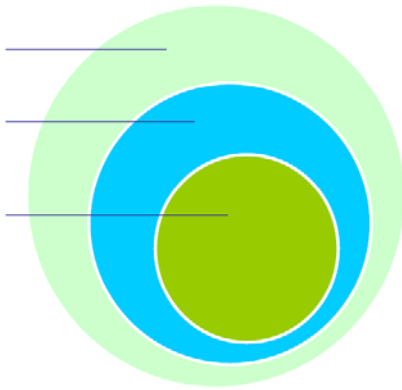


Retail Sales, Private Consumption and GDP 2007

Gross Domestic Product
2,423.80 Billion Euro

Private Consumption
1,374.39 Billion Euro
in % GDP: 56.7 %

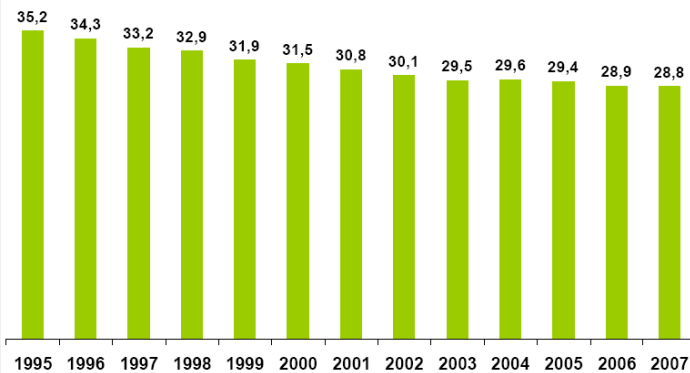
Retail Sales
563.7 Billion Euro
in % GDP: 23.3 %



Source: Federal Statistical Office Germany

- Central distribution function of the retail trade in the relationship between producers and consumers.
- Third biggest industry in Germany.
- 410.000 enterprises and annual sales of 565.4 billion Euro (including motor vehicles, gas stations).

Retail Sales*, Private Consumption 1995-2007

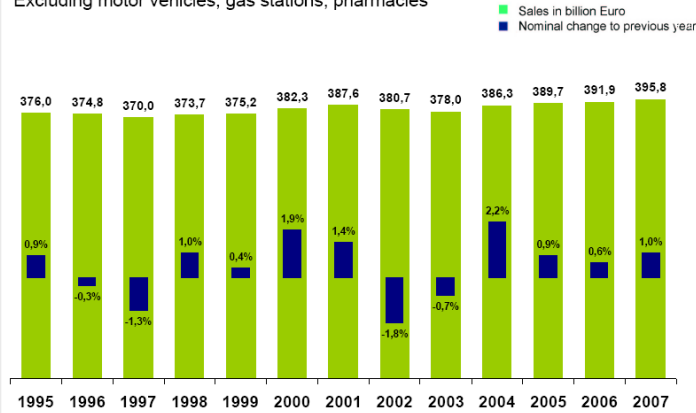


* In percent on Private Consumption; Retail Sales excluding motor vehicles, gas stations, pharmacies
Source: Federal Statistical Office Germany, HDE

- Decreasing share of retail sales on private consumption.
- Rising importance of alternative uses of the disposable private income such as old-age provision, telecommunication services and leisure and travel activities.

Retail Sales, 1995-2007

Excluding motor vehicles, gas stations, pharmacies

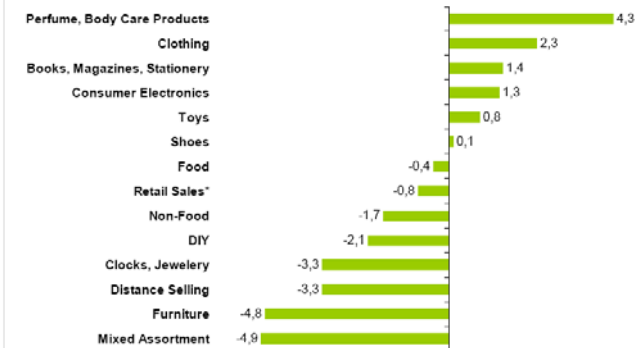


Source: Federal Statistical Office Germany, HDE

- Long period of stagnation since the mid-90's.
- High competition level.
- Success of both discount-oriented and service and quality-oriented distribution concepts.

Retail Sales 2007

Nominal change to 2006

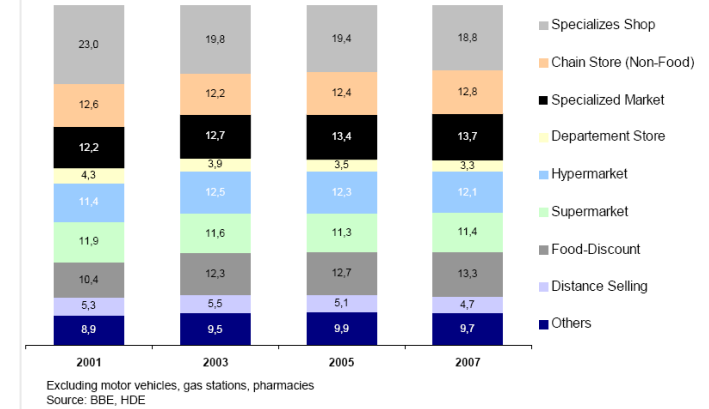


Source: Federal Statistical Office Germany, HDE

- Different economic activities within the retail sector.
- Innovative products and customer-oriented retail concepts as key success factors.
- Retail market as a whole remains weak.

