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# Voluntary Carrier Bag Agreement

## Review of Supermarket Carrier Bag Use 2010

Aug 2010

# Background – Voluntary Carrier Bag Agreement

- Agreement between the Scottish Government, Defra, the Welsh Assembly Government, and the Northern Ireland Department of the Environment with the British Retail Consortium (BRC) and its supermarket members.
- Participating retailers (in 2009 results) were: Asda, Co-operative Group, Marks & Spencer, Sainsbury's Supermarkets Ltd, Somerfield, Tesco and Waitrose.
- Target to reduce single use carrier bags by 50% by Spring 2009 on a 2006 baseline. This target was narrowly missed with a 48% reduction measured for the UK.
- In July 2009, an agreement to monitor carrier bag use in 2010 was made - although no formal target was agreed to measure against.

# Voluntary Carrier Bag Agreement - Monitoring

WRAP's role in the Agreement is to monitor the sector's carrier bag use through data collection and analysis.

Individual retailers were contacted directly to ascertain the performance of organisations committed to the Agreement.

**Individual retailer data was supplied voluntarily to WRAP on the basis that it is held confidentially and not disclosed to third parties.**

2010 monitoring results are presented for the sector not for individual retailers.

## 2010 Carrier Bag Use – participating retailers

- The Co-operative Group acquired Somerfield in 2009
- Morrisons participated in the 2010 carrier bag review and fully disclosed figures to WRAP. This data has not been included in the sector results, presented in these slides, in order to maintain continuity of reporting and to ensure confidentiality of data.
- As in 2009, Marks & Spencer, Sainsbury's Supermarkets Ltd, Tesco and Waitrose also participated.

## 2010 Carrier Bag Use – Scope

- Results are presented by:
  - Numbers of bag
  - Weight of bags (tonnes)
  - Virgin content (tonnes)
- The timeframes for results presented are:
  - Annual trend data
  - Bag use in the month of May 2010 against the baseline (May 06)
- Bags are split into single use bags<sup>1</sup> and reusable bags (which are split into polyethylene bags for life and other reusable bags)
- Data for sector sales growth is provided to provide the context as to the increase in numbers of packs / items sold.

(1) For the purpose of the Agreement, single use bags were defined as all paper bags and thin-gauge polyethylene bags of a gauge (thickness) of less than 25 microns.

## Breakdown by Nations of the UK

- Some retailers were able to provide data split by the 4 nations
- For those that could not, sales data (by volume) were applied to their carrier bag figures based on TNS Kantar Worldpanel data for 2009 (we do not hold data for May 2010)

# Monthly Data (May)

## Analysis of ALL Carrier Bags

The following analysis includes ALL carrier bags including single use bags (thin-gauge), Bags for Life and reusable bags such as cotton, jute bags.

	May 2006	May 2009	% reduction 2006-2009 <sup>i</sup>	May 2010	Reduction May 2006-May 2010	% reduction 2006-2010 <sup>i</sup>
<b>Numbers of bags (millions)</b>	<b>896</b>	<b>510</b>	<b>43%</b>	<b>502</b>	<b>395</b>	<b>44% ↑</b>
<b>Weight of bags (tonnes)</b>	<b>8,890</b>	4,740	47%	<b>4,142</b>	4,751	<b>53% ↑</b>
<b>Virgin polymer used (tonnes)</b>	<b>8,194</b>	3,112	62%	<b>2,839</b>	5,354	<b>65% ↑</b>

<sup>i</sup> Rounding may cause apparent discrepancies between the figures for the Nations and the total UK row, as well as the number of single-use bags and percentage reduction figures.

## Numbers of Single Use Bags - Breakdown by Nations

	Number of single-use bags (millions) <sup>i</sup>		% reduction 2006-2009 <sup>i</sup>	Number of single-use bags (millions) <sup>i</sup>		% reduction 2006-2010 <sup>i</sup>
	May 2006	May 2009		May 2010	Reduction 2006-2010	
<b>UK</b>	<b>870</b>	<b>452</b>	<b>48%</b>	<b>475</b>	<b>394</b>	<b>45% ↓</b>
England	718	372	48%	391	327	46% ↓
Scotland <sup>ii</sup>	78.4	39.6	49%	43.2	35.2	45% ↓
Wales	53.2	27.1	49%	26.6	26.5	50% ↑
Northern Ireland	19.8	12.2	38%	14.5	5.38	27% ↓

<sup>i</sup> Rounding may cause apparent discrepancies between the figures for the Nations and the total UK row, as well as the number of single-use bags and percentage reduction figures.

