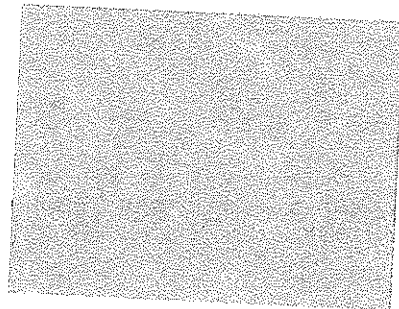


INDUSTRY ANALYSIS

SUBJECT: URBAN FURNISHING IN GREECE

ANALYST:



January 2009

MARKET DEFINITION

This analysis referred to the market of Urban Furnishing, a market that contains companies that import, manufacture, elaborate and trade commodities such as bollards (fixed and removable), small rubbish baskets, benches and tree grids. These products are manufactured in cast iron, steel, stainless steel, concrete and wood and put in public or private grounds. Although, the products are different, they all belong to the same market. In general we speak about a market of perfect competition with many small companies with homogeneous products. ✓

As far as the geographic market, it is the whole region of Greece, including all municipalities, regions and cities.

INTERNAL RIVALRY


The last years in Greece, there were a high growth in the market of urban furnishing, mainly with the financing of municipalities for reformation projects and because of the projects for the Olympic Games of 2004. The need of more beautiful and aesthetic cities, cities in the service of the people, pushed companies to work on this sector, import from abroad or manufacture new products challenging a share of the market (Appendix, Ref 4).

Companies in the market of urban furnishing have about 20% of their products manufacture here in Greece in their factories, about 50% import half-finished products from foreign countries like China and Bulgaria where the cost of raw materials and labor is lower, and make the elaboration here (painting,

assembling), and 30% import finished products from large foreign firms with reputation in the global market (Appendix, Ref 1).

Urban furnishing in Greece is a very competitive market that has as buyers the Greek Municipalities, many Public Authorities (Ministry of Public Works, Port Authorities, Airports, and Traffic Authorities), large contractors and private individuals. Let's see how each of them affects the competition between the companies.

Greek Municipalities and Public Authorities have large construction projects or reformation of public grounds. A little part of those projects is concerned with Urban Furnishing and there is assigned an amount for equipment. Municipalities either supply the equipment themselves or assign to large contractors the whole project and thus the contractors take the responsibility to supply the products. Greek law dictates that in order for the Municipalities to assign to a company the supply of such products there has to be an invitation to tender. Companies give their bids and the decision is made based on the lower price and the fulfillment of the technical requirements. In the case that an independent contractor has taken the whole project he chooses the company based mainly on the lower price and the compliance with the specifications. That is why all companies compete aggressively adjusting the prices quickly and trying to lower them as much as they can in order to take the job. Sometimes they do so even though they will have no profit from it. As far as the private individuals, again the most important factor in purchasing, except quality, is price.



It has been observed that some companies occasionally cut their prices in combination with changing their suppliers (China). This movement is followed by other companies too, something that enhanced the competition. As far as the costs among the companies, the existing differences have to do with the different qualities of the products or the different suppliers. Quality differences appeared mostly in painting and finishing of the products. This situation, where a company uses low quality products in lower prices, forces all the others to follow in order to stay in the market. This includes the supply of products from countries with lower costs like China. Supplies from countries like China happen always in large volumes and are prepaid. This creates the need for selling the products straightforward usually in lower prices. The cost of replacing the already sold products is every time higher, due to raise of the prices from the suppliers something that it's not continuous but eventually has lowered the price-level of the market (Appendix, Ref 1, 2).

The majority of the companies represent large foreign firms (Appendix, Ref 3). That means high quality, reputation and high cost for purchasing some of those products. Of course, any increase in raw materials, affect companies that forced to put their prices higher. The market is count mainly to the public authorities, so the money available from them yearly, determines in a large extent the size of the competition. There is no particular fixed amount that municipalities offer for urban furnishing each year but is approximately 10 million. Because the municipalities with population under 10,000 cooperate mostly with small local

suppliers, substantially the amount available for the companies is about 8 million (Appendix, Ref 6.1).

In general and as shown from the financial data the 5 larger companies in the Greek market in the last 3 years have an average gross profit margin of 40% (Appendix, Ref 5). More or less the same is applied for the other companies too. It is expected that the market will continue grow but with a lower rate.

These facts shows that we talk about a market with hard competition between the companies, with no cooperation among them, based mainly on price. The products are differentiated but similar and the sellers can easily switch from one supplier to another without any cost.

ENTRY

The entry in the market of urban furnishing is not so easy. The experience-based and the technological know-how advantages of the incumbents give them a significant advantage against a possible entrant. It is also the reputation of the large firms that the incumbents represent that guarantee high quality and innovation in technology. This gives the incumbents the privilege of establishing trust and loyalty with their customers.

On the contrary, as mentioned before, the price is the significant factor of customer's choices. So with no legal barriers or protection of the incumbents by government, a possible entrant can under circumstances enter the market. It must first of all find a firm that no other incumbent found it earlier in order to represent it and sold their products. The access to the distribution channels and

raw materials is easy. Maybe the most difficult part will be the establishment of a network of sales but with determination and patient can be achieved (Appendix, Ref 1, 2).

SUBSTITUTES AND COMPLEMENTS

There are no clear substitutes and complements outside the market of urban furnishing so there is no threat for the incumbents. A potential substitute for the fixed bollards maybe steel banisters or products from plastic that protect grounds and pedestrian areas from vehicles but there are not in great use. Also, as substitutes for benches there are some products from concrete and instead for steel rubbish baskets some of plastic. Also for these products there is no need for maintenance and so we can not say that maintenance is something that affects the products prices (Appendix, Ref 1, 2).

SUPPLIER POWER

Suppliers for raw materials (steel, iron) and finished products are foreign firms from France, Spain, Italy and smaller companies and foundries from China, Bulgaria and Greece (Appendix, Ref 3). Suppliers market is not an oligopoly so the competition is very heavy among them. Nevertheless, because the global market of urban furnishing in regard with the Greek is very large, the big suppliers have high turnovers. However, because the basic ingredient of the products is iron, the price of iron globally determines the operational expenses of the suppliers and thus the correspondent prices for purchasing the products.

Regarding the large foreign firms, the first days of each year they send to the seller its pricing catalogue. This catalogue shows the typical prices for each product. In every order the supplier makes a discount. For large volumes there is a cooperative pricing between the seller and the supplier something that shown with a higher discount. Because the competition is aggressive the suppliers adjust the prices quickly in order to take the job (Appendix, Ref 2).

