LIFTING THE LID

REPORT

National Recycling Bin Survey 2025

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VOICE: CHY 13196 and CRA 20040437.
We are a Company Limited by Guarantee, CRO275127.

Contact
info@voiceireland.org
+353 1 642 5741
www.voiceireland.org
VOICE 9 Mount Street Upper
Dublin 2 D02 K659
Republic of Ireland

Social Media
@sickofplasticireland
@voiceireland

Written by Solene Schirrer,
VOICE Project Manager

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Executive Summary

Plastic pollution is no longer just a waste issue: it's a planetary crisis. Plastics are present in every environment and in our bodies, with microplastics found in humans, animals, oceans, soil, and even the air we breathe. Some scientists, artists, and activists have gone so far as to name it the "Plasticocene"[1], a new geological epoch defined by plastic's lasting imprint. Globally, plastic production emits over 50 million tonnes of greenhouse gases annually. Half of all that plastic is designed to be single-use, often discarded after just 12 minutes.[2]

In this global crisis, Ireland is no different. In fact we are the number one producer of plastic packaging waste per capita in the EU, with 67 kilograms in 2023, which is a 50% increase since 2013[3]. In the past 10 years we have become completely reliant on single use packaging, mainly made of plastic, a consumption model that cannot be made sustainable.

Moreover, Ireland's current recycling rate for plastic packaging of 32% is falling short of our EU targets of 50% by 2025[4]. In contrast, it is now believed that plastics will never fully decompose into the environment but instead continue to break down into smaller pieces, from microplastics to particles known as nanoplastics.

In order to tackle this crisis we need to work backwards and look at the sources of waste. The National Recycling Bin Survey is the first in Ireland to analyse household recycling waste and attribute such waste to specific retail sectors. The results of the Survey included **129** people in **50** households across **14** counties. Participants audited a total of **9,407** waste items, producing several key findings.

Main Findings

73

Every two weeks, an average of 73 plastic and packaging items are put into the recycling bin per person

70%

of waste items in the average recycling bin in Ireland originated from the supermarket

48%

of waste items in the average recycling bin in Ireland were plastic

65%

Existing solutions were able to cut packaging by 65%

This year also includes Top 5 Irish Supermarkets price/packaging comparison! → Pages 18 to 21

Actions and Policy priorities

Based on the findings of this second National Recycling Bin Survey (NRBS25), it's clear that household packaging waste remains high and retail responsibility is growing. To address this, we propose a series of focused recommendations targeting government, supermarkets and the retail sector as a whole. These actions aim to reduce packaging at the source, expand reuse and refill systems, and ensure fair access to zero waste solutions across Ireland.

Make reusable packaging the norm across all retail sectors, with strong targets to shift away from single-use.

Ensure supermarkets offer refill options at scale, by requiring 20% of floor space in shops over 400m² to be dedicated to refill by 2030.

Phase out single-use in the takeaway sector, making reuse the default for food and drink packaging (75% reusable packaging by 2030)

Reduction of packaging quantities, not only their weight, focusing especially on supermarkets where overpackaging is growing.

Track national progress on reuse and circular systems, through a public, central observatory based on France's model.

Make zero waste and healthy food accessible to all, by supporting local refill hubs and lowering the cost of loose, organic goods.

Introduction

The EU's Directive for Single Use Plastic estimated that, alongside fishing equipment, 70% of marine litter is made up of ten everyday plastic items. These items are products (or byproducts) we purchase at our local supermarkets, stores and takeaways such as beverage containers, plastic cutlery, food packaging and plastic bags. Despite years of efforts to develop recycling infrastructure for these materials, we have to face the fact that recycling is will not solve this crisis. The use of plastic needs to be reassessed and drastically cut down to essential use rather than the current convenience-based consumption that wastes beyond imagination. To initiate the necessary change, we need to attribute responsibilities and explore ways to introduce systems that allow reduction and reuse to become the norm.[5]

The national recycling bin survey, first run in 2023 is the first and only to analyse household recycling waste and attribute such waste to specific retail sectors. This report presents the findings of the 2nd edition of the NRBS led between May and July 2025. This year's report provides updates that help us answer the following questions: are we being exposed to more or less single use packaging, and who is pushing it on to us now?

This year's survey is also complemented by a supporting focus study examining the plastic generated by each of Ireland's top five main food retailers (see page XX for details).

This data aims to support stronger recommendations to retailers and the government for ambitious action on packaging toward a circular economy.

Sick of Plastic is a national campaign founded by Voice of Irish Concern for the Environment (VOICE) and Friends of the Earth Ireland in 2018. Since then, Sick of Plastic has empowered communities to pressure industry and decision-makers to take action on single-use plastic. The National Recycling Bin Survey was born out of prior work by Sick of Plastic to expose the failures of the supermarket industry to tackle the plastic crisis. In 2022 Sick of Plastic conducted the Refill, and Reuse in the Grocery Sector report which reviewed the pledges of Ireland's top supermarket chains and provided recommendations to catalyse the transition away from single-use plastic packaging.[6] Sick of Plastic also facilitated the 2022 Under Wraps? report in Ireland, in which Irish grocery chains received a score of just 16 out of 100 for their transparency, commitments, and policy support regarding the elimination of plastic waste. This ranked Ireland 5th worst country out the 13 EU members involved in the study.[7]

Background

The Global Plastic & Packaging Problem

Plastic packaging waste accounts for approximately 40% of all virgin plastic consumed in the EU. Concerningly, the amount of plastic packaging waste generated within the EU is expected to rise 46% by 2030 despite the catastrophic environmental consequences plastic is already causing.

