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1. Population and age structure

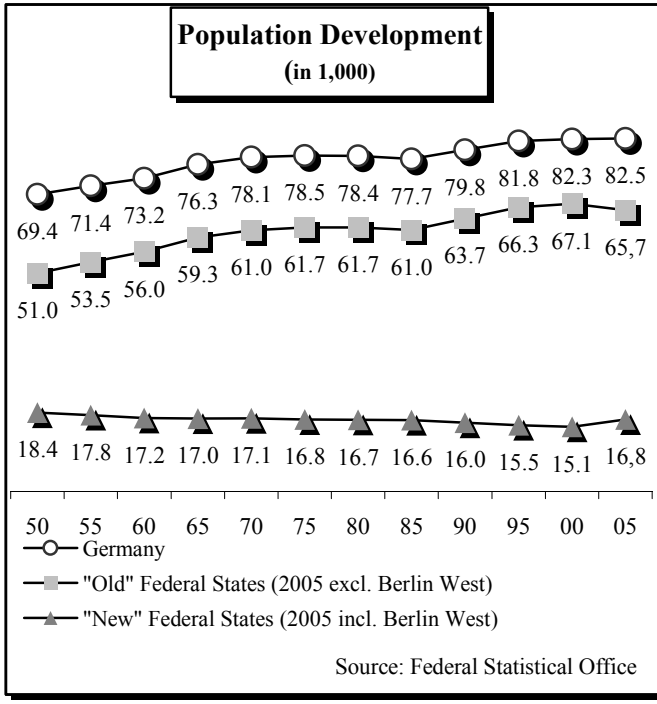
With a population of 82.5 million, the Federal Republic of Germany is the country with the largest population in Europe after Russia (total 143.4 million). Following the eastern enlargement of the European Union in 2004, Germany accounts for 18% of the population of the EU; its share of the total area of the EU is over 9%.

Germany in the EU – Population and Area

	Area		Population (2005)			
	1,000 km²	in %	in 1,000	in %	per kn	Change in %
Germany	357	9.2	82,501	18.0	231	-0.5
Belgium	31	0.8	10,446	2.3	342	4.6
Denmark*	43	1.1	5,411	1.2	126	3.0
Estonia**	43	1.1	1,347	0.3	31	-2.8
Finland**	305	7.8	5,237	1.1	17	3.5
France	544	14.0	60,561	13.2	111	5.4
Greece	132	3.4	11,076	2.4	84	3.3
Utd. Kingdom	244	6.3	60,035	13.1	246	5.3
Ireland	70	1.8	4,109	0.9	58	20.2
Italy	301	7.7	58,462	12.7	194	5.3
Latvia	65	1.7	2,306	0.5	36	-5.4
Lithuania	65	1.7	3,425	0.7	52	-7.0
Luxembourg	3	0.1	455	0.1	176	7.3
Malta	0.3	0.0	403	0.1	1274	-2.1
Netherlands**	39	1.0	16,306	3.5	481	7.8
Austria	84	2.2	8,207	1.8	98	2.0
Poland	313	8.0	38,174	8.3	122	7.8
Portugal	92	2.4	10,529	2.3	115	-0.7
Sweden	411	10.5	9,011	2.0	22	3.2
Slovakia	49	1.3	5,385	1.2	110	3.1
Slovenia	20	0.5	1,998	0.4	99	4.7
Spain	505	13.0	43,038	9.4	85	17.1
Czech Rep.	79	2.0	10,221	2.2	130	2.9
Hungary	93	2.4	10,098	2.2	109	-2.1
Cyprus	9	0.2	749	0.2	81	31.3

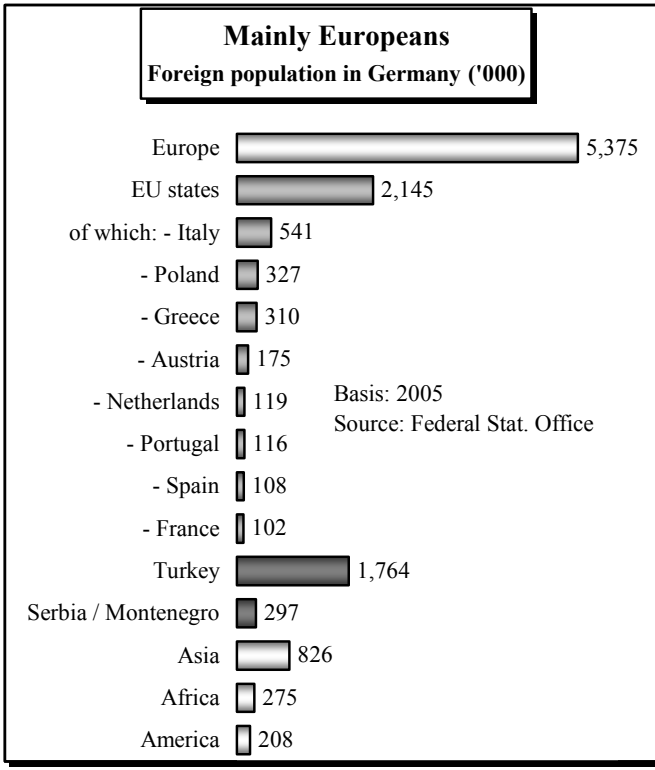
*excl. Faeroes and Greenland **only land area

Source: Eurostat 2005 (estimates); own calculations



Whereas the population of most EU countries is growing, mainly as a result of high immigration levels, the population of Germany has been on the decline since 2003: the net immigration level (number of immigrants less number of emigrants) is not sufficient to make good the deficit in the birth rate.

The Federal Statistical Office reports that at the end of 2005 there were 82.45 million people living in Germany – after 82.50 the year before. The number of births fell from 706,000 to less than 690,000 in 2005; the number of deaths remained relatively constant at 820,000. Net immigration – i.e. immigrants less emigrants – stood at around 100,000 (previous year: 83,000).

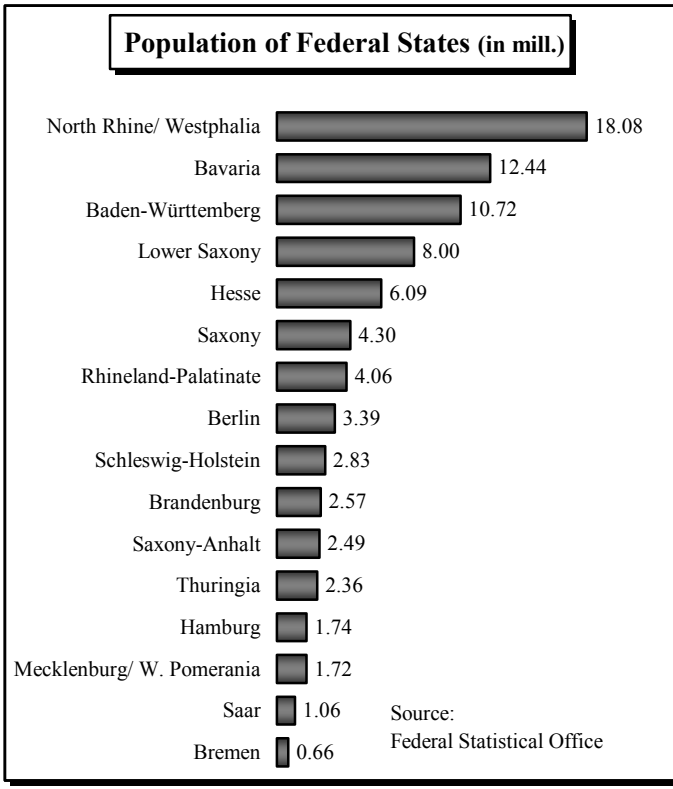


At the end of 2005 there were about 6.76 million foreigners registered in Germany. The great majority (80%) come from European countries, and nearly one in three immigrated from an EU country. In terms of nationality, Turkish citizens were by far the largest group of foreigners (1.76 million), followed by Italians (0.54 million), Poles (0.33 million) and Greeks (0.31 million).

Population growth in the 25 member states of the EU averaged 4.4% in 2005; apart from Germany, only the Baltic states, Hungary, Malta and Portugal reported a drop in population figures (Eurostat).

Above all, the difficult employment situation continues to stimulate migration from the eastern part of German ("new" federal states) to the west ("old" federal states). Between 1991 and 2004 the east recorded a net emigration of around 900,000 people.

In 2004 alone, the eastern states lost a net total of 51,700 people through migration to the west (plus: 94,700, minus: 146,400). The westward pull is particularly strong in the 18 to 30 age group: they accounted for 54% of emigrants (Federal Statistical Office).



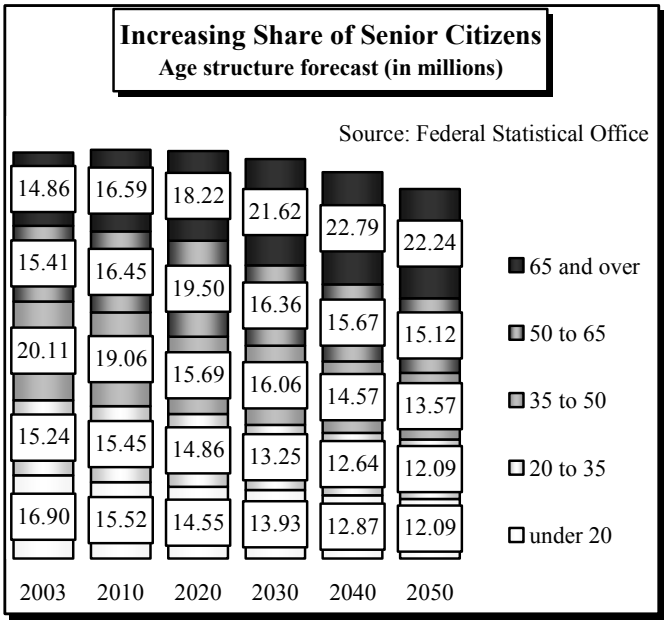
The Federal States and their Major Cities				
Federal State	**City**	**Pop. ('000)**	**City**	**Pop. ('000)**
Baden-Württemberg	Stuttgart	589.2	Heidelberg	143.0
	Mannheim	308.4	Heilbronn	120.7
	Karlsruhe	282.6	Ulm	119.8
	Freiburg	212.5	Pforzheim	119.0
Bavaria	Munich	1,247.9	Würzburg	132.7
	Nürnberg	493.6	Regensburg	128.6
	Augsburg	259.2	Ingolstadt	119.5
Berlin	Berlin	3,338.5		
Brandenburg	Potsdam	145.0	Cottbus	107.5
Bremen	Bremen	544.9	Bremerhaven	118.3
Hamburg	Hamburg	1,734.1		
Hesse	Frankfurt/Main	643.4	Kassel	194.3
	Wiesbaden	272.0	Darmstadt	139.7
Mecklenburg/ W. Pomerania	Rostock	198.3		
	Schwerin	97.7		
Lower Saxony	Hanover	516.2	Oldenburg	158.3
	Braunschweig	245.1	Göttingen	122.9
	Osnabrück	165.5	Wolfsburg	122.7
North Rhine/ Westphalia	Cologne	966.0	Bielefeld	328.5
	Dortmund	589.7	Bonn	311.1
	Essen	589.5	Gelsenkirchen	272.4
	Düsseldorf	572.5	Münster	269.6
	Duisburg	506.5	Mönchengladb.	262.4
	Bochum	387.3	Aachen	256.6
	Wuppertal	362.1	Krefeld	238.6
Rhineland-Palatinate	Mainz	185.5	Koblenz	107.6
	Ludwigshafen	162.8	Trier	100.2
Saar	Saarbrücken	181.9		
Saxony	Leipzig	497.5	Chemnitz	249.9
	Dresden	483.6		
Saxony-Anhalt	Halle/Saale	240.1		
	Magdeburg	227.5		
Schleswig-Holstein	Kiel	233.0		
	Lübeck	212.8		
Thuringia	Erfurt	201.6	Jena	102.6
	Gera	106.4		
			Source: Federal Statistical Office	

Germany

Germany has an area of 357,046 km², resulting in an average population density of 231 inhabitants per km². Of the individual federal states, Berlin has the highest population density with 3,799 inhabitants per km², followed by the city states of Hamburg and Bremen (2,297 and 1,641 per km² respectively).

Of the other states, North Rhine/Westphalia has the highest population density (530/km²), followed by Saar and Baden-Württemberg (411/km² and 300/km² respectively). The eastern states all have lower population densities than the west – here Thuringia has the highest figure with 146 per km², while Mecklenburg/ W. Pomerania has the lowest with 74 per km² (Federal Statistical Office).

Germany is growing older. The proportion of senior citizens has been growing for years; and even the comparatively young age structure of the immigrants is not sufficient to redress the balance. For about 30 years the birth rate (average number of children per woman) has



been fluctuating around 1.4 (2004: 1.36) – until the late 1960s it was still in excess of 2 (Federal Statistical Office).

Assuming "average life expectancy" and "average net migration" (at least 200,000), the "Tenth Coordinated Population Forecast" (Federal Statistical Office) estimates the number of senior citizens aged 65 and over at 16.6 million in 2010, and 18.2 million ten years later.

On this basis nearly 22 million persons would belong to this age group by 2030. Their share of the total population would thus have risen from 18% in 2005 to nearly 27%.

Whereas in 1995 there were only about 25 senior citizens aged 65 and over to every 100 persons in the working age range of 20 to 64 years, the figure will have climbed to 33 by 2010 – and in 2030 there will be as many as 47 senior citizens to every 100 persons of working age. As a result not only the number of pensioners will increase, but also the average age of the working population.

While the 35-49 age group currently account for nearly two fifths of the working age population, the forecast indicates that by 2020 their share will have fallen to 31%; by contrast, the proportion of 50 to 64-year-olds will have increased from 30% to 39%.

2. The economy and growth

The growth of the German economy was once again subdued in 2005 – the inflation-adjusted gross domestic product went up by 0.9%; in 2004 the growth rate had been 1.6%. Consumer household spending power, already reduced by the difficult labour market situation, was further depressed by other factors including increased energy prices.

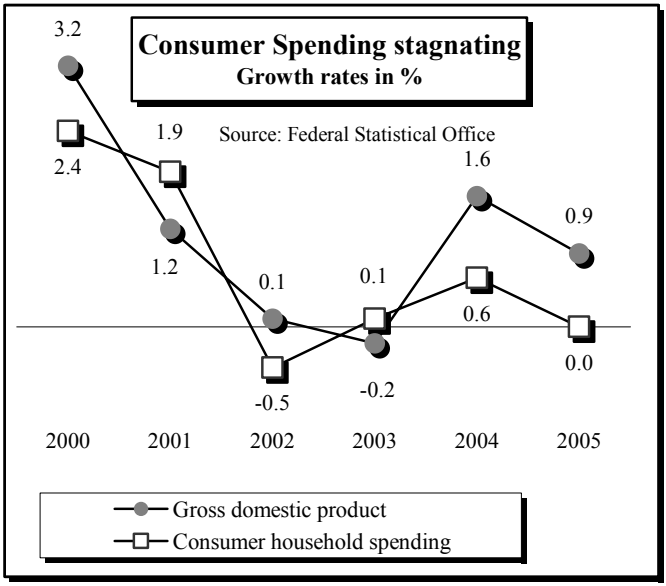
Gross Domestic Product by Federal States

	GDP per head 2005 Index D=100	Change in GDP 2005/2004 in %
Hamburg	169	1.3
Bremen	135	0.7
Bavaria	119	1.2
Hesse	119	0.8
Baden-Württemberg	113	1.5
North Rhine/Westphalia	99	0.5
Saar	96	2.7
Schleswig-Holstein	90	1.5
Rhineland-Palatinate	88	0.9
Lower Saxony	87	0.9
Berlin	86	-0.1
Saxony	74	-0.1
Saxony-Anhalt	72	1.1
Thuringia	70	0.2
Brandenburg	69	-1.1
Mecklenburg/ W. Pomerania	68	0.2
Germany	**100**	**0.9**

Source: State Statistical Offices

Of the federal states, Saar displayed well above-average GDP growth in 2005 with a plus of 2.7%; Brandenburg, by contrast, lagged well behind with -1.1%. In terms of GDP per head, Hamburg leads the federal state rankings with an index of 169 (average for Germany = 100). Bremen

(139), Bavaria, Hesse (119 each) and Baden-Württemberg (113) are also well above the national average. At the bottom end of the scale, Rhineland-Palatinate, Lower Saxony and Berlin are followed by all the "new" federal states – GDP per head in Saxony is around three quarters of the national average, and the lowest index figures are found in Brandenburg and Mecklenburg/W. Pomerania (69 and 68 respectively).



