

The GfK logo consists of the letters 'GfK' in a white, sans-serif font, centered within a solid orange square.

GfK Living

A close-up photograph of a woman with long dark hair, wearing a dark jacket, looking through a pair of black binoculars. The background is a soft-focus outdoor scene with greenery and a blue sky. A semi-transparent grey box is overlaid on the bottom half of the image, containing the title text.

GfK Market survey on Flower mills / Cereal mills 2007

Project description

2

GfK Panel Services analysed the **ownership** and **acquisitions** for **flower mills / cereal mills** in the German consumer panel in August 2007.

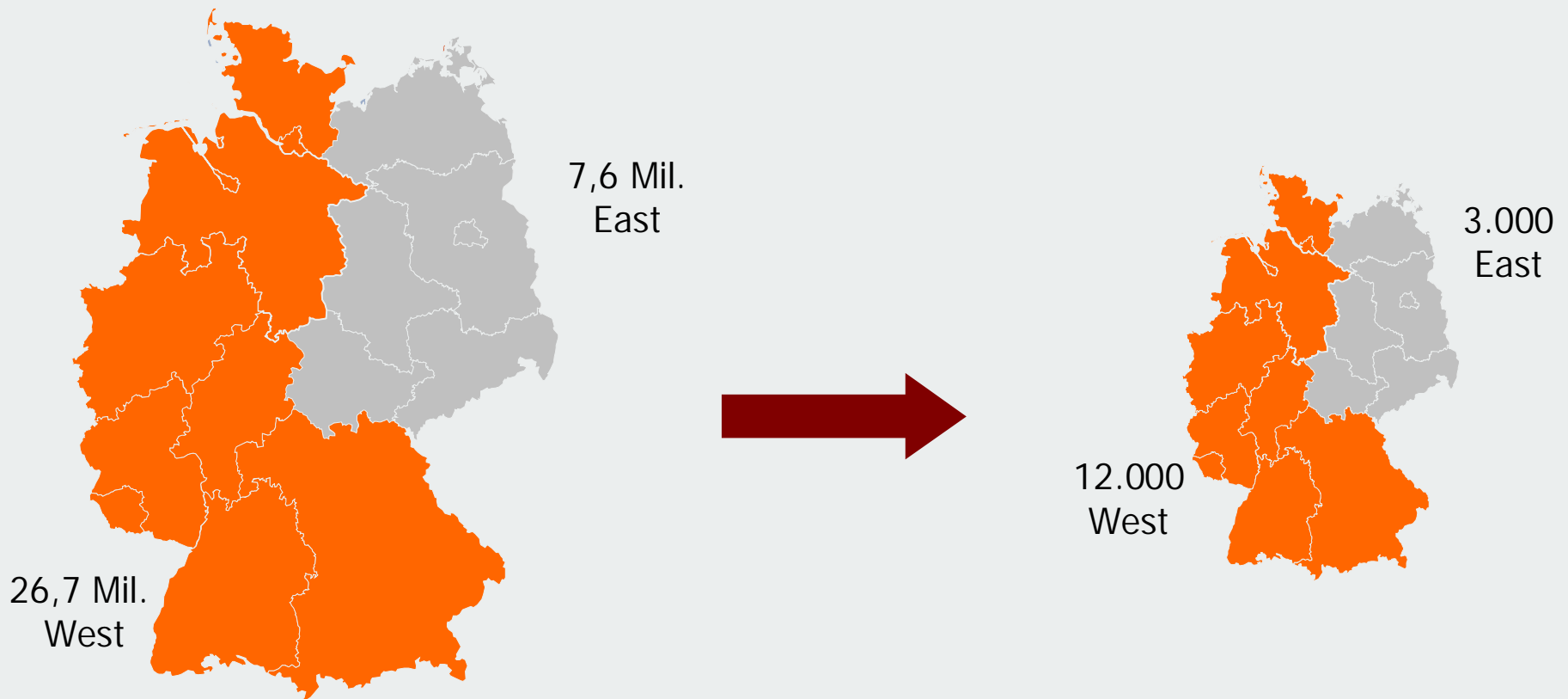
The information provided is based on ownership and acquisitions up to July 2007 reported by **15.000 representative German households**, thereof:

- 12.000 households in West Germany
- 3.000 households in East Germany

The results are **representative** for all private German households (34,3 Mio.). Foreign households, institutional households and industrial demand etc. are not considered.

