



# **UK Voluntary Carrier Bag Agreement - 2014 Data**

**Governments,  
Retailers and the  
BRC**



WRAP's **vision** is a world in which resources are used sustainably

WRAP's **mission** is to accelerate the move to a sustainable, resource-efficient economy through:

- re-inventing** how we design, produce and sell products.
- re-thinking** how we use and consume products.
- re-defining** what is possible through re-use and recycling.

- Background
- Scope of monitoring
- Headline results for 2014 carrier bag use
- Nation data

- Agreement between the Scottish Government, Defra, the Welsh Government, and the Northern Ireland Department of the Environment with the British Retail Consortium (BRC) and its supermarket members.
- Target to reduce thin-gauge carrier bags by 50% by Spring 2009 on a 2006 baseline. This target was narrowly missed with a 48% reduction measured for the UK.
- Levies for carrier bags were introduced in Wales (2011), Northern Ireland (2013) and Scotland (2014), with a levy in England from October 2015.
- An agreement was made to continue monitoring carrier bag use during the period 2010 - 2014 – although no formal target was agreed to measure against.
- The 7 participating retailers are: Asda, Co-operative Group, Marks & Spencer, Morrison's, Sainsbury's, Tesco and Waitrose.

- WRAP's role is to monitor the sector's carrier bag use through data collection and analysis.
- Individual retailers were contacted directly to obtain their data.
- **Individual retailer data was supplied voluntarily to WRAP on the basis that it is held confidentially and not disclosed to third parties.**
- Monitoring results are presented for the sector, not for individual retailers.

- Results are presented for 12 month periods: 2006, 2007, 2008, 2009/10<sup>a</sup>, 2010, 2011, 2012, 2013 and 2014.
- Metric presented:
  - number of bags (total and per capita);
  - weight of bags (tonnes); and
  - virgin polymer use (tonnes).
- Bags are split into thin-gauge bags<sup>b</sup> and reusable bags (split into polyethylene bags for life and other reusable bags). The results cover all bag types used in the retail sector.
- Data for the four nations of the UK are presented using information reported by the majority of the retailers.
- Data on grocery retail volume sales (packs sold) has been purchased to provide context of changing bag use.

(a) Reporting period: June 2009 – May 2010; the reporting period June 2008 – May 2009 has been omitted due to lack of data for all retailers.

(b) Thin-gauge bags are defined as all paper bags and polyethylene bags of a gauge (thickness) of less than 25 microns.

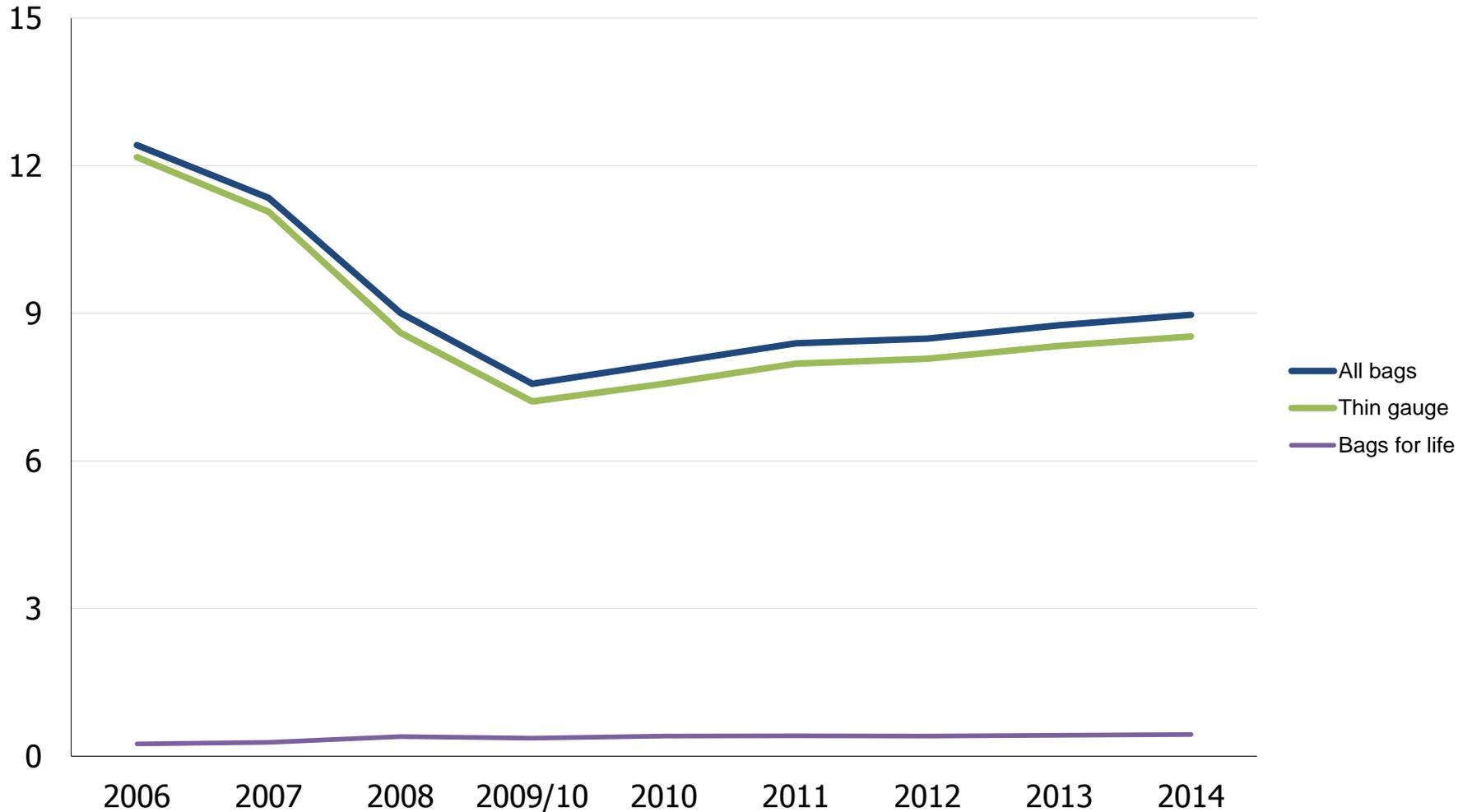
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Results: Carrier bag use in the UK, 2006-2014



