

Nikos Magopoulos
Managing Director
Iaponiki S.A.

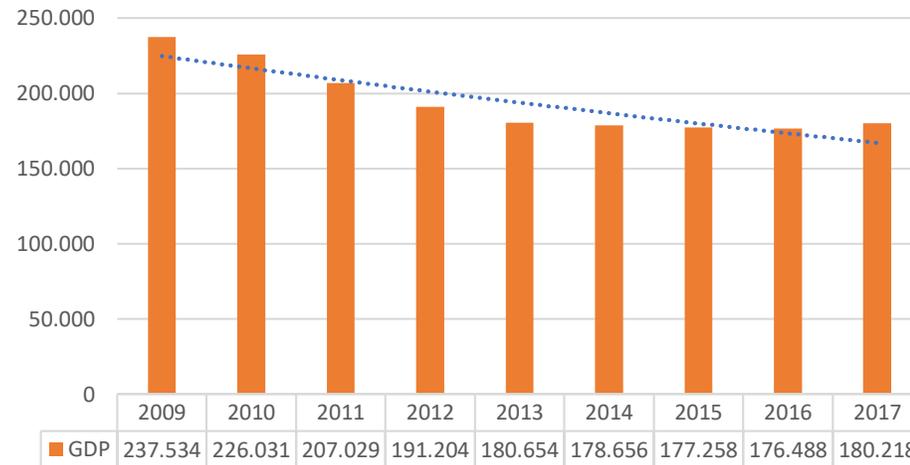
Organizatör Kuruluşlar / Powered By

- Inhabitants : 11 million . Low birth rate – aging population
- More than 40% live in Athens
- Over 2.000 islands – 170 populated
- Almost 80% of land is mountains.
- Biggest industries : Tourism , marine , farming

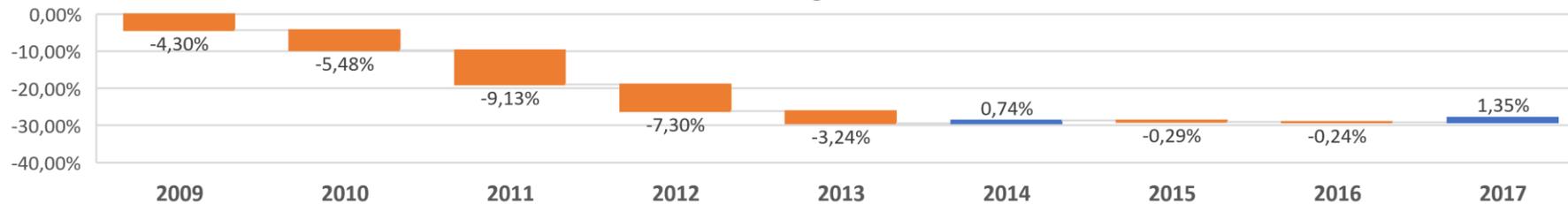


- GDP was dramatically reduced during crisis years 2008-2017
- Taxation increased
- Available income minimized