For the current year, 2006, economic researchers are unanimously predicting an economic upturn in Germany – in their joint spring paper, the leading economic research institutes forecast a plus of 1.8%. The EU Commission expects the German economy to grow by 1.5%.

This growth will largely be due to foreign trade, but domestic demand is also likely to display a moderate increase – as in the previous year, the principal driving force will be capital expenditure on plant and equipment. After a gap of several years, investment in the construction

sector will also show a rise. Moreover, advance spending in an effort to beat the increase in value-added tax planned for the beginning of 2007 will have a positive impact on consumer spending – though this may in turn result in a drop in spending power in 2007. In both 2006 and 2007, economic development in Germany will lag behind the trend for the Euro area as a whole.

Economic forecast

Change from previous year in %

	Germany		Euro area	
	2006	2007	2006	2007
Gross domestic product	1.8	1.2	2.1	1.8
Consumer prices	1.6	2.5	2.0	2.2
Consumer household spending	0.4	-0.1	1.5	1.4
Capital expenditure	3.1	3.0	3.3	3.4
Exports	8.2	6.6	6.0	5.3
Imports	7.4	6.2	6.2	5.2

Source: Spring Assessment 2006

In its consumer climate study in April 2006, GfK diagnosed a distinctly positive basic mood – following the change of government, consumers were expressing greater optimism than for the previous five years. In particular, their inclination to make purchases was considerably greater than in 2005 – which can partly be attributed to spin-off from the forthcoming FIFA World Cup to be held in Germany. Another factor identified by GfK is a substantial backlog of demand following a lengthy period of restraint. And consumers can avoid the higher value-added tax in 2007 by buying in 2006.

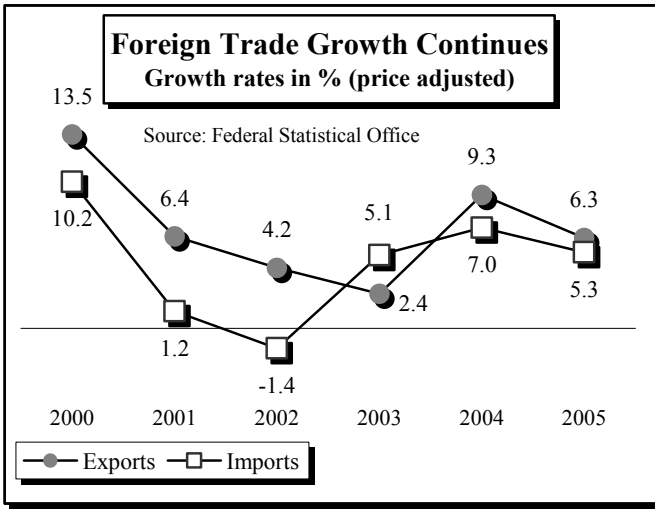
With exports of goods totalling 786 billion EUR, Germany headed the world export rankings in 2005. The foreign trade surplus came to 164 billion EUR (provisional figures, Federal Statistical Office). At 626 billion EUR, the volume of imports was 8.7% up on the year before. Some 59% of these imports came from EU states; the share of imports from all European countries amounted to 72%. The list of import countries was headed by France and the

Netherlands with a share of nearly 9% each. Goods worth a total of 103.8 billion EUR were imported from Asia (16.6%). Germany's most important import partners outside Europe are the USA and China.

Imports 2005 – Trade Partners			
	Import volume		Change
	bn. €	%	%
Europe	**448.5**	**71.7**	**9.1**
France	54.6	8.7	6.0
Netherlands	53.4	8.5	15.5
United Kingdom	39.4	6.3	14.4
Italy	35.6	5.7	-0.2
Belgium	31.1	5.0	17.3
Austria	25.3	4.0	5.3
Switzerland	23.3	3.7	8.6
Russian Federation	21.6	3.5	32.4
America	**57.4**	**9.2**	**5.1**
USA	41.3	6.6	1.6
Brazil	5.7	0.9	22.6
Canada	2.6	0.4	6.0
Mexico	2.1	0.3	26.5
Asia	**103.8**	**16.6**	**8.4**
PR of China	39.9	6.4	21.6
Japan	21.4	3.4	-0.7
Republic of Korea	9.1	1.4	17.1
Taiwan	5.2	0.8	-8.3
Singapore	3.9	0.6	-6.4
Malaysia	3.7	0.6	3.2
India	3.4	0.5	14.8
Thailand	2.4	0.4	-1.2
Indonesia	2.4	0.4	4.7
Africa	**13.2**	**2.1**	**19.1**
Libyan-Arab. Jamahiriya	3.9	0.6	37.6
South Africa	3.4	0.5	2.7
Australia, Oceania	**2.1**	**0.3**	**-5.3**
Total import volume	**625.6**	**100.0**	**8.7**
			Source: Federal Statistical Office

Imports by Volume 2005			
	Import volume bn. EUR	in %	Change in %
Chemical products	70.46	11.3	+ 6.0
Motor vehicles and comp.	63.91	10.2	+ 2.9
Oil and gas	51.76	8.3	+ 35.7
Machinery	42.07	6.7	+ 1.4
Communications, radio, TV equipment, electronic comp.	39.73	6.4	+ 1.4
Metals	37.51	6.0	+ 9.4
Office equipment, IT	28.82	4.6	- 0.2
Food industry products	28.14	4.5	- 3.8
Electricity generation equip.	25.14	4.0	- 4.1
Other vehicles	24.82	4.0	+ 6.1
Medical, instrumentation and control systems, optical products, clocks and watches	17.17	2.7	+ 2.7
Agricultural goods	16.03	2.6	- 2.9
Clothing	16.00	2.6	- 2.6
Coke products, petroleum products	15.28	2.4	+ 30.7
Rubber and plastic goods	14.81	2.4	- 1.8
Furniture, jewellery, musical instr., sports equipment, toys	14.10	2.3	- 0.1
Metal products	13.79	2.2	+ 0.1
Paper	11.87	1.9	- 6.2
Textiles	11.73	1.9	- 5.4
Glass, ceramics, processed stone and minerals	6.05	1.0	- 7.0
Leather and leatherware	5.98	1.0	- 0.3
Wood, wood products, cork, cork products, basketwork	4.01	0.6	- 10.7
Ores	3.62	0.6	+ 16.1
Printing and publishing	2.10	0.3	- 7.6
Coal and turf	2.01	0.3	+ 10.6
Stone and minerals	1.22	0.2	+ 2.7
Tobacco products	0.72	0.1	- 5.5
Energy	0.64	0.1	- 38.8
Source: Federal Statistical Office			

The biggest groups of imported goods were chemical products with an import volume of 70.5 billion EUR (+6.0%) and motor vehicles and components (63.9 billion EUR, +2.9%). The third-largest product group, oil and natural gas, showed an unusually large increase owing to the rise in prices on the energy market (+35.7%, 51.8 billion EUR).



According to the EU Commission, Germany contributed 21% to the nominal gross domestic product of the 25 EU member states in 2005. Gross domestic product per head (on the basis of comparable purchasing power standards) displays major differences within the EU – in Luxembourg it is well over twice the EU average (244%), in Ireland it is around 138%, and in the Netherlands, Austria, Denmark, Belgium and Sweden around one quarter to a fifth above the average.

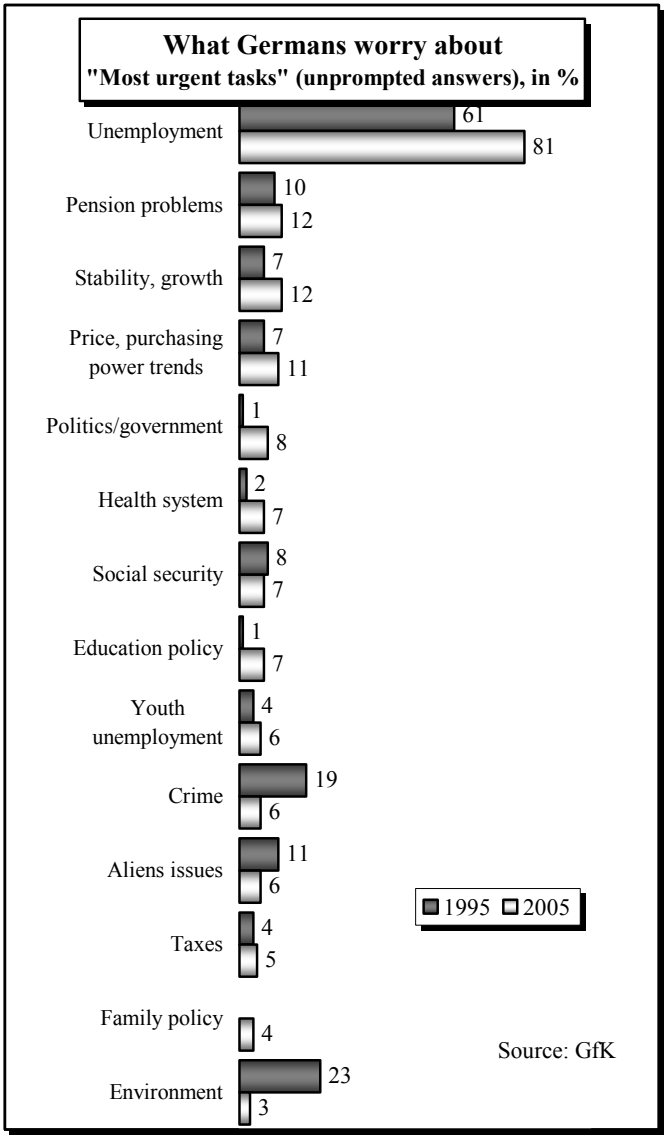
Germany, at 108%, lies in the upper mid range along with other major EU countries such as France and Italy.

Germany in the EU – Economic Indicators				
	Change in GDP		GDP per head**	Unemploym. rate
	2005 in %	2006* in %	Index 2005* EU25=100	2005 in %
EU25	**1.6**	**2.1**	**100**	**8.7**
Germany	0.9	1.2	108	9.5
Belgium	1.4	2.1	118	8.4
Denmark	3.4	2.3	124	4.8
Estonia	9.8	7.2	56	7.9
Finland	2.1	3.5	113	8.4
France	1,5*	1.8	109	9.5
Greece	3.7	3.4	84	9.2
Utd. Kingdom	1.8	2.3	116	4.7
Ireland	4,4*	4.8	138	4.3
Italy	0.0	1.5	104	7.7
Latvia	10.2	7.7	47	9.0
Lithuania	7.5	6.2	51	8.2
Luxembourg	4,2*	4.4	244	5.3
Malta	2.5	0.7	70	7.3
Netherlands	0.9	2.0	124	4.7
Austria	1,7*	1.9	122	5.2
Poland	3.2	4.3	50	17.7
Portugal	0.3	0.8	71	7.6
Sweden	2.7	3.0	119	6,3*
Slovakia	6.0	5.5	54	16.4
Slovenia	3.9	4.0	81	6.3
Spain	3.4	3.2	98	9.2
Czech Rep.	6.0	4.4	73	7.9
Hungary	4.1	3.9	62	7.2
Cyprus	3.8	4.0	84	5.3

*Forecast/provisional figure **in purchasing power standards

Source: Eurostat

Germans are worried about the country's economic development – above all, according to a GfK survey, 81% see unemployment as one of the most urgent problems that Germany has to face.



Some 12% mention the pension problems that are attracting increasing attention because of the demographic trend, 12% are worried about economic stability and economic growth, and 11% regard the trend in purchasing

power as a specially urgent challenge. People also see increased need for action on the education front.

By contrast crime and environmental protection, problem areas that were high on the list of priorities 10 years ago, evidently cause the German public far fewer headaches these days.

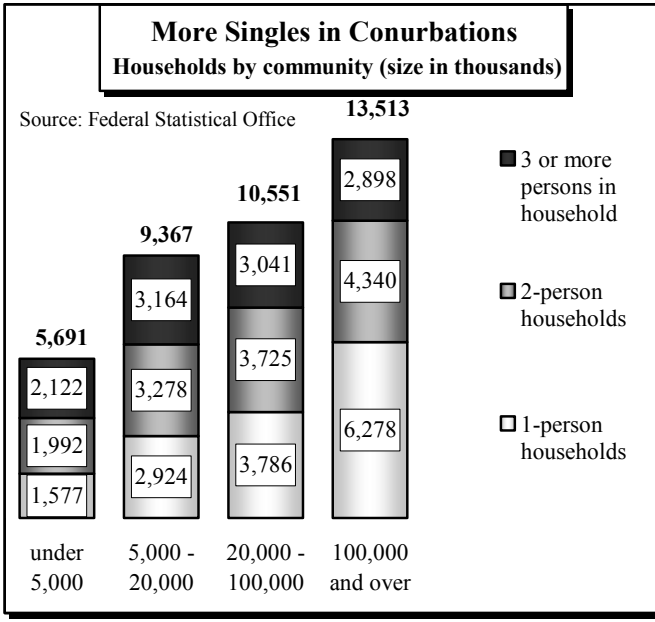
According to the Federal Labour Agency, an average of 4.86 million persons were registered as unemployed in 2005, some 482,000 more than the year before. The unemployment rate (on the basis of all civil gainfully employable persons) averaged 11.7% for the year.

The differences between east and west are clearly evident: In the new federal states the unemployment rate was around 18.8%, compared with 9.9 % in the west. The highest rates were recorded in Mecklenburg/ W. Pomerania and Saxony-Anhalt, with 20.3% each. The best labour market figures were found in Baden-Württemberg (7.0%) and Bavaria (7.8%).

In the east, by contrast, only the drop in the number of gainfully employable persons will ease the unemployment situation – the potential labour force fell from 10.2 million (1991) to 9.2 million in 2004, and could shrink to 7.5 million by 2020.

3. Consumer households and families

In recent years there has been a steady decrease in the average size of households – and the number of single households continues to increase. Whereas consumer households in 1991 still averaged around 2.27 persons, by 2004 the figure had fallen to only 2.12. For comparison: in 1970 the average household size was around 2.74.



Of the 39.12 million households in Germany, a good 37% are currently single-person households (14.57 million), and in municipalities with a population of more than 100,000 the share is as high as nearly 47%. A good one in three households consist of 2 persons (34% or 13.3 million); large households with five or more persons are the exception, with a share of 4%. Some 9.01 million households include children under 18 years (Federal Statistical Office/Microcensus).

Roughly one in two households include married couples living together (49%); the proportion of married couples living apart is around 3% (basis: consumer households, Federal Statistical Office). In the 45-65 age group, the proportion of married couples living together is around 62%.

Household Size by Federal States

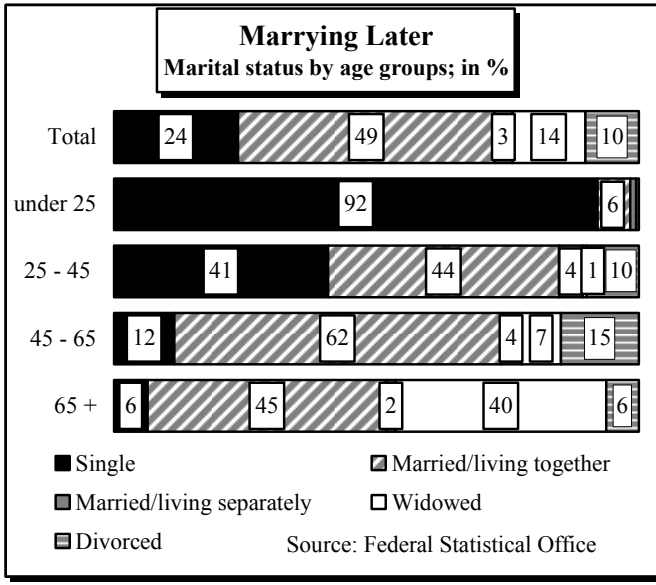
	House-holds in '000s	Household size, in %				
		1	2	3	4	5+
Baden-Württemberg	4,891	36.2	32.1	13.7	12.7	5.3
Bavaria	5,731	36.3	32.2	14.1	12.4	5.0
Berlin	1,891	50.1	30.9	10.7	6.1	2.2
Brandenburg	1,218	33.4	37.2	17.2	10.1	2.1
Bremen	358	48.9	32.1	9.8	6.1	3.1
Hamburg	930	48.5	31.2	10.0	7.3	3.0
Hesse	2,849	35.4	34.8	14.4	11.2	4.2
Mecklenb./ W. Pom.	815	33.9	36.1	17.4	9.9	2.6
Lower Saxony	3,764	37.2	34.5	12.8	11.3	4.3
North Rhine/West.	8,460	36.4	35.1	13.3	10.8	4.5
Rhineland-Palatinate	1,872	35.3	33.7	14.7	11.9	4.5
Saar	517	39.3	33.8	14.5	9.1	3.3
Saxony	2,156	37.4	36.5	15.2	8.7	2.1
Saxony-Anhalt	1,201	35.2	36.4	17.0	9.1	2.3
Schleswig-Holstein	1,351	38.4	40.9	13.3	11.0	4.3
Thuringia	1,118	35.0	34.8	17.4	10.3	2.5

Source: Federal Statistical Office

The number of unmarried partnerships has increased considerably – by nearly half within a decade (+47.5%) to 2.45 million (figures: 2004). It is mainly childless couples who live together without being married (1.68 million) – but the number of unmarried parents living together has shown an unusually sharp rise of nearly two thirds (1994: 462,000 persons; 2004: 769,000 persons).