- In 2014, 9.0 billion bags were used by the participating supermarket retailers.
- This compares to 12.4 billion bags in 2006, 8.5 billion bags in 2012 and 8.8 billion bags in 2013.
- These figures represent an increase of 2.4% between 2013 and 2014, and an increase of 18.5% since the end of the voluntary agreement in 2009/10.
  - but a reduction of 28% on the 2006 baseline.
- 'Total carrier bags' includes:
  - Thin-gauge (sometimes referred to as 'single-use' bags), and
  - Bags for Life ('reusable' bags) such as cotton, jute and polypropylene bags and thicker gauge polyethylene bags.

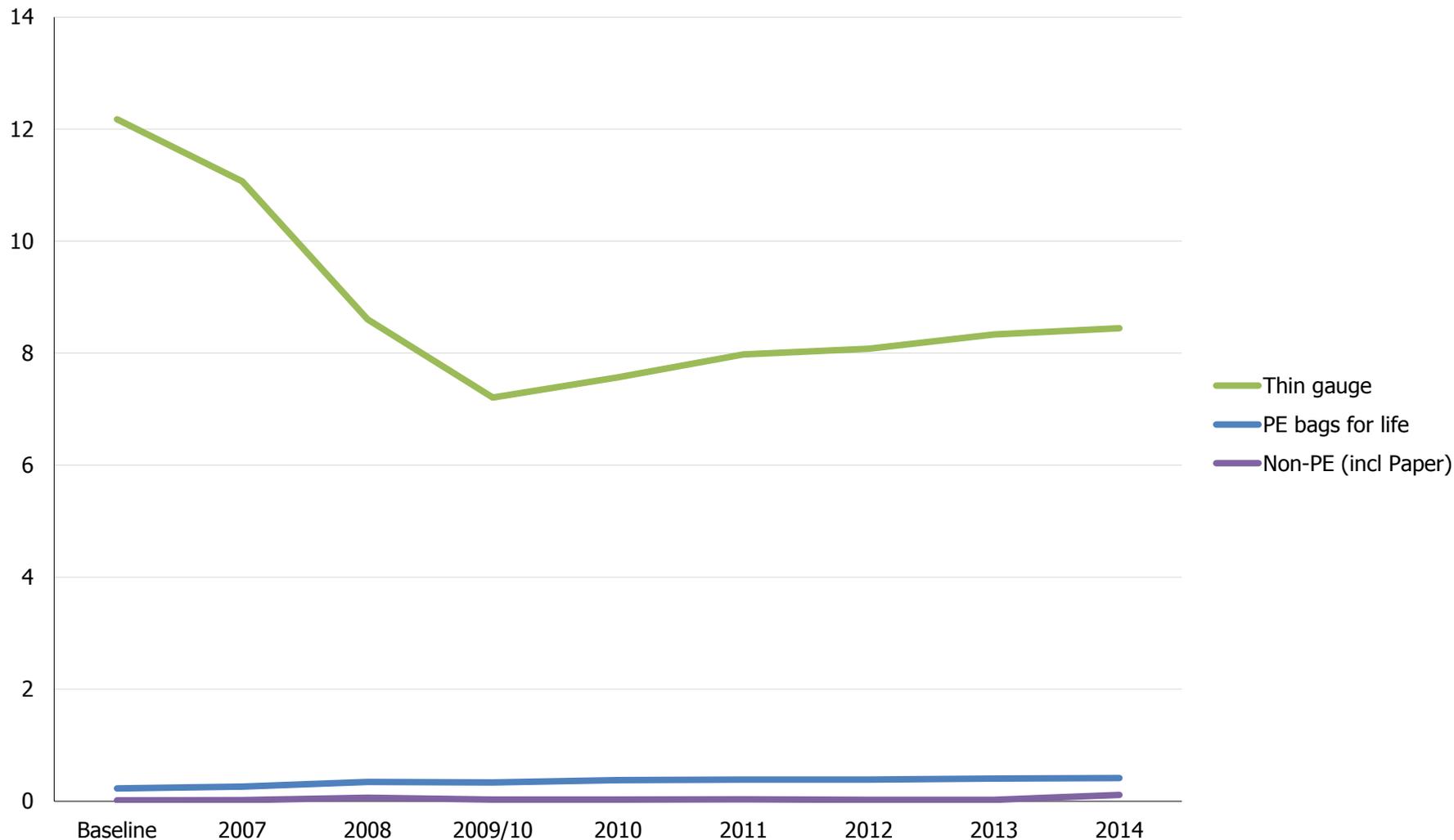
Number of bags (billions)



Total number of bags used in the UK  
(participating retailers)



Number of bags used (billions)