As far as the foundries in Greece or individual suppliers of raw materials is concerned, they may increase the charged prices depending on the changing of the global petrol price as also the different prices of raw materials like steel and iron. They sometimes sell directly to buyers bypassing the sellers. That is something that is not so easy because requires an investment for setting up a sales network (Appendix, Ref 1).

Another thing that does not lower pricing is the absence of substitute products.

BUYER POWER

There are three categories of buyers, each of which has negotiating power. Municipalities or Public Authorities, contractors and private individuals negotiate with the sellers for the lower price. All prices are negotiable and there is not take-it-or leave it from the sellers. The volume and the size of the orders determine how low the seller can drop the price. Usually municipalities and contractors order large volume. Due to the heavy competition sellers are very submissive and do the best they can in order to satisfy their customers. The large number of companies gives the buyers the advantage to have many choices among

different prices, so they have the advantage over the companies. Sometimes is possible for the buyers to bypass the sellers and go straight to suppliers, especially local suppliers. An important issue in the relationship between seller and buyer is the payment terms. Due to the heavy competition, the companies in order to sell their products accept paychecks receivable in 4 or 6 months. Sometimes, when it comes to businesses with Public Authorities the payment may happen after 1 or 2 years. That cause financial problems to sellers and difficulties in settling their liabilities (Appendix, Ref 1, 2).

CONCLUSION

The market of Urban Furnishing is characterized by heavy competition based mainly on pricing. The firms inside the market can not determine the prices. It is not a market with advantages and a potential entrant will face an impregnated market with low rate of grow. The data show that there is a general profitability in the market (Appendix, Ref 5.6), but the uncertainty in the payment section is a factor that may deter a possible entrant from entering.

*interesting paper.
good job of research.
good economic analysis.*

A

REFERENCES

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APPENDIX

- 1. Interview with Mrs Sarri, Vice President of the
company URBANICA SA**
- 2. Interview with Mr Simos, Manager of Sales
Department of the company URBANICA SA**
- 3. Foreign Firms represented in Greek Market (Typical)**
 - 3.1. URBACO**
 - 3.2. FABREGAS**
 - 3.3. MONTINI**
 - 3.4. CALZOLARI**
- 4. Greek Companies (Typical)**
 - 4.1. URBANICA**
 - 4.2. TEMKA**
 - 4.3. ATHLETICO**
 - 4.4. FK GROUP**
 - 4.5. EUROSPORT**
 - 4.6. OIKOANAPTIXIAKI**
 - 4.7. SPIDER**

4.8. MISAILIDIS

5. Financial Data for Greek Companies

5.1. URBANICA

5.2. TEMKA

5.3. FK GROUP

5.4. ATHLETICO

5.5. EUROSPOORT

5.6. TABLE 1

6. Municipalities

6.1. TABLE 2

**Greek Municipalities/Population/Amount for
Urban Furnishing per Year**

1 INTERVIEW with Mrs Sarri, Vice President of the company URBANICA S.A

About Internal Rivalry

- Last years in Greece high rate of grow in the market of Urban Furnishing
- Companies sometimes cut prices, find suppliers with lower cost (China)
- No significant cost differences, existing differences only in quality
- Orders for large volumes for China, prepaid orders
- Differentiated products but similar, easy switch of suppliers with no cost
- Quick adjustment in prices
- No cooperative pricing
- Price elasticity of demand

About Entry

- Technological know-how of the incumbents
- Reputation of firms represented
- Trust by buyers
- Easy access of potential entrant to distribution and raw materials channels

About Substitutes and Complements

- No substitutes, no complements

About Supplier Power

- Suppliers market is not oligopoly, heavy competition
- High turnovers of big suppliers
- Iron determines the prices of the products
- For large volumes cooperative pricing
- Some suppliers may make forward integration into the market

About Buyer Power

- No substitutes
- Cooperative pricing in large volumes
- Payment is significant issue
- Maybe happen backward integration

2. INTERVIEW with Mr. Simos, Manager of Sales Department of the company

URBANICA S.A

About Internal Rivalry

- Pricing competition
- Municipalities, Public Authorities, contractors, private individuals as customers
- Invitation to tender for supply products to Municipalities
- 20% manufacture, 50% import half-finished products, 30% import finished products, elaboration here (painting, assembling)
- No cooperative pricing
- Sometimes no profit in order to take the job
- Aggressive strategies- heavy competition
- Quick adjustment in prices
- Lower labor cost in China and Bulgaria
- Municipalities give each year about 8-10 million for urban furnishing, municipalities <10000 give 3000 euros yearly, from 10000-50000 give 30000, from 50000-100000 give 60000 and >100000 give 100000.

About Entry

- Difficult, matter of trust
- Incumbents have already establish powerful agreements with big suppliers from around Europe
- Easy access to distribution channels, hard to establish sales network

- Products with high cost, difficult to sell them

About Substitutes and Complements

- No clear substitutes
- Maybe products from plastic or steel banisters
- Maintenance doesn't affect prices

About Supplier Power

- Competitive market- supply and demand
- Cooperative pricing for large volumes
- No substitutes
- Raw materials affect product prices

About Buyer Power

- Many companies, variety of prices
- No substitutes
- Buyers have negotiating power against sellers
- No take-it-or leave it by the companies, all prices are negotiable
- Sellers have compliant against buyers

3.1



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Since inventing the 'retractable bollard' Urbaco has developed many models of bollards to meet the technical and aesthetic standards and security needs of its clients. At the same time Urbaco has developed and installed numerous access control systems combining bollards, controllers, technical centers, electronic detectors, software and more.

The *Generation 6* line of bollards can be fixed, removable or retractable to complement the existing *Tradition* range. We also manufacture a range of energy supply bollards and urban street furniture.

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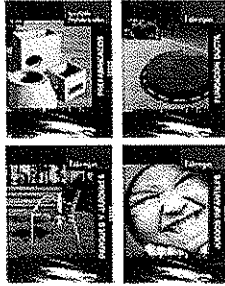


3.2



Fábregas Catalogues

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To see the last fairs in which participated Fábregas,



presenting in them new products of the sector.

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Olympic games Athens 2004 Fábregas was there.

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Grupfabregas



All the models in ductile smelting: Covers and frames, grates, Iron curb, Scuppers ...



All the models of furniture: Benches, bollards, garbages, tree grills, fountains ...



All the models in prefabricated of concrete: cones, rings, channels, coffers...

Fábregas News

New bench



New fences



Service Quality Price

The quality in products is one of our basic principles ...



The attention to the client is made by means of 8 telephone lines that work during 12 hours daily ...