Each year, 850 million tonnes of greenhouse gases are emitted from the production of plastics alone, contributing to global temperature rise and exacerbating the most devastating impacts of climate change[10]. On our current trajectory, annual emissions from plastic manufacturing are expected to more than triple by 2050[11]

The impacts of plastics on human health and the planet are well known and long-studied. The average person ingests up to five grams of plastic each week. Plastic never decomposes but breaks down and accumulates in our system and food chain over time in the form of microplastics and nanoplastics. These particles are traceable everywhere on Earth from our freshwater taps, to the air we breathe, to the food on our dinner table, and has even been found in breastmilk[12]. On the other hand, a study has uncovered microplastics embedded in both human and canine testes, raising serious concerns about their impact on male reproductive health.[13] Overall, scientists are now able to correlate hundreds of thousands of death to the presence of plastic in our bodies[14]. Why then, are supermarkets sending us home with more plastic in our reusable shopping bags than ever?

> **Out of the 9.5 billion tonnes[8] of plastic that were produced between 1950 and 2019, only 9% has ever been recycled.[9]**

It goes beyond Plastic

Although focusing on plastic makes sense given its impact, the problem goes beyond plastic alone: all packaging should be taken into account. The excessive use of packaging is causing a wider waste crisis, including the overuse of resources for cardboard, paper or aluminium.

Paper-based packaging is actually the largest source of packaging waste in the EU, even before plastic. In recent years, the fight against plastic and legislation on its production has led companies to switch to paper and cardboard.

While paper seems more eco-friendly, it is not necessarily more sustainable, especially at the current scale of production. A report from the European Environmental Bureau exposes the paper packaging industry as a major driver of deforestation in Europe and across the globe, causing brutal biodiversity loss and water pollution and scarcity. Around 90% of paper pulp is made from wood, and paper production is responsible for about 35% of all clear-felled trees[15].

Ironically, many companies promote paper-based packaging as a "greener" alternative, raising serious greenwashing concerns. These so-called solutions are often just as damaging.

Moreover, much of what is labelled as paper packaging is, in fact, multi-material, often containing plastic layers or requiring chemical treatments to achieve heat or moisture resistance comparable to plastic. This makes such items problematic for food-contact applications and current recycling techniques. Therefore, efforts must go beyond simply switching from one material to another, but rather address the wider issue of single-use packaging and the consumption patterns that sustain it.

Ireland's Plastic & Packaging Problem

Ireland is the number one producer of plastic packaging waste per capita in the EU, at a rate of 67 kilograms per person per year, 17kg ahead of the second in that list: Iceland[16]. According to the EPA, we generated 1.2 million tonnes of packaging waste in 2022[16], which represents a 9,8% increase from 2020 levels.

Nearly a third, 27%, of Ireland's packaging waste is plastic (measured by weight) and 40% is paper & cardboard. The use of plastic packaging by supermarkets, retail stores, and other commercial sectors is frequently excessive and unnecessary, causing needless harm to our environment.

Although Ireland met some EU targets for recycling and recovery of packaging waste for 2025, we are falling behind on our recycling rates for plastic packaging with only 32% of our plastic packaging being recycled when the EU mandates 50% this year. It is worth noting that the EU average rate is also stagnating with a 40.3% rate in 2022, a slight regression compared to the 41% in 2019[17].

Ireland is regressing, with an overall recycling rate that fell from **67%** in 2016 to **60%** in 2022[18] (Figure 1). Considering that we recycle more than ever before in volume/weight, this clearly shows that we cannot cope with the ever-increasing production of plastic and packaging and the subsequent waste generated.

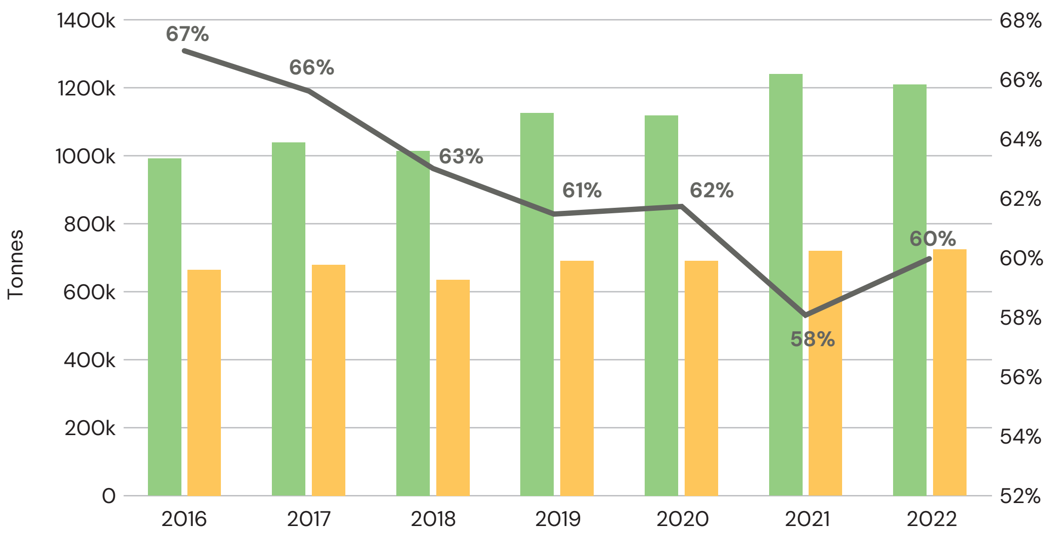
Figure 1. Types and percentages of materials in packaging waste in 2020 and 2022