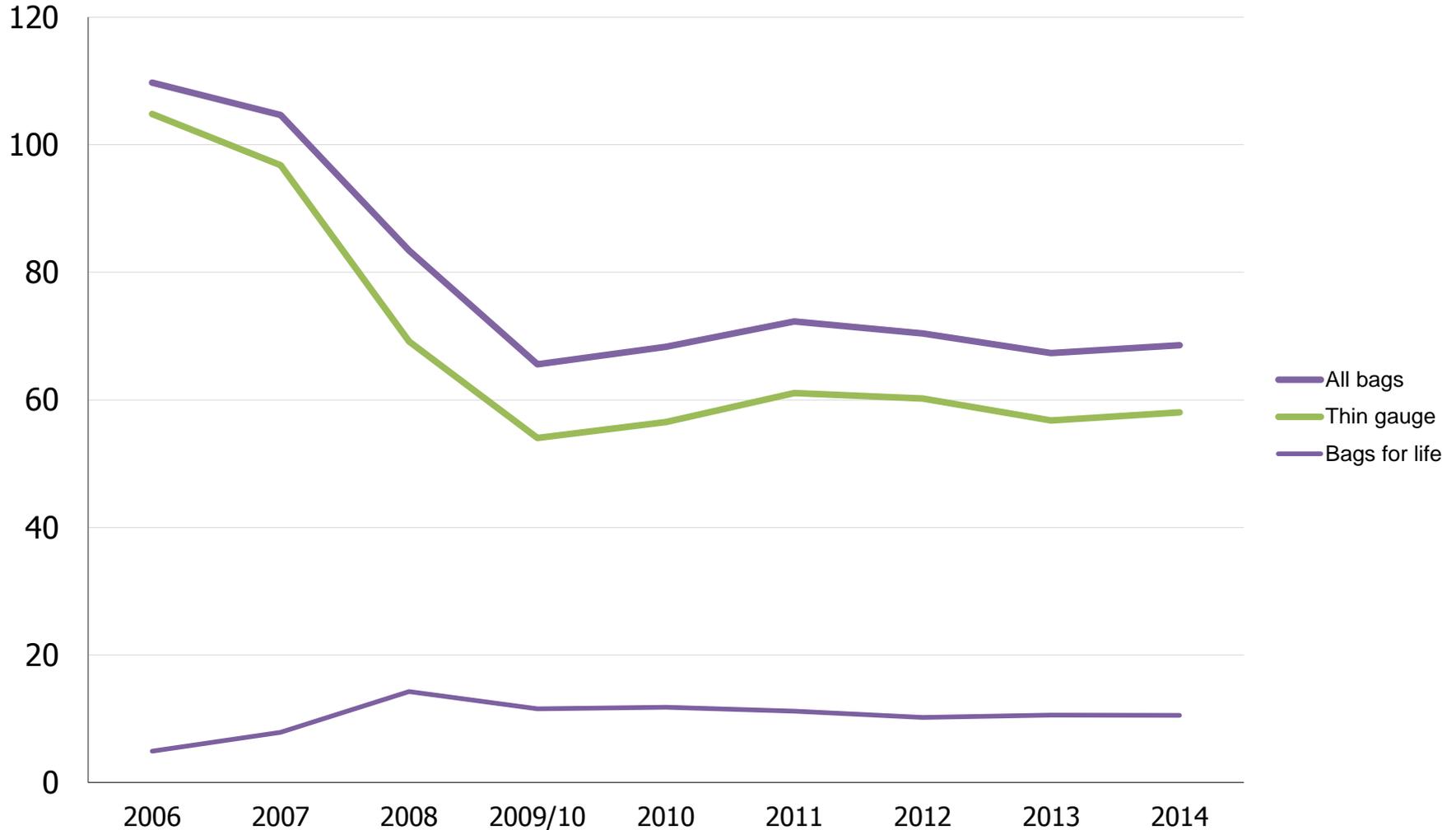


Number of 'bags for life' used in the UK - by material (participating retailers)