<sup>ii</sup> Includes data for Scotmid in Co-operative figures.

## Weight of Single Use Bags - Breakdown by Nations

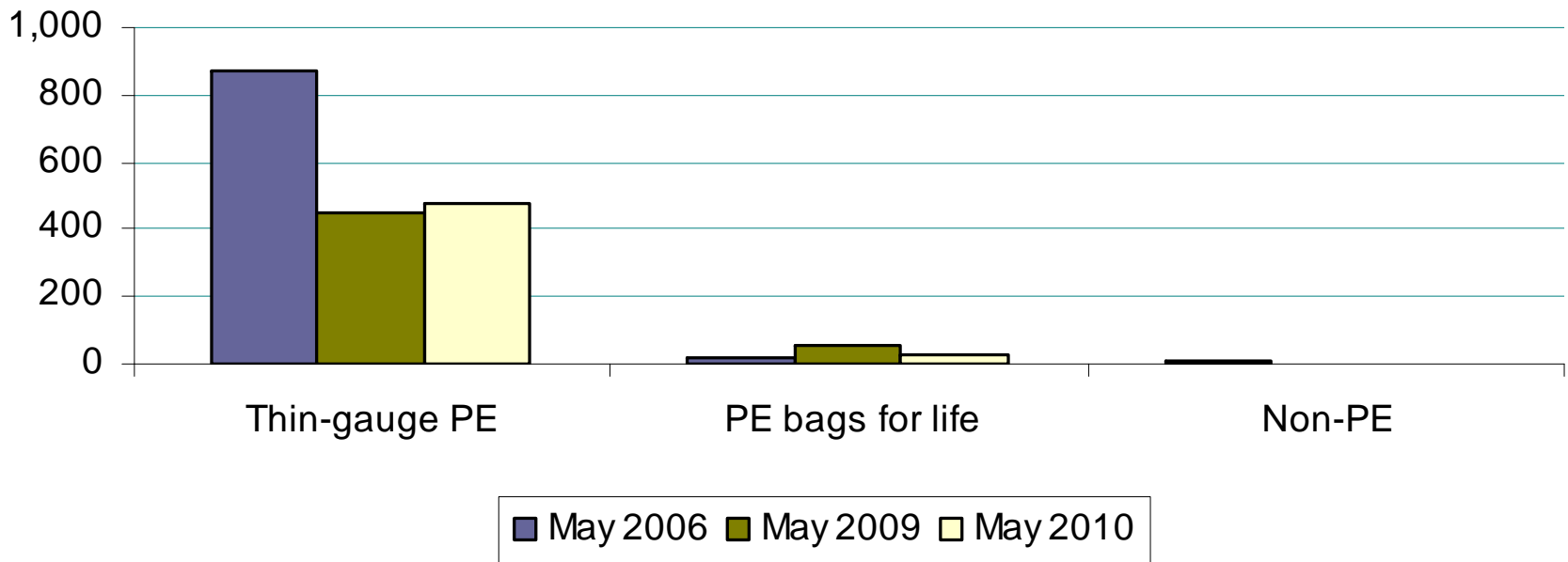
	Weight of single-use bags (tonnes) <sup>i</sup>		Reduction 2006-2009 <sup>i</sup>	Weight of single-use bags (tonnes) <sup>i</sup>		% reduction 2006-2010 <sup>i</sup>
	May 2006	May 2009		May 2010	Reduction 2006-2010	
<b>UK</b>	<b>7,196</b>	<b>3,161</b>	<b>4,035 (56%)</b>	<b>3,337</b>	<b>3,859</b>	<b>54% ↓</b>
England	5,952	2,614	3,338 (56%)	2,752	3,200	54% ↓
Scotland <sup>ii</sup>	636	269	367 (58%)	293	343	54% ↓
Wales	434	192	243 (56%)	187	247	57% ↑
Northern Ireland	169	83	87 (51%)	102	67	39% ↓

<sup>i</sup> Rounding may cause apparent discrepancies between the figures for the Nations and the total UK row, as well as the number of single-use bags and percentage reduction figures.

