



A Qualitative Study of Grocery Bag Use in San Francisco

This summarizes the findings of a store check of San Francisco grocery outlets to determine the effects of the City's ban on traditional plastic bag dissemination.

Background

On November 20, 2007, the City of San Francisco banned the use of non-compostable plastic checkout bags in supermarkets and grocery stores doing at least \$2 million in annual sales. The Ordinance requires the use of recyclable paper bags; compostable plastic bags; or bags with handles specifically designed for multiple reuse, defined as durable plastic bags at least 2.25 mils thick. Further, under California AB 2449, stores in areas where plastic bags are banned are no longer required to recycle plastic bags, including dry cleaning bags, newspaper bags, and plastic films.

To determine the impact to date of the Ordinance, Robert Lilienfeld, President of The Cygnus Group and Editor of *The ULS Report*, traveled to San Francisco to observe store and customer bag usage and activity. A total of 25 retail stores were visited.

The Retail Environment

The store check encompassed all of the major retailers in the City. For reference, significant changes in food retailing have occurred here in the last 10 years. First, consolidation has reduced the variety of major outlets: Safeway purchased and assimilated Von's; and Kroger purchased both Fred Meyer and Ralph's and is operating mainly under the Foodsco and Cala names, respectively. Second, two "greener" retailers have created a reasonable presence in the market. Both Whole Foods and Trader Joe's have established themselves as viable alternatives to Safeway et al.

It should be noted that as in other big cities, independent food stores are a significant presence, serving local neighborhoods in which walk-in traffic and convenience are critical. Also, major drug chains such as Walgreens are both ubiquitous and competitive with traditional food retailers: Walgreens uses food to battle Safeway, which competes by offering pharmacy services, vitamins & supplements, and HBA products.

Methodology

Retail outlets were visited from September 14 to 17, 2008. Stores were walked through, store personnel were questioned, checkout activities were observed, and customers' bagging preferences were reviewed.

A total of 25 retail visits occurred, as shown below. This list represents many, if not most, of the retailers covered by the ordinance. It also represents a very significant percentage of retail volume in the City. (See the Appendix for store locations and observation notes.)

Safeway – 3 stores (All 3 in the City)
Kroger – 2 stores (Representing both Fred Meyer and Ralph's)
Whole Foods – 3 stores (All 3 in the City)
Trader Joe's – 1 store (The major store in the City)
Independents – 7 stores (1 large store, Harvest Urban Market, and 6 small "corner" stores)
Walgreens – 7 stores
Rite Aid – 2 stores

9/22/08

Findings

1. All food chains affected by the ordinance have switched back to paper bags, with none offering plastic of any type. In all cases, the only plastic bags present were those used for self-bagging of produce items.
2. Among drug store chains, Walgreens appears to be meeting the ordinance by offering paper bags or heavy HDPE plastic bags marked "REUSABLE" (see attached photo), while Rite Aid has switched completely to paper. Interestingly, the overwhelming majority of Walgreens purchasers chose the plastic over the paper bags.
3. The number of consumers bringing their own bags was judged to be minimal, and not greater than in other cities. Very few people were seen bringing reusable bags to the stores, no more than the observer has seen being used in other metropolitan areas such as Detroit or Chicago.
4. Paper use was judged to be excessive. A significant amount of double bagging occurred, of which much was fostered by store employees. In many cases, baggers simply assumed that customers wanted bags doubled. This was especially true in Trader Joe's (see attached photos).
5. In some cases, plastic bag recycling bins have been removed. Only one of the three Safeway stores had a recycling bin. Employees in the other two stores said that the bins had been removed, but they did not know when or why. In all cases where bins were still available, they were not placed in easy-to-spot or use locations.

The one exception was Whole Foods, which had bins in all three stores, placed at the entrance. Unlike other grocery retailers, Whole Foods has turned its bins into a marketing advantage by creating a recycling display that positions the company as a concerned environmental citizen (see attached photo).

6. Even if bins were available, store employees were generally not aware of their presence or appropriate use. After being told that there was no available plastic bag recycling bin in one Safeway, this writer found it hidden in a far corner of the store (see attached photo). Interestingly, there were quite a few bags in it.

Employees in the two Kroger-owned stores stated that there were no bins, even though they were actually fairly well hidden in the front of the stores. (One employee told a customer to recycle her unwanted paper bag in the bin, even though it had large lettering stating "Plastic Bags Only" (see attached photo).

The Trader Joe's manager stated that there was no bin in his store, but he would be happy to put customer bags in his baler.

7. No compostable plastic bags were found. One independent store, Harvest Urban Market, gave out plastic bags labeled as “recyclable” and “100% Totally Degradable.” (The bag was made with TDPA from EPI.) Given the relatively large size of this store, it is suspected that the Ordinance is relevant but these bags do not appear to meet the requirement of being compostable (see attached photo).
8. Independents continue to offer primarily plastic bags. The reasons for doing so appear to be cost, reduced storage needs, convenience and customer preference.

Conclusions/Indicated Action

1. If reducing environmental impact is the objective of the Ordinance, results to date do not indicate it will be successful. First, little use of reusable bags was observed. Second, the replacement of plastic by paper and the return to double bagging may actually increase environmental impact, as many peer reviewed lifecycle studies indicate that paper bags use more energy, produce more waste, and generate more greenhouse gas emissions than do plastic bags. (See the ULS website at www.use-less-stuff.com for a review of these studies.)
2. Given the demand for recycled plastic combined with the desire of many consumers to help recycle, the State of California should consider revising AB 2449 to ensure the presence of plastic bag recycling bins in all larger stores, regardless of bans. The plastic bag recycling bins that were still available in San Francisco contained dry cleaning bags, produce bags, and bags from non-grocery retailers.