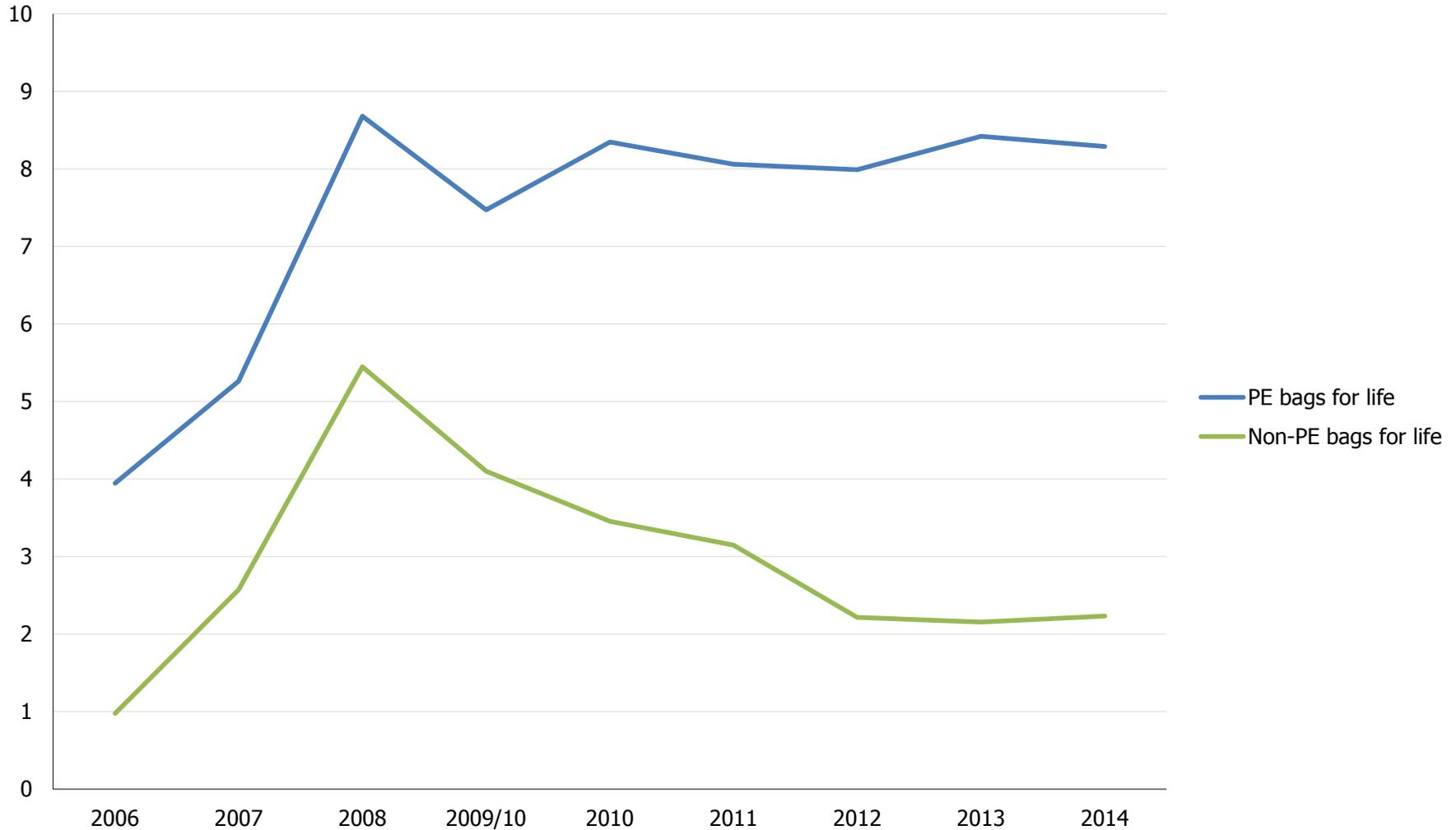
- In 2014, total carrier bags (single use and bags for life) used by the participating supermarket retailers weighed 68,600 tonnes.
- This compares to 109,800 tonnes in 2006 and 67,300 tonnes in 2013.
- These figures represent an increase of 1.8% between 2013 and 2014, and a reduction of 37.5% since the baseline year of 2006.
- But an increase of 4.5% since the end of the voluntary agreement.

Weight of bags used (thousand tonnes)



Total weight of bags used in the UK  
(participating retailers)

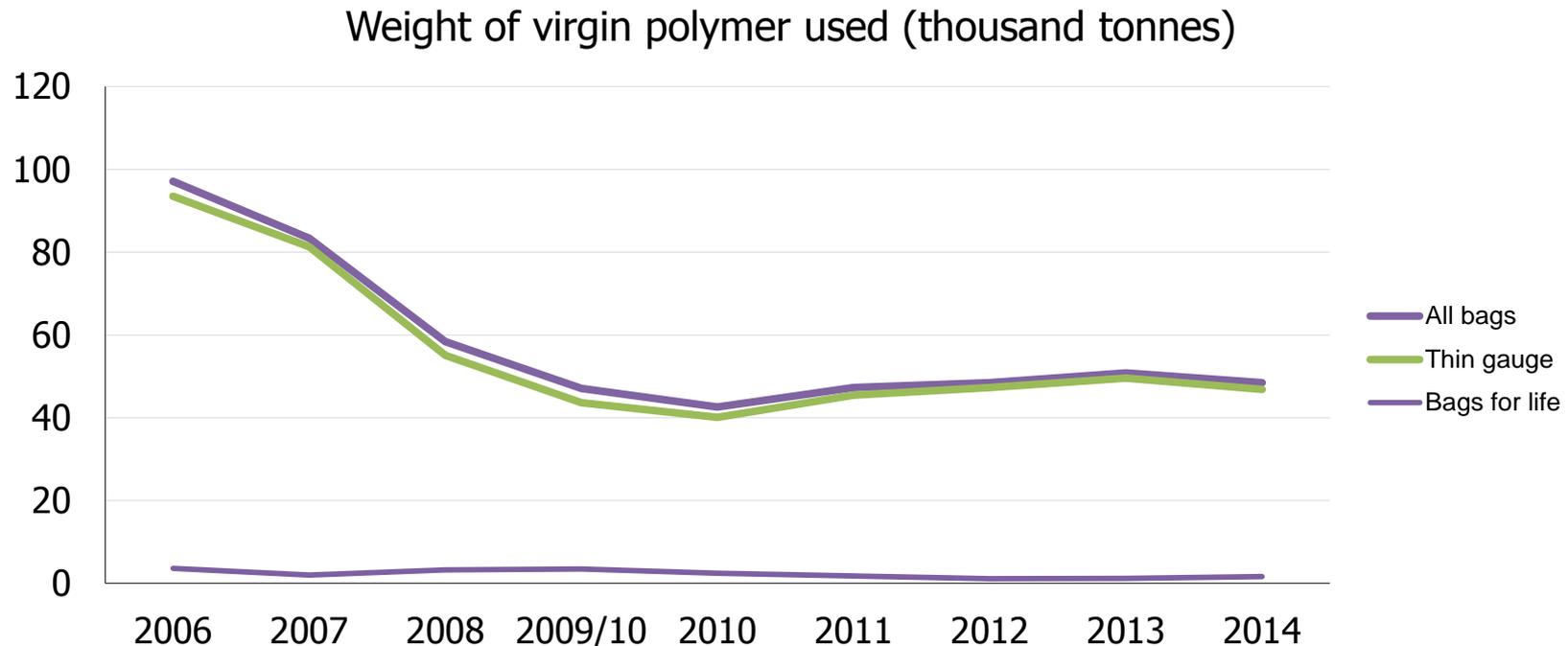
Weight of bags used (thousand tonnes)



Total weight of 'bags for life' used in the UK – by material (participating retailers)



- There has been a 50% reduction in the amount of virgin polymer used in all carrier bags between the baseline and 2013
- Between 2013 and 2014 there was a 4.5% reduction in virgin polymer used in all carrier bags.



