
UK Supermarket Retailers Voluntary Carrier Bag Agreement

2011 Carrier Bag Use

WRAP

July 2012

Contents

- **Background**
- **Scope of monitoring**
- **Headline results for 2011 carrier bag use**
- **External communications plan**

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.
- 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.
- **An agreement to continue monitoring carrier bag use during 2010 and 2011 was made – although no formal target was agreed to measure against.**
- Participating retailers are: Asda (including ex-Netto stores), Co-operative Group, Marks & Spencer, Morrison's, Sainsbury's Supermarkets Ltd, Tesco and Waitrose.

Voluntary Carrier Bag Agreement - Monitoring

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

Individual retailers were contacted directly to ascertain the performance of participating retailers.

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.

Basis of Reporting

- Results are presented for 12 month periods: 2006, 2007, 2008, 2009/10^a, 2010 and 2011
- 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^b and reusable bags (split into polyethylene bags for life and other reusable bags)
- Data for the four nations within the UK has been presented using information reported by the majority of the retailers
- Data on volume sales (packs sold) was 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.

Results: Carrier bag usage, 2006-2011

Total Number of bags

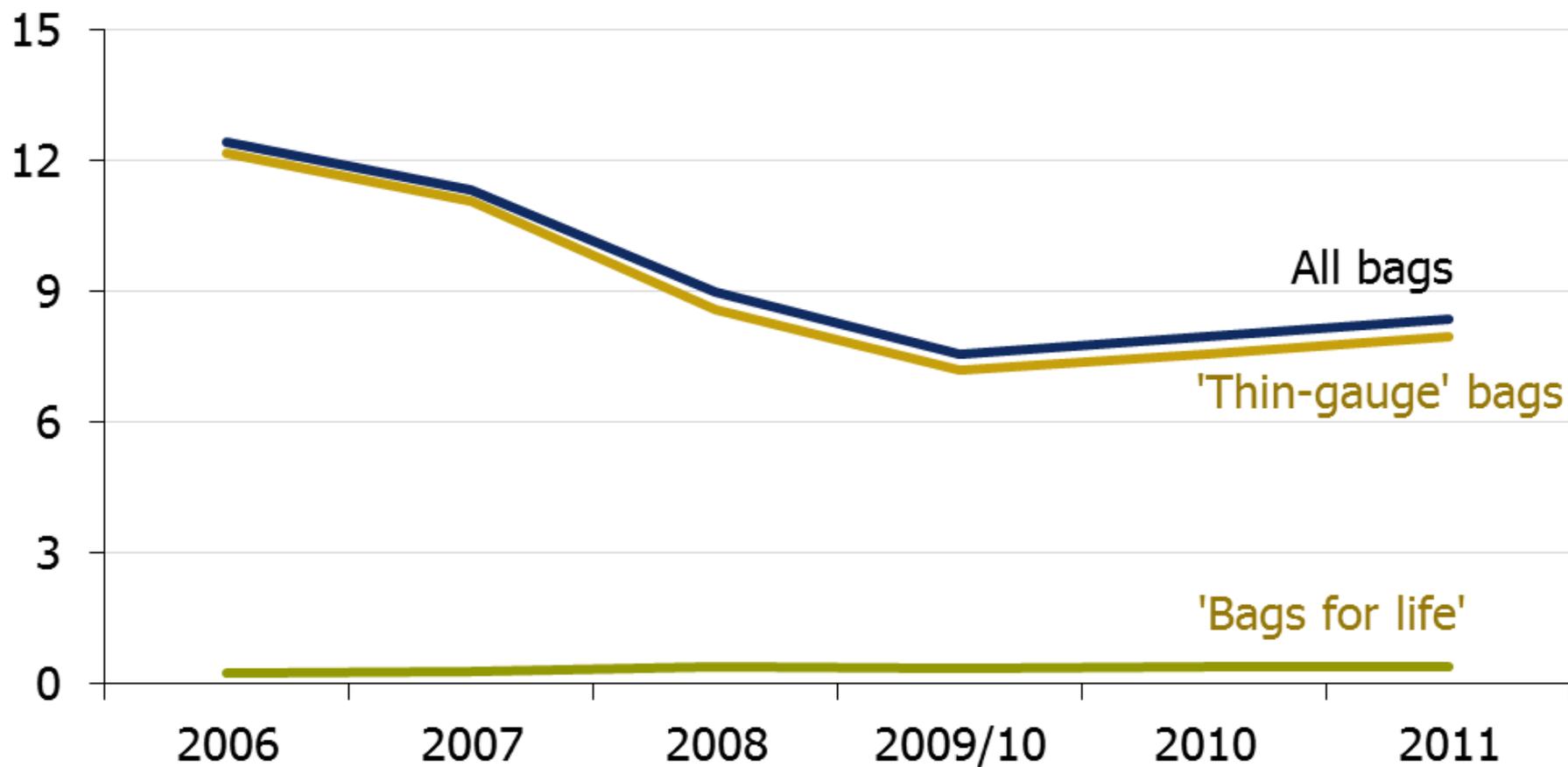
- In 2011, **8.4 billion bags** were used by supermarket retailers
- This compares to **12.4 billion bags** in 2006 and **8.0 billion bags** in 2010
- These figures represent an increase of 5.2% between 2010 and 2011, and a reduction of 32% since the baseline year of 2006