2020
Total packaging waste generated:
1,100,000 tons

2022
Total packaging waste generated:
1,208,000 tons

2020		2022	
Paper & Cardboard	40.3%	Paper & Cardboard	40.4%
Plastic	27.4%	Plastic	28.6%
Glass	16.3%	Glass	15.1%
Wood	9%	Wood	8.7%
Metal & aluminium	6%	Metal & aluminium	6.6%
Other (textiles)	1%	Other (textiles)	0.6%

Figure 2. Difference between waste generated and recycled with recycling rate



Source: EPA

In order to meet EU plastic recycling targets, established in the Waste Directive Framework, of 55% by 2030, Ireland doesn't need more recycling facility, but a different approach to plastic production, consumption and recycling practices that focus on turning the tap off first and respecting the Waste Hierarchy.

In the 2022 Underwraps Report, the five largest supermarket chains in Ireland were provided a questionnaire to assess their plastic targets and transparency. Only three provided a response to the questionnaire, and only two of those replies were deemed to be meaningful[19]. Aldi led the ranking across all categories, scoring the highest overall at 61 points out of a possible 100. Lidl fell far behind Aldi with a score of just 16, but came ahead of Tesco's mere 3 points and the zeroes awarded for lack of response to Supervalu (Musgrave) and Dunnes Stores. Ireland's country average, accounting for the results from these five supermarkets, came out to just 16 out of 100, with Ireland ranking fourth out of thirteen countries participating across Europe.

Avoidant behaviours from the industry

The design, production, and sale of single-use packaging is a multi-million euro industry. Yet while industries drag their feet on providing reusable alternatives for fear of revenue losses, our plastic waste continues to pile up costing society millions in waste management and environmental impacts.

All too often, commitments made by retailers to reduce their plastic footprint are weak targets introduced only to appease concerned customers. Worse, they tend to present their compliance with the law as innovations. On the other hand, corporate pledges towards the reduction of single-use packaging, such as fruit or vegetable wrappings, are self regulated and often lack transparency in the disclosure of progress towards goals. This often results in slow progress and piecemeal targets, delaying meaningful change.

The National Recycling Bin Survey

The aim of the National Recycling Bin Survey 2025 (NRBS25) is to provide data from a new angle, with a level of detail that is not achieved through current national waste management data. Our citizen-led research piece focuses on identifying the volumes, sources and types of material present in household recycling bins. Studying the household bin and the source of its content is essential to allocate responsibilities regarding who should act and how, informing policy in a more accurate way.

Results from the first edition

The first edition of our survey in 2023 (NRBS23) got 49 households to successfully complete the survey with accurate data, providing a strong sample across 13 counties in Ireland.

Participants recorded 10,029 waste items, which represents 74 items per person, or 1,917 annually.[20] Supermarkets were the main source of recycling bin waste (66%). In total, plastic (both soft and rigid) made up more than 50% of all waste items recorded.

What’s changed?

The introduction of the Irish DRS

Since the first NRBS report (2023), Ireland has made changes to its collection and management of packaging waste, with the introduction of the National Deposit Return Scheme in February 2024.

The DRS has improved the collection rates of plastic bottles and aluminium cans which are materials with historically low recovery rates despite their high recyclability. Within its first year, the scheme has increased the collection rate from 49% to 76%, demonstrating its effectiveness in diverting valuable materials from general waste streams. This rate should reach 90% by 2030, respecting EU targets.[21]

Notably, the littering levels of these items have also seen a decline. According to the 2025 Irish Businesses Against Litter (IBAL) annual report, the presence of plastic bottles and cans in litter surveys has decreased by 50% compared to pre-DRS levels. Although cans and plastic bottles are still “far from a rare sight on our streets and in our hedgerows,” states Mr Horgan (IBAL’s spokesperson), this is an encouraging start.[22]

Packaging and Packaging Waste Regulation (PPWR)

At the European level, major regulatory changes also occurred in 2024. The EU’s Packaging and Packaging Waste Regulation[22] (PPWR) is the first legislative framework to mandate **reductions** in packaging production, rather than focusing solely on recycling improvements. Under the new rules:

- By 2030, several categories of single-use plastic packaging such as packaging for unprocessed fruit and vegetables, single-portion condiments, and miniature hotel toiletries will be prohibited.
- By 2040, Member States must achieve an overall 15% reduction in packaging use (by weight) compared to 2018 levels.

In Ireland, however, challenges persist. Despite increasing the volume of materials recycled, overall recycling rates are stagnating due to the growing volume of packaging placed on the market. In recent years, packaging consumption is increasing 2.5 times faster than recycling capacity, confirming that addressing overconsumption should be our main focus.