Weight of virgin polymer used (participating retailers)

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Results: Carrier bag use in the nations of  
the UK, 2010-2014



- Most retailers are now providing information on thin-gauge bag use for the nations of the UK so comparisons are possible between 2010 and 2014.
- However, comparisons prior to 2010 are difficult because the data are not consistent; as such, they are not presented.
- These estimates are based on reported data for 6 out of the 7 retailers.

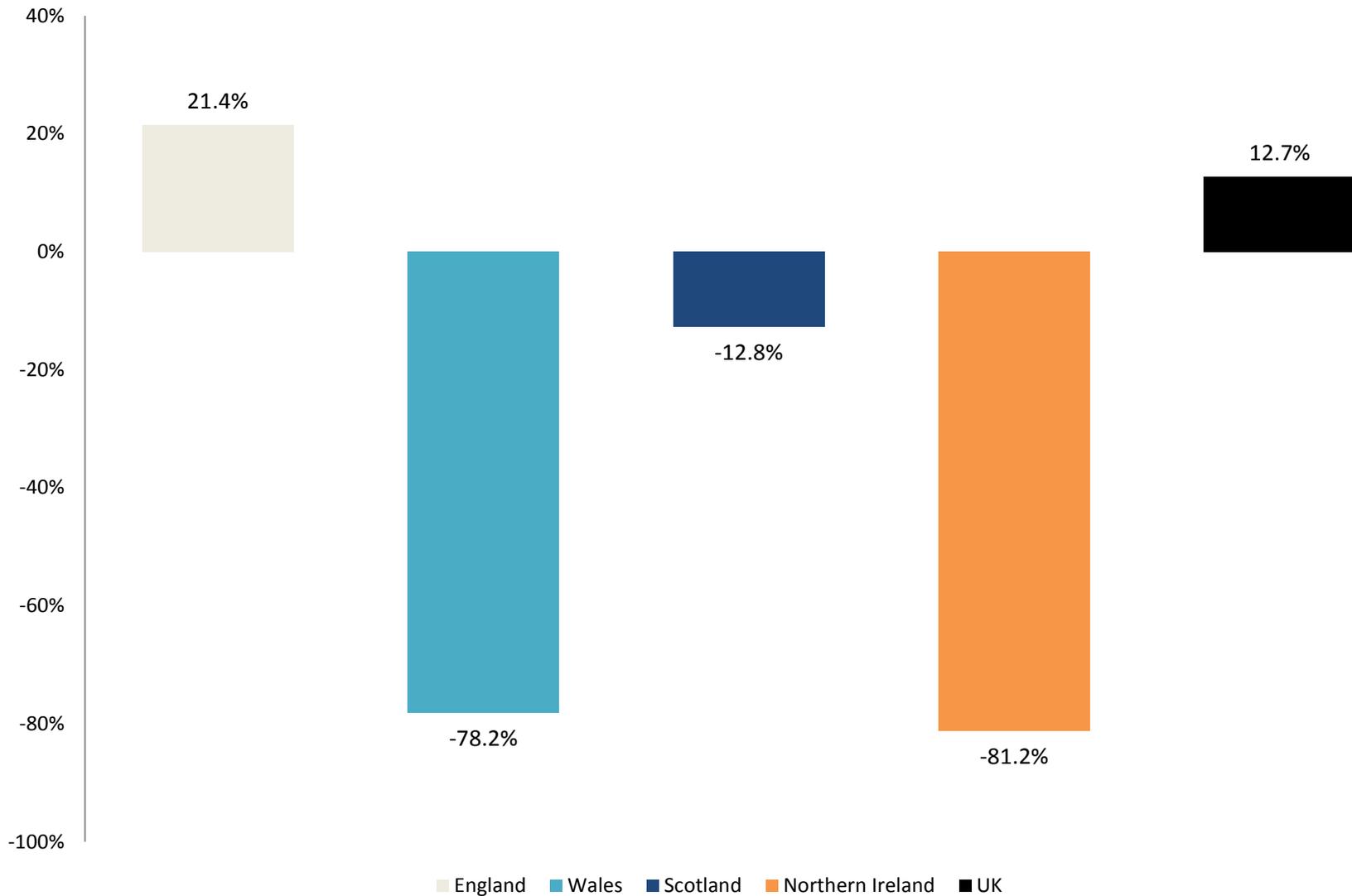
<b>No of bags (millions)</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>% change 2010 to 2014</b>
England	6,287	6,760	7,061	7,402	7,635	21.4%
Wales	351	273	62	73	77	-78.2%
Scotland	752	753	761	803	656	-12.8%
Northern Ireland	173	188	193	57	33	-81.2%
<b>UK*</b>	<b>7,568</b>	<b>7,977</b>	<b>8,079</b>	<b>8,335</b>	<b>8,529</b>	<b>12.7%</b>

The data illustrate a reduction in thin-gauge bag use in Wales in 2012 and in Northern Ireland in 2013 and 2014. In 2014, thin-gauge bag use dropped substantially in Scotland (by 18% of its 2013 value), which could potentially be attributed to the introduction of charging for thin-gauge carrier bags.

