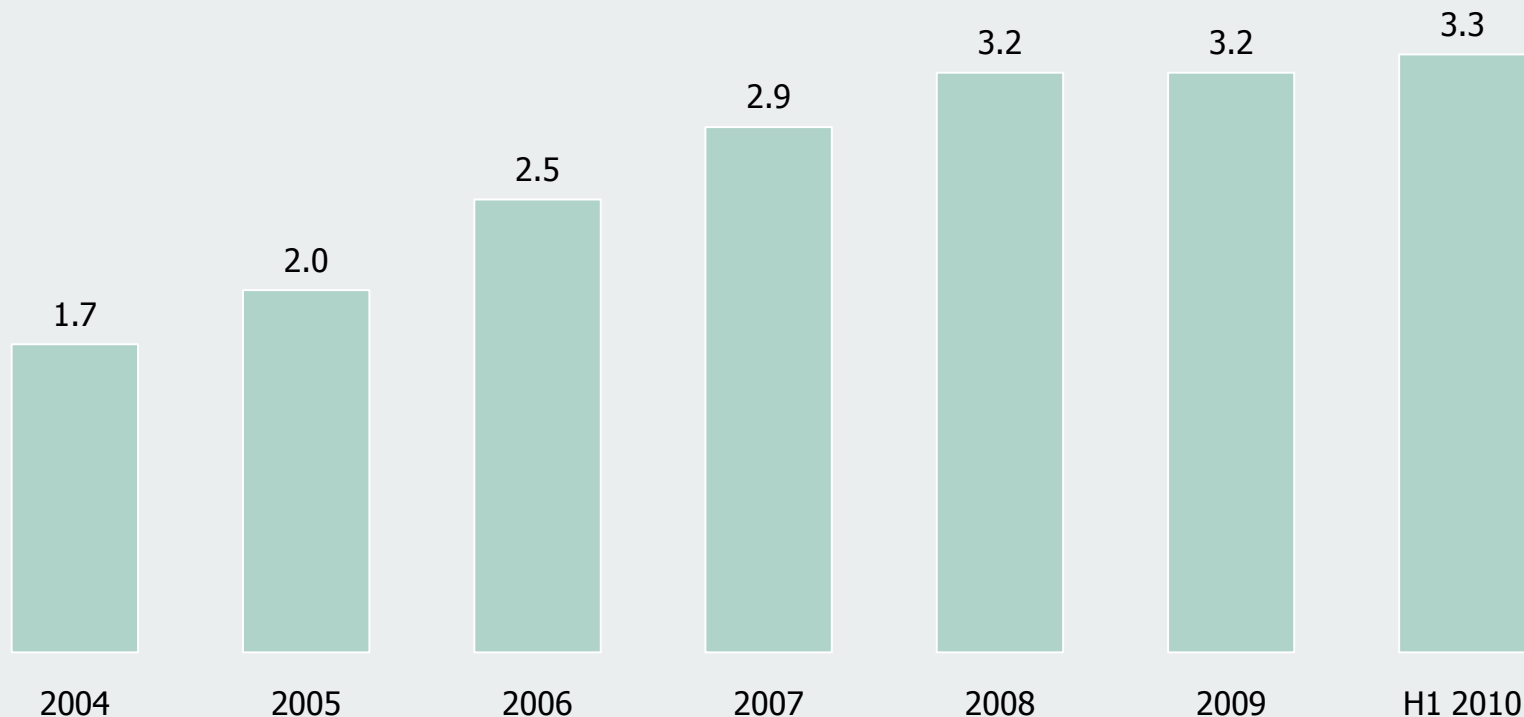


The trend towards organic food continues – albeit at a low level

Proportion of organic food in spending on food and drink
(Drinks incl. beer and wine – based on consumer spending – value)

