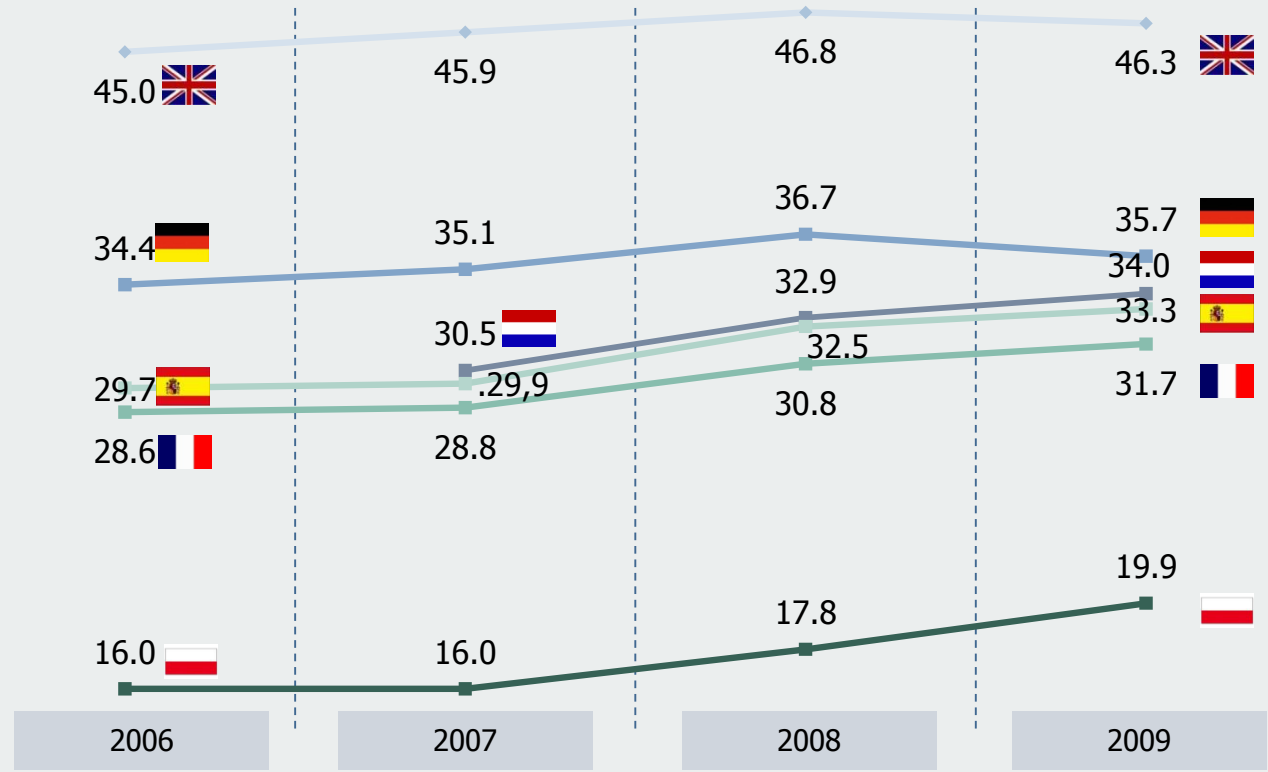


In those countries with a high retail brand market share, retail brands have evidently reached their maximum potential.

