News about the organic market in Germany 2011

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2011 started with the Dioxin scandal surrounding conventional feed stuff in January - strongly pushed all organic animal products

In May/June 2011 EHEC scandal turned down consumer spendings for certain vegetables and scions tremendously – organic and conventional

Fukushima made people more concerning about the origin and the quality of their food

Small harvest for cereals, many vegetables and fruits in 2010 with high prices slowed down consumer spendings for plant products

Better supply for all animal product

Higher consumer prices

MARKET GREW by 9 percent in 2011 up to 6.59 billion EUR – 3.7 percent of the entire food market
German organic market grew by 9 %

Source: Arbeitskreis Biomarkt based on GfK, Nielsen and Klaus Braun
Sales and Price changes in the German organic market

Growth rate in % to previous year

Source: AMI Analysis based on GfK household panel
Consumer spendings for organic fresh products*

Mio. EUR

<table>
<thead>
<tr>
<th>Quarter</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>+15%</td>
<td>+15%</td>
</tr>
<tr>
<td>Q2</td>
<td>+9%</td>
<td>+9%</td>
</tr>
<tr>
<td>Q3</td>
<td>+8%</td>
<td>+8%</td>
</tr>
<tr>
<td>Q4</td>
<td>-3%</td>
<td>-3%</td>
</tr>
</tbody>
</table>

* Meat, Meat products, Poultry, Eggs, Milk & Diary, Oils, Bread, Fruit, Vegetables, Potatoes

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Source: AMI-Analysis of GfK-Household Panel
Conventional vegetables were much more affected by E coli crises – June 2011

Source: AMI-Analysis based on GfK-household panel ©AMI 2012
Animal Products grew the most 2011

- Meat & Poultry: 39.6%
- Eggs: 31.9%
- Hot Beverages: 21.9%
- Meat Substitute: 20.1%
- Butter & Oil: 15.1%
- Confectionary: 15.0%
- Cheese: 13.4%
- Alcoholic Beverages: 12.9%
- Spreads: 11.3%
- Milk & Diary: 10.0%
- Alkoholfree drinks: 9.9%
- Potatoes: 6.3%
- Dry foods: 5.9%
- Fruit: 4.2%
- Cereals/Müsli: 3.9%
- Frozen food: 3.9%
- Noodles, Rice: 2.8%
- Baby Food: 2.1%
- Vegetables: 1.8%
- Bread & Bakery: -0.6%

AMI Analysis based on GfK household panel

Growth rates (sales in EUR) 2011 vs. 2010
Organic Food Sales in Germany 2011

AMI Analysis based on GfK-household panel
Food Sales in Germany 2011

AMI Analysis based on GfK-household panel