The innovating processes of production have allowed to reduce to time and costs us in the manufacture the products ...



Fábregas certificate

Certificate granted to "Parques y jardines Fábregas".



Norm of security fulfilled by the Fábregas Games.



See the Fábregas games.

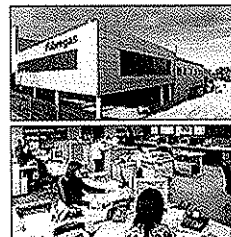
Situation

Where we are ...



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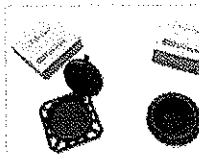
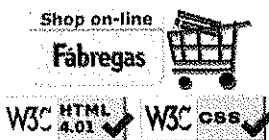
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3.3



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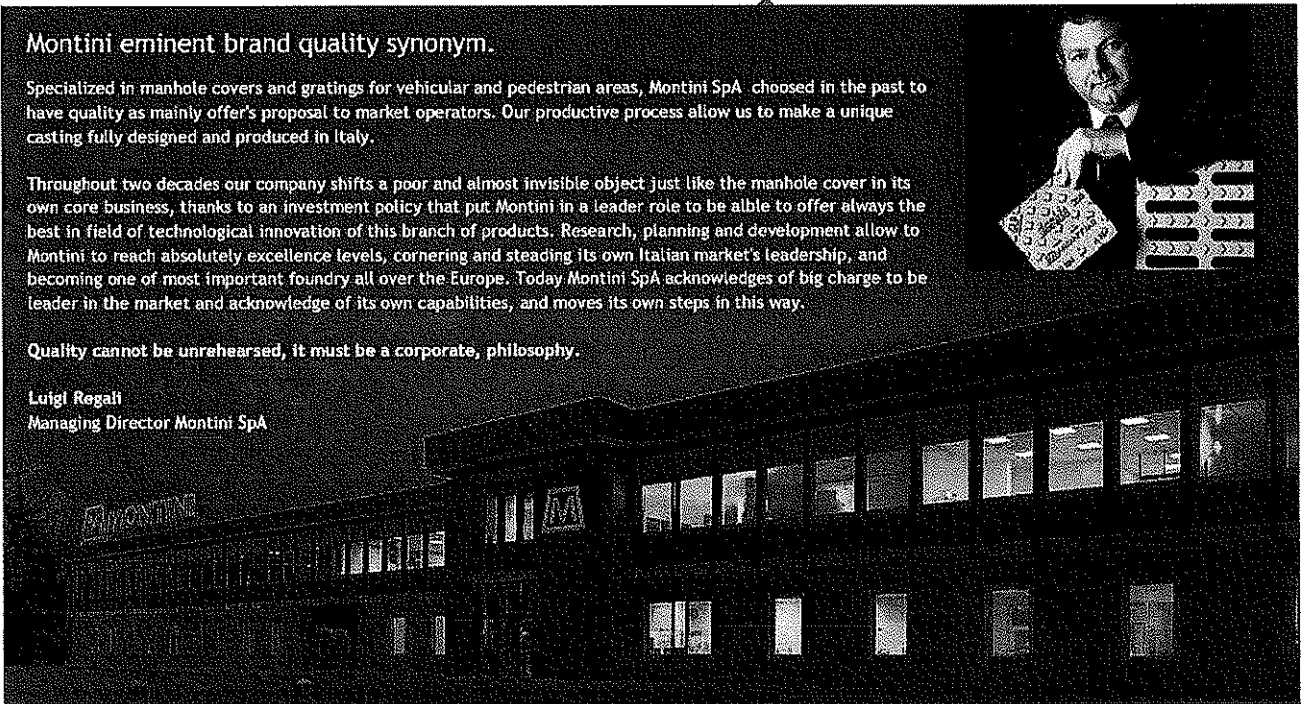
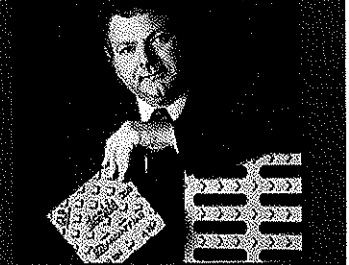
Montini eminent brand quality synonym.

Specialized in manhole covers and gratings for vehicular and pedestrian areas, Montini SpA choosed in the past to have quality as mainly offer's proposal to market operators. Our productive process allow us to make a unique casting fully designed and produced in Italy.


Throughout two decades our company shifts a poor and almost invisible object just like the manhole cover in its own core business, thanks to an investment policy that put Montini in a leader role to be able to offer always the best in field of technological innovation of this branch of products. Research, planning and development allow to Montini to reach absolutely excellence levels, cornering and steading its own Italian market's leadership, and becoming one of most important foundry all over the Europe. Today Montini SpA acknowledges of big charge to be leader in the market and acknowledge of its own capabilities, and moves its own steps in this way.

Quality cannot be unrehearsed, it must be a corporate, philosophy.

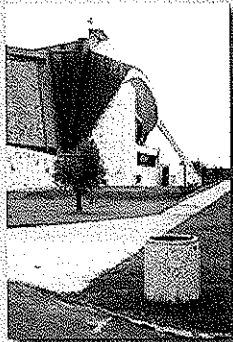
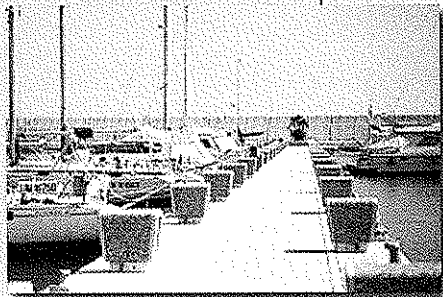
Luigi Regali
Managing Director Montini SpA



3.4

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> Our pluses



That's why we can now boast such eviable know-how



The company's main aim is customer satisfaction. This is shown by the care we give to selecting raw materials, in the manual finish given to each piece, to the assistance provided during the design and after-sales stages. We use only raw materials of "natural" origin such as river aggregates and marble sands or grits. Using suitable binders, we produce a mix known as "reconstructed stone" that maintains all the appeal and features of the original natural stones though taking on the shape of the new design objects manufactured by us. We thus obtain objects able to resist - more than natural stone - vandalism, accidental knocks, the aggressiveness of the weather, urban pollutants and sea salt. Our products have a practically unlimited life span without the need for maintenance. This makes it possible to recover investment costs over a period of time much longer than that of any other material used to make site amenities. Over the last few years, we have acquired extensive experience in making customer-designed objects in both mix and cast iron, as well as other materials. We support the designer in developing executive drawings and then any changes are made to the life-like models. We also follow the entire mould construction phase. We thus give life to the designer's idea and enhance the specific identities of each site by creating one-of-a-kind objects that assume all the dignity of a product which is the result of the know-how and skills of Italian craftsmen.