'Total carrier bags' includes:

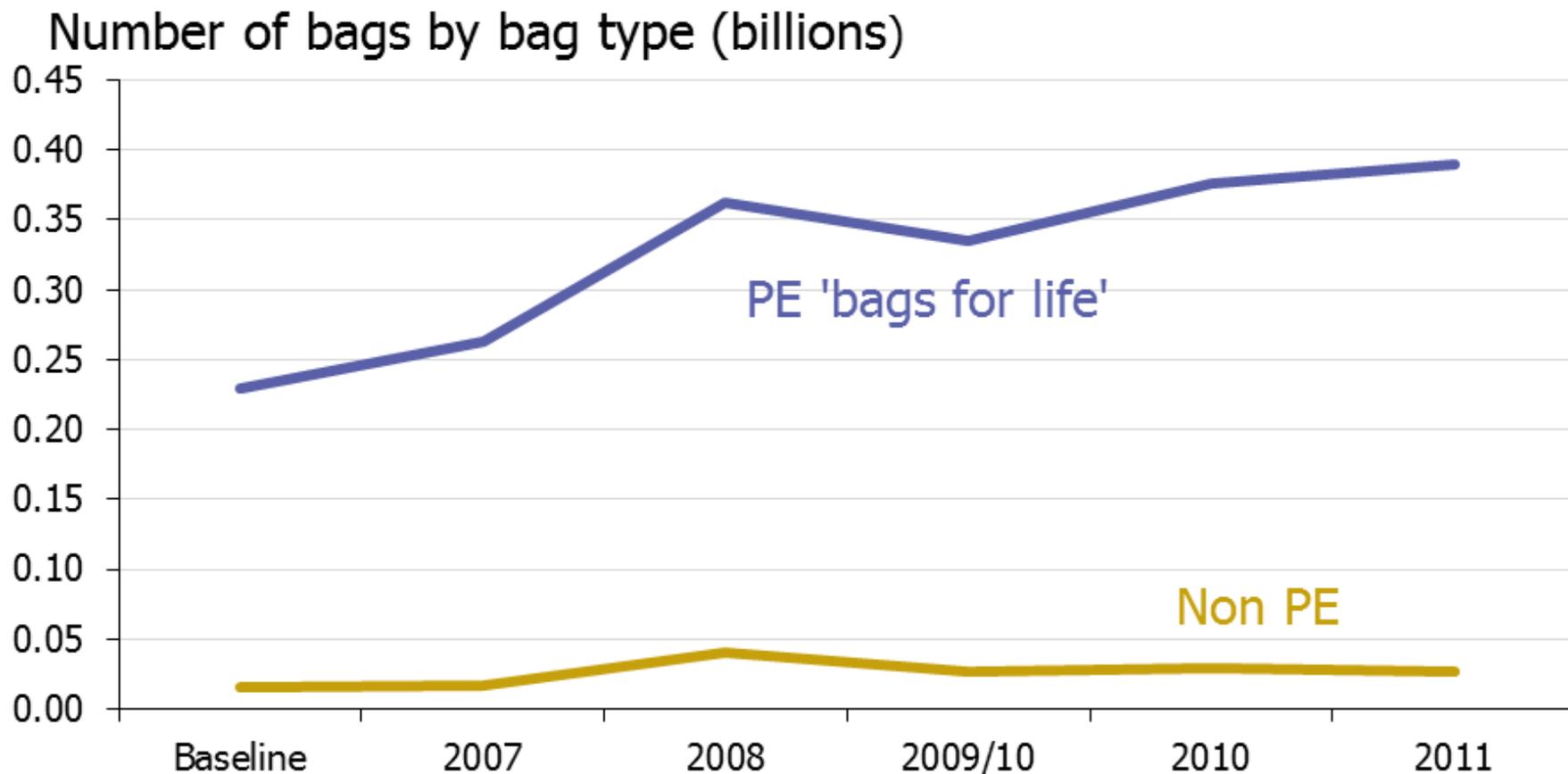
- Thin-gauge (sometimes referred to as 'single-use' bags), and
- Bags for Life ('reusable' bags) such as cotton, jute and polypropylene bags