In 2004 there were 396,000 marriages, 3.4% more than the year before. Roughly one wedding couple in five had children together before getting married. In 61% of cases it was the first marriage for both partners, whereas in 17% of cases both partners had been married at least once before. The trend towards getting married later continues – the average age of newly married couples increased to 36.9 years for men (1991: 31.5 years) and 33.8 years for women (1991: 28.8 years; Microcensus).

Children – if any – are borne correspondingly late. Of the respondents interviewed by the Allensbacher Institut, over 70% of those under 30 did not have any children yet. After that there is a sharp rise in the proportion of parents: two thirds of the 30 to 34-year-olds are parents.



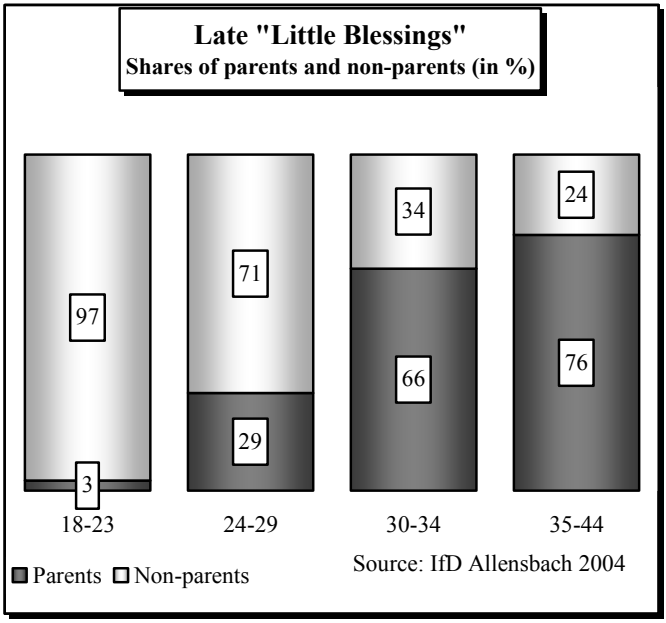
Today one in five parent-child units (including children over the age of majority) consist of a single-parent plus his or her offspring (2.5 million/Microcensus). In 1996 the proportion of single parents was around 17%. Some 85% of single parents are mothers. In the “old” federal states, 14% of children aged under 18 grow up with a single

Multi-person households by number of children
in thousands

Households with...	total	with children under 18				
			Number of children			
		total	1	2	3	4 +
2 persons	13,335	857	857	x	x	x
3 persons	5,413	3,159	2,801	357	x	x
4 persons	4,218	3,511	772	2,660	78	x
5 and over	1,590	1,480	216	297	746	222
Total	24,556	9,007	4,647	3,314	824	222

Source: Federal Statistical Office/Microcensus

parent, whereas in the "new" federal states the figure is 22%.



4. Employment and education

In January 2006 there were a total of 38.25 million gainfully employed persons, of whom 26.52 million were in jobs subject to compulsory social insurance (Federal Labour Agency). Whereas the number of "mini jobs" and the number of self-employed persons has increased, the number of employees subject to compulsory social insurance has fallen in recent years.

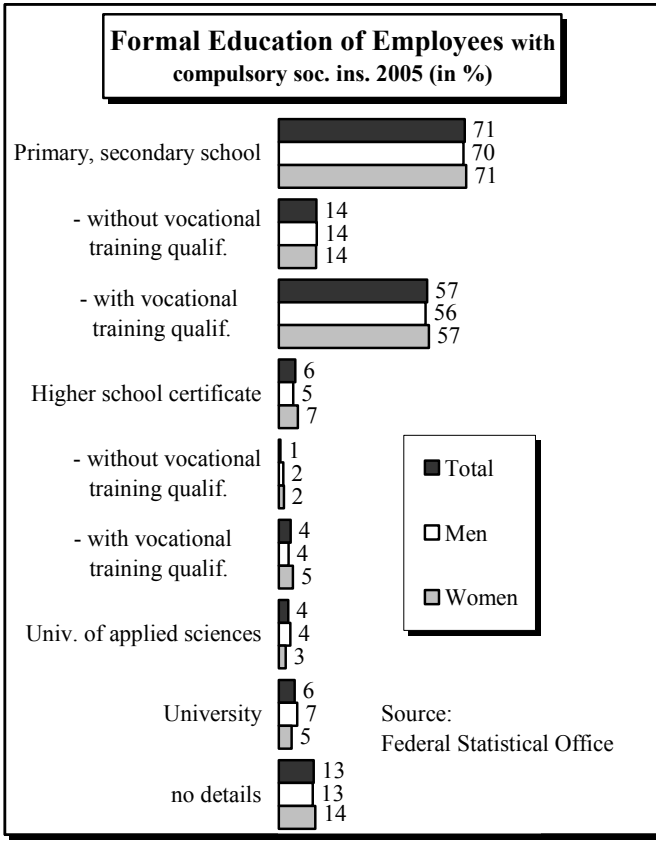
At the same time the trend towards part-time working continues, driven by a desire for flexibility on the part of both employers and employees. The number of part-time employees doubled from 5.5 million in 1991 to 11.1 million in 2005, and today part-time workers account for nearly a third of the workforce (Federal Statistical Office). In individual industries nearly two fifths of the employees work on a part-time basis (public and private service providers: 39.6%; IAB).

Labour Market Structure

Gainfully employed in %	**1991**	**1995**	**2000**	**2004**
Employees	86.8	85.5	84.7	84.1
- full-time	80.6	77.6	74.3	71.1
- part-time	5.8	7.3	9.7	11.7
conventional part-time			6.7	7.8
mini jobs			3.0	3.9
- Spare-time job	0.4	0.6	0.7	1.3
Self-employed	13.2	14.5	15.3	15.9

Source: Federal Statistical Office/IAB

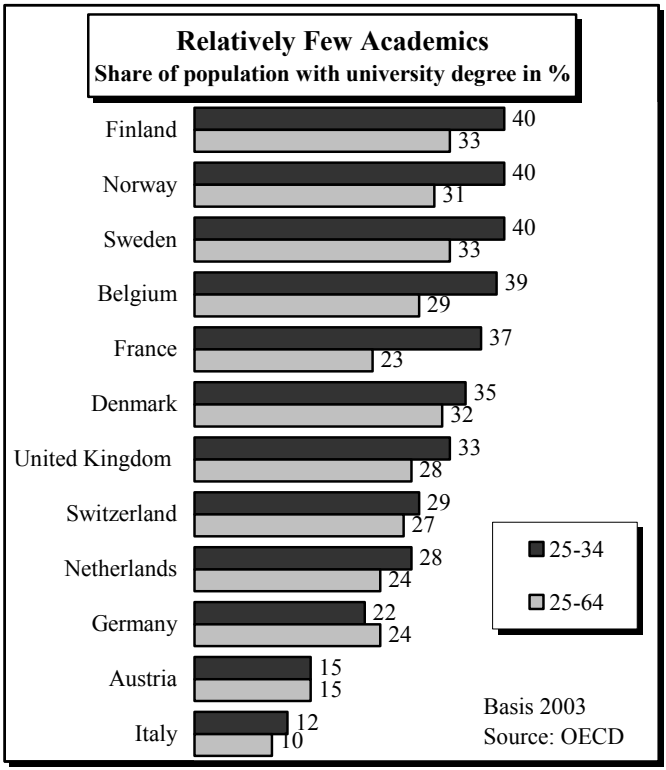
The services sector provides for the livelihood of the largest number of German employees. Nearly two thirds of compulsorily insured employees have a job in the services sector (64%). In recent years there has been a further marked decrease in the number of compulsorily insured employees in the agricultural, production and construction sectors.



The majority of compulsorily insured employees have a vocational qualification – 57% have primary or secondary school education plus vocational training, and a further 4% have a higher school certificate plus vocational training. Some 6% have a university degree, while another 4% have a degree from a "university of applied sciences".

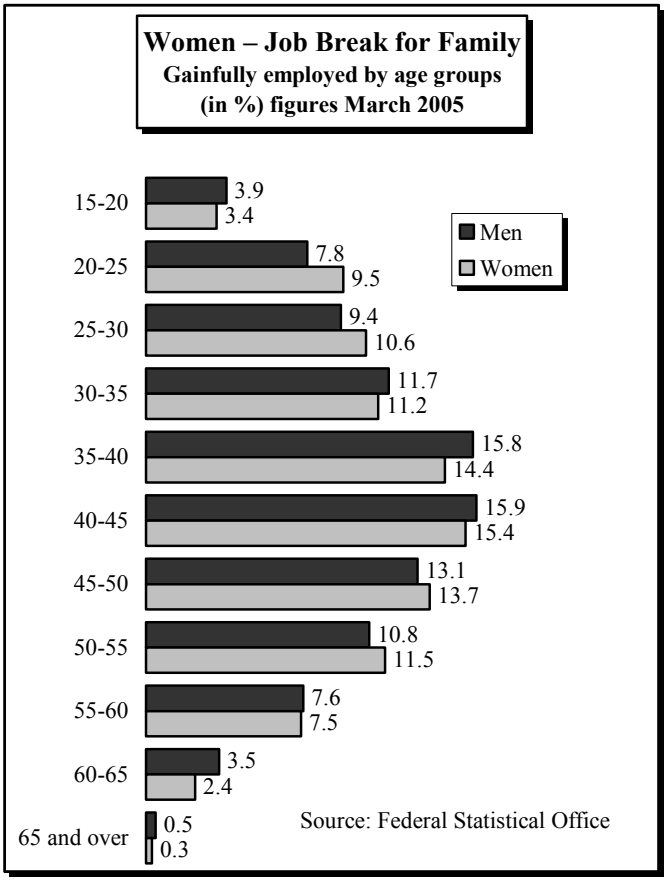
The relatively small proportion of academics is due to the fact that large numbers of legal and medical experts or architects work on a self-employed or freelance basis, and are therefore not subject to compulsory social insurance.

Most school-leavers with a higher school certificate embark on a degree course – in 2004 one in five school leavers with university entrance qualifications signed an apprenticeship agreement, whereas five years earlier the figure was nearly one in three. An increasingly popular choice is a combination of simultaneous degree and apprenticeship – the number of students at such professional academies has increased by about half since 1998 (Institut der deutschen Wirtschaft/iwd).



In the academic year 2005 there were some 1.98 million students registered at German universities (+1%). The "fresher rate" (number of persons starting a degree course as a proportion of the total population of the same age) was around 36.7%, which means it has risen by about 10 percentage points within a decade (1995: 26.8%). The

average age of graduates on completion of their first degree was 27.9 years (Federal Statistical Office).



The number of working women in Germany has shown a further increase in recent years: in 2003 some 59.1% of German women aged 15 to 64 were gainfully employed. Nevertheless, this only puts Germany in the upper middle range within the EU – the EU average (EU 15) for gainfully employed women was 56.1%, and in each of the Scandinavian countries the figures are well over the 70% mark (European Commission/Eurostat).

The choice of job continues to be heavily gender-related: for example, 85.5% of all female employees subject to compulsory insurance work in the services sector, but the corresponding figure for men is only 45.3%.

In manufacturing and technical occupations, by contrast, women are distinctly under-represented. Over 80% of part-time workers are women. Whereas men mostly tend to work on a part-time basis at the beginning or end of their working life, women largely take advantage of this form of employment during the family phase.

Occupational Groups and Industries

Occupational group	in '000	Share in %* Total	Men	Women
Arable, livestock, fishing	**358**	**1.4**	**1.8**	**0.9**
Mining, mineral resources	**36**	**0.1**	**0.3**	**0.0**
Manufacturing	**6,897**	**26.5**	**40.7**	**9.8**
Metal production	505	1.9	3.3	0.3
Fitters, mechanics etc.	1,742	6.7	11.7	0.8
Electricians	633	2.4	4.2	0.3
Food and catering	685	2.6	2.8	2.5
Construction	526	2.0	3.7	0.1
Technical	**1,835**	**7.1**	**10.8**	**2.7**
Services	**16,577**	**63.8**	**45.3**	**85.5**
Merchants	2,083	8.0	5.2	11.4
Transport	1,883	7.2	11.0	2.8
Organisation, office	5,741	22.1	14.6	31.0
Healthcare	1,967	7.6	2.1	14.0
Other jobs (incl. don't know)	**296**	**1.1**	**1.2**	**1.0**

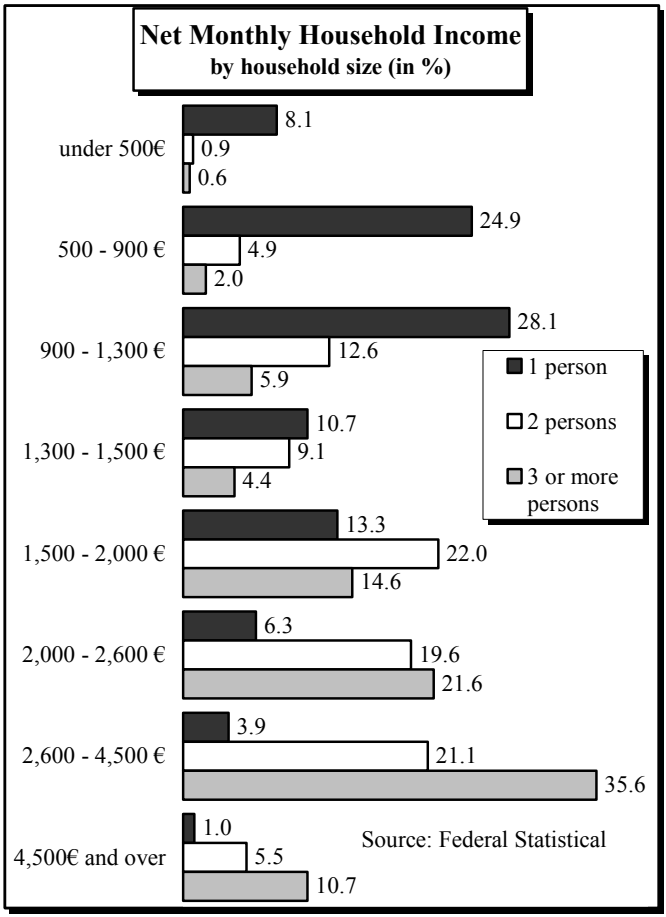
*Basis: 26.0 million employees w. compulsory social ins., of which 14.1 million men, 11.9 million women

Source: Federal Statistical Office

5. Income and expenditure

In 2005 the disposable income of Germany's population was 1.4% up on the year before to 1,468 billion EUR. Whereas mass incomes showed a slight fall of 0.2% to 977.3 billion EUR, company profits, self-employed incomes and asset income went up by a total of 5.1% (529.6 billion EUR; Federal Statistical Office).

According to GfK, every member of the population will have at their disposal in 2006 a net income (including



transfers such as pensions, unemployment benefit or child allowances) of over 17,600 EUR for living and consumer spending. The strongest communities in terms of purchasing power are to be found in the "prosperity belt" that forms round major cities. One example: whereas the total purchasing power of the city state of Hamburg comes to 32.9 billion EUR, the purchasing power of the rural districts directly adjoining Hamburg is almost equally high – 31.6 billion EUR (GfK).