<sup>ii</sup> Excludes data for Scotmid in Co-operative figures.

# Numbers of ALL Bags – by Bag Type (- 44%)

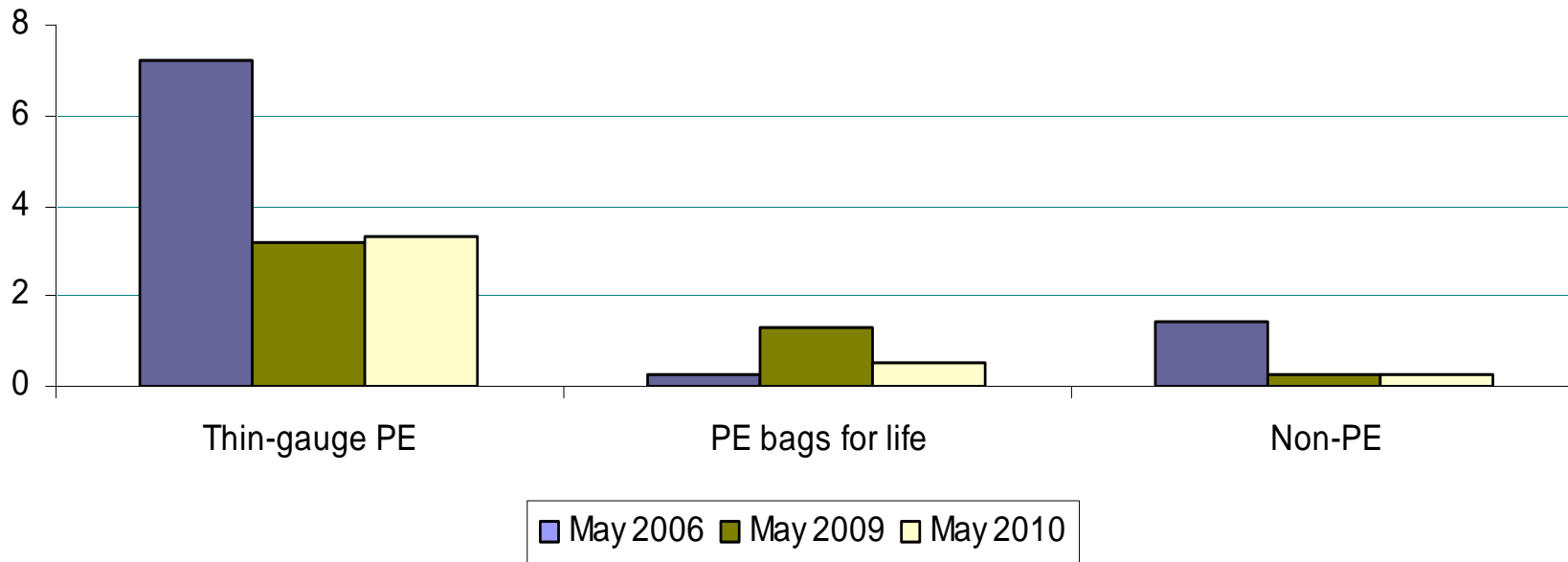
## Numbers of Bags by Bag Type [millions]



