity for the (private) trade show industry and provide a favorable environment for start-ups, who are serving the business (like lead generation applications, matchmaking apps, registering and payment apps etc.). Budgets should be allocated to market and support any sectoral start-ups to provide favorable conditions for participating at local trade shows. It is advisable that the government allocates trade show budget within the trade promotion budget, to avoid uncoordinated double subsidies.

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7. LIST OF STAKEHOLDERS⁶⁹

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- **Mr. Ayalneh Abawo**
Advisor of the State Minister, Agro-processing and Pharmaceutical sector, former Ministry of Industry
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- **Dr. Aynalem Abayneh**
Member of the Board, Ethiopian Chamber of Commerce and Sectoral Associations (ECCSA)
- **Mr. Wube Mengistu**
Deputy Secretary General, Ethiopian Chamber of Commerce and Sectoral Associations (ECCSA)
- **Mrs. Bazgenawork W/Medhin**
Director of Trade Fair and Event Management, Ethiopian Chamber of Commerce and Sectoral Associations (ECCSA)
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- **Mr. Abraham Hailemariam**
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⁶⁹ Listed official designations and relative organizations refer to information received following meetings held in the period November 2018 – February 2019.

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General Manager, SP General Business plc
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