Arch. Cesare Calzolari

4.1

URBANICA

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URBANICA S.A. is a trade import/export company of urban and access control equipment.

Since its founding the Administration's goal has been to make URBANICA a modern business of high quality products and technology for the equipment and function of a city.

URBANICA'S philosophy is to provide its customers with modern products of the highest European standards that cover all the needs of an urban environment for its improvement and quality of life.

URBANICA is the representative and distributor of these European companies:

- 1) **GROUP URBACO**: French company pioneer in Pedestrian Access Control with automated remote-controlled bars, communication systems and surveillance.
- 2) **AUTOMATIC SYSTEMS**: Belgian company for pedestrian and vehicle access control.
- 3) **DESIGNA**: German company specializing in parking access control equipment.
- 4) **SABRA**: Italian company producing playground equipment and city beautifications.
- 5) **MONTINI**: Italian steel mill with steel products.
- 6) **KRAIBURG**: German company manufacturing secure floors for outdoor recreation spaces and sports.
- 7) **CALZOLARI**: Urban equipment Italian company.
- 8) **PRIMUR**: Spanish company specializing in beach equipment.
- 9) **FABERGAS**: Urban equipment Spanish company.



4.2



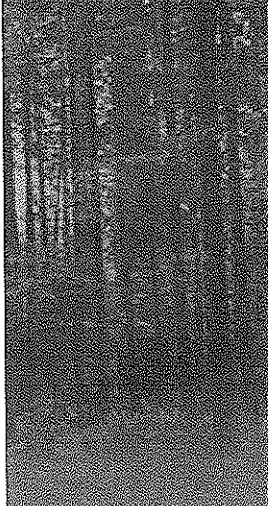
Company Profile

Products for Municipalities and Counties

Public Works Products

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COMPANY PROFILE

HISTORY

TEMKA L.T.D. was established in 1965.
 Ownership: GEORGE PAPATHANASIOU
 FLORA PAPATHANASIOU
 VASILIKI PAPATHANASIOU
 ALIKI PAPATHANASIOU
 Capital: 470.000 euro
 Situated at new building at 9 Ag. Petrou str., 136 74, Acharnae,
 Attica, Greece
 Phone : 0030 210 2580590-1
 Fax : 0030 210 2526768
 e-mail : info@temkald.gr
 Personnel: 15 persons
 Cooperation with suppliers both local and from abroad

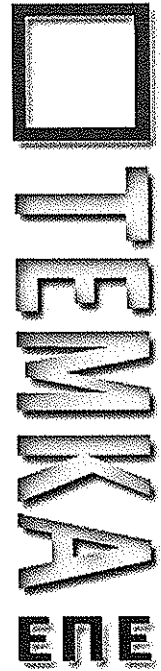
ACTIVITY

Technical and commercial promotion on the Greek market of:


- Products for Municipalities – Cities – Public Works
- Steel and synthetic fibers for shotcrete reinforcement
- Products for anti-flood works
- Pre-fabricated gabions for anti-flood works
- Reinforced earth systems
- Galvanized corrugated pipes for road works
- Special rockfall protections systems

IMPORTANT CUSTOMERS



Most of the Greek Municipalities, many public authorities (Ministry of Public Works, Port Authorities, Airports, Traffic Authorities, e.t.c.) big contractors and so on.



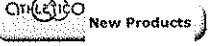
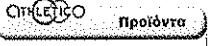
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Company

Profile

Our company was founded in 1989 and up to now we have achieved to possess a leading place in the Hellenic market, with a continuous increase of sales, at a rate that exceeds 20% annually.

Thus, this is the 18th year of our creative and dynamic presence in the fields of:

1. Children Playground Facilities & Equipment design and manufacturing (from the simplest to the most demanding and progressive combinations),
2. City & Parks equipment design and manufacturing (lighting poles, sitting benches, vehicle barriers, bicycle parking stands, litter bins of all kinds etc.), as well as
3. Olympic Standards indoor and outdoors sports & athletics hardware and equipment design, development and manufacturing (mini soccer, basketball, volleyball, tennis, ping-pong, track and field hardware and side-field installations and infrastructure).

Ever since, our primary objective is the steady improvement of quality, safety and progressive design for all our products. We constantly strive for betterment in all our efforts, planning on with responsibility, respect, coordination and proper programming.

To the achievement of these goals, we depend to the fullest extend upon:

- Our own manpower,
- Our own facilities, production line and infrastructures,
- Information technology, which helps us to keep in touch with the universal developments in our field of activities,
- Latest technological production tools and equipment, which helps us be innovative and accurate in transforming our designing ideas into real products,
- Contractual co-operations with the world leading companies in our field, as well as
- Conformity with the strictest quality, safety and environmental standards set by both international and national certifying organizations.

In this manner, we are the first Hellenic company achieving to become a member of F.E.P.I. (Federation Of European Play Industry), being certified at ISO 9001:2000 (ELOT), ISO 14001:2004 (Bureau Veritas Certification) and EN 1176, meaning that all our playground products and equipment are manufactured according to the highest European Standards of safety.

Company policy for quality and environment

Our company strives for the customer satisfaction with:

- the irreproachable quality of our products
- the consistence and excellent level of communication with the customers
- the combination of quality and antagonistic prices
- the right packaging for the protection of products
- the duly delivery
- the right installation where is required by the agreement with the customer


This requires:

- the constant interest and collaboration among administration staff and workers
- the right choice of raw material
- the right choice of reliable suppliers and other collaborators

And is achieved

- with the conformity to the requirements of ISO 9001:2000 standards
- with the prevention of errors (by the continuous inspection and control of the manufacturing process)
- with the continuous effort for improvement of the behavior, the communication and the processes.


Moreover, our enterprise acknowledges the important role that we have to play for the protection of the environment. To this direction, we have placed a registered system of environment protection management in operation, according to the requirements of the International ISO 14001:2004 system, so that our manufacturing plant productive processes, become friendlier to the environment.

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Company Profile

'Kirilis Bros S.A. company, with the trade brand name 'F&K Group' is a commercial and manufacturing organization in the area of Research/ manufacturing/ installation of systems such as:

- Indoor and Outdoor playgrounds
- Polyester pools and dock marines
- Surrounding area equipment
- Sports equipment
- Water slides systems
- Theme parks

Utilizing a forty (40) years' experience in the business, 'F&K Group', possesses all the certifications, thus offering products with uncompromised quality, reliability and safety in all its addressing markets:

- EN ISO 9001:2000 certification (quality management system)
- ISO 14001:2004 certification (environmental management system)
- 15.000 m2 private factory facilities at the area of Elefsina - Athens,
- Totally specialized and experienced personnel.