Methodology

Participants of the Survey were recruited through social-media, newsletter updates, media appearances, and word of mouth. The Survey was open from the 5th of May and closed on the 30th of June 2025, giving participants an eight-week window to complete the survey.

Participants were asked to recycle as normal over a two week period (between bin collection dates) and then conduct the waste audit on the material collected in the recycling bin. Waste items were recorded based on two criteria. First, waste items were analysed by their source. Second, waste items were analysed by their material.

Data gathered

- For the survey, there were four primary source categories (supermarket, retail, online retail, and takeaway) and an ‘other source’ category.
- Four material categories were defined: rigid plastic, soft plastic, paper and cardboard, and metal.

As such, each waste item documented in the Survey has had its source and material recorded.

Two methods were created for participants to audit their recycling bins. A tally sheet was created to facilitate both methods. The tally sheet was a 5x5 table that allowed participants to count waste items while recording their source and material.

- The first audit method involved tipping over the recycling bin after the two-week period, organising the waste into piles, and counting the waste items using the tally sheet before returning the waste to the recycling bin.
- The second method involved logging each waste item as they were recycled, using the tally sheet, over the two-week period. This second method was created to improve accessibility for the Survey, from those who live in apartments, with shared bins, or not willing to tip over their bin.

Finally, participants were asked to input their results into a data entry form hosted on Airtable. This data was accumulated and analysed to produce a picture of the average recycling bin in Ireland and to understand this waste based on its material and source.

Results

In total 56 households completed the survey, from 201 sign-ups, this constituted a 28% follow-through rate. Considering the commitment required to complete the survey (30-45 minutes to audit the bin and another 15 minutes to input the data) a significant differential between the sign ups and follow-through rate was expected. Out of the 56 completed surveys, six surveys were removed from the data analysis due to inaccuracies and two were corrected through direct exchange with the participant to correct inaccuracies found. This meant **50 surveys were completed accurately**, giving the survey a **89%** success rate. With respect to the time commitment and complexity involved for participants, detailed instructional materials were provided as well as on-going support for any doubts or queries. We believe this drove the exceptional follow-through rate. Participants were spread across **14** counties across all regions of Ireland making this a truly national campaign.

Figure 3. Map of participating households across Ireland

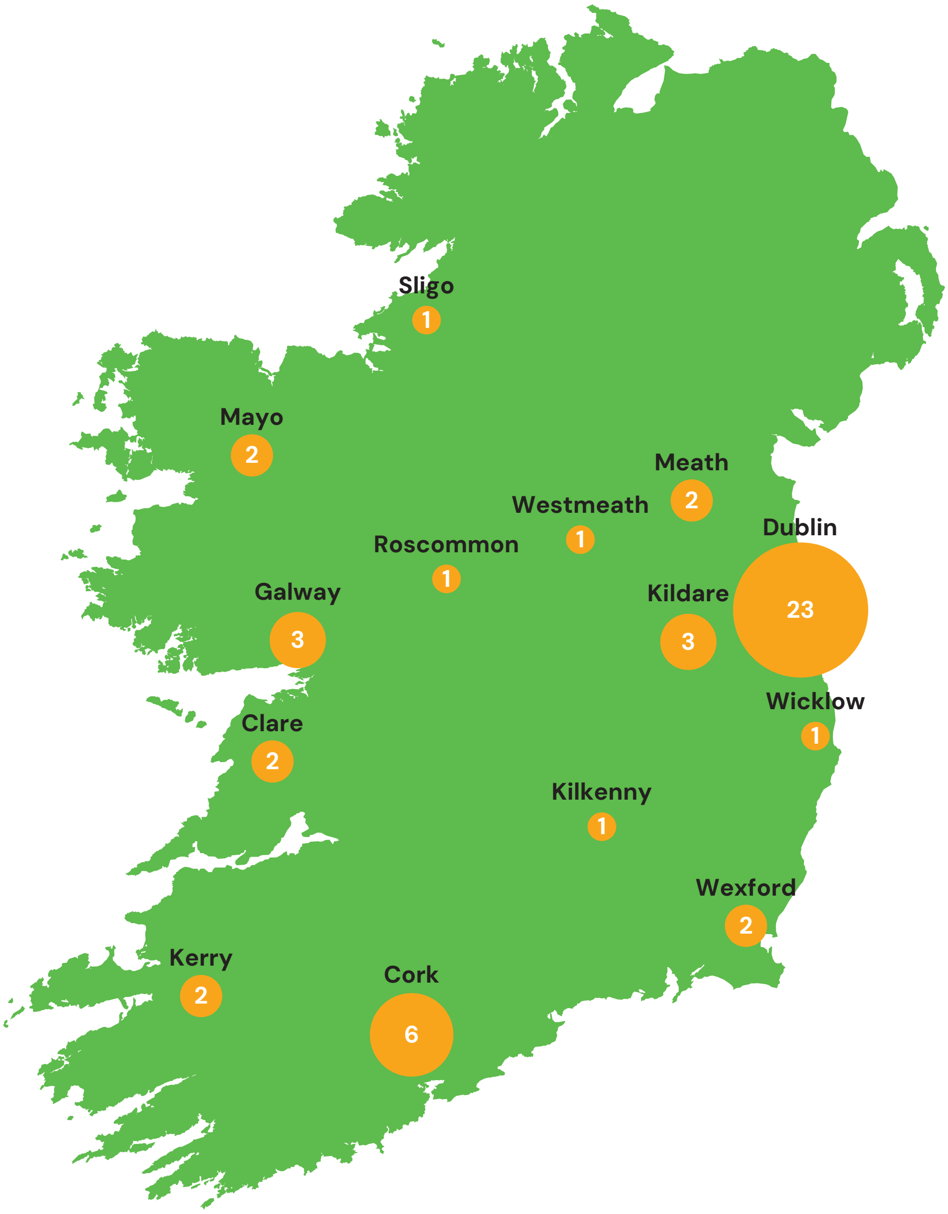
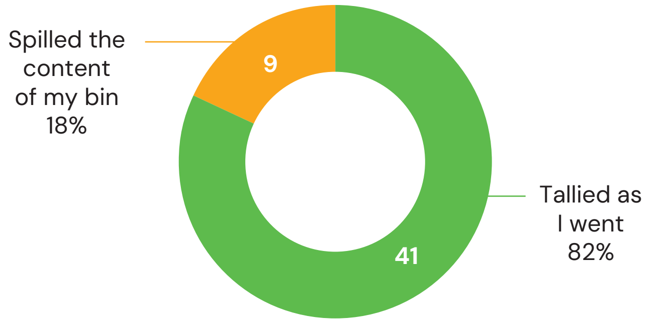


