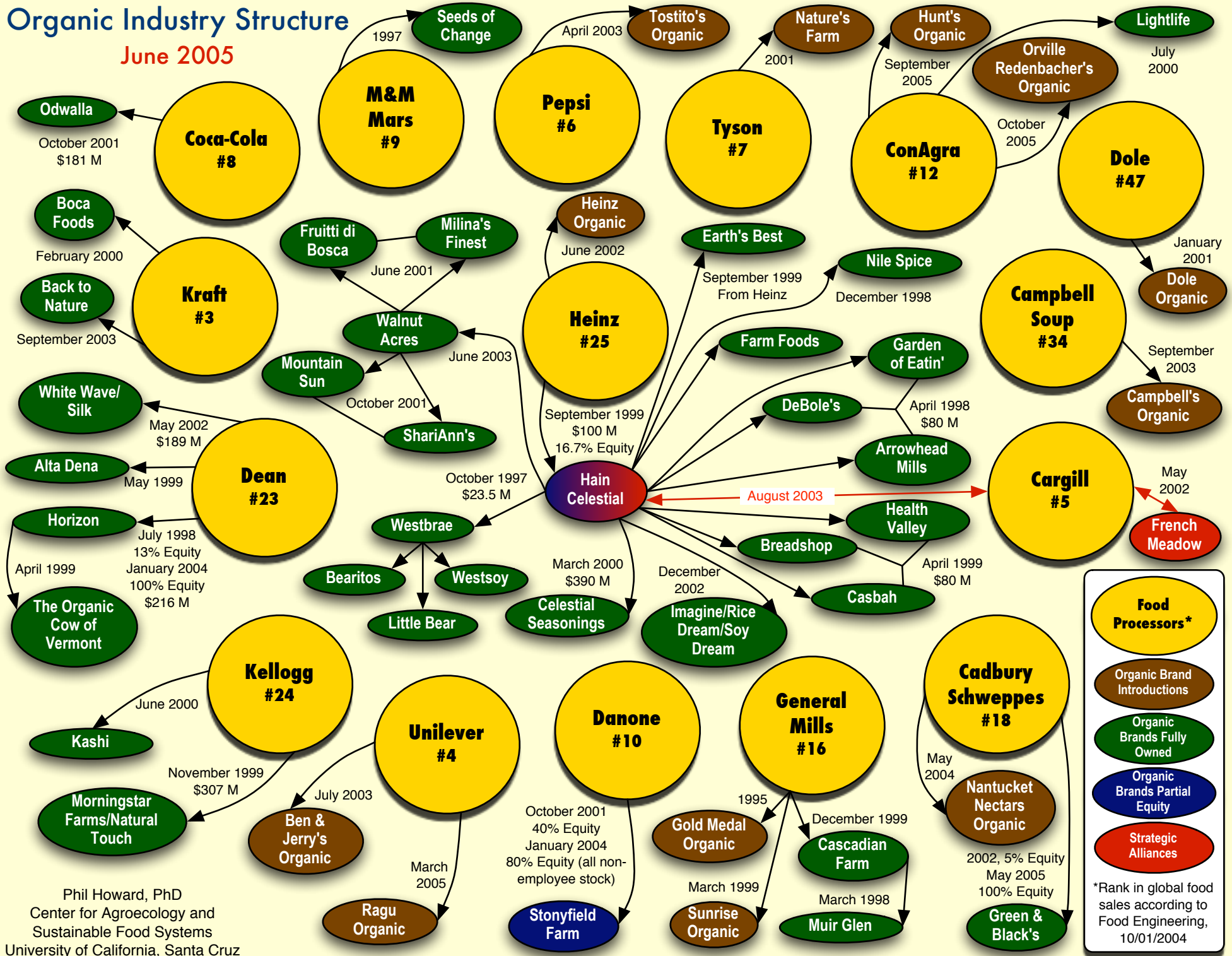


Organic Industry Structure

June 2005



Food Processors*

- Organic Brand Introductions (Brown Oval)
- Organic Brands Fully Owned (Green Oval)
- Organic Brands Partial Equity (Blue Oval)
- Strategic Alliances (Red Oval)

*Rank in global food sales according to Food Engineering, 10/01/2004