PE = polyethylene

## Weight of ALL Bags – by Bag Type (- 53%)

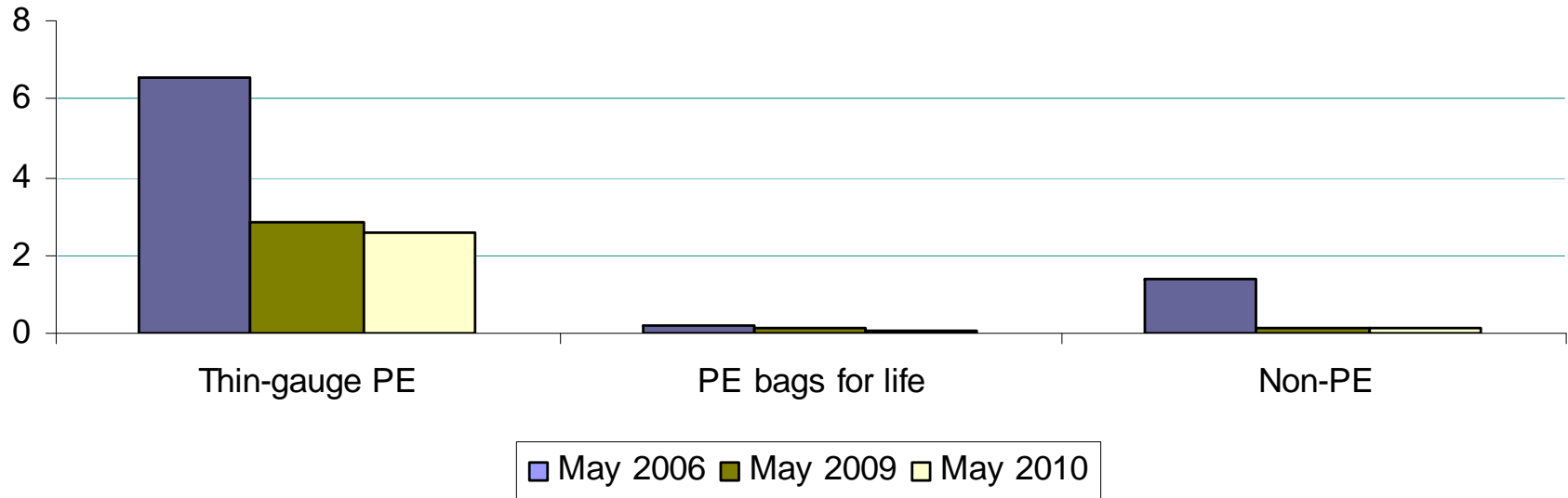
Weight of bags [tonnes 000s]



PE = polyethylene

# Virgin Polymer Content – by Bag Type [- 65%]

Weight of virgin polymer [tonnes 000s]