Representativeness

15.000 panellists represent 34.3 mil. households



34,3 Mil. private German households

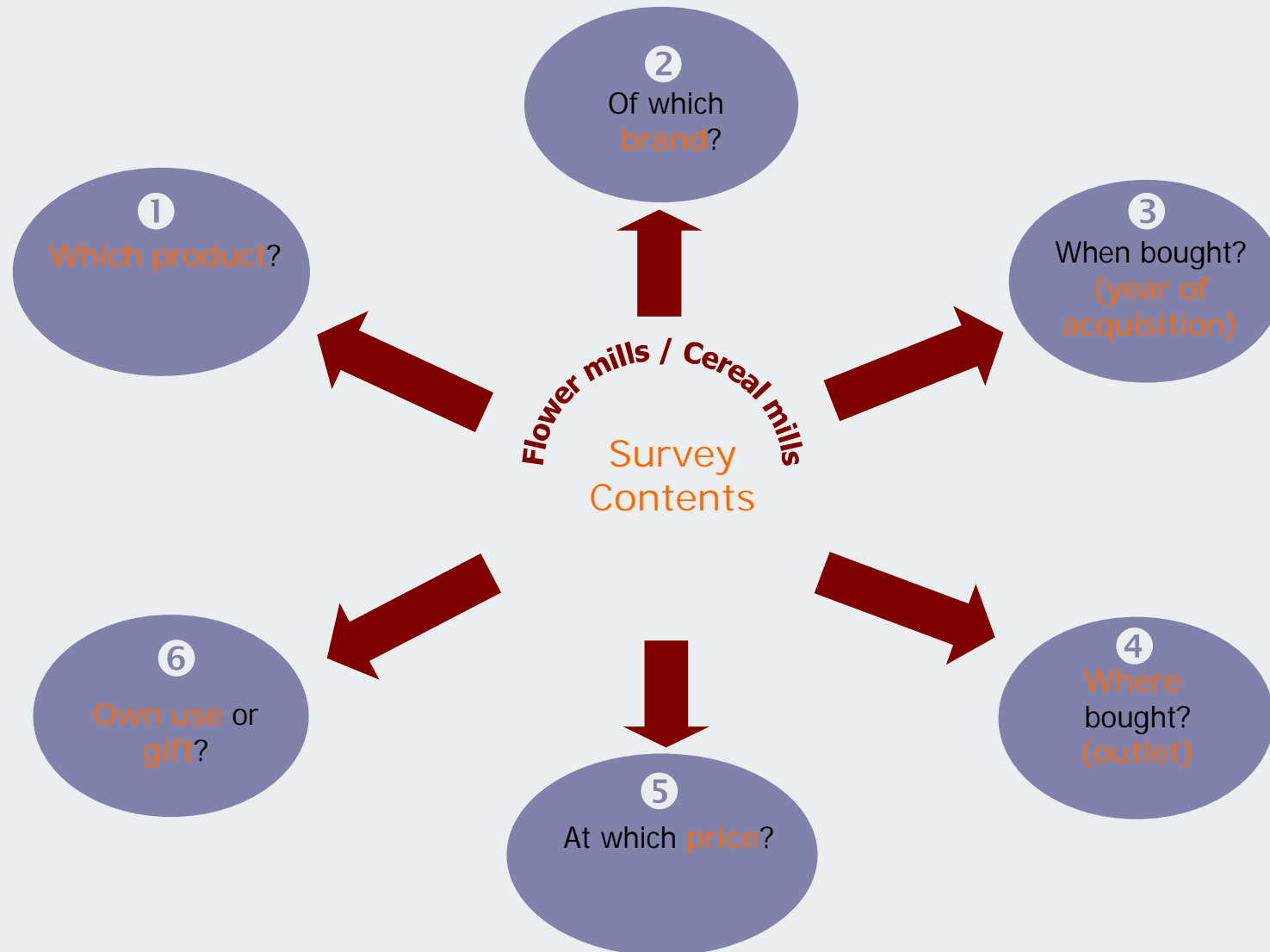
15.000 panellists



Questionnaire

Self-administered paper and pencil questionnaire with instruction pictures at the beginning of August 2007

4



Key information

5

- ➔ Market saturation / ownership rates in %
How many households own a specific appliance?

- ➔ Number of owning households (in millions)

- ➔ Ownership volume (in million units)

- ➔ Market volume in 2006 and 1st half-year of 2007

Information benefit ...

6

1 Market saturation by sociodemographic profiles of owning households (target group profiles) by ...

- regions
- city size (number of inhabitants)
- occupation of main income earner
- household size
- monthly household net income
- monthly per capita income
- age of housekeeping person
- occupation of housekeeping person
- type of dwelling

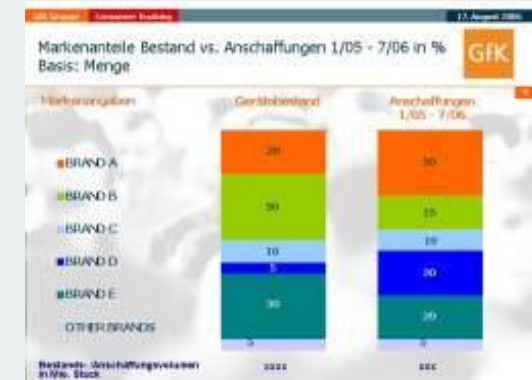


Information benefit ...

7

2 Ownership and acquisitions in 2006 / 1st HY 2007 (market volume)

- by years of acquisition
- by brands (brand shares)
- by types / models (independent electr. appliance, as prefix appliance for mincer / kitchen machine etc., with crank handle (mechanical), cereal mill)



3 Acquisitions in 2006 / 1st HY 2007 (market volume)

- by price groups (low / middle / high)
- average prices
- average price by types / models
- average price by outlets



Information benefit ...

8

4 Acquisitions in 2006 / 1st HY 2007 (market volume) by outlets

- Multiples
- El. Specialist
- Department stores
- Mail order houses
- Hypermarkets
- LEH-Discounter (Aldi, Lidl etc.)
- Hobby- / Handyman- / Home improvement stores
- Exhibitions / Fairs
- Coffee shops (Tchibo)
- Internet
- Other outlets

Results

9

- Penetration / market saturation among private German households
- Market size and brand shares
- Outlet structures
- Price structures
- Target group profiles of owning and non-owning households

Base for sales and distribution planning and target group selection (for the right marketing strategy)

Conditions

10

Budget

Flower mills / Cereal mills

EURO 4.100

The fee is excluding VAT
The amount will be invoiced upon delivery of the report.

Date of delivery

November 2007

Scope of delivery

- Management summary per product group
+ Excel reports

The GfK logo consists of the letters 'GfK' in a white, sans-serif font, centered within a solid orange square.

GfK Living

Should you have any further questions, please do not hesitate to contact:

GfK Panel Services Deutschland
Competence Division GfK Living
Uwe Broeske
Senior Research Consultant

Nordwestring 101
90319 Nürnberg
Tel.: +49 (0) 911 / 395 - 4214
Email: uwe.broeske@gfk.com
www.gfk-living.com