Total Number of bags

Number of Bags (billions)



Numbers of Total Bags – by Bag Type



PE = polyethylene

Weight of Total Bags

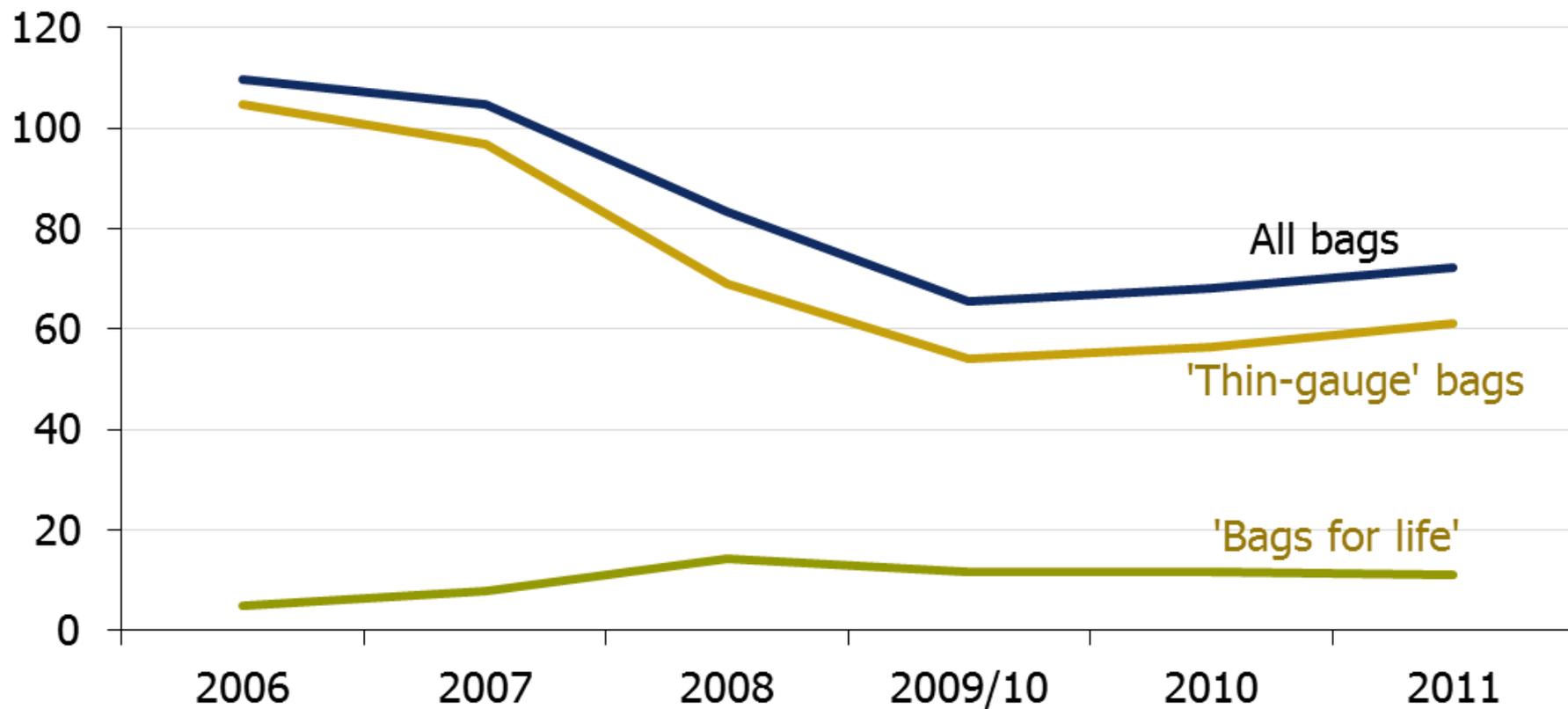
- In 2011, total carrier bags weighed **72,300 tonnes**.
- This compares to **109,800 tonnes** in 2006 and **68,300 tonnes** in 2010.
- These figures represent an increase of 5.8% between 2010 and 2011, and a reduction of 34% since the baseline year of 2006