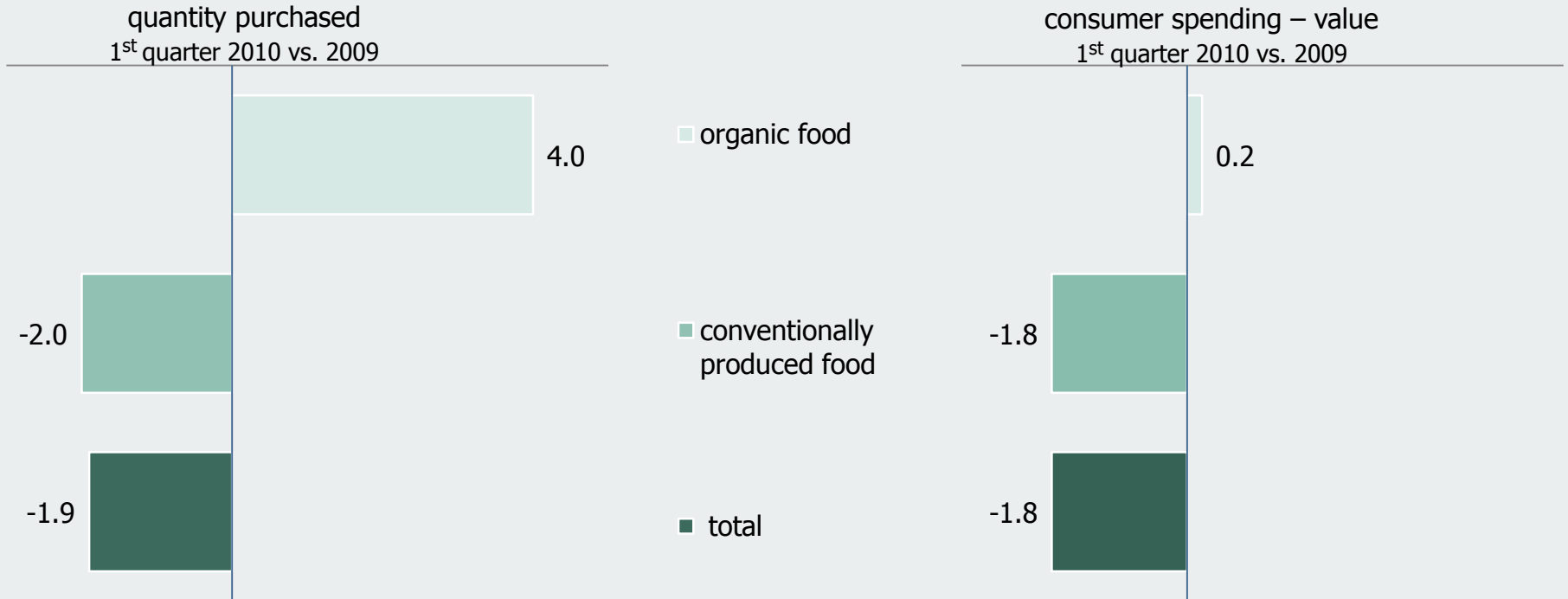
- in %, rounded -



Growth in the organic segment is primarily quantitative – prices are falling

Change in demand for organic products
compared with conventionally produced food/drink