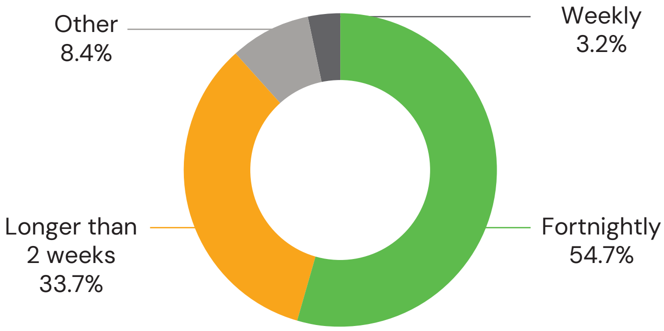
Table 1. Participating Households size

Number of people in households	Number of households of this size	Total number of people
1	5	5
2	24	48
3	12	36
4	5	20
5	4	20
Total	**50**	**129**

Source: VOICE Ireland

Together they counted and sorted **9,407 items**. On average, a person discards **73 pieces** of packaging through their recycling bins over two weeks, bringing it to 1,898 a year. This presents a status quo from our last survey that found a yearly average of 1,917 in 2023 (less than 1% difference).





As well as source and material questions, we asked about participants' perceptions towards their waste. When asked, **92% of participants reported feeling 'frustrated' by the amount of waste entering their homes.** Moreover, when asked to rank their bins fullness on a 1-5 scale (1 meaning their bin was hardly full and 5 meaning they had to squash the bin's contents) 68% of participants ranked their bin a 4 or higher. Correlation analysis was conducted using a Pearson Correlation Coefficient, which showed no significant difference in household size and reported bin fullness (r = 1.2). Meaning households of all sizes are struggling with their waste quantities.

Table 2. Aggregated results from our 50 participating households

Source	Number of items	Percentage of total	Number of plastic items	Percentage of plastic from that source
Supermarkets	6,227.00	66.20%	3,479.00	**55.87%**
retail	1,256.00	13.35%	480.00	38.22%
Online retail	348.00	3.70%	122.00	35.06%
take-away	146.00	1.55%	59.00	40.41%
PB	257.00	2.73%	257.00	**100.00%**
CANS	287.00	3.05%	0.00	0.00%
Other	886.00	9.42%	112.00	12.64%
Total	**9,407.00**		**4,509.00**	47.93%

As expected, supermarkets were the main source of packaging waste found in household recycling bins. Altogether, supermarket packaging - including bottles and cans - accounted for over 70% of what ended up in recycling bins[*].

Even more worrying, 60%[**] of the supermarket-related waste was plastic, meaning that 40% of the average recycling bin in Ireland is made of plastic contents from the supermarket.

Soft and rigid plastic combined made up nearly 48% of total waste items. Based on EPA recycling statistics, we estimated that of the 4,509 plastic waste items recorded in the National Recycling Bin Survey, only 1,442 will actually be recycled. Whereas as the majority of plastic, 3,066 waste items, will be incinerated[23].

One of the most important takeaways from NRBS25 is the fact that very little has changed since NRBS23. This being our second edition, so we cannot claim any long-term trends just yet, but the lack of difference is striking. Despite growing public awareness around the circular economy and plenty of promises from industry and policymakers, the data tells us a different story.

At the household level, packaging waste hasn't decreased. If anything, we can note that supermarkets' responsibility is growing as the main source of waste: rising from 66% in 2023 to 70% in 2025.

The issue being that we are faced with a global crisis that compels us to urgency. Claiming progress without measurable change nor any accountability is not enough anymore. That is why the NRBS is one way to independently measure the state of our waste generation. VOICE is determined to not let the problem grow unchecked any longer. These results show that without stronger regulation and accountability upstream, the burden of waste is still being pushed onto households.