\* UK figure contains a small number of bags allocated to Isle of Man, and varies with retailer ability to split data by nation. Nation totals may not sum to UK total

Number of thin-gauge carrier bags by nation





Change in thin-gauge carrier bag use by nation  
2010-2014 (participating retailers)

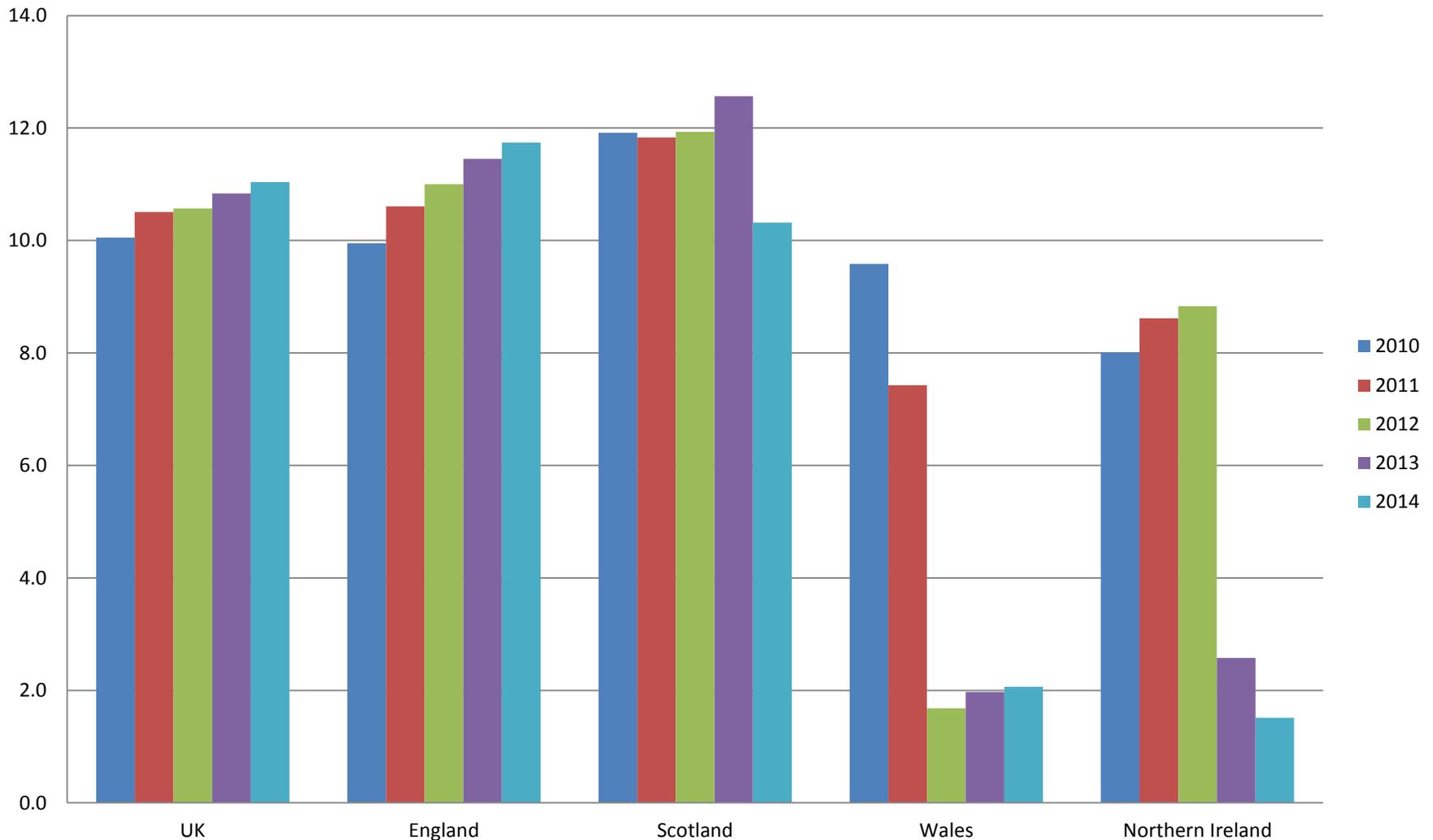
<b>Bags per person per month (ave.)</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009/10</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
<b>UK</b>	16.7	15.0	11.6	9.6	10.0	10.5	10.6	10.8	11.0
<b>England</b>	n/a			0.0	10.0	10.6	11.0	11.5	11.7
<b>Scotland</b>				0.0	11.9	11.8	11.9	12.6	10.3
<b>Wales</b>				0.0	9.6	7.4	1.7	2.0	2.1
<b>Northern Ireland</b>				0.0	8.0	8.6	8.8	2.6	1.6

Population data source: ONS, ONS 2012-based national population projections

Thin-gauge bags usage per capita per month (participating retailers)