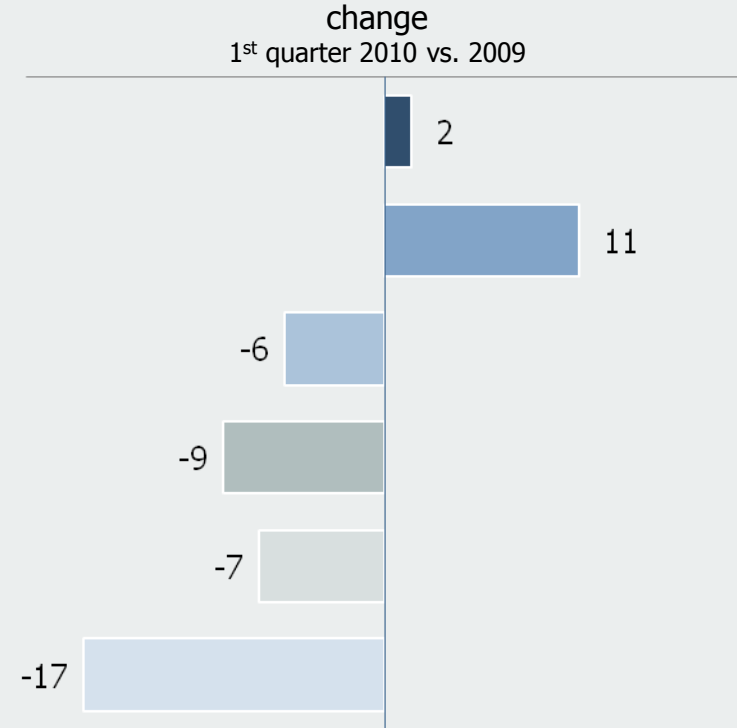
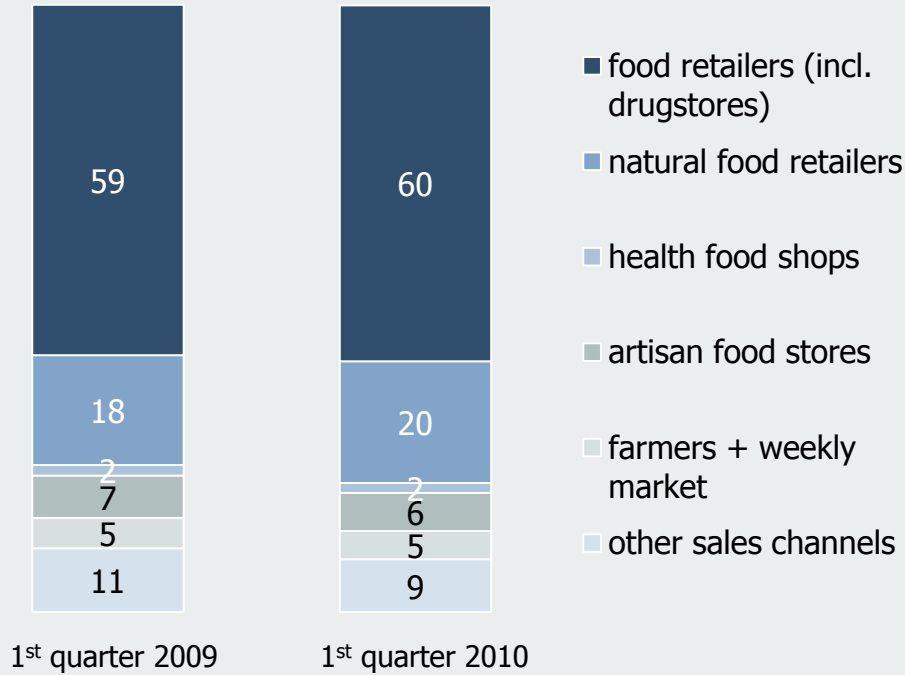
- in %, rounded -



60% of organic food is purchased from traditional food retailers (incl. drugstores)

Change in sales channels for organic food
(Based on consumer spending – value)