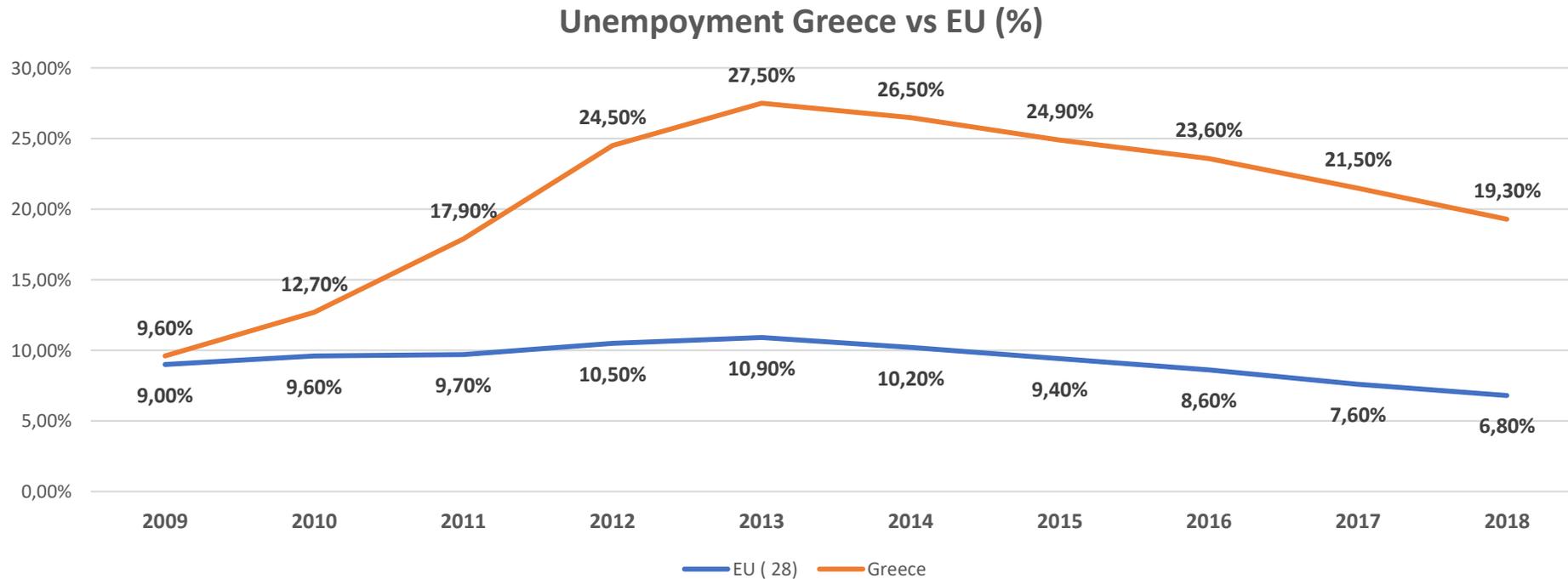
GDP development



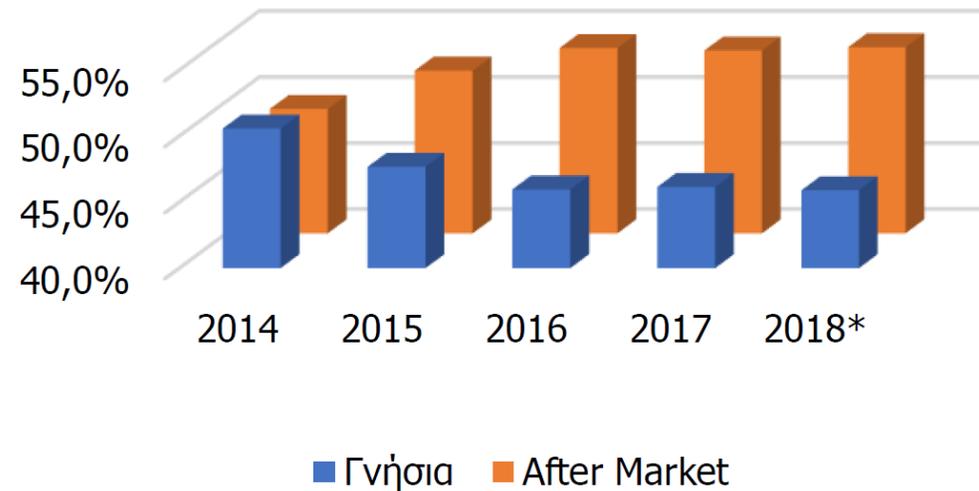
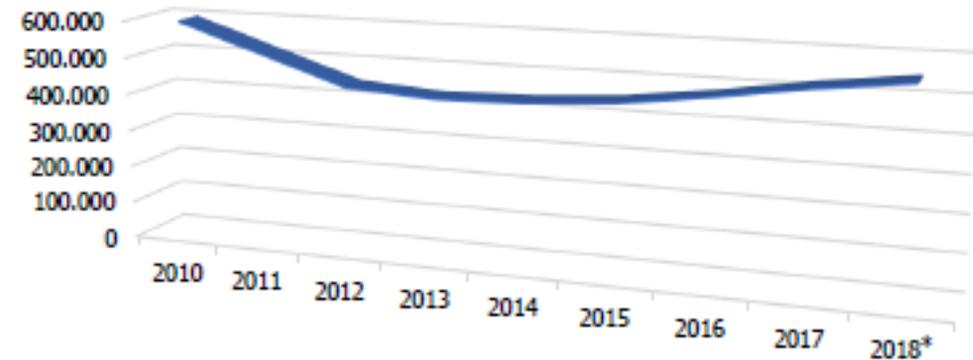
GDP change in %