Purchasing Power Potential of State Capitals

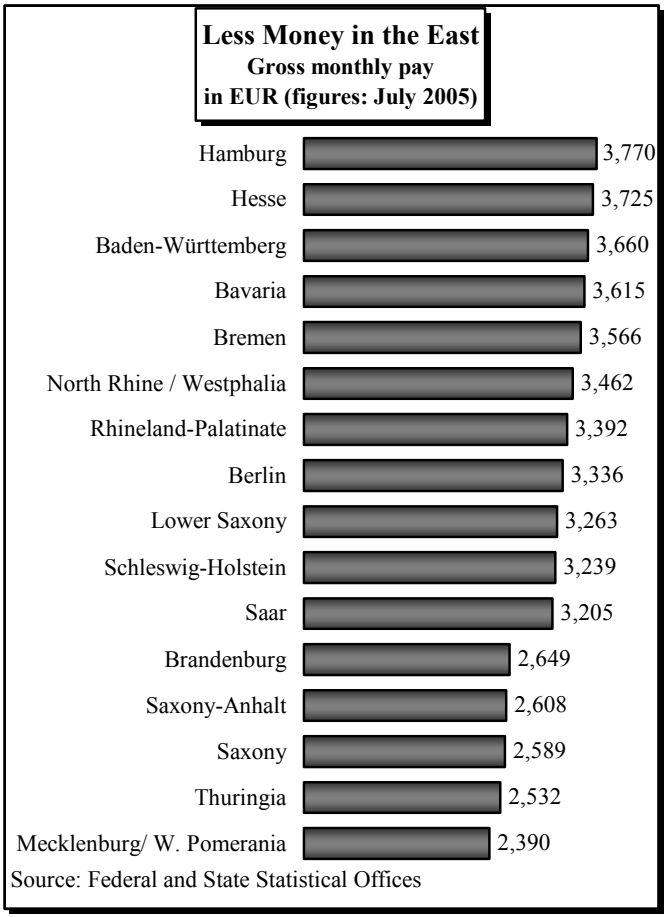
Retail purchasing power of state capitals by market areas; 2005

	Retail purchasing power	
	in bn. €	Per head in €
Berlin	22.7	4,350
Hamburg	16.6	5,000
Munich	15.2	5,300
Stuttgart	14.2	4,950
Düsseldorf	13.8	5,050
Hanover	8.6	5,000
Saarbrücken	6.2	4,300
Bremen	5.5	4,850
Dresden	4.8	4,000
Mainz	3.4	4,900
Erfurt	3.3	3,900
Magdeburg	3.2	3,940
Kiel	2.7	4,750
Wiesbaden	2.4	5,100
Schwerin	1.3	3,950
Potsdam	1.2	4,500

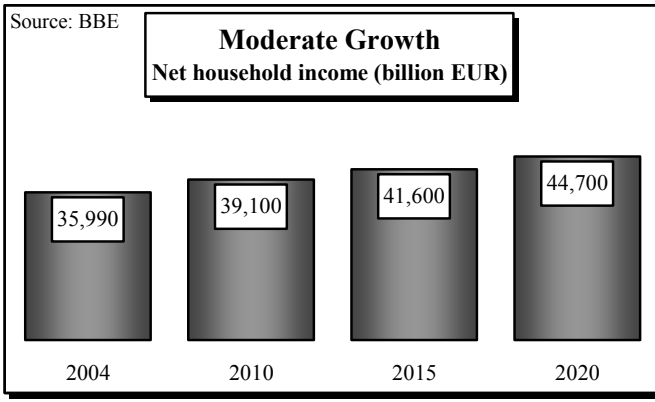
Source: GfK

According to BBE (consulting company), the purchasing power of the East German population in 2005 stood at around 77% of the western level – the income gap between West and East continues to be substantial.

For one thing, the gross pay of employees in the East is well below western levels; for another, the proportion of households with unemployed persons or pensioners is larger in the "new" federal states; one euro in three of the gross income of East German households comes from social security payments (West: 24.4 %; Federal Statistical Office). Another factor is the larger wealth base in the "old" federal States, which results in correspondingly higher income from capital, rental income etc.



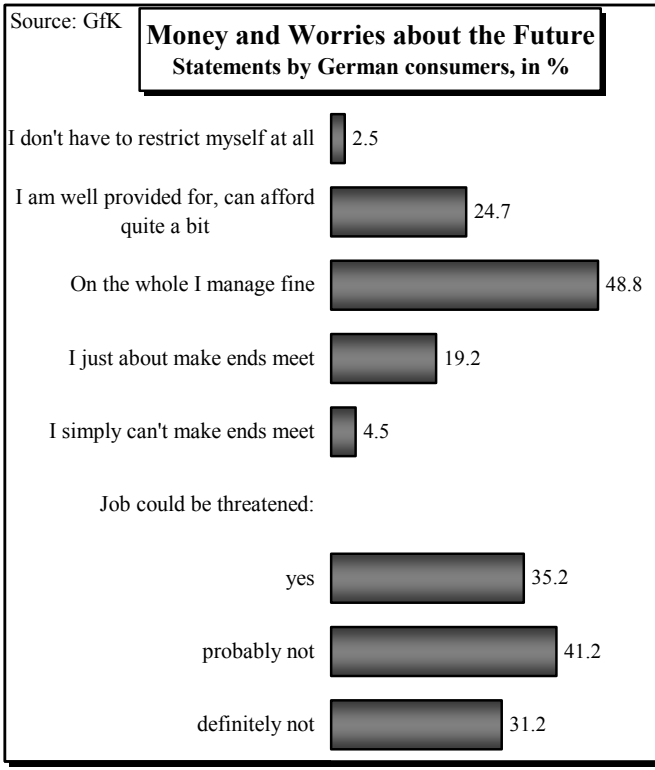
But even within the "old" federal states there are still appreciable differences in income. For example, according to the official income and consumption sampling reports (EVS/Federal Statistical Office) the net monthly incomes of households in the city states are well below the level of most West German non-city states. There is also a north-south gradient – the highest net monthly household incomes are found in Baden-Württemberg, Bavaria and Hesse.



According to the GfK Spending Trend Sensor 2006, one in three households in Germany claim that their financial situation has deteriorated within the last 12 months (slightly worse: 25%; considerably worse: 7%) – while roughly 13% of households had more money available (situation much improved: 2%).

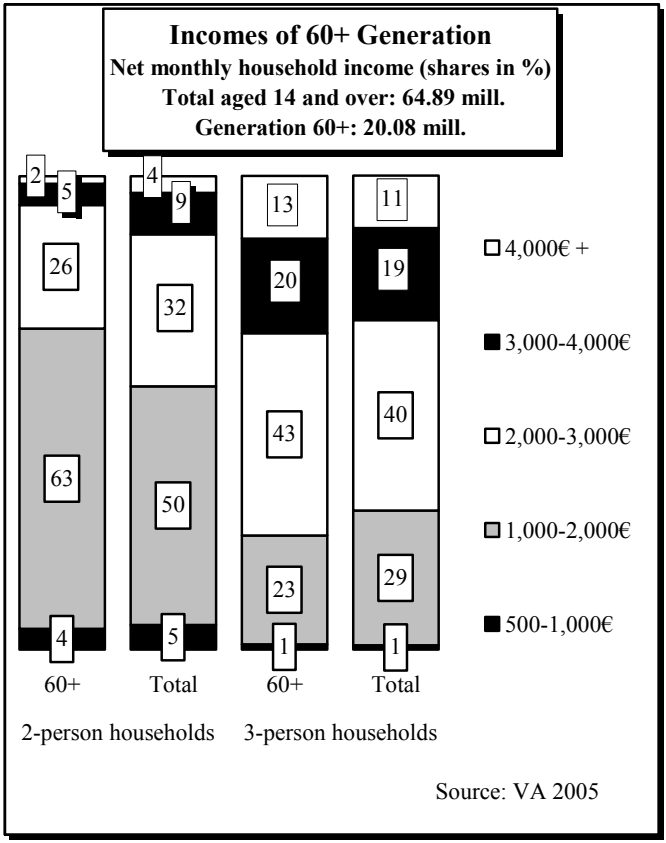
In the near future the great majority (71%) do not expect any major changes; 13% expect to see an improvement, and 15% anticipate a worsening of their situation.

Retail Purchasing Power 2005		
	Expenditure per head	
	in €	in %
Food, alcohol and tobacco	1,514.63	29.0
Bakers, butchers	260.59	5.0
Florists, pets	73.96	1.4
Druggists, perfumery, cosmetics	226.31	4.3
Pharmaceutical, medical + orthopaedic	475.72	9.1
Paper, office, stationery (private), newspapers, magazines, books	186.64	3.6
Mainly short-term needs	**2,737.85**	**52.4**
Clothing, underwear	490.78	9.4
Shoes (excl. sports shoes), leatherware	107.07	2.0
Garden supplies (excl. furniture)	80.78	1.5
Building supplies (DIY range)	471.94	9.0
Glass, china, ceramics, household items, gifts	77.50	1.5
Games + toys, hobbies, crafts, musical	99.74	1.9
Sports equip., bicycles, camping	84.46	1.6
Mainly medium-term needs	**1,412.29**	**27.0**
Carpets, curtains, decoration, screens and sunblinds	63.33	1.2
Bedding, home, table and bed linen	61.94	1.2
Furniture	290.17	5.6
Electrical items, lamps and major household appliances	130.07	2.5
Home entertainment, music, video, PC, printers, communication	312.50	6.0
Photo, optical, acoustic	107.88	2.1
Clocks, watches, jewellery	49.01	0.9
Miscellaneous	58.37	1.1
Mainly long-term needs	**1,073.28**	**20.5**
Total retail purchasing power (incl. mail order)	**5,223.42**	**100.0**
Strictly retail (excl. bakers, butchers, pharmacists, cars, heating and motor fuels)	**4,515.12**	**86.4**
		Source: BBE



The "**Silver Generation**" is developing into an increasingly important spending power – even though gaps in pension provision and forthcoming zero rises in pensions are causing headaches for many a pensioner.

According to a study by business consultants bbw Marketing Dr. Vossen und Partner, the income of the 60+ age group in 2005 was in excess of 400 billion EUR – and they possess 35.5% of total household financial assets. Saving as a means of providing for the future is dwindling in importance. The 65 to 75 age group have the highest spending rate of all age groups: they invest 84% of their income in consumer spending, compared with a national average of only 75% (DIW).



According to the Perfect Ager 2010 study (BBDO / Institut für Handelsforschung IfH), individuals in the 50 to 89 age group are particularly brand and quality conscious in their buying habits and spend around 100 EUR per week on food alone. Older customers prove to be unusually loyal with regard to both brands and outlets – 32% stick to familiar brands, and 41% prefer to shop in stores they know well.

More likely to experiment and more technically literate than their parents' generation, the "new older generation" are perfectly capable of taking an interest in high-tech

when it comes to home entertainment and information technology. Which explains why computer usage in terms of time displays the biggest growth among the older age groups – whereas there is hardly any scope left for expansion among younger target groups (bbw Marketing).

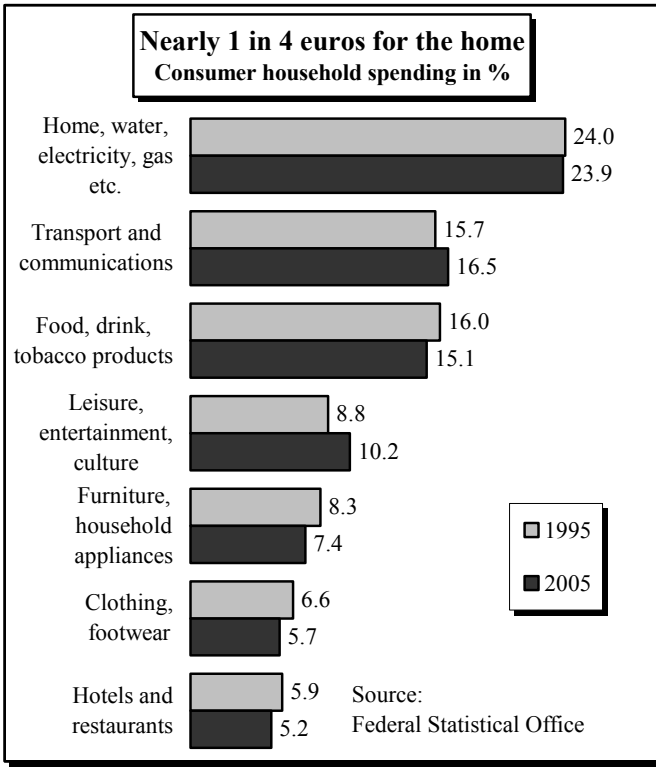
Older Age Groups		
Annual expenditure by 55 to 69-year-olds		
	Expenditure bn. €	**Market share in %**
Clothing	19.4	33
Travel	16.8	40
Home/domestic appliances	12.7	--
Furniture	6.3	30
Health products	5.6	>50
Cosmetics	4.0	35
		Source: bbw Marketing

Consumer prices rose by an average of 2.0% in 2005, which was primarily due to the disproportionate increase in petroleum product prices.

Certain fields have increased in price considerably since 2000. For alcoholic drinks and tobacco products the price index last year – largely due to the increase in tobacco excise duty – stood at 129.2 (2000 = 100). In the healthcare sector the price index was 124.4. By contrast, prices in the communications field showed a marked drop (94.3) – a trend made possible by the keener price competition in the telecommunications sector. Prices for clothing and footwear were also down appreciably.

Today at least one in every two euros spent by households goes on services (2004: 50.6%). For comparison: in 1991 the services share was only around 41.6%. The share due to expenditure on no-durable consumer goods is now down from 30.9% to 28.3%. Households invest 11.3% of their spending in consumer durables, and 9.8% in short-term

goods (1991: 14.3% and 13.2% respectively; BBE Unternehmensberatung).



Especially in the fields of leisure, culture and entertainment they spend appreciably more than ten years ago. The share of expenditure due to transport and communications is also up. By contrast, the shares devoted to retail goods such as food, drink, tobacco products, furniture, household equipment or clothing have all gone down.

In households where net incomes are low, accommodation and energy costs account for a particularly large share of income – households with less than 1,300 EUR per month spend nearly two fifths of their consumer expenditure on

these items, compared with only a quarter for top earners. Rising incomes are paralleled by a greater readiness to spend on mobility – i.e. on buying and running cars. Top earners spend nearly a quarter of their income on "transport".

Consumer Household Spending					
by net monthly household income (in %)					
	Net monthly household income				
	under 1,300	**1.300-2.600**	**2.600-3.600**	**3.600-5.000**	**5.000-18.000**
Food, drink, tobacco products	16	16	16	14	12
Clothing, footwear	5	5	5	5	5
Home, energy	39	30	29	27	25
Furniture etc., household appliances	6	6	7	6	8
Healthcare	3	3	2	3	4
Transport	8	15	16	19	24
Communications	4	3	3	3	3
Leisure, entertainment	12	12	12	12	12
Education	0	0	1	1	1
Hotels and restaurants	4	5	6	6	5
Other goods and services	4	4	4	4	3
Source: Federal Statistical Office/EVS 2003					

The share of expenditure due to leisure, entertainment and culture, by contrast, is a steady 12% across all income groups, and a constant 5% of consumer expenditure goes on clothing and footwear. Private expenditure on education is of minor importance (at least to date), accounting for not more than one percent of consumer expenditure (EVS/Federal Statistical Office).

6. Investment and wealth

Germans possess greater wealth than ever before – private household assets are put at over 10,000 billion, with one in two euros accounted for by property. And for quite a few people the financial basis will show appreciable growth in the foreseeable future – within the next ten years the "generation of heirs" will receive inheritances totalling more than 2,500 billion Euro, three quarters more than in the last decade. In 2005 alone the volume inherited came to around 179 billion EUR.

However, barely half the population will profit from these forthcoming asset transfers – it is primarily the households which are already well situated financially that will increase their existing capital through inheritances.