* This year, we asked participants to record supermarket packaging, plastic bottles, and cans separately because of the new Deposit Return Scheme (DRS). However, since most bottles and cans are likely bought in supermarkets, we grouped them together when looking at the overall sources of waste → 64.87% + 2.44% + 3.04% = 70,35%

** This figure counts both hard+soft plastics from the supermarket (3,479) and the number of plastic bottles (257)

Results by source

70%
Supermarkets comprised 70% of total waste items.

13,3%
Retail comprised 13,3% of total waste items.

3,7%
Online retail* comprised 3,7% of total waste items

1,5%
Takeaways** comprised 1,5% of total waste items.

The remaining **9%** items came from sources defined as "other", typically reported as letters, printed paper and other loose paper

*with the exception of online supermarket shopping
**with the exception of supermarket's delis

Results by material

Paper & Cardboard comprise **40%** of total waste items

Soft plastic, defined as plastic that you can scrunch up in your hand comprise **24%** of total waste items

Rigid plastic, defined as plastic that keeps its form (including plastic bottles), comprise **23%** of total waste items

Metal comprise **13%** of total waste items

Analysis per capita

On average a person managed
73
packaging items biweekly

< 1% difference with NRBS23 report.

92% of participants declared being frustrated by the amount of plastic they have to deal with

Analysis per household size

(from most waste per person to least)

Household of 1:
88
items/person fortnighly

Household of 3:
82
items/person fortnighly

Household of 2:
79
items/person fortnighly

Household of 5:
50
items/person fortnighly

Household of 4:
44
items/person fortnighly

DRS use insights

Introduced in February 2024, Ireland's Deposit Return Scheme (DRS) marked a major policy step toward improving collection rates and eventually recycling rates for plastic bottles and cans. NRBS25 offered a unique opportunity to explore how this new system is working in practice and how households are adapting. Over the two-week survey period, households reported an average of **5.1 plastic bottles** and **5.7 cans** per home. This would suggest an annual count of **280** eligible containers to the scheme per household.

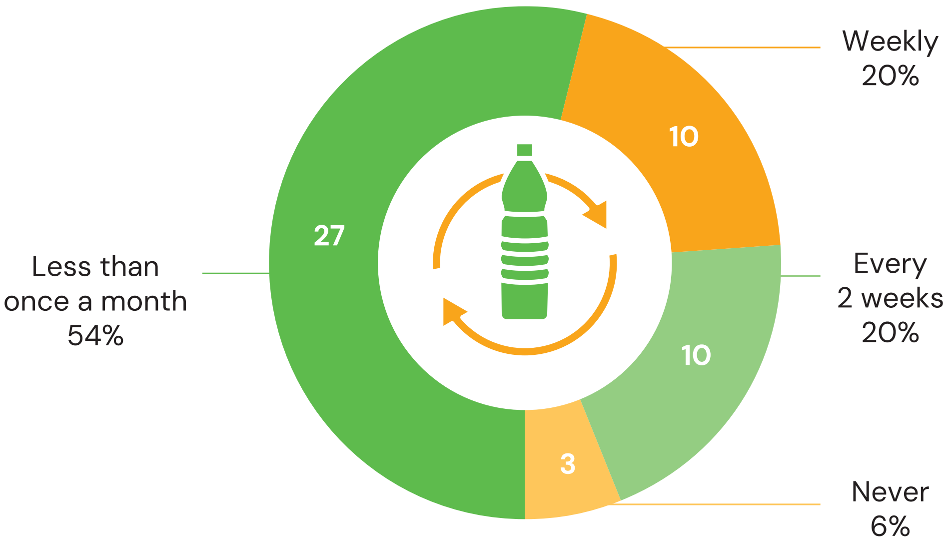
Most participants reported having set up a dedicated system to collect DRS items, with the most common approaches being **storing the items in a shopping bag** or **a specific box or bin** in kitchens, utility rooms, or garages. This suggests that the scheme is beginning to shape household behaviours and routines.

Only **three households (6%)** reported not using the DRS at all, mainly due to a **very low use of eligible containers**. One household continued to place items in the recycling bin, while another noted: *"We only had two of these in this survey time, and usually have none, so we don't have a system for storing them really."* A third had no DRS-eligible containers to report.

While early, these insights indicate that most households are engaging with the DRS, and are actively adjusting their sorting habits to support it.

> **"Only three households reported not using the DRS at all, mainly due to a very low use of eligible containers.**

Figure 4. How often do you redeem DRS items?



Supermarket Packaging Audit

This year, we introduced a dedicated Supermarket Focus Study as part of the National Recycling Bin Survey to better understand how our everyday grocery choices contribute to household packaging waste. Supermarkets are central to most people's weekly routines, yet they remain the biggest contributors to single-use packaging, especially plastic. By zooming in on what a typical shop for two people looks like, we aimed to quantify just how much unnecessary packaging is still present in our food systems.

To assess the packaging production of Ireland's main supermarkets, we selected the five main chains based on their national turnover and number of outlets.

Table 3. Irish supermarkets annual turnover and number of stores

Supermarket	Annual Turnover	Number of stores in Ireland
Musgrave (SuperValu, Centra, etc.)	4.5 billion	840
Dunnes	4.1 billion	116
Tesco	2.9 billion	154
Aldi	2 billion	150
Lidl	1 billion	187

Methodology

Study Design and Assumptions

Before beginning the audit, we established a standardised list of around 30 essential items that might appear in a typical weekly shop for a two-person household. While this does not account for all consumer preferences, the selection represents approximately 80% of a standard shop. We also included items that may not be weekly purchases—such as dry goods (flour and sugar), cleaning products, coffee, and tea to represent a fuller scope of household packaging waste.