'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

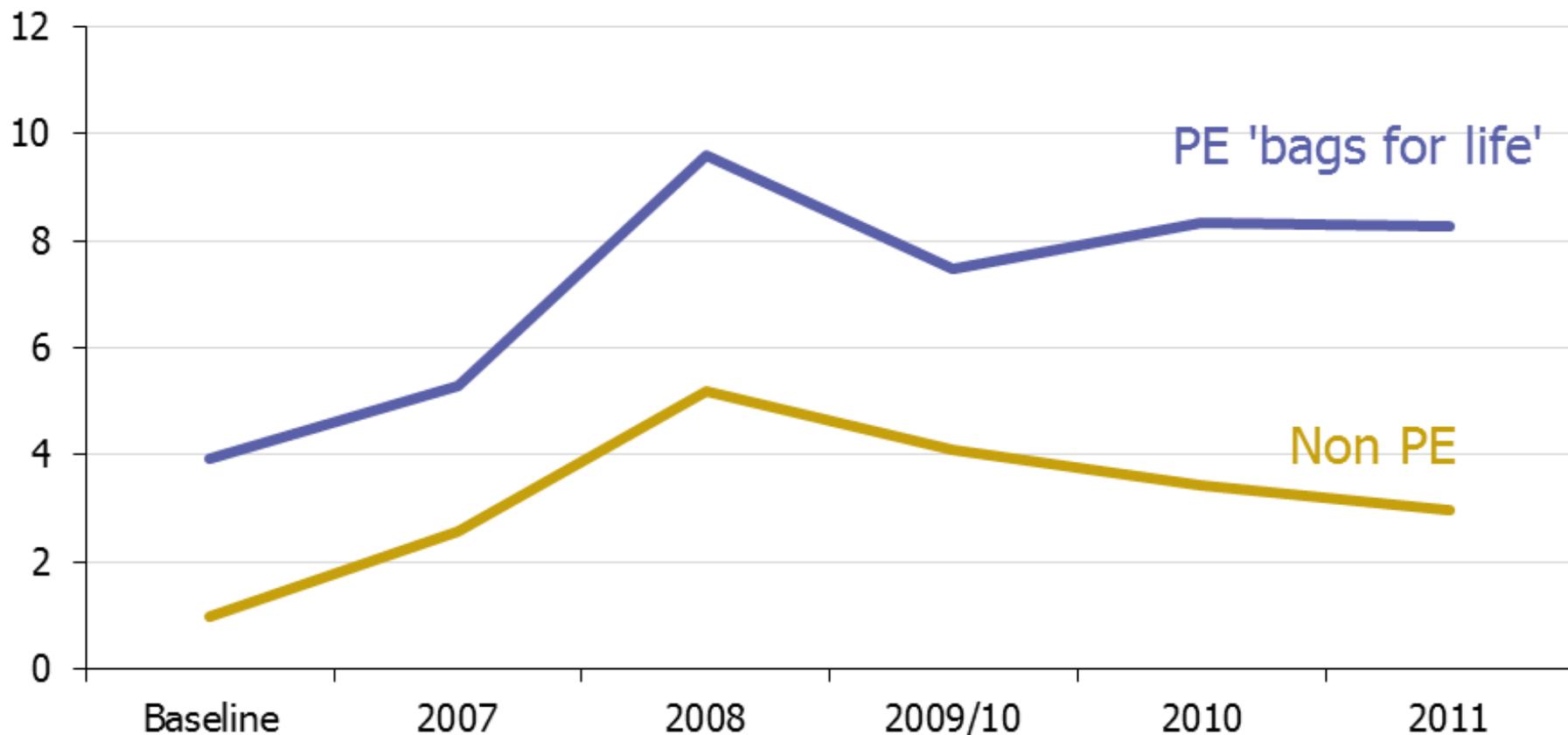
Weight of Total Bags

Weight of bags used (thousand tonnes)



Weight of Total Bags – by Bag Type

Weight of bags by bag type (thousand tonnes)

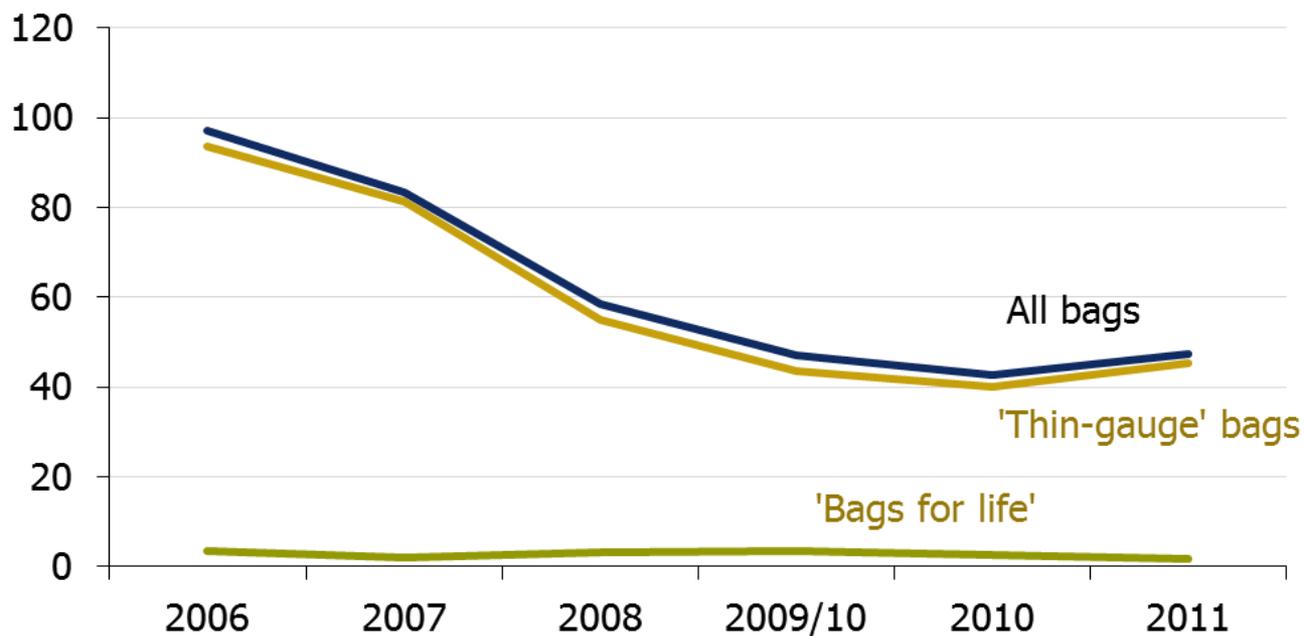


PE = polyethylene

Weight of Virgin Polymer Used

- There has been a **51% reduction** in the amount of virgin polymer used in all carrier bags between the baseline and 2011
- Between 2010 and 2011 there was a **11% increase** in virgin polymer used in all carrier bags.