Distribution Systems

Market share in percent



Excluding motor vehicles, gas stations, pharmacies
Source: BBE, HDE

- Strong structural change within the different distribution systems.
- Food-Discounters and specialized markets improve their market position continuously. Small and medium sized shops lose market share.

Sales and Enterprises

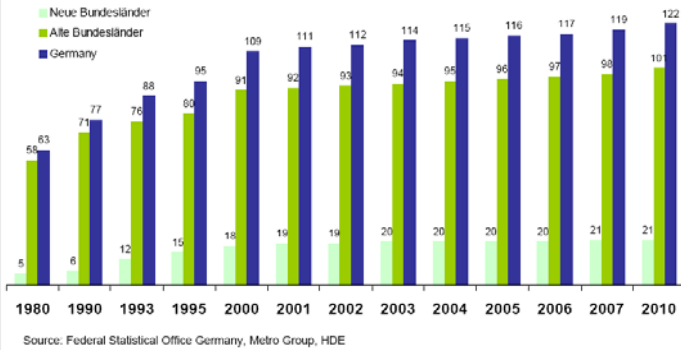
Size Range	Sales in Billion Euro	Enterprises
< 500.000 Euro	45,0	332.533
< 1 Mio. Euro	25,4	35.884
< 2 Mio. Euro	35,3	25.179
< 5 Mio. Euro	38,9	13.097
< 10 Mio. Euro	22,5	3.292
< 25 Mio. Euro	21,5	1.436
< 50 Mio. Euro	14,0	409
< 100 Mio. Euro	13,0	188
< 250 Mio. Euro	24,3	151
> 250 Mio. Euro	191,6	182
Total	431,5	412.351

Sales excluding VAT Excluding motor vehicles, gas stations
Source: Federal Statistical Office Germany

- Despite of concentration processes in the German retail trade the market is characterised by a high amount of small and medium-sized enterprises.
- 90 percent of the retail enterprises realise annual sales up to 2 million Euro.

Sales Area, 1980-2010

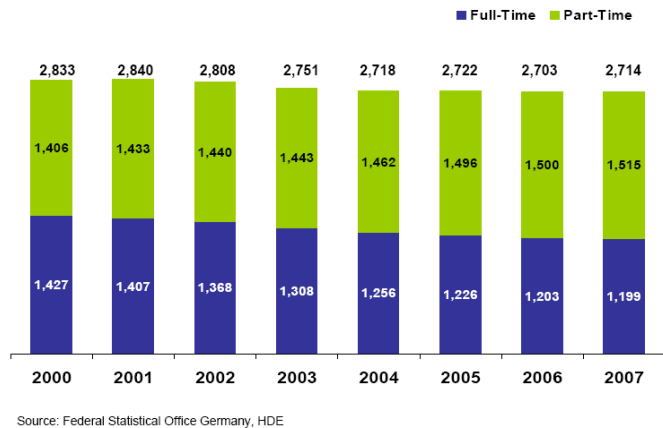
In million sqm



- Decreasing sales per square metre.
- Specialized stores, food-discounters and shopping-centers as successful distribution concepts expand their stores.
- Increasing store vacancies particularly outside the city centers.

Employees, 2000-2007

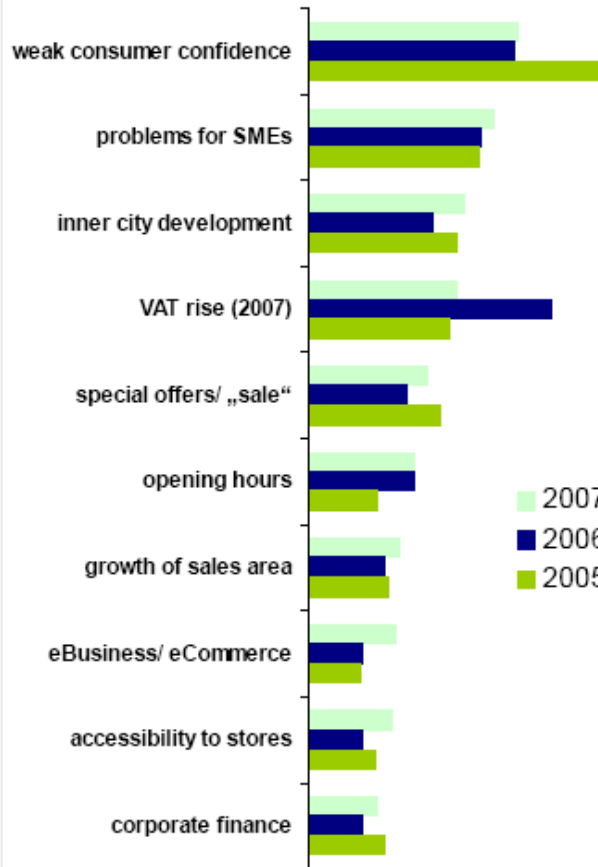
In million



- 2.7 million persons are employed in the retail industry.
- 170.000 trainees.

Hot Topics*, 2005-2007

In percent



Source: HDE

* For enterprises

HDE

German Retail - Facts and Figures

German Retail Federation

- Federation of the entire retail industry
- Professional, economic and employer federation
- Promotion of interests for retailers of each size and sales type

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