- Unemployment was and still is the highest among EU states. Among young people > 40%



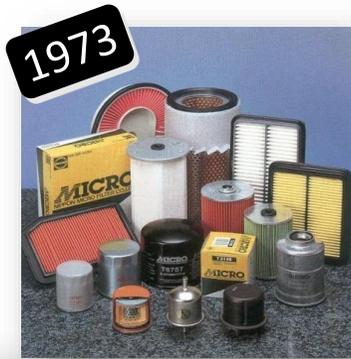
- Carpark circa 5,5 million .
- Average vehicle age increasing – close to 17 years
- Total market more than halved during crisis years
- OES biggest loser
- Current share IAM-OES : 60% - 40%
- IAM total volume recovered during crisis years



■ Γνήσια ■ After Market

- Crisis however is also offering great opportunities

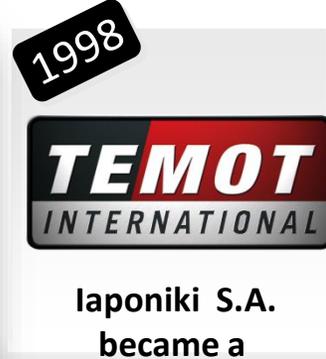




1973
Spare parts for Japanese vehicles



1991
Full assortment offer



1998
Iaponiki S.A. became a shareholder of Temot International



2002
Garage Network of BCS



2002
Tools & Diagnostics



2003
Support & Hotline



2007
Trainings in multiple locations



2008
Garage Network of Autofit Service

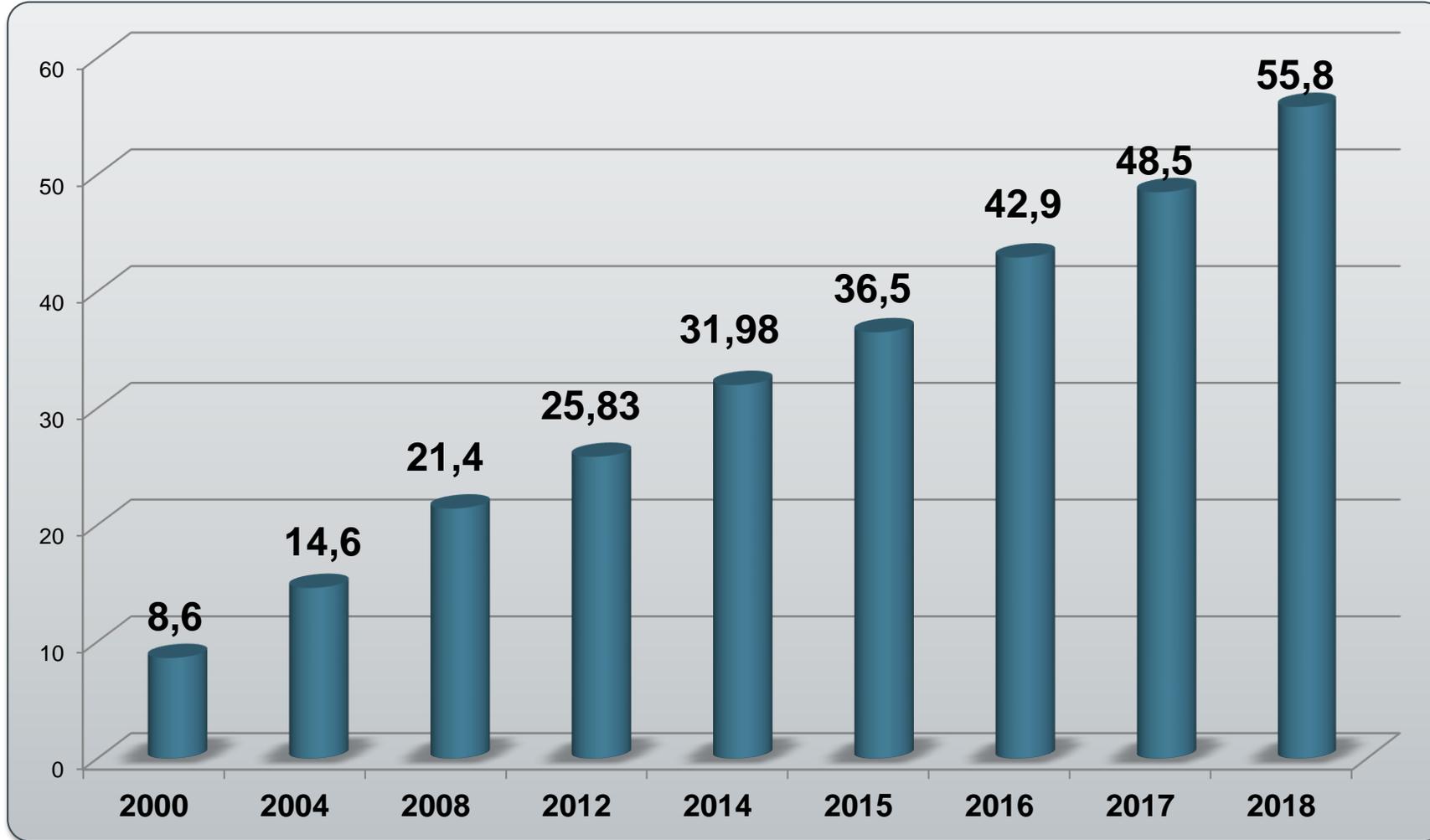


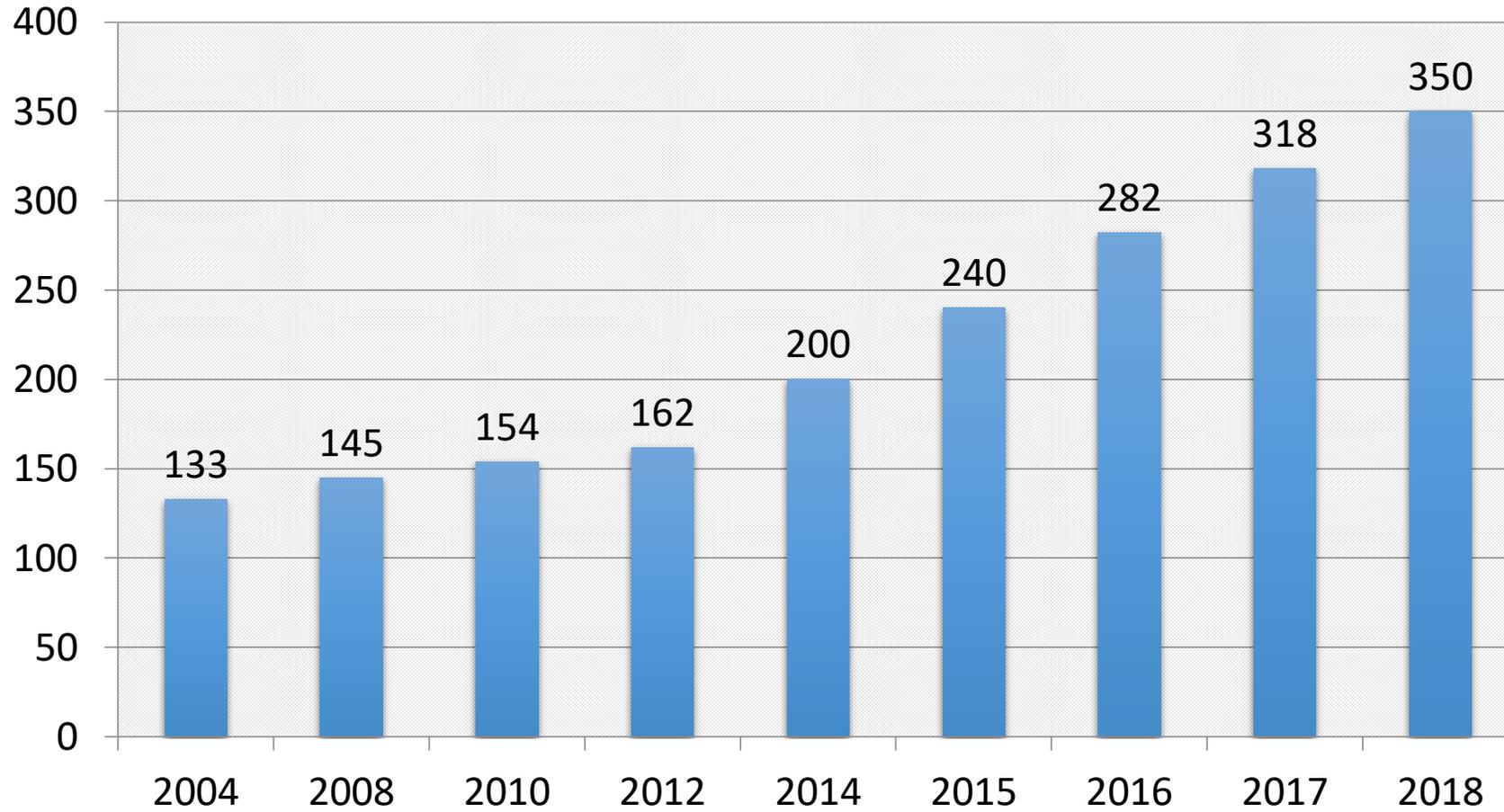
2010
Iaponiki S.A. was among the first companies to promote the r2rc campaign



2013
40 year anniversary !