Also, in the area of children's playgrounds manufactory:

- EL.O.T compliance certification along with the right of use of the EL.O.T compliance Seal, referring to the safety regulations based on EN 1176 1-7 norms.

Here are some of the markets that F&K group's range of products address:

Municipalities, State institutions, hotels, kindergartens, child playhouses, parks, camps, sole owners, constructing and technical companies, civil engineers, architects, malls, food business owners-either franchises or entrepreneurs-, athletic facilities, gyms, sports equipment department stores etc.

'F&K Group's focuses on the qualitative cover of its customers' needs, as well as our partnership companies from U.S.A., Canada and Europe have enriched our know-how and expertise, entering with this way in the manufacturing progress.

Thus, we have created a plethora of new models and complex constructions in kids' playgrounds and playhouses equipment.

Our proper lines 320-'funny kido' and 350-'dreamy kido' are a result of long research, study with the above mentioned abroad houses. They are innovative playground compositions of multiple characteristics and multiform activities.

The materials which are used -for the first time in Greece- in the manufactory of 320-'funny kido' and 350-'dreamy kido' (themed) playground series are of excellent quality and durability.

The particular materials (Polyethylene accessories baptized in PVC, such as floors, staircases and bridges) provide an excellent durability over the years, with no need for service.

In addition, our company manufactures the 310-'kidy kido' (base series), manufactured solely by wood and is equipped with polyester slides.

For the first time in Greece, 'F&K Group' manufactures polyester pools that do not need any service. They can be carried and installed in one (1) day. Their installment ranges from sub-terrestrial, semi sub-terrestrial to super-terrestrial with independent filtering system. They do not require specialized crew for the installation and their depth is of specified limit (1, 50m).

'F&K Group' wide range of products extends to a great variety of Surrounding area equipment (litter bins, wooden benches, cast iron benches, safety floors, polyester cabins, beach changing rooms, deck chairs, umbrellas, atriums, kiosks, pergolas, beach bars, etc.)

Moreover, the manufactory of Athletic facilities along with the commerce of athletic gear/equipment through approved brand names abroad, based on international specifications (I.A.A.F. & F.I.B.A), enable 'F&K Group' to be among market leaders in Greece.

'F&K Group' is the only company in Greece that manufactures EN 1069 certified water slide systems, with numerous exports abroad.

'F&K Group' is the only Greek company that completely undertakes the research, design and installation of such systems.

Facilities in hotel enterprises such as: Grecotel Group, 'Mitsi's Hotel' enterprises, Aldemar Palace, Blue Bay, Lindos Princess, Esperos Village, Sunny Resort and many more, as well as a 65% of the water park market in Greece (Crete, Corfu, Rhodes islands, Athens and many others), entrust F&K Group's products.

Last but not least, 'F&K Group' incorporates and creates new, ergonomic, elegant designs, environmental-user friendly, all these with the option of customizing to fit your exact needs, whether you are a customer or an organization. Our knowledge and expertise are at your service.

4.5

Flex Error #1001: Digest mismatch with RSL framework_3.2.0.3958.swf. Redeploy the matching RSL or relink your application with the matching library.

PRODUCT CATEGORIES

- Athletic equipment
- Playground equipment
- Urban equipment
 - Benches
 - Rubbish bins - Ashtray
 - Lighting
 - Bollards - Railings
 - Bus Shelters
 - Bike Racks
 - Roofings
 - Poster Stands & Notice Boards
 - Fences
 - Kiosks
 - Special Constructions

Company	<p>«EURO*SPORT - ATHLETIC & PLAYGROUND EQUIPMENT»</p> <p>EURO*SPORT - athletic & playground equipment - company was established in 1990. The Head offices are in Thessaloniki and the branch is in Athens.</p> <p>The company's object is trading and distributing qualitative Equipment for Sports Facilities, Stadiums, Gyms and Swimming Pools as well as Equipment for Playgrounds, Play Areas, Parks and Recreation Places, in the Greek market, Cyprus and in the countries of the Balkans.</p>
Speciality	<p>EURO*SPORT - athletic & playground equipment - is an excellently organised import and trade company which provides high level multifaceted services during the study, the installation and the operation of the equipment. The preventive and periodical control of maintainance and service, the stock of spare parts and the constant technical support constitute the philosophy of the company and of its specialized personnel. The company possesses fully equipped privately-owned offices in Thessaloniki and Athens, exhibition and storage spaces, network of distributors and co-operators in all the regions of Greece.</p>
Aim	<p>Aims of EURO*SPORT - athletic & playground equipment - are to offer to the Greek Athletics and Childhood, products of high specifications, certified and tested by Official Certification Organizations and International Sports Federations (IAAF - FIG - FIBA - FIVB etc), safe and of excellent quality. To provide full support, technical cover and backing to the users of its products. For the implementation of the objectives above, EURO*SPORT - athletic & playground equipment - has ensured the collaboration and the distribution of leading firms of abroad.</p>
Q	<p>EURO*SPORT -athletic & playground equipment - practices the System of Management of Quality</p>

4.6

OIKOANAPTIXIAKI®

CITY EQUIPMENT

ΕΛΛΗΝΙΚΑ

WE DESIGN FOR THE CITY

COMPANY

SERVICES

PRODUCTS

ISO

RECENT WORK

CONTACT

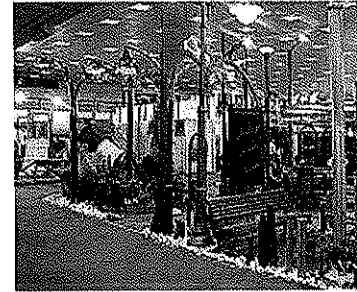
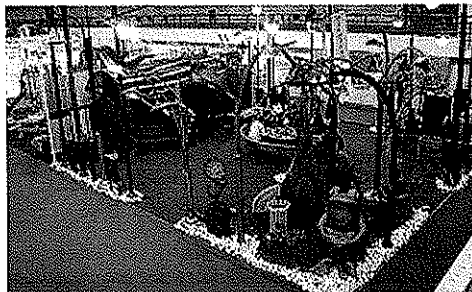
G.STEFANOY OIKOANAPTIXIAKI® company is a leader company in the field of designing, manufacturing and trading of products for urban lighting and furnishing. The company was founded in the early 90's and during 2002, it moved in its own new facilities in NEOCHOROUDA THESSALONIKIS.