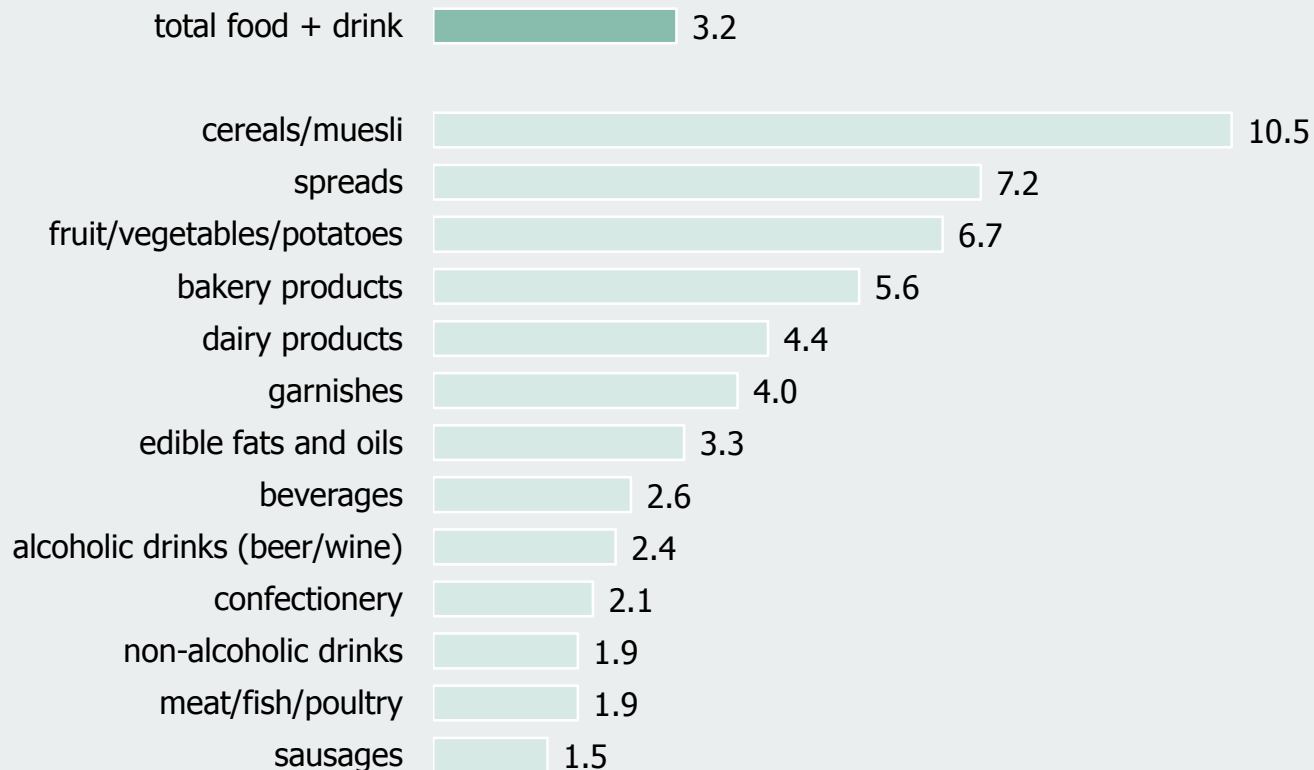
- in %, rounded -



Cereals, spread, fruit/vegetables and potatoes account for the largest proportion of organic food sold by food retailers

Organic/natural food segment as a proportion of the respective total range in 2009
(Based on consumer spending – value)