Turnover evolution Iaponiki 2000 - 2018

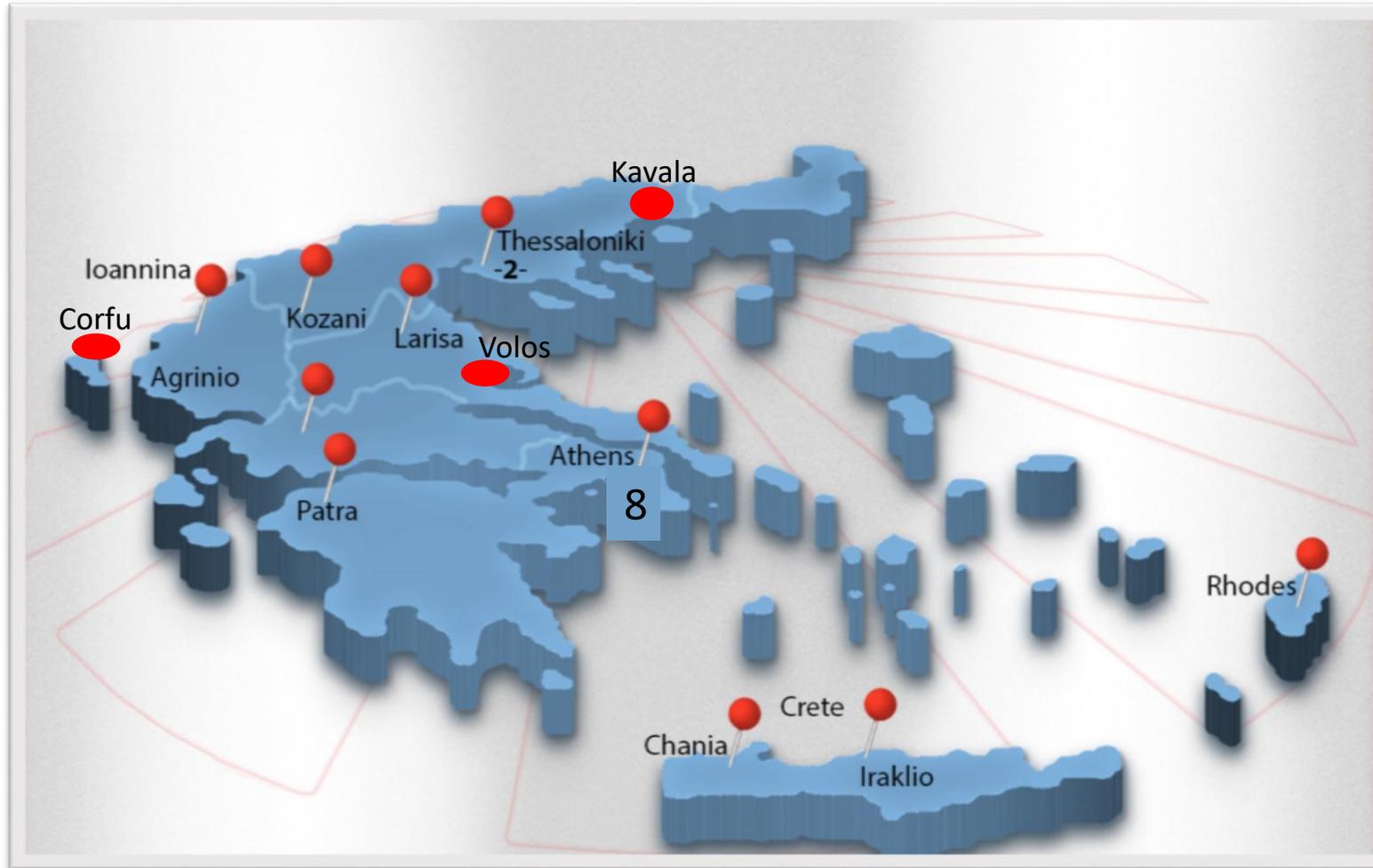




• Investment in :

- Market geographical coverage
- Improved logistics
- Expansion of product range
- Advanced IT and cataloguing systems
- Marketing activities
- Investment in training – support - hotline
- People (qualitative – quantitative)