Based on this continued use of existing bins, there is still public desire to recycle plastic bags, and apparently awareness that it is valuable to do so. Given the fact that there is still significant usage of plastic bags in San Francisco among independent grocers and other retailers, these bins can help ensure that plastic recycling rates improve, and the volume of recycled material increases.



Robert Lilienfeld, Editor

Appendix: Stores Visited and Notes

Safeway, 1335 Webster

Virtually everyone used paper bags, some double bagging.
Only saw 1-2 people using reusable tote bags
No plastic bags of any type

I asked one of the customer service reps if they had a recycling bin for plastic bags. She said "no" and that I would need to go outside to the recycling center. I actually found the plastic bag recycling bin in a hard-to-find corner, right behind customer service where we were standing! There were a fair number of bags in the bin.

Safeway, 2020 Market

Virtually all paper bags, some double bagging. A few more reusable totes than in other store. (Less affluent neighborhood with younger crowd.)

One man was hoarding plastic produce bags. Wanted them for his dogs.

No recycling bin. Assistant Manager told me it was taken away a few weeks ago and didn't know why. Asked a few other people and they didn't know why either. (Store was undergoing renovation in the area where the bin used to be placed.)

Safeway, 2300 16th St

Could not find plastic bag bin. Was told by customer service rep that there wasn't one.

Most people using paper bags, including double bags. Some reusables, but not many.

Trader Joe's, 555 9th

As expected, more people using totes, but not a large number.

However, significant use of paper bags and double bagging of paper!

Asked manager if there was a plastic bag recycling bin and he said no, but I could use their baler.

Walgreens

In about 8 Walgreens, all but one offered plastic bags. Bags are heavy HDPE marked Recyclable and Reusable. These bags appear to meet the Plastic Ban Ordinance, which allows *"reusable bags," which are defined as bags with handles that are specifically designed and manufactured for multiple reuse and is... made of durable plastic that is at least 2.25 mils thick.*

Rite Aid

Found no plastic bags at all, only paper. Was told this is their City policy.

Foodsco, 1800 Folsom (used to be Fred Meyer, now part of Kroger)

Was told by store employee that there was no plastic bag recycling bin, but found it at the front of the store in a corner. Saw only paper bag use, no reusable bags.

Cala, 1095 Hyde (used to be Ralph's, now part of Kroger)

Told that there was no bin, but found it hidden up front. Also watched store employee tell customer to recycle paper bags in it, when it clearly said "Plastic bags only." Saw only paper bags being used, no reusables.

Whole Foods, 399 4th, 1765 Franklin, 450 Rhode Island

Recycling bin in front of all 3 stores. Staff reasonably knowledgeable. In 4th Street store, I asked someone if they had a bin, and he said no. Another employee overheard and said yes but didn't know where. I found it right in the front of the store. In the two other stores, employees knew exactly where it was.

Most people used paper, some double bagging. More reusable totes than in other stores.

Independents:**Harvest Urban Market, 191 8th St**

Large block-long store had plastic bags stating they are "100% Totally Degradable" with a recycling symbol (no number) and World4Green on the bags. The bags also had the EPI trademark, indicating they contain TDPA. Bags not compostable as stated.

People took both paper and plastic, double bagging the paper!!! Store had no plastic bag recycling bin.

Mi Tierra Market, Howard & 6th

Plastic bags, no recycling bin

Hyde & O'Farrell Market, 701 O'Farrell

Plastic bags, no recycling bin

Sutter Fine Foods, 988 Sutter

Plastic bags, no recycling bin

Geary & Hyde Market, 798 Geary

Plastic bags, no recycling bin

Market Mayflower, 985 Bush

Plastic bags, no recycling bin

Round the Clock Market, Bush & Jones

Plastic bags, no recycling bin

More Groceries? More Paper!

If people were buying lots of food, they used lots of paper, in terms of both the number of bags and double bags (especially at Trader Joe's).

Very few people buying large amounts brought their own bags. In fact, only one person out of the approximately 800-1000 observed had a reusable bag that was big enough to carry the equivalent of 3-4 paper bags of groceries.



Double Bagging

Plenty of double bagging was seen, across all stores. Trader Joe's had the most double bags, with store personnel actively encouraging it. Other stores encouraged it, too. In the bottom middle photo, double bagging was pre-set by Safeway personnel. In the last photo, the woman at Cala (Kroger) asked to have her double bag removed. (A friendly clerk took it from her, and put it in the Plastic-Only recycling bin!)



Whole Foods Store Entrance Display and Bin



Hidden Safeway Bin



Bin That Cala Employee Used for Paper Bags





Walgreens

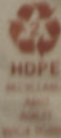
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WALGREENS KEEP THIS BAG AND THE MATERIALS AND LABELS FROM IT OUT OF THE TRASH. REUSE OR RECYCLE IT. PLEASE DON'T BURN IT. KEEP IT AWAY FROM HEAT AND MOUTH AND FIRE. SEE 501199.

REUSABLE

Harvest Uptown Market Plastic Bag

THANK YOU



100% Totally Degradable
World4Green