Brand share of discount stores in food retail

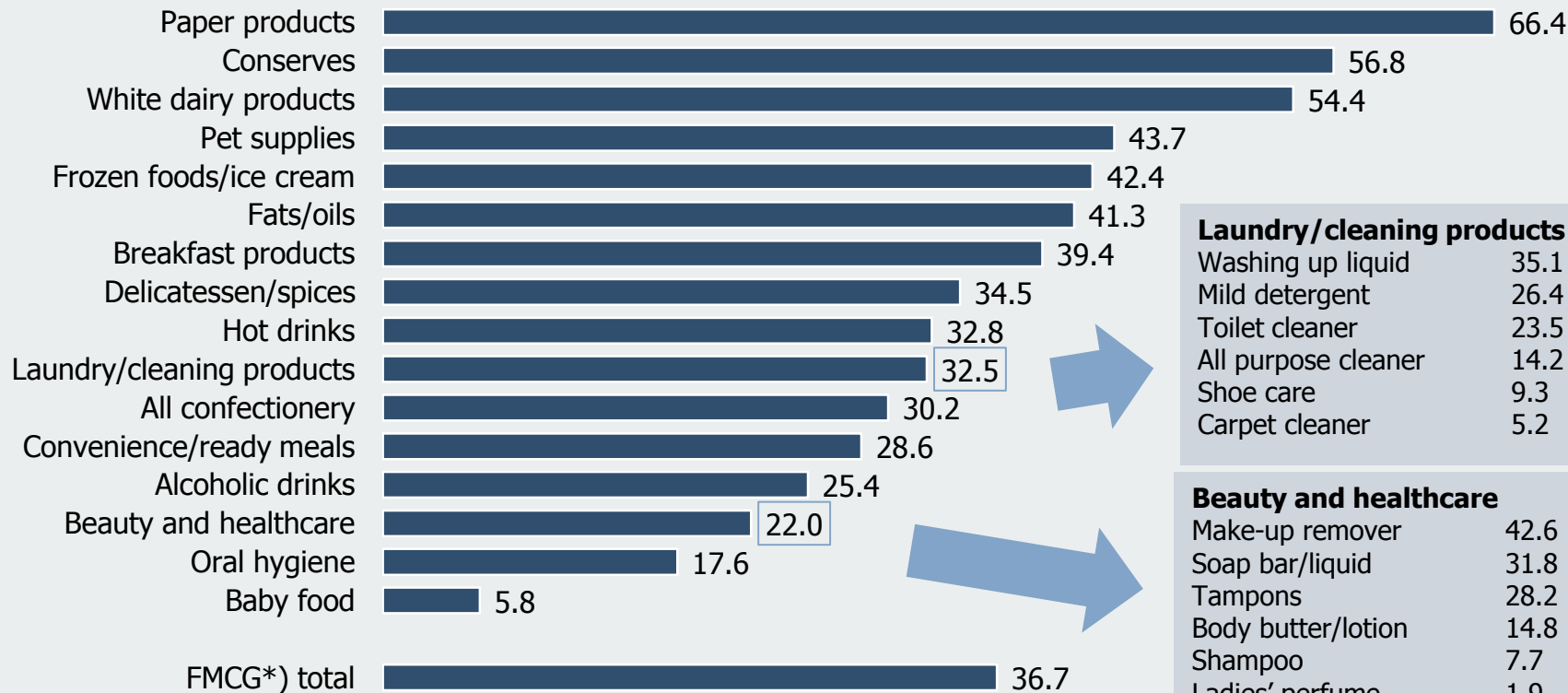
- Share in % -



Product groups differ significantly in terms of the market share of retail brands (example: Germany).

Market share of retail brands in Germany in the first half of 2010 (incl. Aldi)

- Share in % -

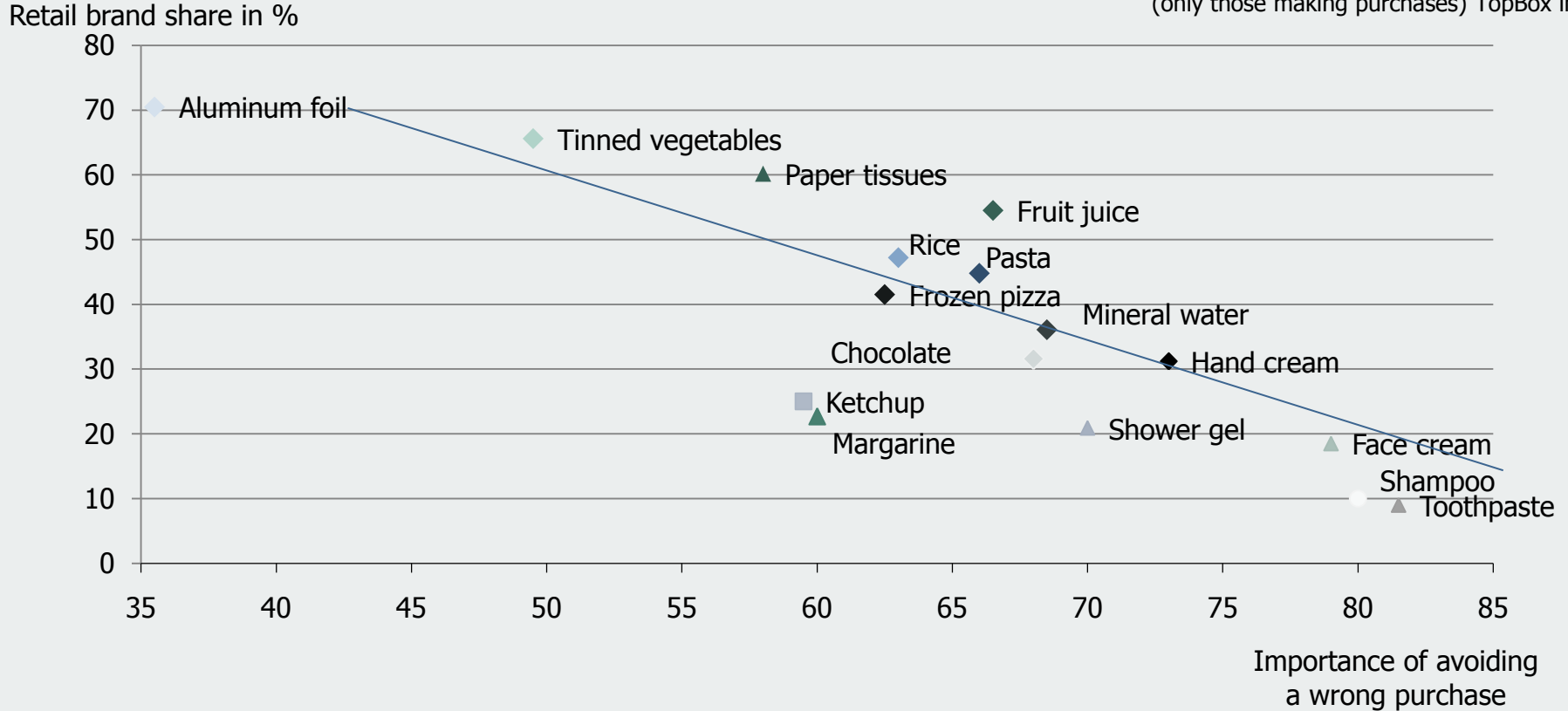


*) FMCG= fast moving consumer goods excluding fresh produce

The perceived risk of making a bad purchase is highly subjective depending on the product group.

Importance of avoiding wrong purchases and significance of retail brands

- Retail brand share in % (based on: value), importance of avoiding a wrong purchase (only those making purchases) TopBox in % -



For consumers, different influencing factors affect the perceived risk.

... the greater the prestige of
the product group.

... the more difficult it is to
determine the quality.

For the consumer, the
risks associated with
choosing a brand
increase...

... the greater the level of
body contact with the
product.

... the more the product is part
of a comprehensive range of
goods and services.