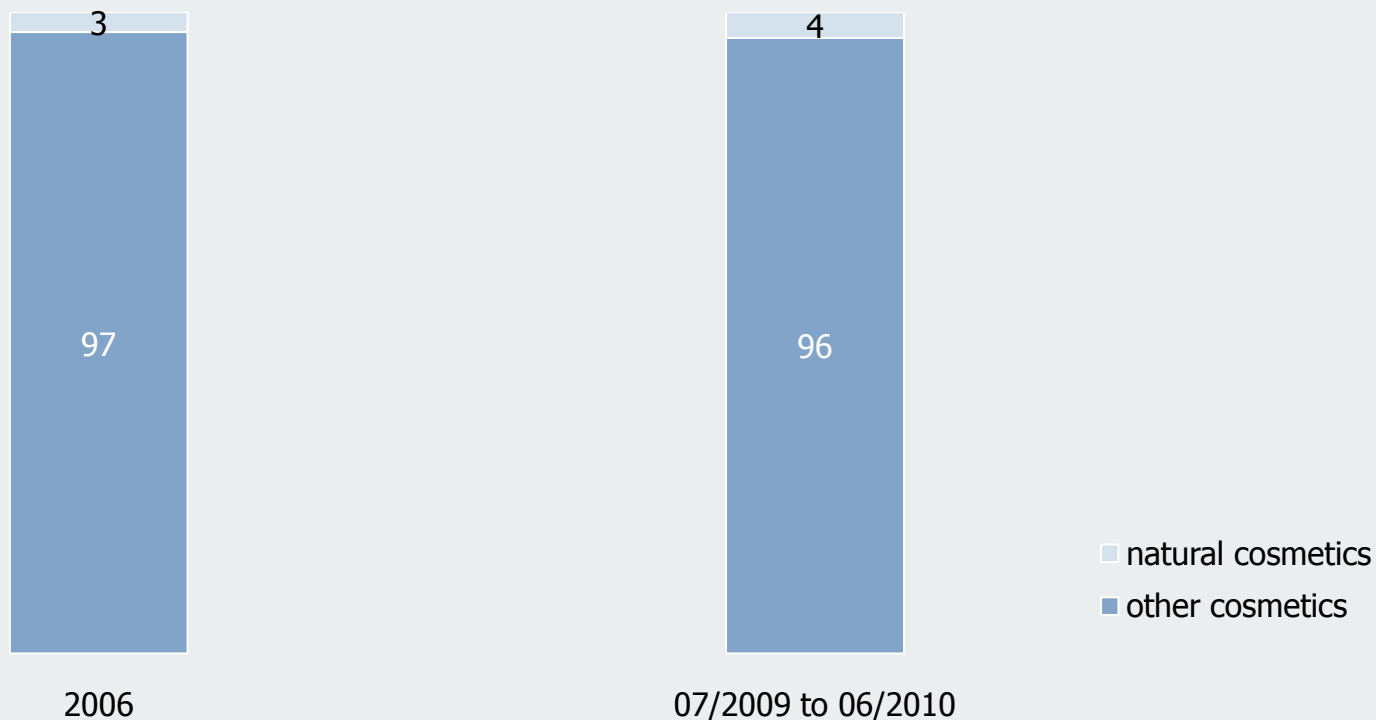
- in %, rounded -



“Nature” is also driving growth in the cosmetics market

Proportion of natural cosmetics in the cosmetics market
(Based on consumer spending – value)