Over fifteen years of experience and the high level of professionalism

of the employees and managers, guarantees the high quality of the products and services, which fulfill even the most specialized customer's demands.

Products as street luminaries, urban luminaries, post poles, litter bins, small bollards, bus shelters, banners, etc are designed and manufactured according to the highest demands and requirements of National and European standards. The company, since 2002, is also certified with the ISO 9001:2000 quality system standard.

Today G.STEFANOY OIKOANAPTIXIAKI® offers a large range of products, with high quality, innovative design and excellent quality to price ratio.



Oikoanaptixiaki participated in "POLIS" HELEXPO exhibition for 12th year.

4.7



- [The Company](#)
- [Shop Fitting](#)
- [Waste Management](#)
- [Vehicle Superstructures](#)
- [Sub-Contracting](#)
- [Investor Relations](#)
- [Rack Point](#)
- [Contact](#)



The Company

Spider N. Petsios & Sons S.A.' was founded by Nikolaos Petsios in 1946 and is one of the largest metal product manufacturers in Greece today. The next 50 years saw the company succeed in making the name "SPIDER" synonymous with development, design and innovation.

"SPIDER" is a healthy and forward looking company with a wide range of products with a dynamic awareness to the increasing demands from the National & International Markets.

The successful evolution of the International markets, the research and development programs and the continuous updating in the modernization of the factories, helped strengthen and consolidate future plans.

Having the vision to become a major player in the European stage, Spider is heavily investing in the production resources and development for its trade activities within the International markets.

The Company's privately owned facilities are based in Ioannina and boast a total of three large factories of 155.000 sq.m together with a 30.000 sq.m of offices and warehousing.

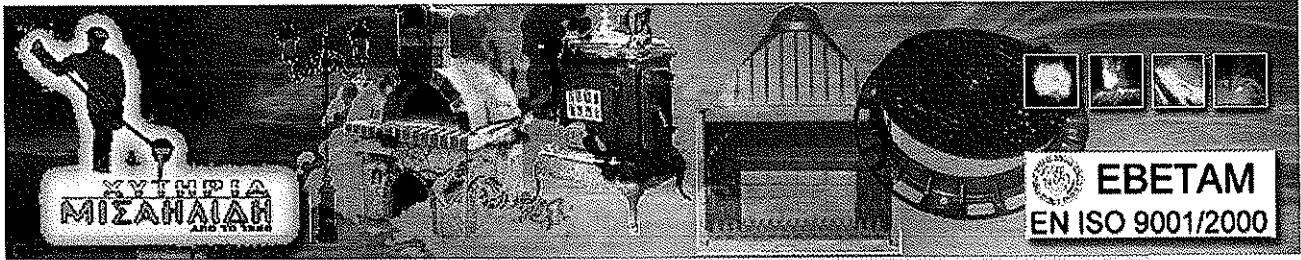
Other operations include 3.500 sq.m of offices and display area in

- [History](#)
- [Company's Identity Philosophy](#)
- [Members of the Board of Directors](#)
- [Organisation Chart](#)
- [Human Resources](#)
- [Professional Training](#)
- [Sector](#)
- [Employment](#)
- [Announcements - Press Releases](#)
- [TV Spots - Multimedia](#)
- [Subsidiaries](#)
- [Environment](#)

[Certifications](#) | [Employment](#) | [User Terms](#) | [Site Map](#)

2008 Spider S.A. GR GB IT

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[Home](#) |
 [Company](#) |
 [Works](#) |
 [Products](#) |
 [Contact](#)

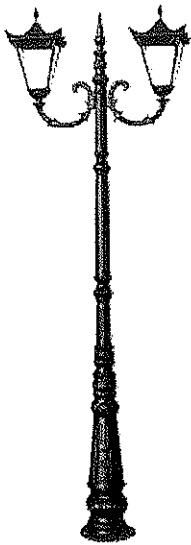
Traditional
Lamp Posts

Manhole Covers
Gully Grates

City Decoration

Fireplaces - Stoves

Tables - Barbeque



The company **A. MISAILIDIS SONS C.O.** is a traditional and continuously developing company which accomplishes 56 years of continuous operation, owning a production factory of 1300 m² which stands in a plot of 12000 m² at the 7,5 km of Thessaloniki Kavala road.

The main object of our company's activities is the production of cast iron products and especially the **manhole covers** and the **grates**.

Our company following the rate for modulation and decoration of the cities produces the last years new products such as **traditional lamp posts**, (made from cast iron, aluminum, steel), **seats, tables, tree grates, bars, litter bins**, which conduce to the try for improvement of the citizen's life.

Also following the specifications of quality and tensile strength our company can supply **manhole covers** and **grates** from **ductile iron**.



The consequence to our customers and the quality of our products are the main feature of our company, which has installed the quality certification system **ISO 9001/2000** and also the **CE** certification for the lamp posts, which produces.

Our company is a supplier of many municipalities and public organizations such as the E.Y.D.A.P., the E.Y.A.Θ. the O.T.E. and D.E.Y.A. all over the Greece.

[Home](#) |
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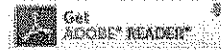
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Company Details

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**URBANICA S.A.****ADDRESS**

15 Aigialeias, 15125, Maroussi

PHONE

2106836500, 2106800687, 2106847769

FAX

2106847769

URL

www.urbanica.gr

EMAIL

urbanica@otenet.gr

URBANICA
Urban Furnishing

**Profile****Trade (Commercial Equipment)****ISO 9001:2000**

Established	1995
Company Registry ID.	33952/001/B/95/422
Tax Registration No.	094435959
Capital (euro)	317,420
Employees	15
CEO	J. Beltsios

Activity / Products

Exclusive imports, trade, installation and maintenance of city, building (access control systems), playground and vehicle parking area equipment.