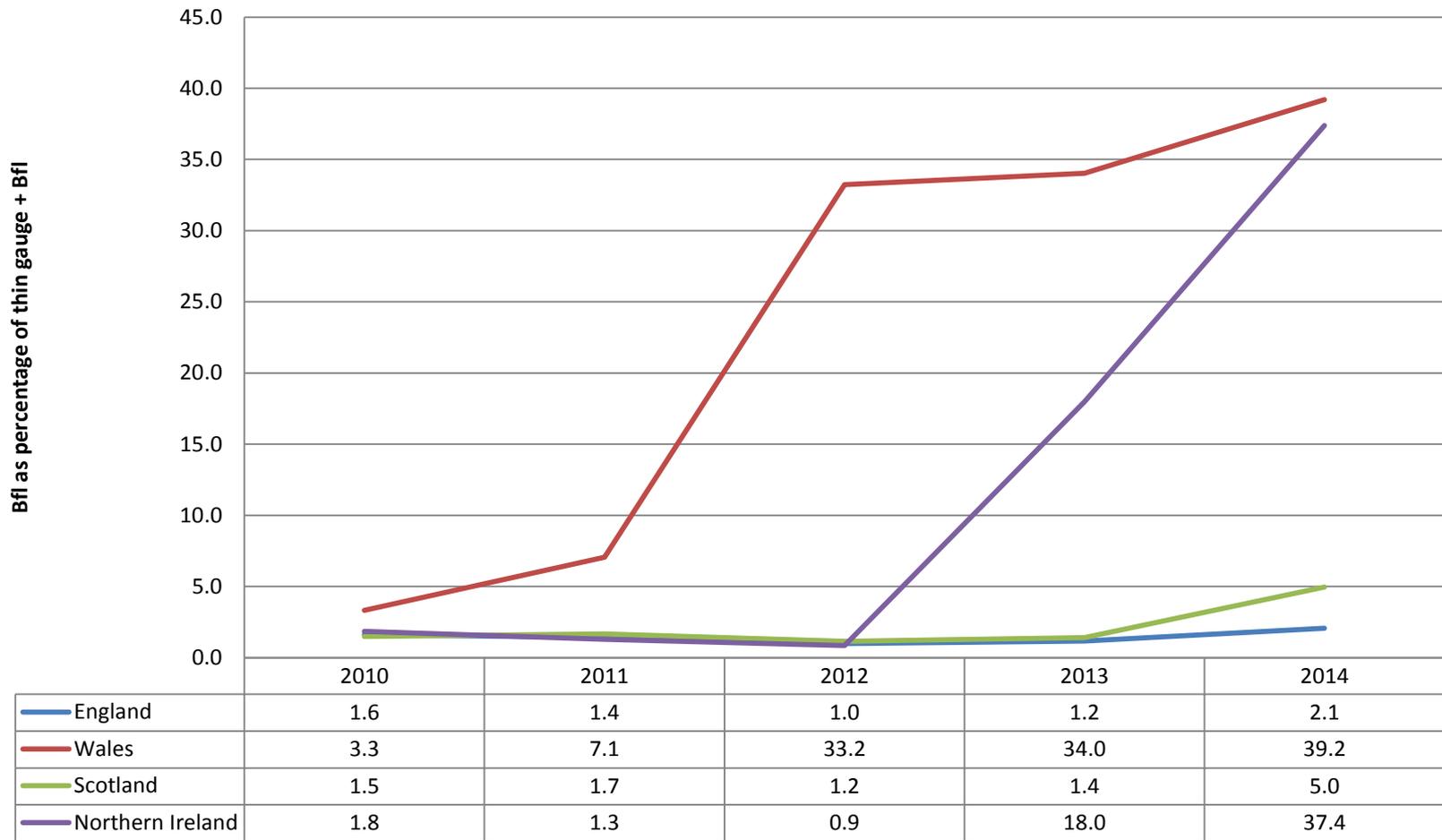
Thin-gauge bags used per person per month 2010-2014



Average thin-gauge bags used per person per month, 2010-2014 (participating retailers)



- The number of retailers providing data on bag for life use by nation varies by both year and nation.
- To enable comparison, the number of reported bags for life (defined here as all non thin-gauge PE bags) per nation / year was reported as a percentage of the total number of bags used.
- The results show that Wales and Northern Ireland now have more than a 1/3 rate of bag for life use, while the rate in Scotland is around 5%. In England, the rate is around 2%.
- Bag for life use in Scotland has quadrupled (albeit from a low base) as a proportion in the past year. This is likely to be a result of the introduction of charging. Bag for life use is also increasing in England; consumers and retailers may be anticipating the introduction of charging in October 2015.