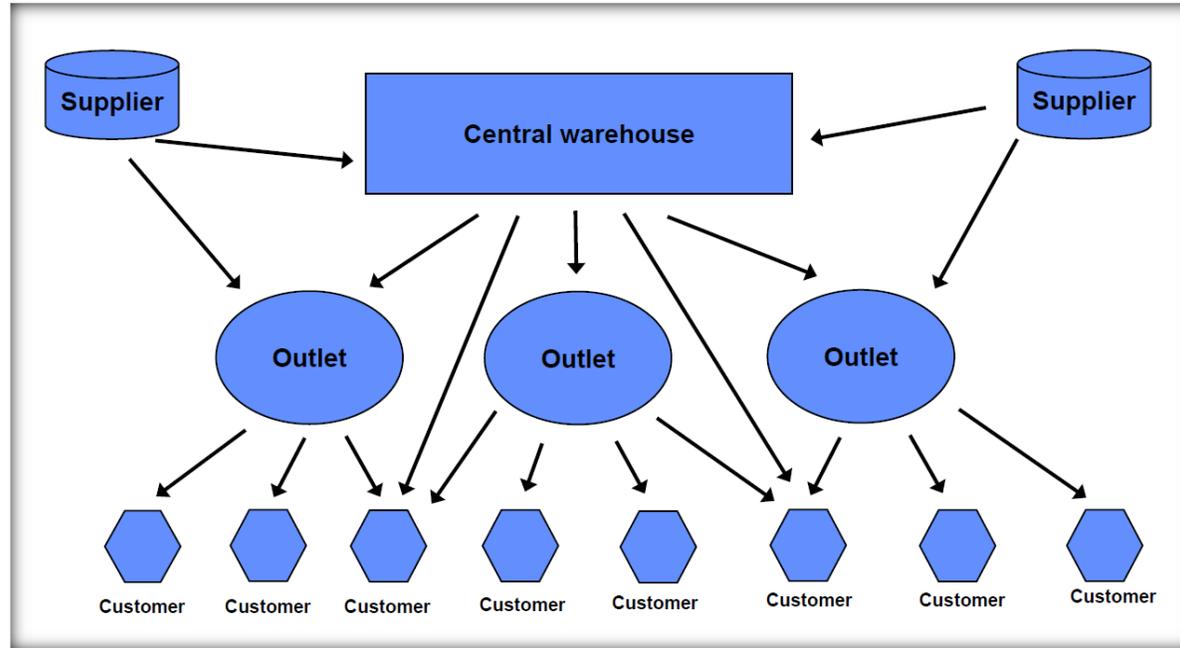
21 outlets in Greece



Market coverage – Outlets



- Logistics flowchart



- Central warehouse distribution
- Bulky items stored in 3PL provider
- Direct deliveries to outlets & customers
- 21 outlets with up to 12 daily deliveries to customers
- 163 delivery vehicles

Central distribution center



- In progress upgrade project
- Advanced WMS