Exports

Total Percentage 7 %
France

Foreign Firms

Automatic Systems	Belgium
Designa GmbH	Germany
Fabregas S.A.	Spain
Galzolari Srl	Spain
M.D.O.	France
Montini	Italy
Sarba	Italy
Urbaco	France

Merchandise

	I	A	D	E
Cleaning equipment, town	*	*		*
Playground equipment	*	*		
Security systems	*	*		
Signalling and security goods	*	*		
Vehicle parking area equipment	*	*		

F On contract basis **FT** In third party facilities **I** Imports **A** Representations **D** Regional Agent **E** Exports

NACE

5187-Wholesale of other machinery for use in industry, trade and navigation (Main Activity)

5190-Other wholesale

5143-Wholesale of electrical household appliances and radio and television goods

5186-Wholesale of other electronic parts and equipment

Financial Data

	2007	2006	2005
Capital	317,420	317,420	317,420
Net worth	396,765	401,339	398,257
Liabilities	739,669	839,025	851,897
Net fixed assets	33,583	27,307	48,335
Total assets	1,136,434	1,240,364	1,250,153
Turnover	1,255,106	1,282,596	1,057,120
Gross profit	504,898	567,620	321,706
Revenue	4,646	123	5,330
Net income (Loss)	9,172	73,210	58,391

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**TEMKA LTD****ADDRESS**

9 Ag. Petrou, P.O. Box 46550, 13610, Acharnes

PHONE

2102580590-1, 2102526702

FAX

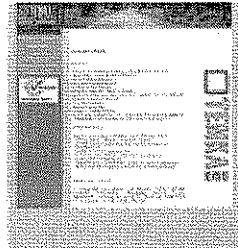
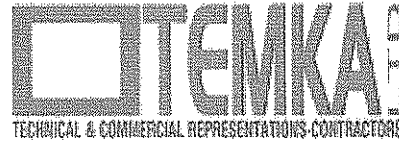
2102526768

URL

www.temkald.gr

EMAIL

info@temkald.gr

**Profile****Trade (Security Equipment)****ISO 9001:2000**

Established	1965
Tax Registration No.	095010899
Capital (euro)	398,100
Employees	15
Administrator	A. Papathanassiou G. Papathanassiou

Activity / Products

Imports and wholesale trade of road signs, marking materials and machinery, cleaning and decorative materials (for Municipalities, public works etc.), asphalt and fence products, flood control and slope protection equipment and culverts (for road construction works). Road marking and signalling.

Exports

Total Percentage 1 %
Cyprus

Merchandise

	I	A	D	E
Asphalt and products				*
Cleaning equipment, town	*			
Construction materials	*			
Construction materials, iron	*			
Machinery, road construction	*			
Metal products	*			
Paints, special use	*			

Signalling and security goods	*			
-------------------------------	---	--	--	--

Services

	E
Road marking and signalling works	

F On contract basis **FT** In third party facilities **I** Imports **A** Representations **D** Regional Agent **E** Exports

NACE**5190-Other wholesale (Main Activity)**

4523-Construction of highways, roads, airfields and sport facilities

5154-Wholesale of hardware, plumbing and heating equipment and supplies

5187-Wholesale of other machinery for use in industry, trade and navigation

5153-Wholesale of wood, construction materials and sanitary equipment

Financial Data

	2007	2006	2005
Capital	398,100	398,100	398,100
Net worth	1,238,683	1,216,944	635,409
Liabilities	1,087,207	662,330	691,649
Net fixed assets	1,008,398	272,613	257,354
Total assets	2,325,891	1,879,273	1,327,058
Turnover	1,951,159	2,099,699	1,609,692
Gross profit	753,476	837,421	517,584
Revenue	137,211	88,712	136,784
Net income (Loss)	-10,088	132,352	42,877

5.3

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Company Details

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**F & K GROUP S.A.****ADDRESS**

13-17 Sarantapotamou (B' side street), 19200, Elefsina

PHONE

2105562780-1

FAX

2105562782

URL

www.fk-group.gr

EMAIL

sales@fk-group.gr

**Profile****Industry (Miscellaneous Products)****ISO 9001:2000**

Established 1970

Legal Status Change 2001

Company Registry ID. 48690/001/B/01/26

Tax Registration No. 082510703

Capital (euro) 4,500,688

Employees 30

CEO F. Kyrillis
K. Kyrillis**Activity / Products**

Study, designing and tidying up of artificial rocks and theme parks. Landscaping services. Mfg, representations, exclusive imports, exports and wholesale trade of water slides, playground equipment (indoor and outdoor), water entertainment toys, gymnasium and athletic field equipment and instruments, beach umbrellas, garbage containers, wooden structures (kiosks, pergolas, atriums, benches, tropical roofs).

Exports

Total Percentage 8 %

Cyprus

Netherlands

Foreign Firms

Amusement Leisure	Canada
Aqua Gym	United Kingdom
Aukam	Germany
Beckmann	Germany
Fabregas	Spain
Jumbo Inflatables	United Kingdom
Miracle Recreation Equipment Co.	United States

Industrial Products

	F	FT	E
Athletic field equipment			
Dams and platforms, floating			*
Exercising equipment			*
Kiosks, pergolas, lattice			*
Playground equipment			*
Swimming pools			*

Umbrellas				*
-----------	--	--	--	---

Merchandise

	I	A	D	E
Athletic field equipment	*			
Cleaning equipment, town	*			
Exercising equipment	*	*		
Playground equipment	*	*		
Prefabrications	*			

Services

	E
Landscaping services	

F On contract basis **FT** In third party facilities **I** Imports **A** Representations **D** Regional Agent **E** Exports

NACE**3640-Manufacture of sports goods (Main Activity)**

2030-Manufacture of builders' carpentry and joinery

2051-Manufacture of other products of wood

7487-Other business activities not elsewhere classified

5190-Other wholesale

5147-Wholesale of other household goods

Financial Data

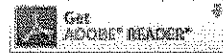
	2007	2006	2005
Capital	4,500,688	1,000,009	733,672
Net worth	5,061,338	1,476,376	1,296,232
Liabilities	5,696,332	4,352,858	4,644,858
Net fixed assets	3,421,102	760,180	2,747,635
Total assets	10,757,670	5,829,235	5,941,090
Turnover	3,935,395	3,997,571	3,395,045
Gross profit	1,756,764	1,911,546	1,147,275
Revenue	435,631	189,918	175,860
Net income (Loss)	120,992	252,189	202,055

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**GIANNOS, G., S.A.****ADDRESS**

1 Ag. Stylianou, Lakka Stamou, 19018, Magoula

PHONE

2105559097, 2105559183

FAX

2105551562

URL

www.athletico-com.gr

EMAIL

athletico@tee.gr

Profile**Industry (Miscellaneous Products)****ISO 9001:2000**

Established 1989

Legal Status Change 2005

Company Registry ID. 59373/003/B/05/42

Tax Registration No. 082387862

Capital (euro) 650,000

Employees 60

CEO G. Giannos

Activity / Products

Mfg of playground, gymnasium and athletic field equipment. Athletic field construction installations.