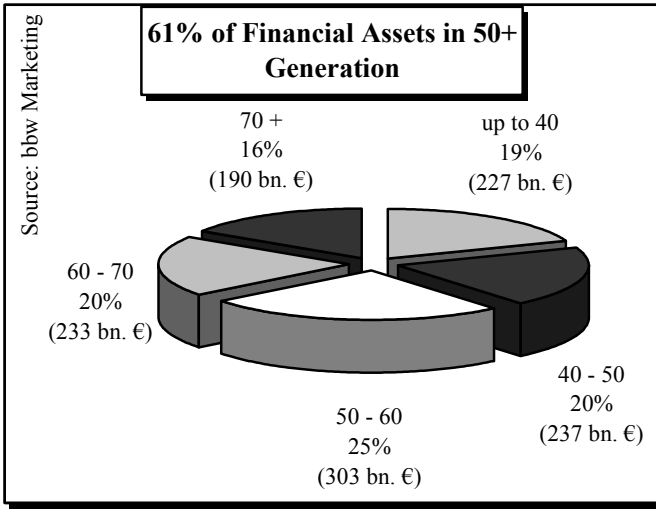
Household Financial Assets

Level at year-end

	2004	Change on previous year	Share
	bn. EUR	%	%
Private financial assets	4,067	3.9	100
of which:			
at banks	1,451	3.7	35.7
- short term	1,159	4.3	28.5
- long term	292	1.4	7.2
with insurance companies	1,040	4.9	25.6
- life assurance	644	3.0	15.8
in securities	1,344	3.7	33
- fixed-interest securities	477	8.7	11.7
- stocks and shares	251	2.4	6.2
- other investments	152	2.0	3.7
- investment certificates	464	0.0	11.4
from pension provisions	233	2.2	5.7

Source: Gesamtverband der Deutschen Versicherungswirtschaft/ Deutsche Bundesbank

According to the BBE study on "Inheritances", nearly 40% of the volume of inherited wealth is reinvested.

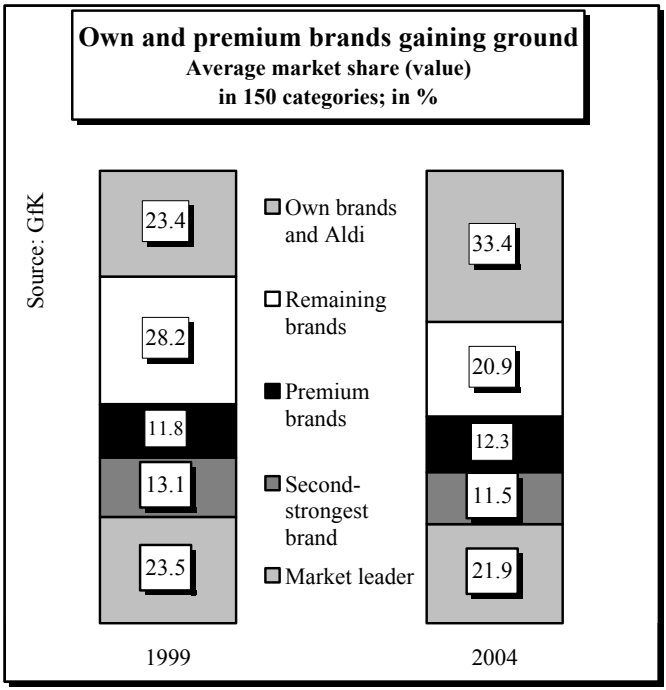


In 2005 the **savings ratio** showed a slight increase from 10.5 to 10.6%. The population of Germany set aside a total of 158 billion EUR "for a rainy day" – a plus of 2.4%, whereas available incomes increased by only 1.5% over the same period (BVR). As a result of the "buy-early effects" in response to the rise in VAT scheduled for 2007, the savings ratio is likely to show a temporary drop in 2006 before rising again to 10.7% the year after (DIW).

According to GfK nearly two thirds of all households have less than 10,000 EUR available for investment. Only 5% have financial assets in excess of 50,000 EUR. Germans mostly put their money in short-term investments – a good three quarters (76%) of households have savings accounts and time or overnight money accounts with a monthly savings input averaging 110 EUR. By contrast, only a good third have their money invested in savings contracts, fixed-interest securities, capital-formation life assurance policies and building-society savings contracts (GfK).

7. Shopping habits

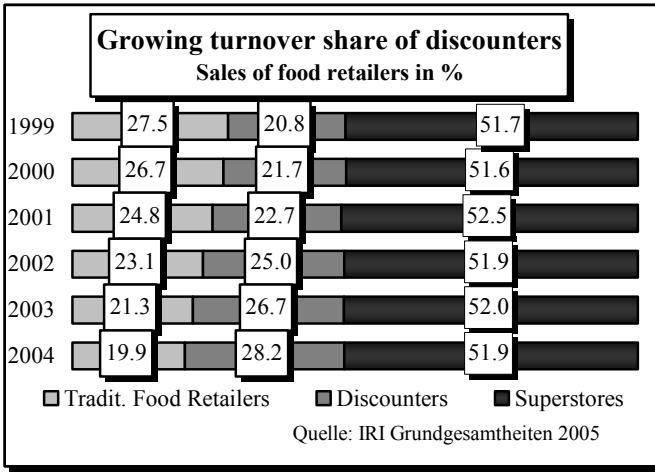
Sales by the German retail trade (excluding cars, filling stations, fuels and pharmacies) increased by a nominal 0.6% in 2005 (real 0.4%) to 382.3 billion EUR (Federal Statistical Office/Central Association of the German Retail Trade HDE). In 2006 the HDE expects to see sales rise by between 0.5 and 1%.



As far as their shopping habits are concerned, German consumers range between economy-driven thriftiness and a marked trend towards a feel-good and enjoyment culture: the “hybrid customer” who has no problems about being encountered both in discounters and in speciality stores or luxury boutiques has long since become a reality.

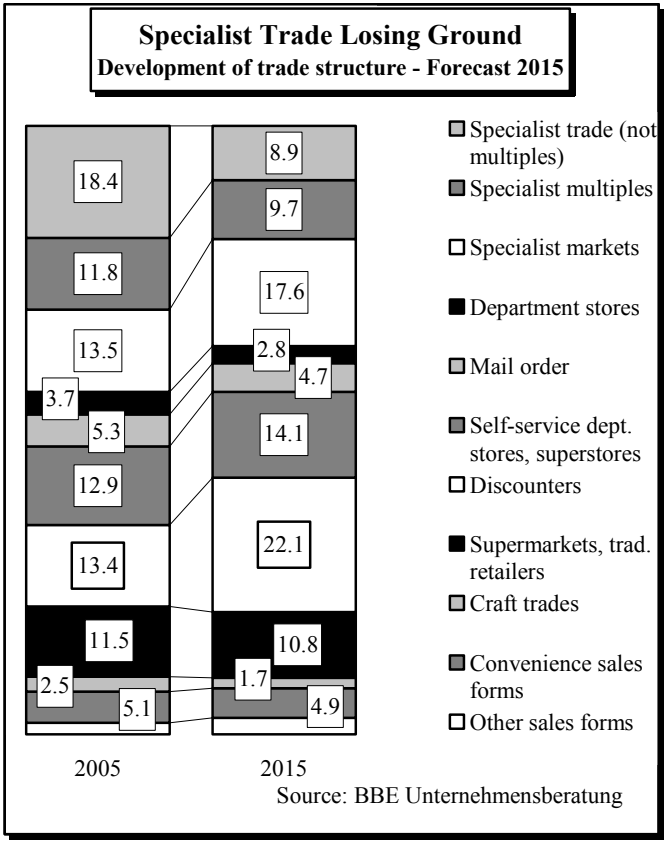
This is partly because high earners have grown price-conscious – bargain hunting has become acceptable. And it is partly because normal earners also value a touch of luxury – and make savings elsewhere to give themselves a treat every now and then.

The result is that the market share of distributor-owned brands is continuing to grow, but premium brands are also gaining ground. The keen competition on prices is nevertheless making life difficult for many market players. Since the statutory restrictions on discounts in the retail trade were abolished in the summer of 2004, promotion prices and large-scale discount campaigns have more than ever become a fact of life in Germany's shopping streets.



Among the **sales channels**, the greatest growth is displayed by discounters – according to the trade scenario painted by business consultants BBE they could expand their market share from over 13 to more than 22% in the ten years to 2015 – according to IRI they already account for a 28% share of the retail food trade. In particular, non-multiple specialist retailers are definitely suffering from the sustained pressure on prices.

Street-based stores are encountering increasing competition from the Internet: whereas traditional catalogue-based mail order business can look back on a subdued year in 2005, **e-commerce** can again boast record sales. Last year, products worth 6.1 million EUR found their way into electronic shopping baskets, roughly a quarter more than the year before; and this figure does not include an estimated 2.5 billion EUR that changed hands via the auction platform Ebay.



Popular Internet Department Stores					
Selection based on number of online buyers					
	%	million		%	million
ebay	59.8	14.85	fleurop	4.1	1.01
amazon	33.2	8.24	buecher	4.1	1.01
tchibo	17.8	4.42	bol	3.6	0.90
otto	12.4	3.07	karstadt	2.5	0.61
weltbild	11.3	2.80	zweitausendeins	2.2	0.54
quelle	10.8	2.69	baur	2.2	0.55
neckermann	8.1	2.01	discount24	2.1	0.52
conrad	6.4	1.59	hse24	1.8	0.46
buch	4.7	1.16	shopping24	1.7	0.43
heine	4.2	1.04	schwab	1.7	0.42
Basis: 24.84 mill. online buyers				Source: ACTA 2005	

Including electronic services, sales in the e-commerce sector totalled around 18.1 billion EUR (German Association of Mail Order Businesses/bvh).

The product categories most popular with the nearly 25 million German online shoppers are books (48%, last three purchases), clothing, accessories and shoes (30%), videos, DVDs and games (21%), computer hardware (21%) and electronic equipment (20%; ACNielsen). The German mail order industry's association expects that by the year 2010 one euro in two of all mail order sales will be made online.

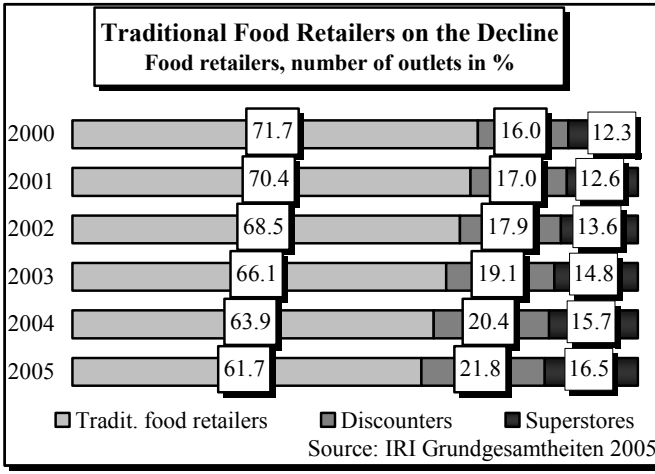
The online travel market in Germany displays unexploited potential: only 9% booked a flight as one of their last three Internet purchases – the European average is 20%. In Germany, one in ten online shoppers booked holidays and made hotel reservations (ACNielsen).

Germans are economical when it comes to shopping for food: the discounter share is currently around 40% and still rising. In Germany food is an average of 16% cheaper than elsewhere in Europe. Here too, however, market

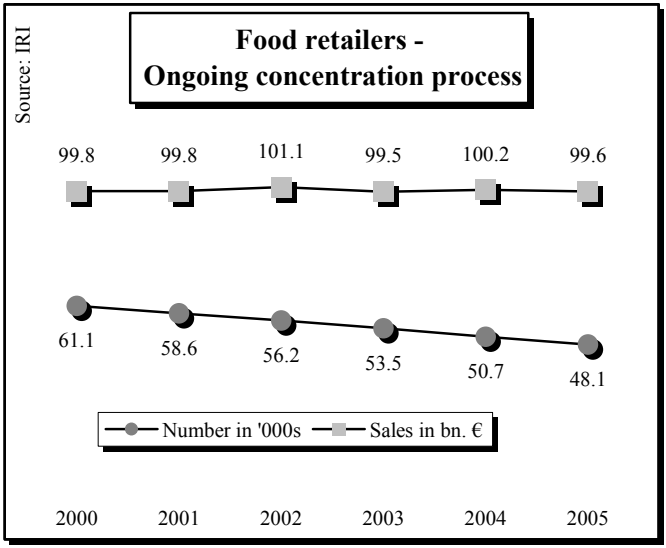
Top 20 Food Retailers 2005		
	Sales mill. €	Market share %
Edeka group	36,934	17
of which: Edeka Minden-Hanno	5,758	3
AVA	5,534	3
Spar AG	4,380	2
Metro group	33,686	16
of which: Real	10,575	5
Media-Saturn	9,000	4
Kaufhof	4,000	2
Rewe group	31,319	15
of which: Penny	6,408	3
Toom	2,107	1
Schwarz group	22,800	11
of which: Lidl	13,000	6
Kaufland	9,800	5
Aldi group	21,500	10
of which: Aldi Süd	11,000	5
Aldi Nord	10,500	5
Tengelmann group	14,056	7
of which: Plus	6,732	3
Lekkerland	6,389	3
Karstadt	5,900	3
Schlekker	5,500	3
Globus	3,531	2
Norma	2,750	1
Wal-Mart	2,675	1
dm	2,417	1
Bartels-Langness group	2,105	1
Rossmann	1,973	1
Müller	1,697	1
Dohle group	1,474	1
Coop Schleswig-Holstein	1,350	1
Bünting	1,200	1
Tegut	1,030	0
	TradeDimensions/M+M Eurodata	

observers are also seeing a trend towards better quality and more brands, and a rise in prices is expected. One example: bio products are booming. The industry expects the figures for 2005 to show an increase of about one fifth, and more and more organic supermarkets are springing up (KPMG).

Discounters too are reacting to consumers growing quality-consciousness and rounding off their product ranges in an upward direction – whether with third-party branded products or with up-market brands of their own.



The process of concentration in the retail food trade has already made great strides – and most recently received a boost from the takeover of Spar AG by the Edeka group (May 2005). Previously ranked third, Edeka overtook the Metro group and now leads the German retail food market with a share of around 17% (annual sales: about 37 billion EUR) (TradeDimensions). Smaller supermarkets in particular are being crowded out of the market. Estimates by business consultants KPMG indicate that by 2010 the combined market share of the five biggest suppliers will be more than three quarters.



Druggist supermarkets have developed into successful sales channels for fast-moving consumer goods. In the classic druggist and specialist perfumery trade, druggist supermarkets already have a market share of 73%.

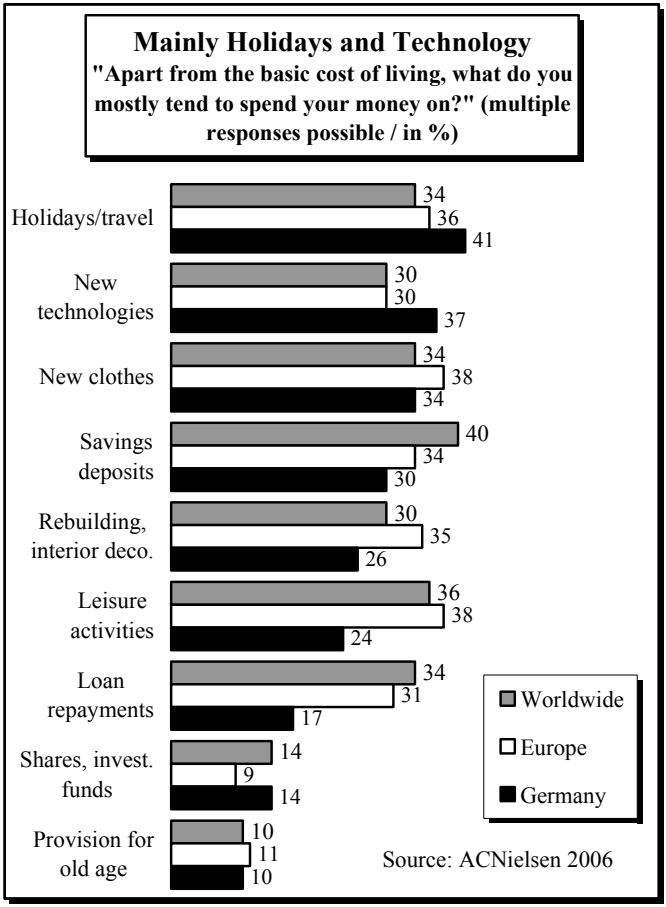
Druggists' Market Shares

	14,440 outlets	10.9 bn. EUR
Company	**Shares in %**	
Schlecker	77	42
dm	5	21
Rossmann	8	14
Müller	2	10
Ihr Platz	6	8
Kloppenburg	1	3
Budnikowsky	1	2

Source: IRI 2005

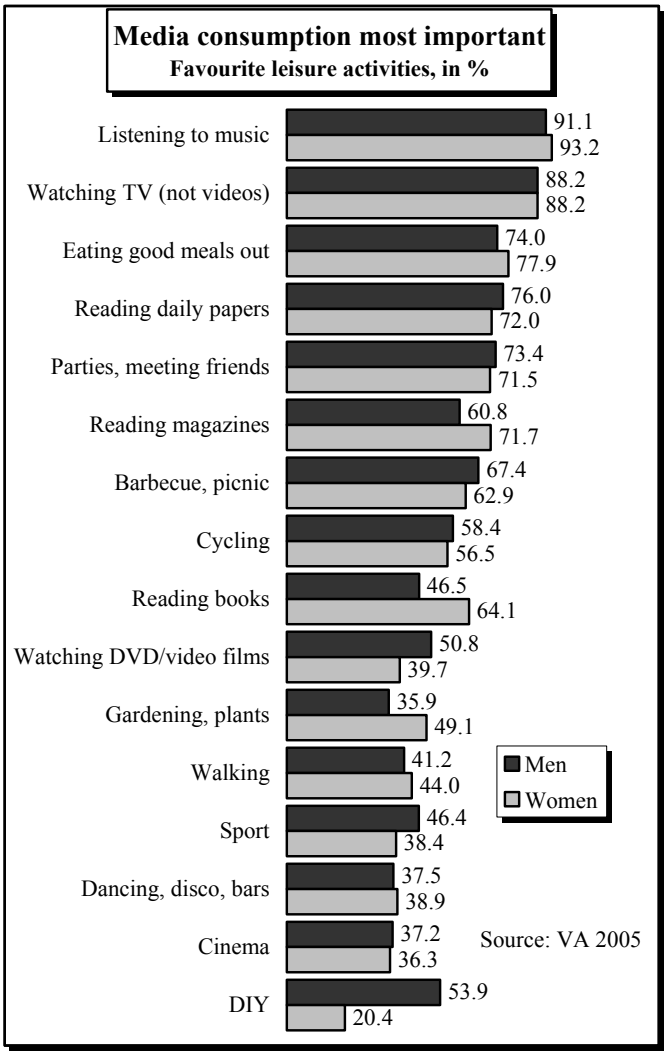
8. Leisure and travel

Travel and new technologies – this is an area of their life on which Germans are particularly likely to spend their disposable income, according to the findings of a comparative international study by ACNielsen.