PE = polyethylene

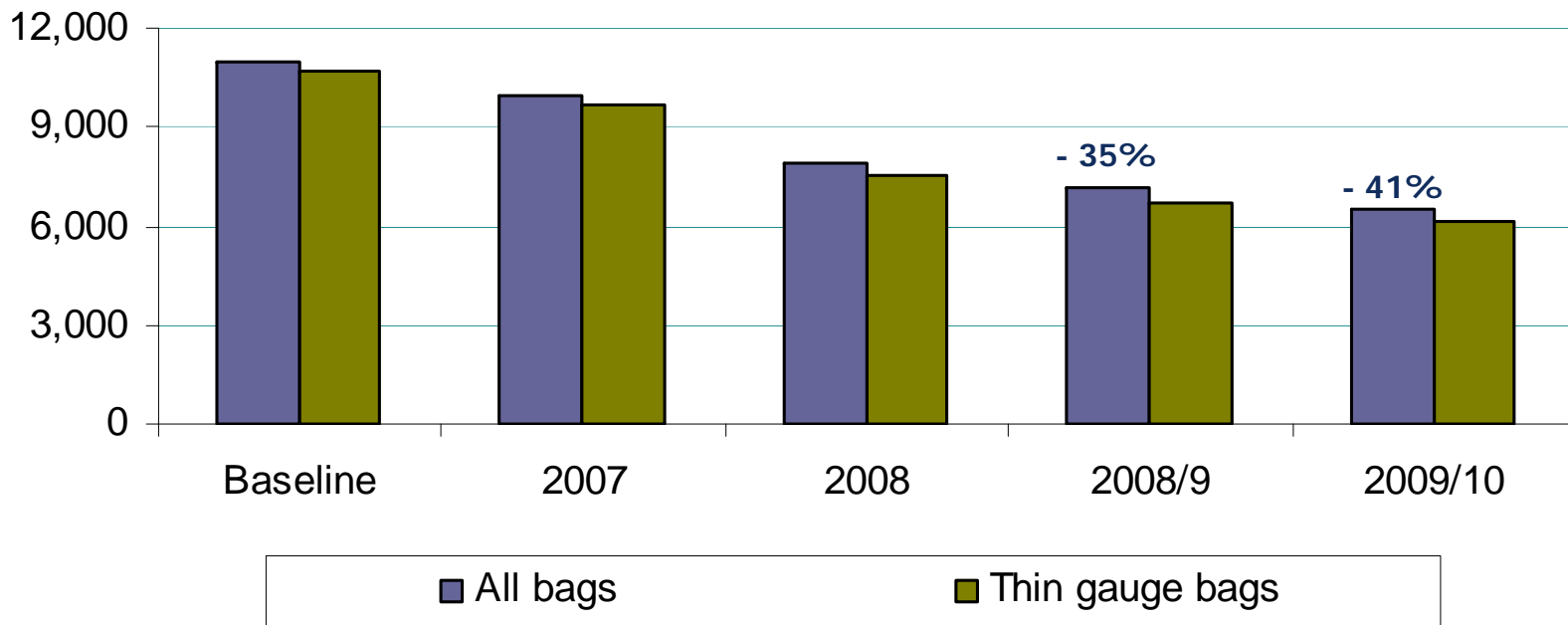
# Annual Trend Data

# Numbers of Bags

41% reduction between 06 and 09/10 for ALL bags (-35% last year)

43% reduction between 06 and 09/10 for single use (-37% last year)

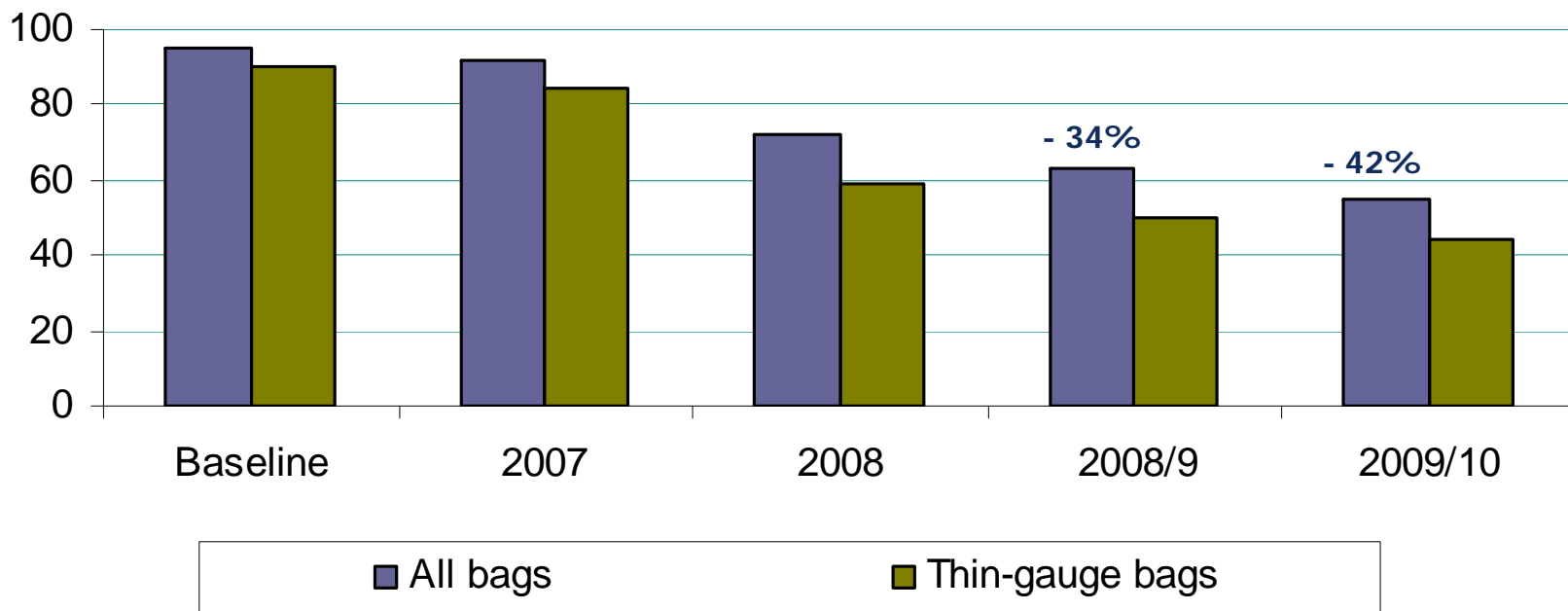
## Numbers of Bags [Millions]