Sourcing Principles

In each store, we prioritised the loose or packaging free option when available, bringing our own reusable packaging. We also favoured own-brand products, as these are the ones supermarkets most often include in their packaging commitments. Each item on the shopping list was counted as a single unit regardless of quantity (e.g. a bunch of bananas or four tomatoes).

Overall, this study represents what a consumer can expect in terms of packaging waste using current systems and options available in mainstream retail.

Comparing the Zero Waste approach

We then carried out an ultimate shopping trip following zero-waste principles, using refill and bulk stores within the same area. The goal was to compare both the amount of packaging generated and the overall cost between conventional supermarkets and low-waste alternatives.

All the food that was purchased as part of this study has been redistributed to Feed Dublin, a registered charity that is dedicated to fighting food poverty.

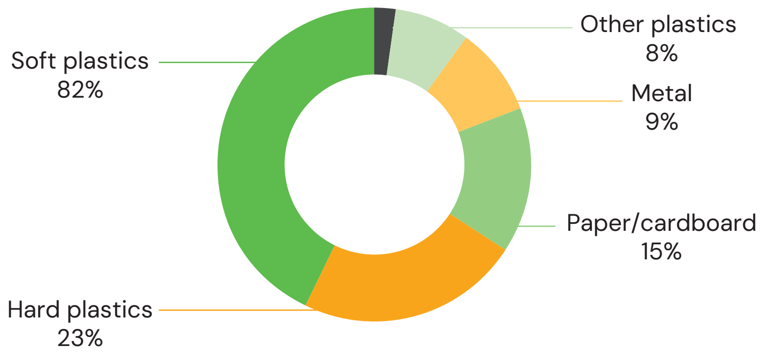
Results

Over the 5 conventional shopping carried in Ireland's main supermarket, a list of 30 items generated an average of 40.6 pieces of packaging, with only 3.8 items found loose.

Excessive Packaging and Plastics Dominance

Plastic packaging, (hard plastics, soft plastics, nets, tetrapacks and polyethylene) accounts for approximately 67% of all packaging generated by supermarket (excluding loose items). This clearly highlights plastic as the dominant material in supermarket packaging.

- Soft plastics alone represent the largest share. With 43%, of all packaging, this indicates the prevalence of flexible plastic packaging, which is often harder to recycle.
- Hard plastics make up about 23%, of all packaging, reflecting the widespread use of rigid plastic containers and trays.



Nets, commonly used for produce like garlic and onions, comprise about 4.4%. Importantly, nets are not recyclable in Ireland's current system, which adds to the environmental burden.

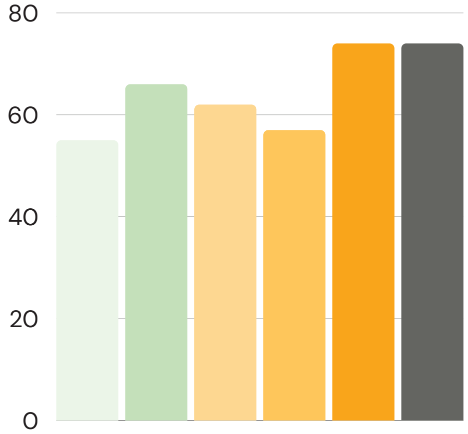
In comparison, by purchasing the same list of essential grocery items in zero-waste stores, bringing our own reusable containers and bags, we were able to cut packaging waste by 65%, reducing it from 40 items to just 14 packaging items. This practice would amount to 871 pieces of items of waste saved annually, or over 4.5 billion nationwide if adopted broadly. This shows that existing solutions can already deliver tremendous environmental benefits.

Although shopping zero-waste had clear impact on the waste generated, there are still a number of barriers to its accessibilities:

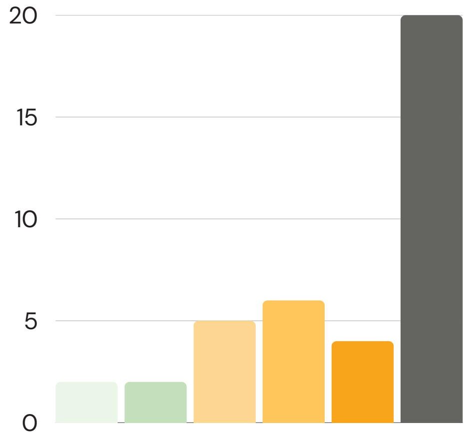
- **Accessibility.** In the frame of this study, it was fortunate that all these supermarkets and stores were located in the same area. Yet, we acknowledge that many areas in Ireland do not have such a variety of choice.
- **Time consumption.** We spent an average of 35 minutes in each supermarket, while gathering all the items in a zero waste approach meant going to 4 different stores and took 1h.
- **Budget.** Although the Zero-Waste shop cost the same price as the Supervalu one, it was 19% more expensive than the average across the five supermarkets (€63). However, it is worth noting that for that price, 40% of the produces were organic, where none of the produce from the supermarkets were.