Weight of virgin polymer used (thousand tonnes)



Numbers of Thin-Gauge Carrier Bags – breakdown by Nations

- Retailers are now providing more information on bag use for the nations of the UK. This means that the quality of the data has improved, but comparisons with years prior to 2010 are problematic
- Given this and the inclusion of Morrison's data, comparison of 2010 and 2011 are presented
- These estimates are based on reported data for 6 out of the 7 retailers – the split of the 7th retailer is modelled using sales data. This modelling will have a negligible impact on the results presented.

Numbers of Thin-Gauge Carrier Bags – breakdown by Nations

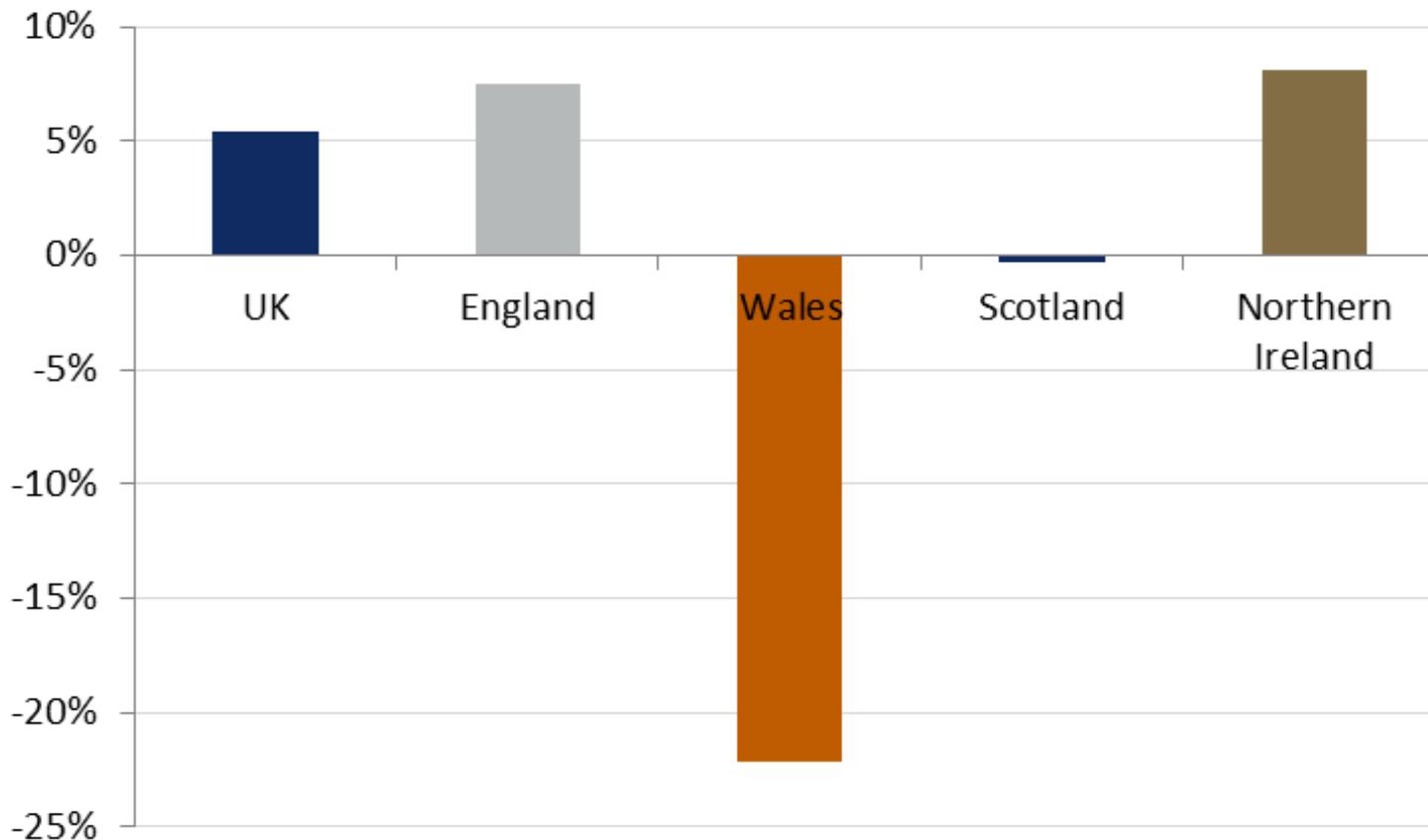
	Bag (billions) ⁱ		% change (2010 - 2011)
	2010	2011	
UK	7.57	7.98	+5.4%
England	6.29	6.77	+7.5%
Wales	0.35	0.27	-22%
Scotland	0.75	0.74	-0.3%
Northern Ireland	0.17	0.19	+8.1%