# Weight of Bags

42% reduction between 06 and 09/10 for ALL bags (-34% last year)  
51% reduction between 06 and 09/10 for single use (-45% last year)

## Weight of Bags [000s tonnes]



## Yearly Data: Numbers of Single Use Bags - Breakdown by Nations

	Number of single-use bags (millions) <sup>i</sup>		% reduction 2008/09-2009/10 <sup>i</sup>
	2008/09	2009/10	
<b>UK</b>	<b>6,714</b>	<b>6,113</b>	<b>9%</b>
England	5,465	5,025	8%
Scotland <sup>ii</sup>	619	540	13%
Wales	416	353	15%
Northern Ireland	208	189	9%

<sup>i</sup> Rounding may cause apparent discrepancies between the figures for the Nations and the total UK row, as well as the number of single-use bags and percentage reduction figures.

<sup>ii</sup> Excludes data for Scotmid in Co-operative figures.

## Yearly Data: Weight of Single Use Bags - Breakdown by Nations

	Weight of single-use bags (tonnes) <sup>i</sup>		% reduction 2008/09-2009/10 <sup>i</sup>
	2008/09	2009/10	
<b>UK</b>	<b>49,653</b>	<b>44,304</b>	<b>11%</b>
England	40,472	36,486	10%
Scotland <sup>ii</sup>	4,479	3,850	14%
Wales	3,091	2,558	17%
Northern Ireland	1,572	1,376	13%

<sup>i</sup> Rounding may cause apparent discrepancies between the figures for the Nations and the total UK row, as well as the number of single-use bags and percentage reduction figures.

<sup>ii</sup> Excludes data for Scotmid in Co-operative figures.