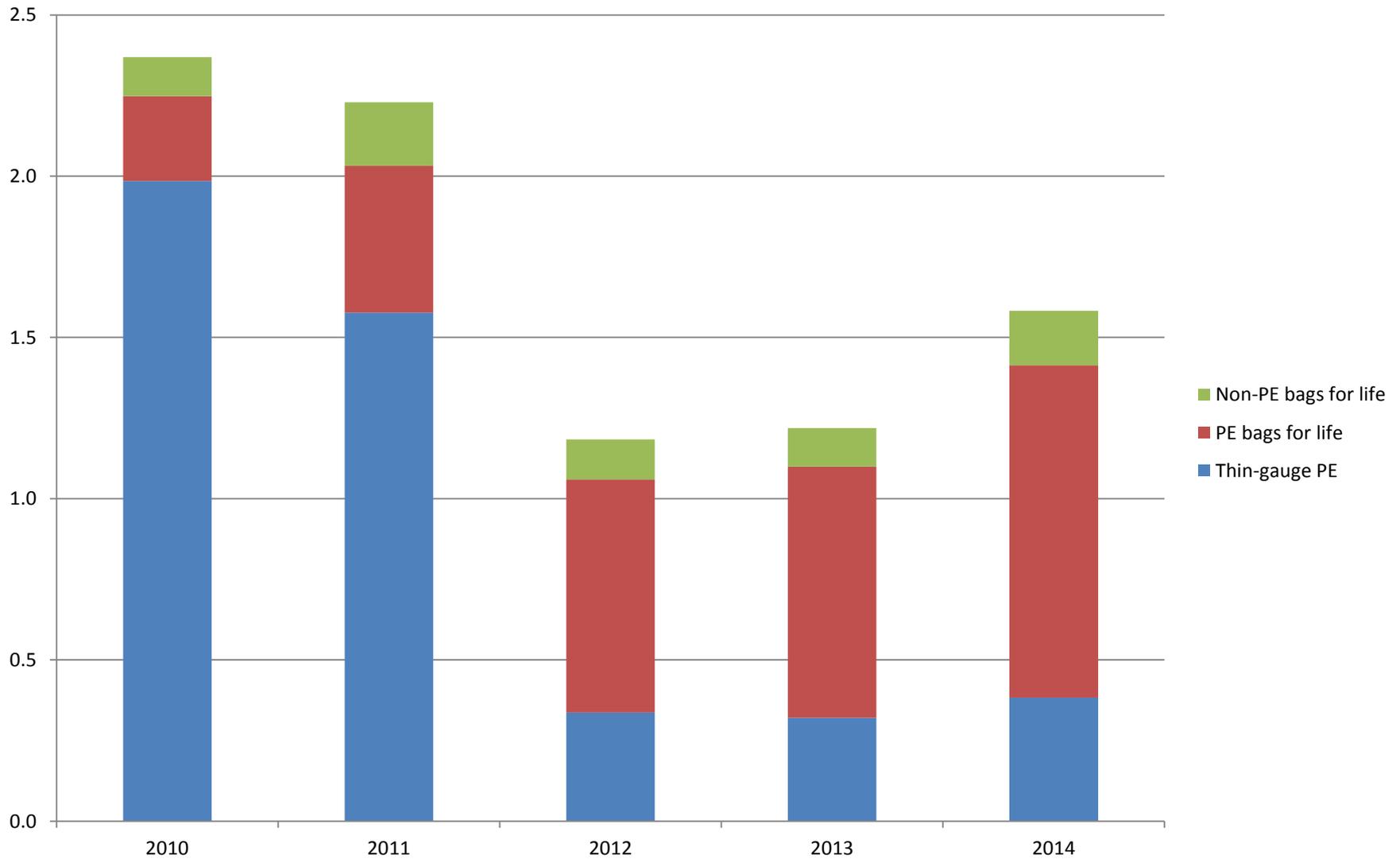


Based on all retailer data available at national level for each individual year . This may vary by year, but the results should not be unduly sensitive as the result is expressed as a proportion, and this approach allows all data to be taken into account.

Trends in bag for life use by nation (% bag for life)



- Five of the seven retailers provided bags for life data for Wales in all 5 years 2010 to 2014, allowing trends in usage to be assessed
- For these 5 retailers,
  - there was a substantial increase in the number and weight of bags for life purchased in Wales between 2010 and 2013. The number of bags for life increased by 165%, the weight by 134%.
- The number and weight increased further in 2014:
  - number: +39% compared to 2013
  - weight: +34% compared to 2013
- The net effect of the changes in both bag types, in terms of weight, is shown in the next slide



Trend in weight of bags used in Wales (data from 5 retailers)

- Three retailers provided data allowing trends in 'bags for life' usage to be assessed in Northern Ireland.
- Based on data from just 3 retailers, the number of bags for life used increased 271% from 2010 to 2013 and 53% from 2013 to 2014.
- The weight of bags for life increased 160% from 2010 to 2013 and 39% from 2013 to 2014.
- The largest jump was seen between 2012 and 2013, with the introduction of the charge for single use bags. Over this period, the number of bags for life, having fallen in previous years, increased by over 650%.

Between 2010 and 2014 grocery volume sales for the participating retailers decreased by approximately 2%. Between 2013 and 2014 sales volume decreased by 1.6%.

The changes seen are different between the 4 nations:

	Change in Sales Volume		Market share (sales volume)
	2010-2014	2013-2014	2014
England	-1.8%	-1.6%	78%
Scotland	-3.5%	-1.6%	77%
Wales (and West)	-2.8%	-2.3%	76%
Northern Ireland	n/a	-0.2%	69%
<b>UK</b>	<b>-2.0%</b>	<b>-1.6%</b>	<b>78%</b>

Data source: Kantar Worldpanel data – sales volume measured in number of packs / items. A major revision of Kantar data means that the current dataset only goes back to 2009 (GB) and 2011 (NI)

- Retailers were asked to supply information about front-of-store recycling of carrier bags. Four retailers provided this information for 2014, while three no longer collect this data.
- From the retailers that responded, 1,940 out of 2,862 shops (68%) had front-of-store recycling for carrier bags.
  - This has increased from 40% in 2013, but is based on a smaller number of retailers (four as compared with six in 2014).
- It is not possible to provide a national breakdown, as recycling point data was provided at a UK level only.
- Only one retailer reported other information about front-of-store recycling, noting that other plastic films were accepted by the collection but not publicised, and that material collected is consolidated with back-of-store film before being sent for recycling.

- **Total bag use increased between 2013 and 2014** (by 2.4%) continuing the trend since the end of the voluntary agreement, but was still lower than in 2006 (by 28%).
  - Thin-gauge bags constitute 95% of all bags used and so the trend in total bag use mirrors the use of thin-gauge bags.
  - The number of bags for life issued is also increasing but from a much smaller base.
- **The amount of virgin polymer** used in carrier bags has decreased slightly, and is now at 50% of its 2006 value.
- **Thin-gauge bag use per capita** has been increasing since 2009, to 11 bags per month in 2014, but still lower than the 16.7 bags in 2006.
- **Retailers' sales volume** decreased by 2% between 2010 and 2014.
- Around 68% of grocery stores from the retailers that responded have a **facility to recycle plastic-film and carrier bags**.

- **Trends in thin-gauge carrier bag use differed between nations between 2010 and 2014:**
  - England increased.
  - Wales, Scotland and Northern Ireland decreased.
- **Bag use per person per month** also differs.
  - A steady year on year increase in England.
  - A decrease in Scotland, following a small increase in 2013.
  - The decline in Wales in 2012 has reversed in 2013 and 2014 but only slightly.
  - Northern Ireland has shown a marked decrease.
- These figures give an indication of **the impact of the introduction of the carrier bag charge.**