Exports

Total Percentage 30 %

Cyprus

Germany

Netherlands

Industrial Products

	F	FT	E
Athletic field equipment			*
Exercising equipment			*
Kiosks, pergolas, lattice			*
Playground equipment			*

Services

	E
Installations, equipment, athletic field	

F On contract basis FT In third party facilities I Imports A Representations D Regional Agent E Exports

NACE**3650-Manufacture of games and toys (Main Activity)**

4523-Construction of highways, roads, airfields and sport facilities

3640-Manufacture of sports goods

Financial Data

	2007	2006	2005
Capital	300,000	300,000	300,000
Net worth	699,341	606,520	567,294
Liabilities	8,599,465	6,911,482	5,836,179
Net fixed assets	1,442,319	1,370,351	1,387,603
Total assets	9,298,806	7,518,002	6,403,473
Turnover	6,275,247	6,594,631	4,919,233
Gross profit	2,584,033	2,421,948	1,744,188
Revenue	23,328	4,731	42,899
Net income (Loss)	667,348	753,840	693,860

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**EUROSPORT LTD****ADDRESS**

63 Kon. Paleologou, Nikopoli, 56430, Stavroupoli, Thessaloniki

PHONE

2310686554-5

FAX

2310686553

URL

www.eurosport.gr

EMAIL

info@eurosport.gr

Profile**Trade (Commercial Equipment)**

Established 1991
Tax Registration No. 095529138
Capital (euro) 99,000
Employees 15
Administrator E. Iordanaki
 G. Livieratos

Activity / Products

Imports and trade of exercising, athletic field and playground equipment, sports goods, educational aids and toys and athletic floorings.

Exports

Total Percentage 15 %
 Albania
 Cyprus
 Italy

Merchandise

	I	A	D	E
Athletic field equipment	*			*
Exercising equipment	*			*
Floorings, special use	*			*
Games and toys	*			*
Playground equipment	*			*
Sports goods	*			*

F On contract basis FT In third party facilities I Imports A Representations D Regional Agent E Exports

NACE**5147-Wholesale of other household goods (Main Activity)**

5187-Wholesale of other machinery for use in industry, trade and navigation

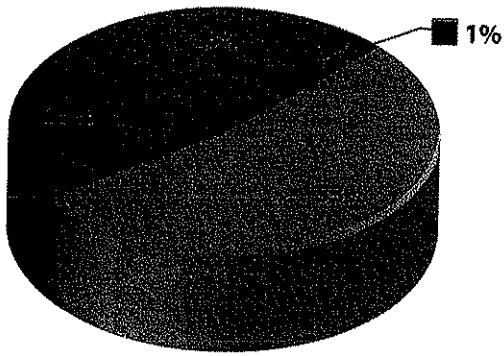
Financial Data

	2007	2006	2005
Capital	98,608	98,608	98,608
Net worth	564,656	463,494	386,340

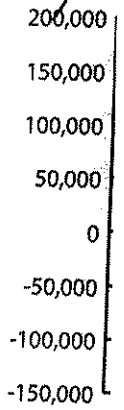
Liabilities	1,665,238	1,591,037	1,784,079
Net fixed assets	101,344	130,876	170,106
Total assets	2,229,894	2,054,531	2,170,419
Turnover	1,897,953	1,856,884	1,425,084
Gross profit	488,434	652,967	854,781
Net income (Loss)	101,162	77,154	26,150

COMPANIES	YEARS	FINANCIAL DATA			% GROSS PROFIT MARGIN	NET INCOME(LOSS) €
		TURNOVER €	GROSS PROFIT €			
URBANICA SA	2007	1.255.106,00	504.898,00	40,23	9.172,00	
	2006	1.282.596,00	567.620,00	44,26	73.210,00	
	2005	1.057.120,00	321.706,00	30,43	58.391,00	
TEMKA LTD	2007	1.951.159,00	753.476,00	38,62	-10.088,00	
	2006	2.099.699,00	837.421,00	39,88	132.352,00	
	2005	1.609.692,00	517.584,00	32,15	42.877,00	
F&K GROUP	2007	3.935.395,00	1.756.764,00	44,64	120.992,00	
	2006	3.997.571,00	1.911.546,00	47,82	252.189,00	
	2005	3.395.045,00	1.147.275,00	33,79	202.055,00	
ATHLETICO	2007	6.275.247,00	2.584.033,00	41,18	667.348,00	
	2006	6.594.631,00	2.421.948,00	36,73	753.840,00	
	2005	4.919.233,00	1.744.188,00	35,46	693.860,00	
EUROSPORT	2007	1.897.953,00	488.434,00	25,73	101.162,00	
	2006	1.856.884,00	652.967,00	35,16	77.154,00	
	2005	1.425.084,00	854.781,00	59,98	26.150,00	
TABLE 1						

Γράφημα 1
Ο.Τ.Α. ανά Πληθυσμιακή Τάξη (Population/Municipality) Σχέσ



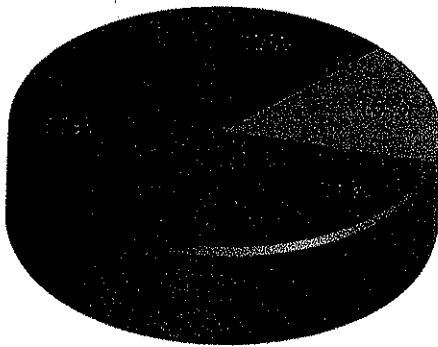
- Αριθμός Κατοίκων:
- 100,000 και άνω
 - 50,000-100,000
 - 10,000-50,000
 - 5,000-10,000
 - 0-5,000



Το συμπέρασμα που προκύπτει από τη σημερινή δομή των Ο.Τ.Α., με βάση τον απογραφικό πληθυσμό τους είναι, ότι το 82% του συνόλου των Ο.Τ.Α. έχει πληθυσμό μικρότερο από 10.000 κατοίκους.

Είναι γνωστό το πρόβλημα στην τελευταία απογραφή μεταξύ μόνιμου και μετακινήσεις που γίνονται

Γράφημα 2
Ο.Τ.Α. ανά Πληθυσμιακή Τάξη
• Μετά τον Καποδίστρια II •



- Αριθμός Κατοίκων:
- 100,000 και άνω
 - 50,000-100,000
 - 10,000-50,000
 - 5,000-10,000
 - 0-5,000



Εάν εφαρμοζόταν η πρόταση του Ι.Τ.Α. για τη διοικητική μεταρρύθμιση ή διάρθρωση των Ο.Τ.Α., ανάλογα με τον πληθυσμό τους αναμένεται να αλλάξει. Η πλειοψηφία των νέων Ο.Τ.Α. θα έχει πληθυσμό μεγαλύτερο των 10.000 κατοίκων και μικρότερο των 50.000.

Από το παραπάνω γράφημα πληθυσμιακά Ο.Τ.Α.