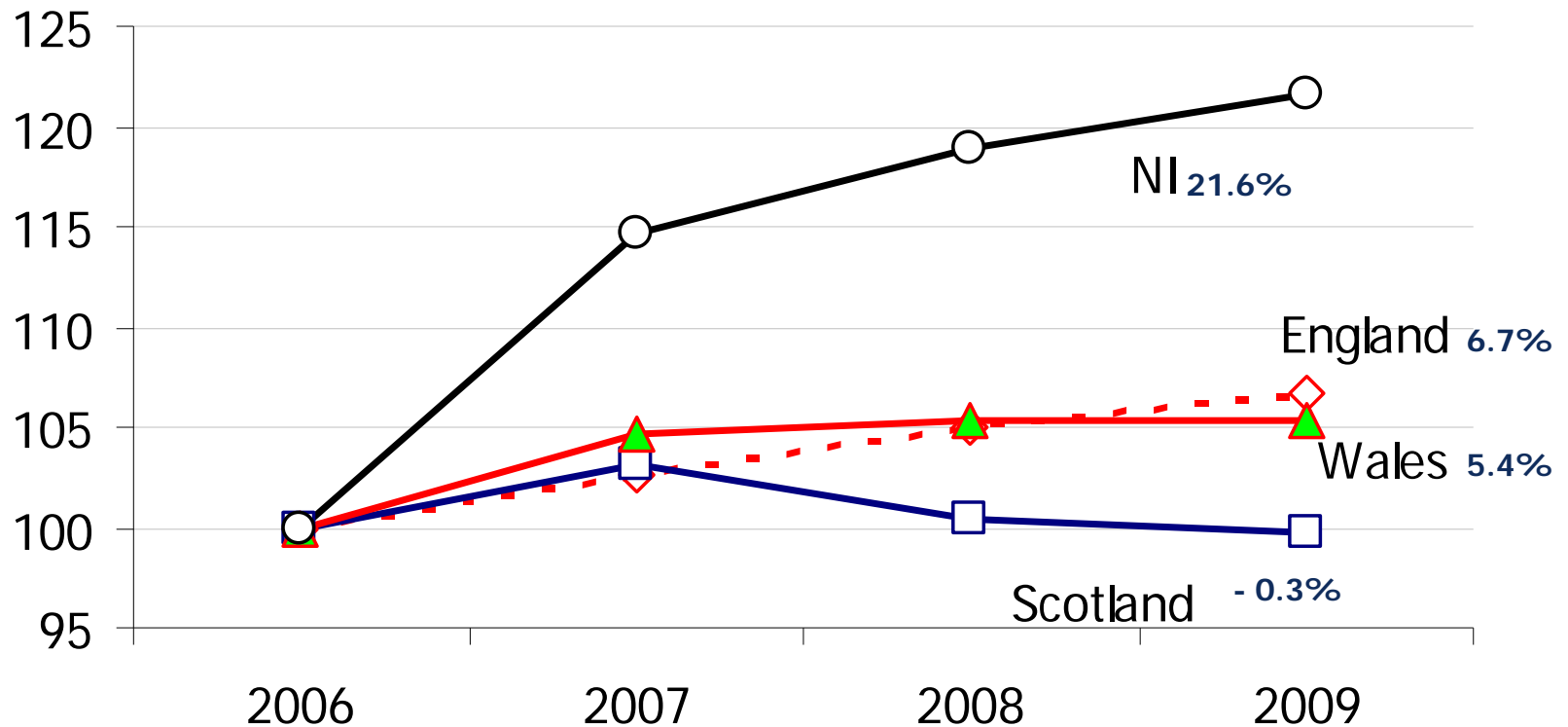
# Further Analysis

# Average Weight of Bags

Average weight	May 2006	May 2009	% change (2006-2009)	May 2010	% change (2009-2010)
ALL bags	9.9 g	9.3 g	- 6 %	8.3 g	- 11 %
Thin-gauge PE bags	8.3 g	7.0 g	- 15 %	7.0 g	~
PE Bags for Life	17.5 g	22.9 g	31 %	22.4 g	-2 %

# Sales Growth Analysis

(6.3% growth between 2006 and 2009 for UK)



Data source: Kantar Worldpanel data.

Sales volume measured in number of packs / items and includes grocery sales only (covering food, drink and household and personal care).

## May 2010: Single Use Bags Per Capita

	Population (millions)	Bag use (millions)	<b>Bags used per person in May 2010</b>
<b>UK</b>	<b>61.4</b>	<b>475</b>	<b>7.7</b>
England	51.5	391	7.6
Scotland	5.2	43	8.3
Wales	3.0	27	8.9
Northern Ireland	1.8	14	8.1

Data source: Population data (mid-year estimates for 2008, ONS)

## Monthly data

- The numbers and weight of total carrier bags has decreased since last year, with a 44% reduction in numbers and 53% reduction in weight since the baseline (2006).
- For single-use carrier bags only, data shows an increase in the numbers and weight of these bags over the last year. An additional 24 million single-use bags were issued in May 2010 compared to May 2009 (which is less than 3% of baseline bag use).
- The increase in single-use bags was more significant in Northern Ireland. Wales was the only nation to show a reduction for this bag type, albeit slight.
- Monthly data shows a reduction in numbers of bags for life issued in May 2010 compared to last year.

## Annual data

- The numbers and weight of total carrier bags – as well as single-use bags - has decreased continuously since the baseline year (2006).
- For 2009/10, there was a 41% reduction in the numbers (35% last year) and a 42% reduction in the weight (34% last year) of total bags since the baseline.

## Summary

- Bag use (single-use bags) per person ranges from 7.6 to 8.9 bags per person in May – roughly 100 bags per person per year. Bag use per capita in Northern Ireland is in line with other nations for 2010.
- There was 6.3% growth in sales volume in UK (2006-2009). More significant growth in Northern Ireland (21.6%) – could the more significant increase in single-use bags used between May 2009 and May 2010 in Northern Ireland be due to the higher level of sales volume growth – or an unknown seasonal factor – or combination of both?
- Annual trend data shows continued reductions in bag use – by weight and numbers. The monthly figures for total carrier bags reflect this trend but when looking at single-use bags alone numbers have increased, albeit slightly, in May 2010 compared to last year.