The Welsh carrier-bag charge had a substantial immediate effect, much greater than that revealed by the trend in annual data. The longer-term effects will be understood through continued monitoring of carrier bag use

ⁱ Rounding may cause apparent discrepancies between the figures for the Nations and the total UK row

Numbers of Thin-Gauge Carrier Bags – breakdown by Nations

Change in thin-gauge carrier bag use, 2010 to 2011



Thin-Gauge Bags Used Per Capita per Month

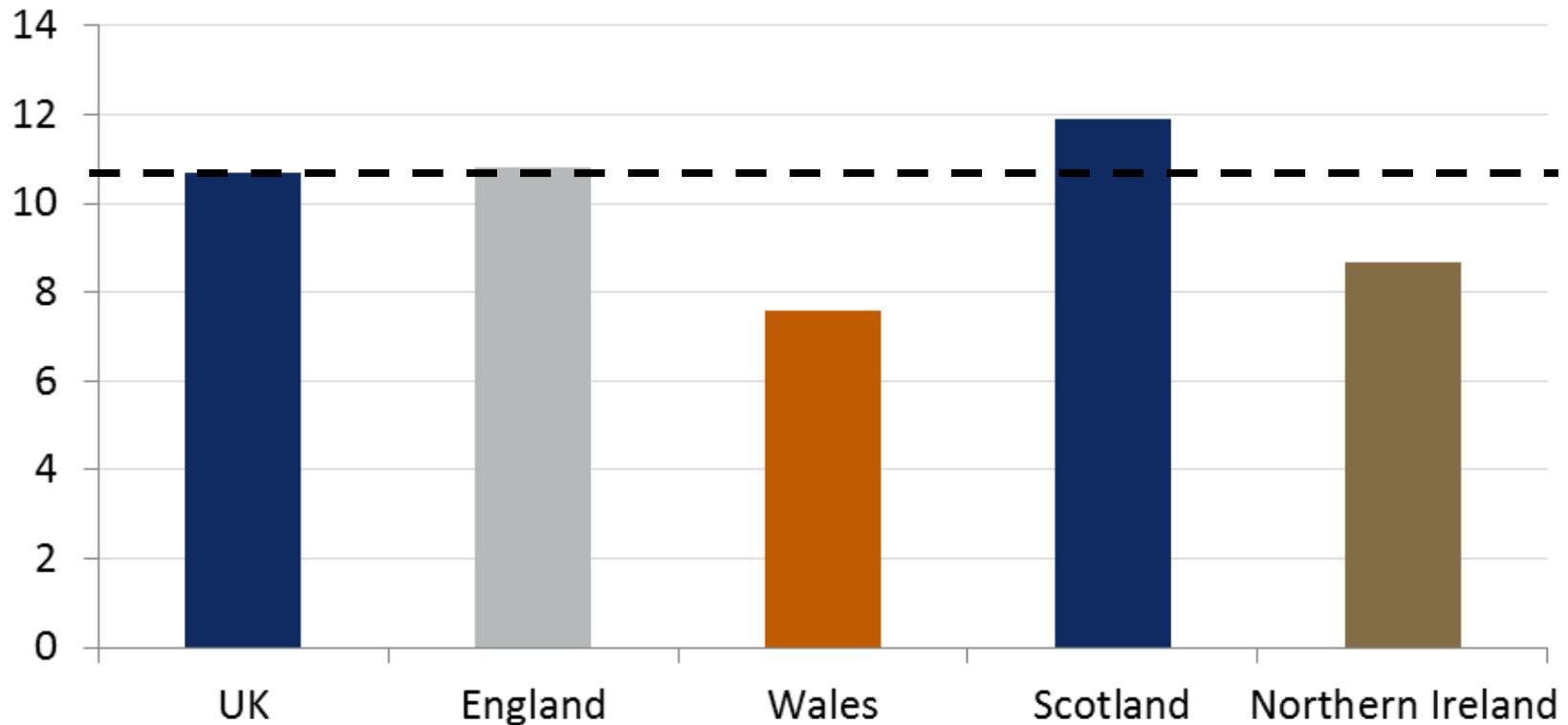
Bags per person per month	2006	2007	2008	2009/10	2010	2011
UK	16.7	15.1	11.7	9.7	10.1	10.7
England	n/a				10.0	10.8
Wales					9.7	7.6
Scotland					11.9	11.9
Northern Ireland					8.0	8.7