41% say that after covering their cost of living they primarily invest in holidays and travel, while 37% are most likely to spend on new technologies. But when it

comes to other "leisure activities", people in Germany are relatively low spenders. Expenditure on furniture and interior decoration is not a great favourite. Repaying loans is a relatively low priority issue in Germany.



Football is king – not only in the year of the FIFA World Cup. Football, both active and passive, is the Germans' favourite sport; with 6.3 million members (including 14% women) the DFB is the world's biggest sporting association. Among association sports it is followed by gymnastics/keep-fit – the German gymnastic association has 5.1 million members, including a large number of children and juveniles. And tennis, with 1.8 million association members, has become a people's sport. Fourth place is taken by the rifle clubs, whose members tend to be drawn from older age groups (1.5 million members).

German Sports Clubs by number of members

	Total members	under 15	15-40	41 and over
	in thousands			
Football	6,273	1,562	2,632	2,079
Gymnastics/general	5,085	1,715	1,403	1,966
Tennis	1,767	263	586	919
Shooting	1,530	78	512	940
Athletics	885	288	297	300
Handball	827	238	382	206
Riding	761	192	569	
Fishing	669	35	252	382
Table tennis	665	127	310	228
Skiing	660	126	262	272
Swimming	610	298	170	142
Life-saving (DLRG)	563	233	201	129
Volleyball	502	77	281	143
Golf	457	24	184	248
Handicapped sport	342	21	63	259

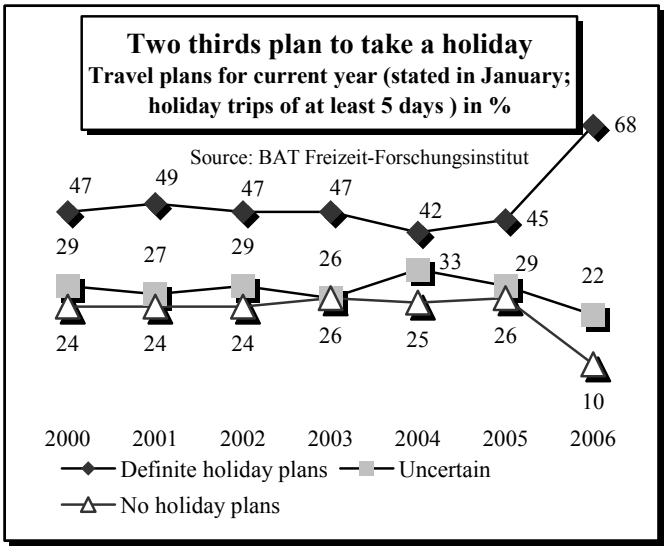
Figures: 2004 Source: Deutscher Sportbund

Travel

The Germans' love of travel reached a new peak in 2006 – according to the findings of survey by the BAT Leisure Research Institute. 68% announced definite travel plans – whereas at the beginning of 2005 only 45% had firm

intentions to pack their cases.

For the majority of Germans, their holiday is an integral part of their planning for the year – according to the Travel Analysis by Forschungsgemeinschaft Urlaub und Reisen (RA 2006/F.U.R), 58% say that they went on holiday at least once a year in the last three years.



The demand for travel is relatively stable – today the Germans, as very experienced travellers, respond flexibly to negative external factors and are hardly diverted from their holiday plans. For example, developments such as bird flu or the disturbances in some Islamic countries are expected to have less of an impact on the volume of holiday travel than on the direction of tourist flows.

The FIFA World Cup will probably affect mainly the timing of holiday travel. However, the increase in jet fuel prices and the resulting rise in the cost of holidays involving air travel could have a depressing effect (market share of air tours: 37%; RA 2006).

Holiday trips 2005			
	Total %	Germany %	Abroad %
Means of transport			
Car/motorhome	45	73	33
Air	37	1	52
Bus	10	10	10
Rail	6	15	2
Accommodation			
Hotel/inn	50	29	60
Holiday chalet/apartment	23	34	18
Pension, private room	8	13	6
Camping	5	7	4
Organisation			
Package tours, modular packages	48	24	59
Individual accommodation	27	43	20
Individual travel	11	9	11
Individual other items	6	7	6
Nothing booked in advance	17	27	12
per trip (in €)	**833**	**517**	**971**
Length in days	**12.5**	**10.6**	**13.4**
			Source: RA 2006

A shift can be observed in the quality standards expected by German holidaymakers – away from straight rest and relaxation or exciting experiences, and towards "feel-good holidays". According to the BAT tourism analysis, "hospitality" and "homely atmosphere" are well up on the list of holidaymakers' priorities, along with "attractive scenery" and "healthy climate".

In 2005 some 47.8 million Germans aged 14 and over took at least one holiday trip lasting a minimum of 5 days. This means that roughly three in every four Germans aged 14 and over went on holiday in 2005. A total of 64.1 million holiday trips were taken (2004: 65.4 million trips). This slight drop contrasts with a marked

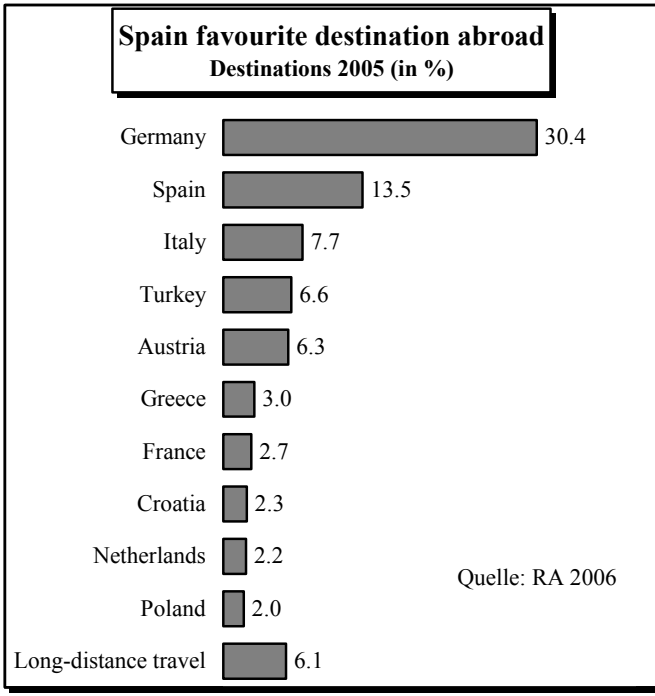
increase in mini trips (2-4 days) from 43.1 million to 48.3 million (RA 2006).

Holiday travel				
Trips of at least 5 days				
	1995	**2000**	**2004**	**2005**
Travel frequency (one or more trips)	77.8%	75.9%	74.4%	73.6%
One trip	58.9%	58.8%	55.0%	55.3%
Two or more trips	18.9%	17.1%	19.4%	18.3%
Holidaymakers	49.0 mill.	48.4 mill.	48.1 mill.	47.8 mill.
No. of trips	64.5 mill.	62.2 mill.	65.4 mill.	64.1 mill.
Frequency of trips (per traveller)	1.32	1.29	1.36	1.34
				Source: RA 2006

Travel expenditure per person per holiday in 2005 averaged 833 EUR – some 112 EUR more than ten years ago, despite the fact that the average holiday duration was down from 14.1 to 12.5 days. In 2005 the average foreign holiday cost 971 EUR per person and lasted 13.4 days.

A good 30% of the holiday trips made last year were taken within Germany. Among foreign destinations, the European Mediterranean states were well ahead in the popularity stakes (26.6%). Within a decade, the non-European Mediterranean states doubled their market share (9.9%). Compared with the year before, the number of long-haul trips remained stable at 6.1%, but still fell roughly one percentage point short of the 2000 level (RA 2006).

Within Germany, Bavaria has long been established as the most popular holiday destination (7.2% of all holiday trips) ahead of Mecklenburg/W. Pomerania, Schleswig-Holstein, Lower Saxony and Baden-Württemberg. In the



foreign Top Ten, Spain with 13.5% lies well ahead of Italy (7.7%), Turkey (6.6%) and Austria (RA 2006).

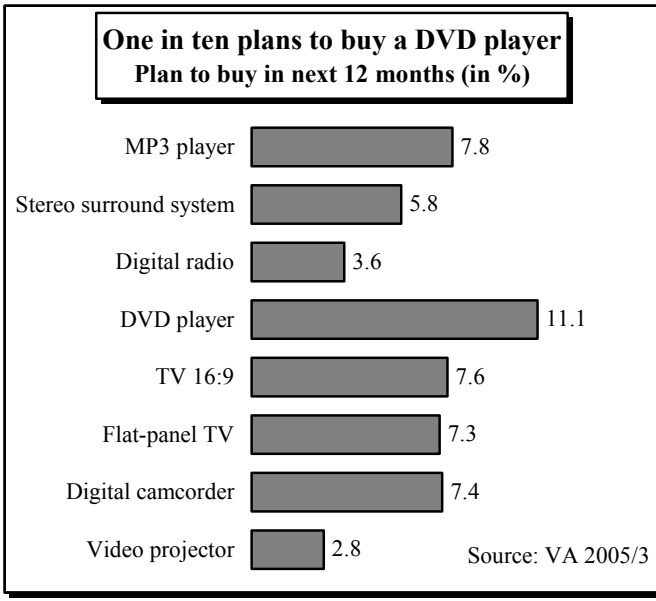
On a long-term view, “traditional” destinations such as Greece and France are losing market shares, while the Alpine regions are stabilising after setbacks in the past. “New” destinations such as Turkey and Croatia and holiday regions in Eastern Europe – e.g. Poland – are gaining ground.

For 2006 the BAT Leisure Research Institute is forecasting a “renaissance of Italian holidays” – at the beginning of the year Spain and Italy were neck and neck with a good 8% each as planned holiday destinations. Older holidaymakers in particular are increasingly drawn to Italy – be it to refresh their childhood memories or to pursue educational and cultural interests.

In third place in the current holiday destination rankings is Austria with 5.3% ahead of Hungary, the Czech Republic and Poland with around 4% each. The list of distant destinations is headed by the USA and Canada (2.8%) and China, Japan and India (2.4%; BAT).

Consumer Electronics

The market for consumer electronics has performed well in recent years – after a plus of 7.6% the value of sales in 2005 came to around 21.7 billion EUR, according to the association of the entertainment and communication electronics industry.



The BBE consumer electronics industry report forecasts further growth of up to 9% for 2006 – driven by people buying new products in advance of the World Cup, bringing purchases forward to beat the rise in VAT, and

the ongoing demand for innovative products such as LCD or plasma TVs, DVD and hard disk recorders, MP3 players with hard disk, car navigation systems, high-tech mobile phones or notebooks and PDAs.

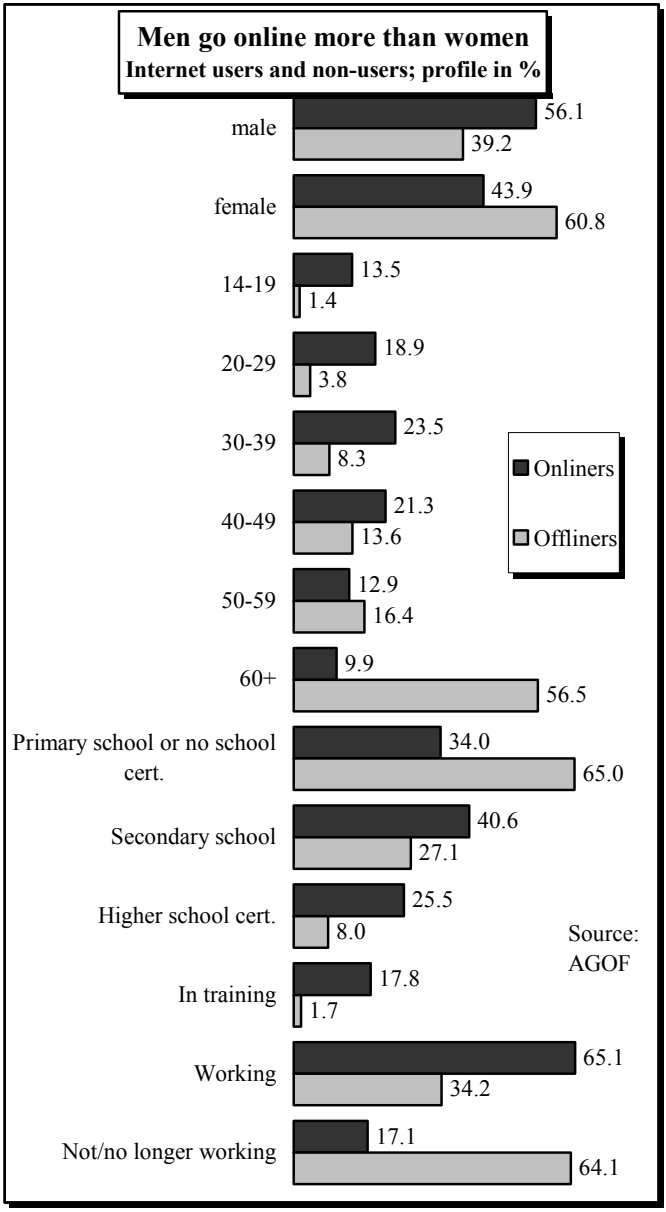
The industry is however suffering from heavy pressure on prices and cut-throat competition – on an EU comparison Germany's prices are below average. In some cases the constant pressure to innovate is coupled with a rapid drop in prices – in 2005, for example, average prices for plasma TV sets fell by a good third, TFT monitors went down by as much as 45%, and navigation systems were 30% cheaper than the year before (gfu).

Telecommunications and computers

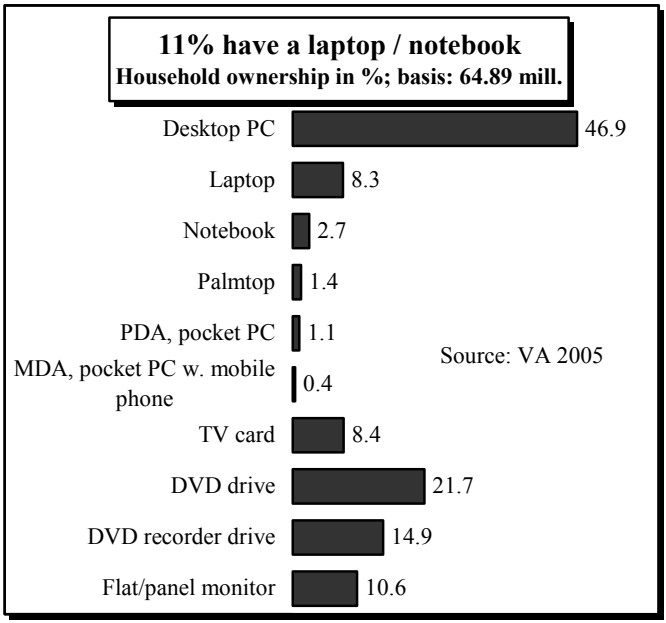
On an international comparison, Germany is in the mid range as far as the spread of computers is concerned – according to BITKOM, there were 43 PCs to every 100 of the population (USA: 84 to 100; Scandinavia: 60 to 100). The growth rate for PC ownership in 2005 was around 8%; in particular, the demand for notebooks gave a boost to the market.