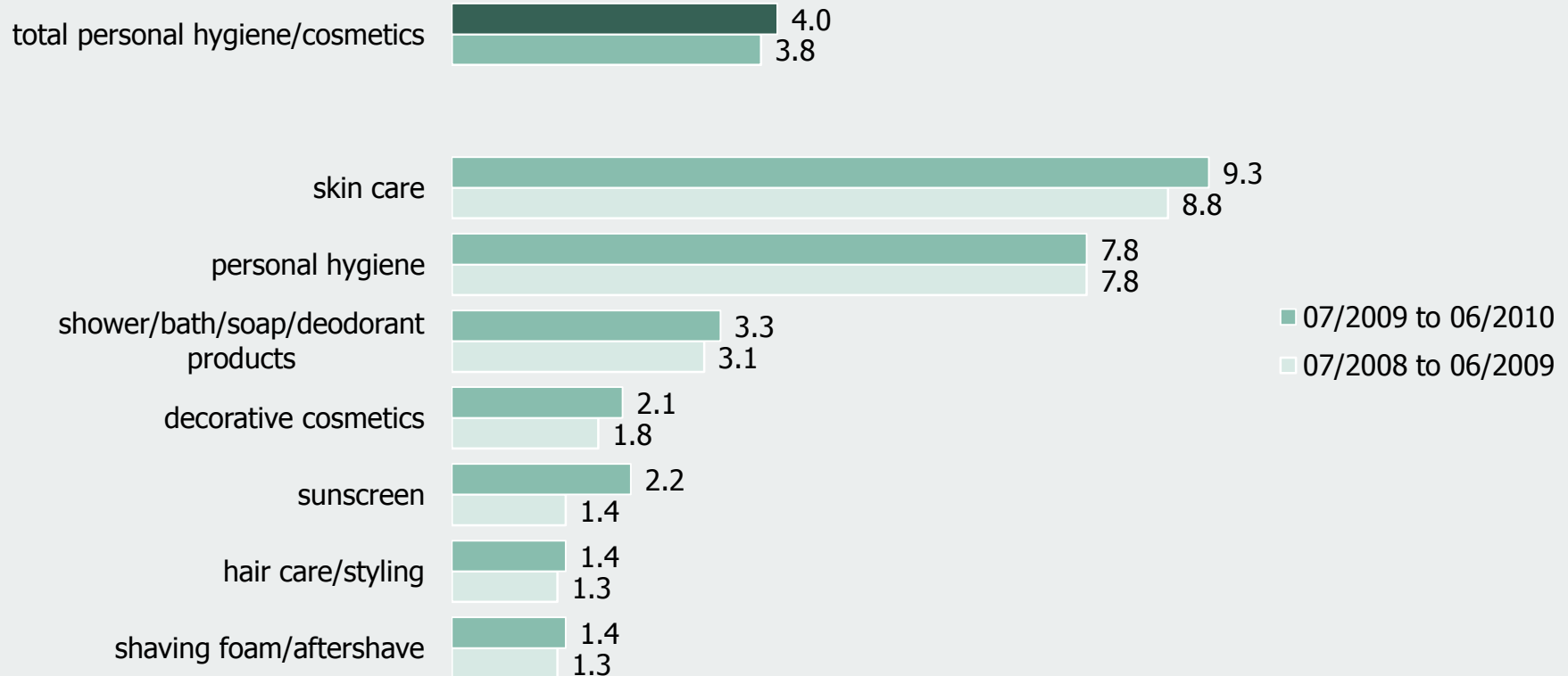
- in %, rounded -



Skin care and personal hygiene are the ranges offering the largest proportion of natural cosmetics

Organic/natural cosmetics as a proportion of the respective total range
(Based on consumer spending – value)

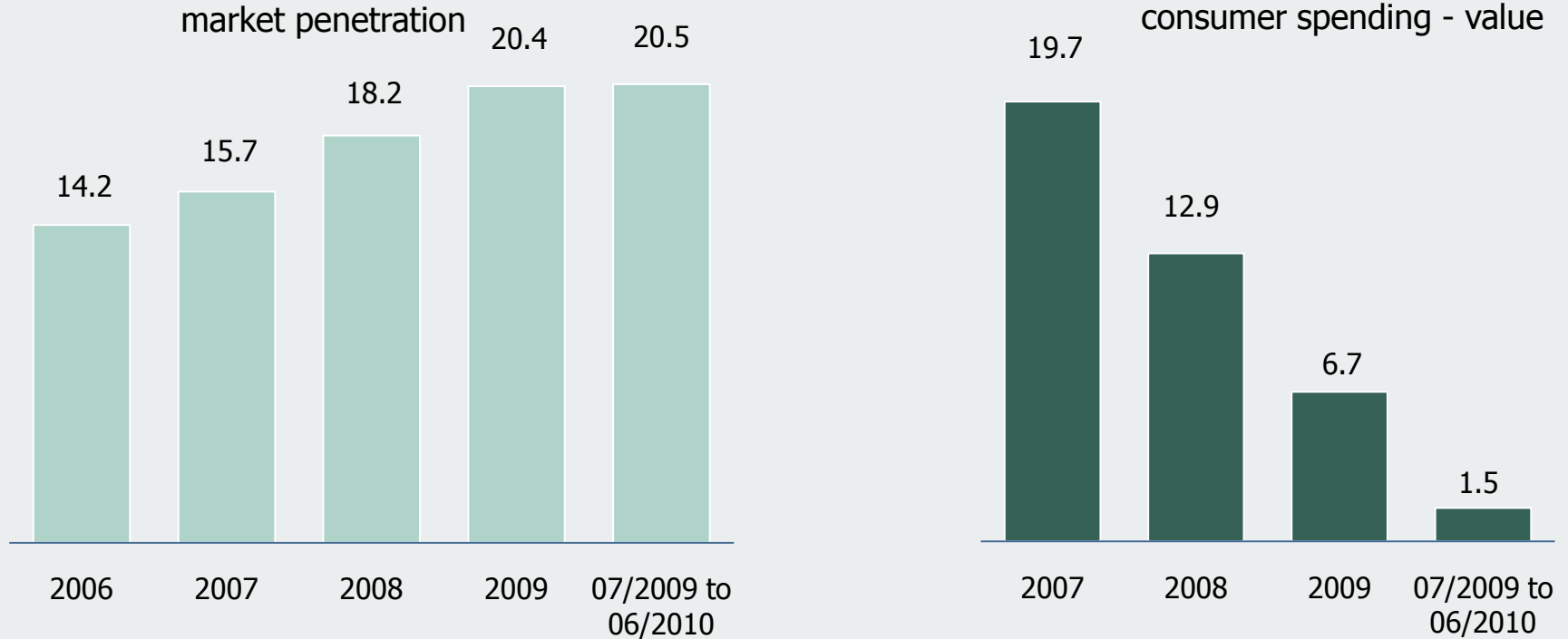
- in %, rounded -



*Market penetration for natural cosmetics now stands at around 20% -
at the same time the rate of growth is declining*