NB: Figures differ from those reported last year due to inclusion of Morrison's data for all years

Data source: Population data - 2006 - 2010 (mid year estimates, ONS), 2010 population used as proxy for 2011 population data

Thin-Gauge Bags Used Per Capita per Month

Thin-gauge bags used per person per month



Bags for life in Wales

- Four retailers provided information allowing trends in Bags for Life in Wales to be accessed
- For these retailers, there had been a sharp increase in the number of bags for life purchased between 2010 and 2011 in Wales (+142% i.e. more than doubling)
- In contrast, in the UK and for the same retailers, Bag for Life purchases fell by 13%
- Considering the **weight of bags in Wales**, the increase in bags for life purchased was approximately two-thirds of the reduction in weight of thin-gauge bags (i.e. a large proportion of the reduction in material use associated with fewer thin-gauge bags was negated by more bags for life)
- To fully understand these impacts, monthly data for 2011 from retailers and the purchases of bin liners in Wales should be obtained and analysed. Ongoing impacts into 2012 should also be analysed.

Context Data – Sales Growth

Volume sales for supermarket retailers increased by **8.8%** between 2006 and 2011, an annual increase of 1.7%. Between 2010 and 2011 volume sales decreased by **0.2%**.

The changes seen are different between the 4 nations:

	Change in Sales Volume	
	2006-2011	2010-2011
England	+8.3%	0.0%
Scotland	+3.5%	-1.9%
Wales (and West)	+11%	+0.3%
Northern Ireland	+41%	-2.2%
UK	+8.8%	-0.2%

Summary - UK

- **Total bag use increased between 2010 and 2011** (by c. 5-6%) but was still lower than in 2006 (by around a third)
- **The amount of virgin polymer** used in carrier bags decreased by 51% between 2006 and 2011
- **Trends in thin-gauge bags were similar to total bag use**
- **Thin-gauge bag use per capita** increased from 10.1 bags per month in 2010 to 10.7 in 2011, c.f. 16.7 bags per person in 2006
- **Retailers' sales volume** has increased by **8.8%** between 2006 and 2011

Summary - Nations

- **Trends in thin-gauge carrier bag use differed between nations between 2010 and 2011:**
 - England and Northern Ireland saw increases
 - Wales saw a marked reduction (22%)
 - Scotland saw no substantial change
- These figures give an indication of **the impact of the introduction of the carrier bag charge in Wales**
- **Bag use per person per month** reflects these differences: ranging from 7.6 in Wales to 11.9 in Scotland
- **The data quality** for the nations within the UK is much improved for 2010 and 2011