According to the study "internet facts 2005-II" by Arbeitsgemeinschaft Online Forschung (AGOF), the Internet is now used by 56.8% of the German population aged 14 and over – a total of 36.9 million users. Every week the Internet reaches roughly 31 million Germans.

The majority of Internet users (57.2%) already have at least three years relevant experience – only 11% have been using the web for less than a year (AGOF).


Men go online more than women
Internet users and non-users; profile in %
male
56.1
39.2
female
43.9
60.8
14-19
13.5
1.4
20-29
18.9
3.8
30-39
23.5
8.3
40-49
21.3
13.6
50-59
12.9
16.4
60+
9.9
56.5
Primary school or no school cert.
34.0
65.0
Secondary school
40.6
27.1
Higher school cert.
25.5
8.0
In training
17.8
1.7
Working
65.1
34.2
Not/no longer working
17.1
64.1
Onliners
Offliners
Source: AGOF

However, there is still a "digital barrier" between Internet users and non-users. Poor formal education, advanced age and – still – gender characterise the profile of Internet "objectors": Two thirds of offliners have no more than an elementary school certificate (onliners: 34%), 61% are women (onliners: 44%), and nearly 57% are sixty or older (onliners: 10%).



In the last four years the number of broadband Internet connections has risen by about 50% a year to reach 10.7 million by the end of 2005 (BITKOM). Despite falling prices and rapid growth, Germany is nevertheless falling behind the international trend. Whereas one in two households in Switzerland already has a broadband connection, the figure in Germany is only one in four (BITKOM).

As well as the DSL connections which are the most widespread of broadband connections (97%, Bundesnetz-

agentur), work on expanding the cable TV network is being stepped up – in 2005 nearly 7 million cable TV households were able to make use of "triple-play" services (broadband, broadcast, phone); some 320,000 households have so far been recruited as customers for the cable TV network.

The first broadband offerings on the basis of wireless technology were also launched (BITKOM). Today nearly one in three Internet users go online with a DSL connection. With an average of 116 minutes a day, DSL users spend nearly twice as long online as the average Internet user (AGOF).

Broadband usage – Forecast

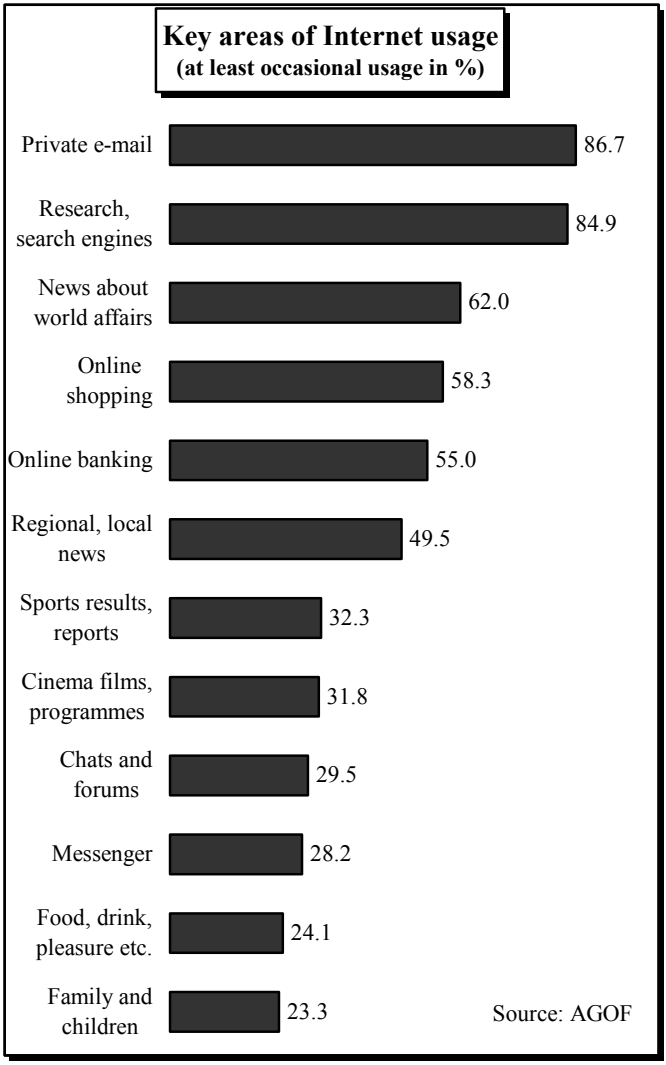
	2007 in mill.	2010 in mill.
Broadband Internet users	15.90	24.30
- of which: private users	13.60	21.50
- of which: business customers	2.30	2.80
Broadband (DSL) users	14.10	19.30
Cable TV users	0.90	2.10
UMTS users	0.50	1.50
Users of other technologies	0.50	1.50
Broadband share of total connections	40.8%	62.2%

Source: BITKOM

Mobile accessibility has become a fact of life for most Germans – there are 95 mobile phones to every 100 households (2004: 87 mobile phones; BITKOM).

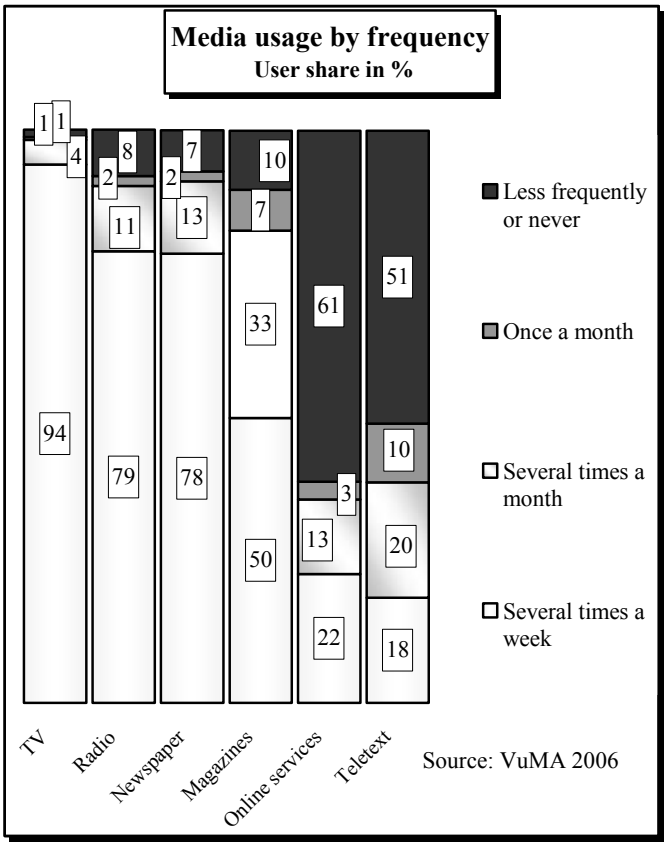
The market for the new UMTS mobile phone standard has taken time to gain momentum. Today Germany with 2.3 million UMTS users takes fourth place worldwide behind Japan (22.4 million), Italy (9.0 million) and the United Kingdom (4.7 million) – according to BITKOM estimates

the number of German UMTS users is set to display a roughly fourfold increase in 2006.



9. Media

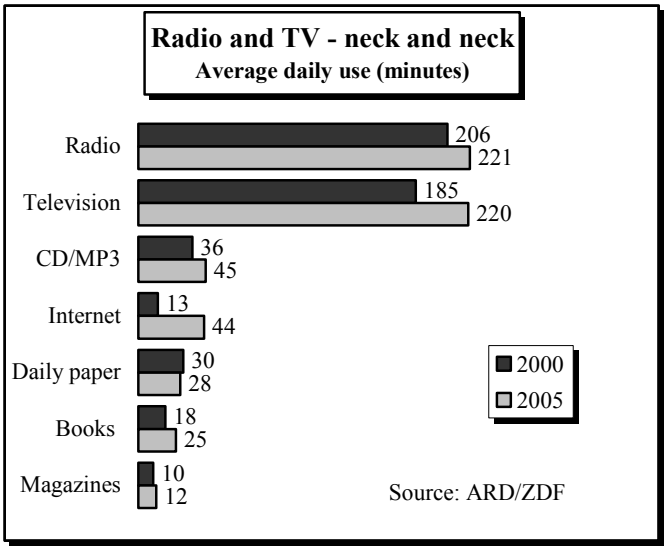
Regular media consumption is something that Germans cannot do without. Three out of four Germans aged 14 and over read a newspaper every day (ZMG 2006). Over 80% read several magazines, which have a longer publication interval, every month. TV and radio are also media that frequently accompany people through their everyday life (VuMA).



The 14-49 age group invest an average of eight hours a day in media use (incl. books, films or video games) – a full 90

minutes more than in 1999 (Time Budget 12 / SevenOne Media). The increase in Internet usage was not at the expense of the other media – TV usage actually increased during the period studied.

According to a long-term study on mass communications (ARD / ZDF), media consumption by those aged 14 and over is already as high as ten hours. In 1995 total daily media time came to 6.5 hours, compared with nearly 6 hours in 1985. The additional media consumption is a result of the increased range of programmes offered by commercial and public broadcasters. Moreover, the Internet has acquired a firm place of its own in the German public's media time budget, and is rapidly expanding this thanks to improvements in the access infrastructure. Time spent reading magazines has also increased in response to a broad and varied range of offerings.



In view of the Germans' great love of television, programme magazines are the most popular titles in the magazine sector. Second place is taken by magazines on

current affairs, politics and society – which are read by over two thirds of men and more than 50% of women. More than two out of three women (and 8% of men) had read at least one women's magazine in the last three months. These are followed by business magazines and business newspapers with a readership share of 23.5% (men: 30.5%, women: 17.1%; VuMA 2006).

Newspaper Usage					
read in last 3 months, in %					
Type of magazine	**Total**	**West**	**East**	**Men**	**Women**
TV programme	**84.7**	86.2	78.7	84.6	84.7
Current affairs, politics and society	**59.9**	63.0	47.3	67.5	52.8
Women	**39.1**	40.2	34.9	8.0	67.9
Business press	**23.5**	22.5	27.5	30.5	17.1
Puzzles	**16.9**	15.8	21.4	12.8	20.8
Sport	**15.5**	15.7	14.5	29.0	3.0
Health and wellness	**14.9**	14.8	15.2	9.4	19.9
Computers	**14.6**	14.5	15.0	24.2	5.7
Motors	**14.3**	14.4	14.2	26.9	2.7
Homes and living	**12.8**	14.1	7.5	8.6	16.6
Nature, environment	**9.6**	9.6	9.5	9.3	9.9
Family, parenting	**8.6**	9.1	6.4	4.5	12.3
Lifestyle, city	**8.5**	9.1	6.1	8.3	8.7
Science, technology, culture	**7.9**	8.1	7.1	12.6	3.5
Youth	**6.6**	6.4	7.2	5.6	7.5
Sex	**5.0**	5.1	4.8	8.2	2.1
Cinema	**4.4**	4.3	4.5	4.6	4.2
					Source: VuMa 2006

The biggest-selling German media business is **Bertelsmann AG** with worldwide annual sales of 17.9 billion EUR. It includes the RTL Group (5.1 billion EUR) and the magazine publisher Gruner & Jahr (2.6 billion EUR).

The biggest newspaper publisher in Germany and Europe is **Axel Springer AG**, which made sales of 2.4 billion EUR in 2005 including magazines. The TV channel group **ProSiebenSat.1 Media AG** achieved sales of 2.0 billion EUR in 2005.

Paid Circulation of Newspapers	
4th quarter 2005 (Monday to Saturday)	
Supra-regional daily newspapers	
Süddeutsche Zeitung	446,040
Frankfurter Allgemeine Zeitung	367,076
Die Welt incl. Welt Kompakt	251,228
Frankfurter Rundschau	161,550
Handelsblatt	142,964
Financial Times Deutschland	101,393
Die Tageszeitung	60,591
Regional subscription papers	
ACN Abozeitungen	1,184,861
WAZ-Mediengruppe	958,162
ZGW Zeitungsgruppe Westfalen	852,751
Hannoversche Allgemeine	578,789
Zeitungskombi Hessen	548,820
Wirako Hamburg	535,356
of which: Hamburger Abendblatt	268,101
STZ Anzeigengemeinschaft	502,792
Zeitungsregion Rheinland-Pfalz-Saarland	483,241
Zeitungsgruppe Bremen-Weser-Ems	468,687
Zeitungsgruppe Thüringen	371,915
Augsburger Allgemeine/Allgäuer Zeitung	349,450
Schleswig-Holstein-Presse	336,304
Freie Presse	330,492
Südwest Presse	325,759
Nürnberger Nachrichten	304,275
Neue OZ/Zeitungsgruppe Südwest-Niedersachsen	301,590
	Source: IVW

For every 1,000 of the population there are 308 copies of a newspaper (BDZV). Circulation figures showed a further decline in 2005 – in the fourth quarter the total circulation

of 27.16 million daily, weekly and Sunday newspapers per on-sale date was 2.5% down on the previous year's level (IVW). The supra-regional daily newspaper rankings are headed by the **Süddeutsche Zeitung**, followed by the **Frankfurter Allgemeine Zeitung** and the daily newspaper **DIE WELT/WELT KOMPAKT**.

Newsstand dailies are dominated by **BILD** with a paid circulation of more than 3.6 million copies. The Sunday newspapers are led by **BILD am SONNTAG** with nearly 1.9 million copies sold.