- Automation of processes
- Kardex vertical lift systems
- Put to light systems
- Targets : Space gain and productivity increase



- More than 90.000 articles available on catalogue
- 50.000 SKUs
- 80 suppliers
- Private label(QP) launched since 2013 and 2015 (QB)

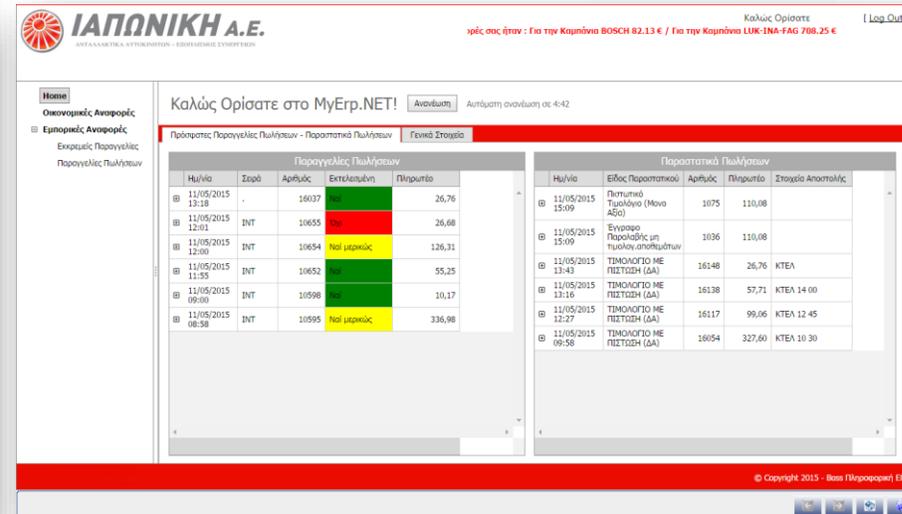
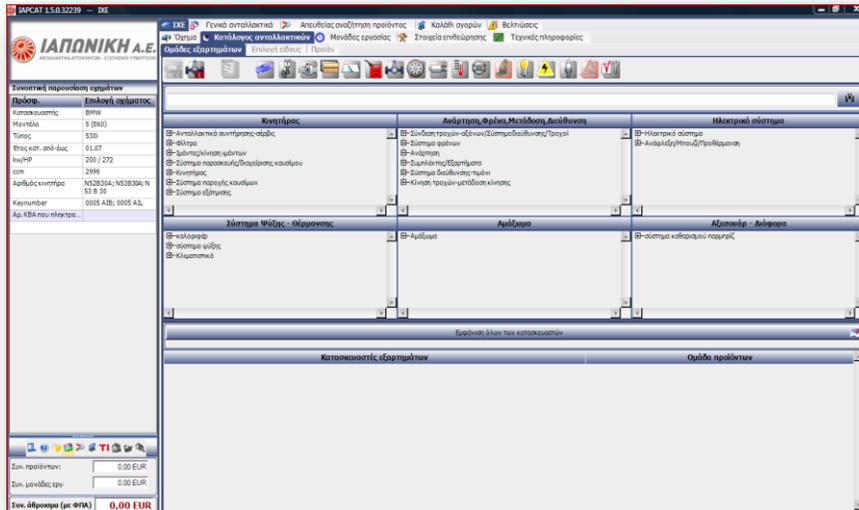
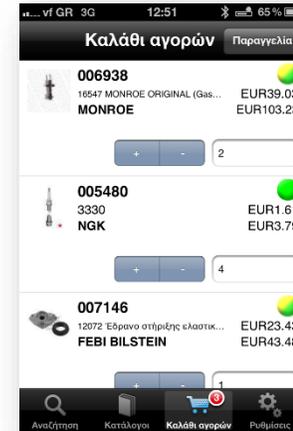