Change in market penetration and consumer spending on organic cosmetics

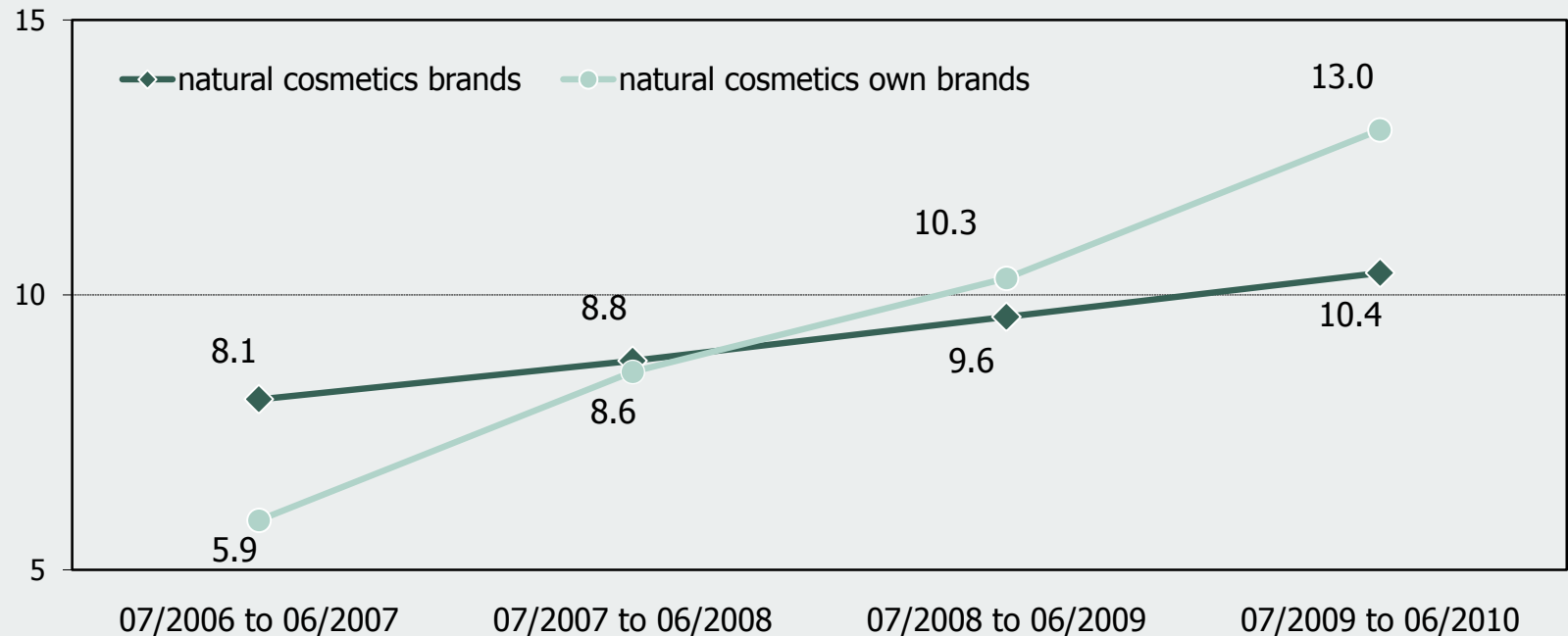
- in %, rounded -



Own brands are becoming more important

Market penetration of brands and own brands in natural cosmetics

- in %, rounded -



On average an own brand only costs around a third of the price of a branded product

Trend in prices of brands and own brands of natural cosmetics

- Average price per item in EUR, rounded -