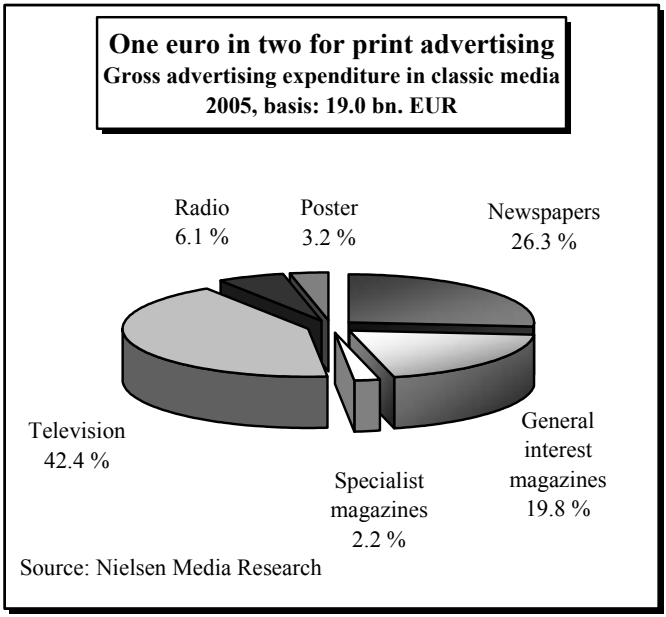
Paid Circulation of Newspapers	
4th quarter 2005	
Newsstand papers	
Bild	3,609,427
Express	224,790
B.Z.	187,778
Abendzeitung	160,098
TZ München	155,007
Berliner Kurier	124,055
Hamburger Morgenpost	111,025
Morgenpost für Sachsen	100,570
Weekly papers	
Die Zeit	481,461
VDI-Nachrichten	148,923
Rheinischer Merkur	91,506
Bayernkurier	72,788
Sunday papers	
Bild am Sonntag	1,863,066
Sonntag aktuell	928,919
Welt am Sonntag	403,009
Frankfurter Allgemeine Sonntagszeitung	308,060
Berliner Kurier	189,775
Berliner Morgenpost	179,733
Tagesspiegel	139,038
Lübecker Nachrichten am Sonntag	126,364
B.Z. am Sonntag	115,433
Morgenpost am Sonntag	71,610
	Source: IVW / HORIZONT

Magazines – Paid Circulation Q4/2005	
Selection, excl. member or customer magazines etc.	
Illustrated magazines	**Paid circulation**
Der Spiegel	1,042,395
Stern	1,017,187
Focus	745,362
Bunte	721,300
Super Illu	545,531
Gala	355,273
Programme magazines	**Paid circulation**
TV 14 (fortnightly)	2,372,340
TV-Movie (fortnightly)	2,082,533
TV Digital (fortnightly)	1,735,186
TV Spielfilm (fortnightly)	1,701,949
Hörzu (weekly)	1,621,407
Auf einen Blick (weekly)	1,564,240
TV-Hören und Sehen (weekly)	1,112,681
TV Direkt (fortnightly)	1,027,746
Women's magazines	**Paid circulation**
Bild der Frau (weekly)	1,083,523
Freizeit Revue (weekly)	1,011,945
Neue Post (weekly)	943,029
Brigitte (fortnightly)	769,659
Das Neue Blatt (weekly)	676,978
Tina (weekly)	651,092
Frau und Mutter (monthly)	637,976
Frau im Trend (weekly)	569,249
Freundin (fortnightly)	540,883
Für Sie (fortnightly)	480,604
Computers/telecommunications	**Paid circulation**
Computer Bild	713,174
Computer Bild Spiele	519,619
PC-Welt	424,556
CHIP	402,787
ct magazin für computer	379,295
Film/video(audio/photo	**Paid circulation**
Audio Video Foto Bild	363,083
SFT -Spiele Filme Technik	241,191
	Source: IVW

Magazines – Paid Circulation Q4/2005	
Selection, excl. member or customer magazines etc.	
Motoring magazines	**Paid circulation**
Auto - Bild	600,812
Auto Motor und Sport	454,381
AUTOStraßenverkehr	207,871
Auto-Zeitung	201,101
Sports magazines	**Paid circulation**
Sport-Bild	451,462
kicker Montag	218,469
kicker Donnerstag	200,328
Parenting magazines	**Paid circulation**
Eltern	361,643
mobile - Das Familienmagazin	262,808
Familie&Co	202,385
Lifestyle magazines	**Paid circulation**
Playboy Deutschland	317,743
Fit for Fun	253,145
Men's Health	232,267
poss.	198,042
Matador	189,415
FHM	185,774
Maxim	154,252
Business press	**Paid circulation**
Guter Rat	233,542
Capital	204,031
Wirtschaftswoche	181,822
Euro - Wirtschaft/ Politik/ Börse	172,342
Knowledge magazines	**Paid circulation**
Geo	437,750
P.M.	410,999
National Geographic Deutschl.	243,222
Home and garden	**Paid circulation**
Mein schöner Garten	378,730
SCHÖNER WOHNEN	297,523
	Source: IVW

10. Advertising

The year 2005 brought the advertising industry an increase of 5.3% in gross expenditure on advertising in the classic media, taking the figure to 19.0 billion EUR (Nielsen Media Research). The media themselves stepped up their gross expenditure by around 12%. In addition to numerous incidental transactions (holidays, literature editions etc.), advertising for the online media and commercial TV channels was also up on the year before.

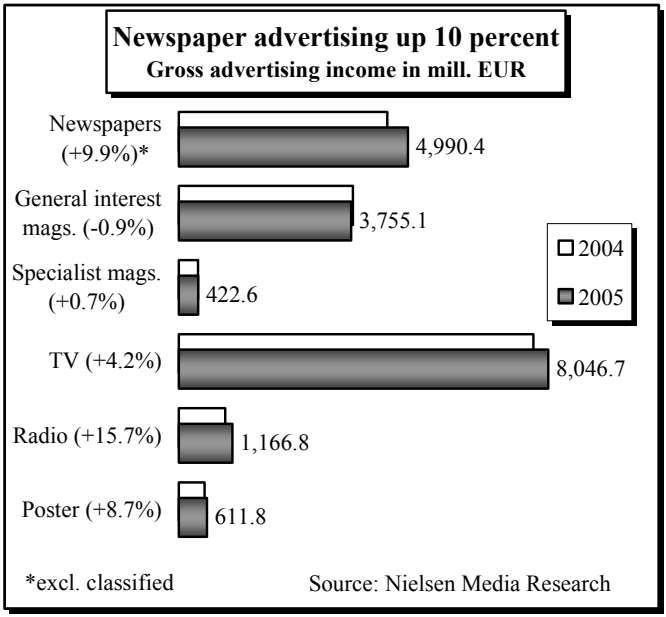


Some 9.2 billion EUR was spent on print advertising in 2005 (excluding classified ads and inserts). Whereas daily newspapers recorded a plus of 9.9% to nearly 5 billion EUR, general interest magazines showed a slight drop of 0.6% (3.9 billion EUR). Specialist magazines were up 0.7% to 423 million EUR.

The TV channels recorded a plus of 4.2% to a good 8 billion EUR (market share of public broadcasting channels: 4.4%). The fastest growth rate in the classic media was achieved by radio with a plus of 15.7% to 1.2 billion EUR (market share of public broadcasting channels: 28.5%); spending on poster advertising increased by 8.8% to nearly 612 million EUR.

Trade organisations increased their budgets by about 100 million EUR to 1.9 billion EUR (+5.9%) – not only discounters and technical department stores, but also the classic trade displayed greater activity.

Thanks to a number of market launches and responses to the activities of several trade companies, spending by the telecommunications industry was up 15% to 725 million EUR.



The industries with the highest advertising turnover invest primarily in print advertising. In addition to the media themselves, this applies particularly to the trade and car sectors.

Advertising-intensive product areas 2005			
Gross advertising expenditure on classic media			
Product group	Total mill. €	Change 2005/2004 %	Print share %
Media	3,358.9	11.7	69.3
Trade and shipment	2,406.2	3.4	75.5
Car market	1,589.4	-1.1	51.1
Services (excl. financial services)	1,094.3	11.2	35.7
Telecommunications	724.6	14.6	35.1
Financial services	597.1	5.1	52.3
Chocolate + sugar	578.3	6.9	4.6
Pharmacy	551.8	3.2	48.3
Tourism	440.8	2.9	41.6
Beer	402.0	10.7	12.3
Hair care	345.0	13.1	16.1
Dairy products – white goods	325.6	51.4	5.9
Care cosmetics	279.5	1.4	41.3
Special mail order	272.8	-14.6	56.1
Insurance	261.0	-0.4	35.1
Construction industry	248.9	12.3	48.1
Non-alcoholic drinks	243.8	0.0	8.7
Polishes ec.	231.7	44.0	3.8
Furniture and furnishings	228.3	8.3	45.8
Outerwear	212.5	13.7	63.4
Coffee. tea, cocoa	175.3	11.8	13.7
Perfumes + fragrances	171.5	4.8	37.4
Money investment	160.4	-16.9	80.8
Audio and video	160.1	23.0	41.0
Preserves, meat, fish	138.4	-38.3	11.8
Source: Nielsen Media Research			

A rapid growth rate of over 50% (to 326 million EUR) was seen in the dairy products sector (white goods) in 2005 – probiotic products in particular provided a new boost. The manufacturers of cleaners and polishers – first and foremost Reckitt Benckiser – made a major contribution to market growth with a rise of 44% (232 million EUR). By contrast, a marked decline was seen in the other segments: preserves, meat and fish, financial investment and specialist mail order businesses.

The big spender rankings are headed by **Media-Markt/Saturn**, followed by **Lidl**, **Procter & Gamble**, **Axel Springer** and **Aldi**. Among the top ten advertisers,

Big Spenders – Top 20 Advertisers

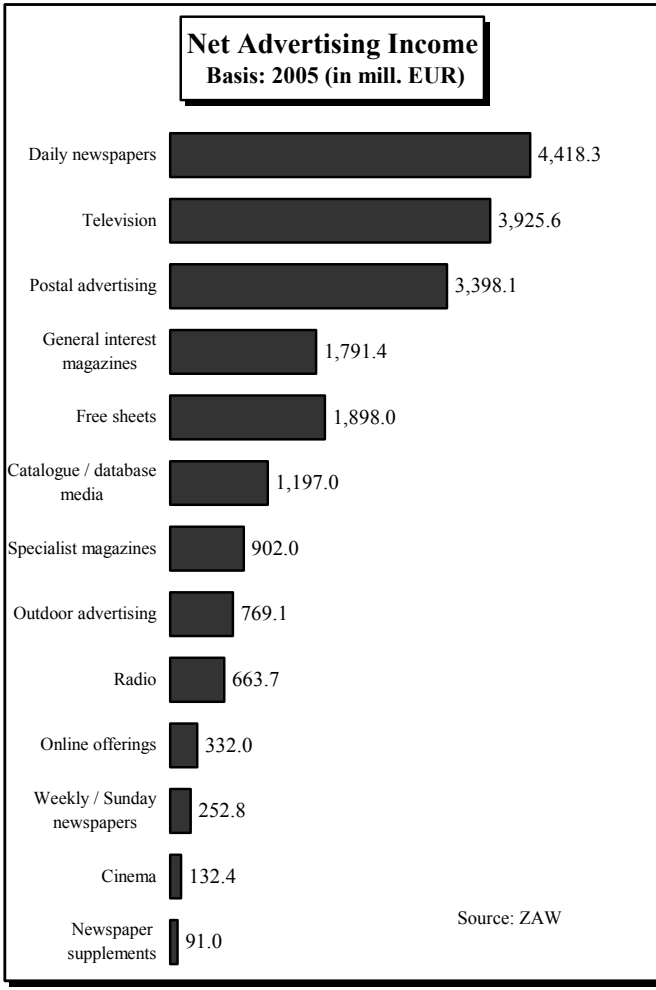
Gross advertising expenditure 2005 in classic media

Company	mill. €	Change in %
Media-Markt/Saturn	396.5	13.8
Lidl	346.2	3.4
Procter & Gamble	293.5	-12.3
Axel Springer	292.1	1.5
Aldi	263.8	7.6
Ferrero	245.4	5.9
L'Oréal	222.7	4.1
Volkswagen	187.5	28.3
Unilever Bestfoods	178.2	19.7
C&A	173.3	9.8
Gruner & Jahr	161.2	2.4
Reckitt Benckiser	158.3	55.6
Opel	153.8	2.4
Toyota	144.7	26.5
Danone	143.1	35.2
Beiersdorf	140.1	6.5
Jamba	136.8	23.5
Sparkassenverband	126.8	-8.3
Renault	122.5	4.3
McDonald's	119.4	7.3

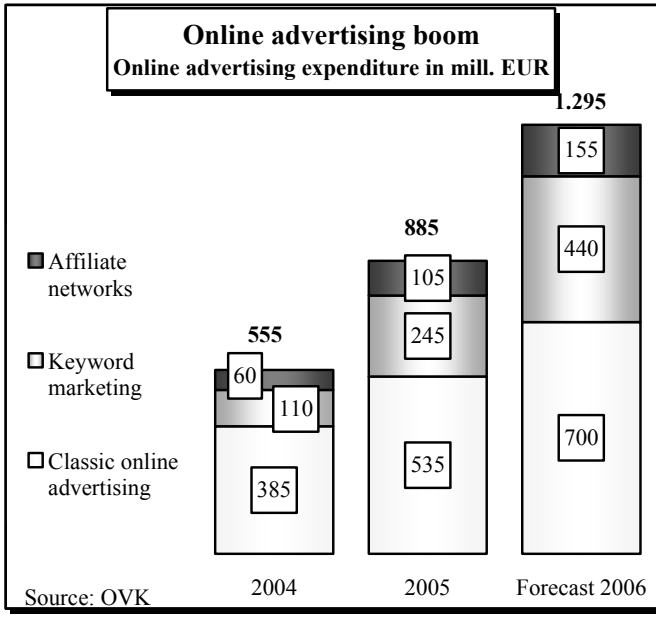
Source: Nielsen Media Research / HORIZONT

only **Procter & Gamble** and the savings bank association **Sparkassenverband** cut back their classic advertising expenditure in 2005. Not only **Reckitt Benckiser**, but also **Danone**, **Volkswagen**, **Toyota** and **Jamba** made sharp increases in their advertising spending.

According to ZAW (which looks at net income), postal advertising with 3.4 billion EUR takes third place behind daily newspapers (4.4 billion EUR) and TV advertising



(3.9 billion EUR).
Very successful were free sheets (+3.4% to 1.9 billion EUR), weekly and Sunday newspapers (+5.6% to 253 million EUR) and online offerings (+22.5% to 332 million EUR).



The online marketer group (OVK) of the national digital business association (BVDW) sees no end to the online boom: it puts the ***online advertising volume*** for 2005 at 885 million EUR, an increase of 60% on the year before.

In the current year, 2006, the total volume is expected to increase by a further 46% to nearly 1.3 billion EUR – and these figures do not include any online classified advertising. According to OVK, the strongest advertising in the Internet was for online service providers, followed by the product groups telecommunications and finance ahead of e-commerce and the car market.

According to Nielsen Net-Ratings, the biggest online advertiser in 2005 by a large margin on the basis of ad impressions (possible visual contacts) was **Ebay**, followed by **Tchibo**, **Postbank**, **Midas Player**, **Arcor**, **Citibank** and **Opodo**.

Media Agency Rankings in Germany

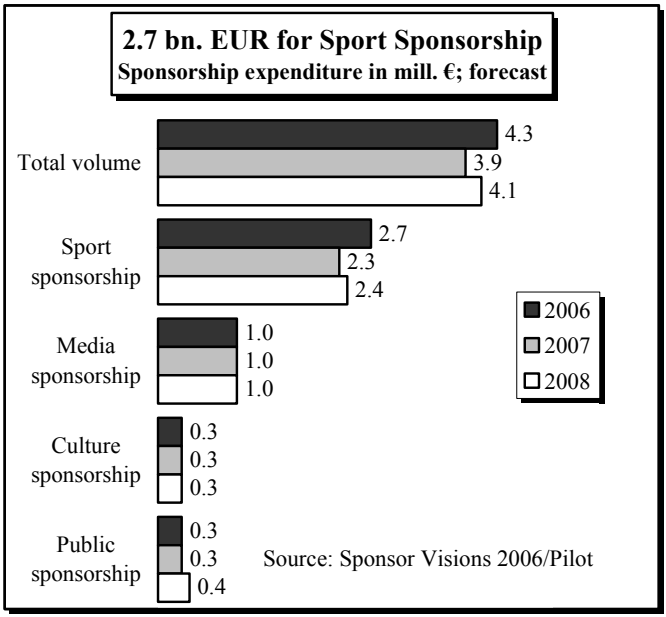
Media agency	Holding co. / owner	Billings 2005* mill. US dollars	Change 05/04 %	Market share %
Mediacom	WPP/Group M	2,950	7.9	18.3
Carat	Aegis Media	2,435	0.0	15.1
OMD	Omnicom	2,180	16.0	13.5
Mediaedge CIA	WPP/Group M	1,545	5.8	9.6
Mindshare	WPP/Group M	1,425	10.9	8.8
Zenith Optimedia	Publicis	1,265	12.9	7.8
Univ. McCann	Interpublic	810	5.9	5.0
Vizeum	Aegis Media	750	21.0	4.7
Mediaplus	Serviceplan	725	12.4	4.5
Initiative	Interpublic	590	-3.3	3.7
TKM Starcom	Publicis	510	3.0	3.5
MPG	Havas	230	-4.2	1.4
Crossmedia	independent	200	5.2	1.2
Ariston Media	independent	195	0.0	1.2
S&J Media	Interpublic	160	0.0	1.0
Pilot Media	independent	150	3.5	0.9

*estimated Source: Recma Billings Report

Billings by German ***media agencies*** increased by 6.6% in 2005 to 16.1 billion US dollars (Recma). The unchallenged leader is WPP subsidiary Mediacom with 2.6 billion dollars (+7.9%) and a market share of 18.3%. Second place is taken by Carat from the Aegis Media Group with an unchanged 2.4 billion dollars (market share 15.1%), followed by the Ominicom subsidiary OMD with 2.2 billion dollars (+16%; market share 13.5%).

Football continues to dominate the advertising scene in 2006 – according to the study Sponsor Visions 2006 by the agency Pilot, 43% of the top companies intend to exploit the World Cup for their brand advertising and plan to use an average of 28% of their total advertising budget for relevant activities.

Total ***sponsorship expenditure*** in 2006 is likely to be 700 million EUR up on the year before to 4.3 billion EUR. Of this, approximately 2.7 billion EUR will probably go on sport sponsorship; apart from football, increased amounts will be devoted to beach volleyball, marathon, triathlon and golf. Second place is taken by media sponsorship with about 1 billion EUR.



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