- **Comprehensive offer of tools**

- Hand tools
- Specialized automotive tools
- Diagnostics
- Garage equipment
- Exhibition van



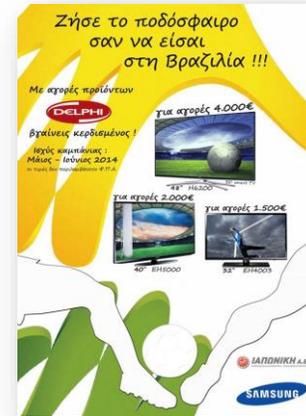
- **ELECTRONIC CATALOGUE :**
 - Most used aftermarket platform in Greece
 - Technical info integrated
 - Available for mobile devices
 - Integrated customer portal
 - Tecdoc based but to a great extent additions & corrections inhouse



Magazine Iaponiki S.A.



Actions



Customer events factory visits



Autofit Service

- ✓ 36 garages
- ✓ presence in 18 prefectures



www.autofit.gr
8011178200



Bosch Car Service

- ✓ 21 garages



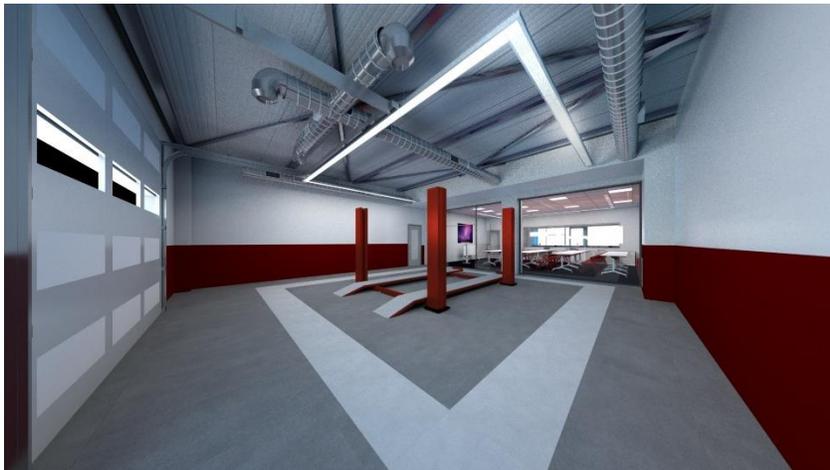
- Emphasis on promoting safety projects





Training rooms

- All over the country – close to the customer
- Fully equipped workshop and training center by end of 2018 at Athens HQ



The **Most important asset** of our company!



- A global organization bringing value to the aftermarket
- 75 shareholders with a turnover exceeding 10 billion Euro
- Iaponiki is actively involved with members in the PSC council , the data projects and the garage council .

- Evolution not revolution
- Willing to change and adapt
- Timing in applying changes
- Strong and supportive team