Read the full Supermarket Audit
here

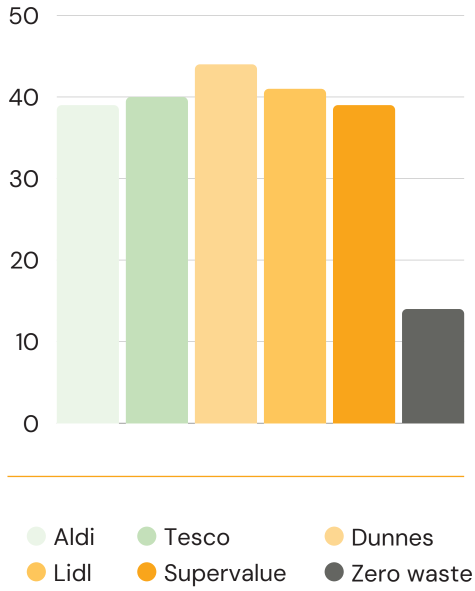
Price of a weekly basket in each supermarket



Number of loose items per shop



Total packaged items per supermarket



Responsibilities and Actions

The findings from both the NRBS25 and the focus study show that the situation is not getting better. On one hand, we see the persistence of a status quo, even an increase in waste generation while recycling rates stagnate. It is clear that recycling is limited in its ability to mitigate the waste crisis. On the other hand, we have observed that we already have ways to shop every day items with significantly less packaging. The issue is not innovation, but scaling up and support for existing alternatives. It is time for stricter regulations on single-use packaging and greater transparency and accountability to follow through on goals and targets.

Examining Supermarkets

The overuse of single use plastic is often justified by supermarkets with the arguments of hygiene and food waste reduction. Although many food items such as loose fruit and vegetables can easily be washed. Moreover, a study by WRAP, an international environmental NGO, demonstrated that for typical fresh produce “plastic packaging had no or little meaningful effect” in keeping the produce fresher for longer. In fact, pre-packaged fruits and vegetables in bulk create food waste otherwise avoidable: 60,000 tonnes of CO_2 emissions and food waste according to WRAP. Indeed, imposing a certain quantity of produce to consumers leads to overconsumption and eventually, more waste. Therefore, eliminating packaging in supermarkets could not only reduce material waste but also food waste, and GHG emissions[24].

“I’d love more plastic-free fruit and veg options, and refill stations for dry goods and liquids inside supermarkets.”

Participant to the survey

A review of the current targets on each company’s sustainability[25,26,27,28] page reveals a strong emphasis on recycling, with a common flagship goal being to make 100% of own-brand packaging recyclable by 2025. However, reuse is only approached from an efficiency standpoint, primarily aimed at reducing packaging weight rather than through a systemic shift to eliminate plastic packaging altogether for products that do not require it. As our studies show, over 90% of products sold are still packaged and 60% in plastic.

Since most of these commitments are set to be achieved by 2025, we are calling on supermarkets to publish transparent progress updates and to incorporate the recommendations outlined in this report into their next set of targets and reduction strategies for 2030. Consumers are ready and want supermarkets to take their responsibilities.

“Fruit and vegetables should be sold loose as much as possible for takeaway in shoppers own reusable bags”

Participant to the survey

Supermarkets shouldn’t stop at making their own-brand packaging “greener”. By setting clear requirements for all suppliers, piloting reusable systems at scale, and working collaboratively with their supply chain, they can move from efficiency gains to systemic reuse and real reduction across all products. This is something that we are seeing being done across Europe and from which Irish retailers should learn from.

Retail

In the Survey, retail stores have been defined as any in-person (non-supermarket) outlets, such as bookstores, clothing stores, electronics shops, and similar businesses. These retailers were identified as the second largest source of household recycling bin waste, accounting for 13% of all items recorded. Of this, 38% was plastic, while 58% was paper and cardboard. This distribution indicates a sectoral shift away from plastic and towards paper-based packaging, probably due to consumer demand, plastic bans, and corporate sustainability commitments. For example, many fashion retailers have replaced plastic shopping bags with paper ones and increasingly use cardboard tags.

However, despite this move towards more "sustainable" materials (which again can be discussed), questions remain around the overall necessity of much of this packaging, particularly for non-perishable items. Excessive wrapping of electronics, accessories, books, or even clothing continues to generate significant volumes of waste, often for the sake of aesthetics, branding, or theft prevention. Packaging is often oversized or containing mixed materials, making recycling more difficult, many of which could be avoided by small changes and incentives upstream (discussing packaging policies with suppliers) as well as downstream (participate to customers' awareness).

Online retail

In the Survey online retail has been defined as any online
(non-supermarket) consumer shopping e.g. Amazon, Boohoo, Shein etc,. Online retail is a growing sector in Ireland with an expected annual growth rate of 10.5% until 2027. Once more, **Ireland ranks first in the online retail consumption in the EU, with 96%[29] of online users declaring they purchased online in 2024, compared to the EU average of 77%**. This means that the amount of packaging waste related to online shopping will continue rising unless reusable systems are introduced.

While the majority, 75%[30], of the packaging material was cardboard, this quantity of single-use material being wasted is not sustainable. Additionally, due to the nature of global trade, most online retailers are not contributing to the cost of collecting and recycling the packaging waste they generate. According to Repak, this results in an annual shortfall of over €1 million, a financial burden that is ultimately shifted onto compliant domestic retailers and, in turn, passed on to consumers.

This lack of accountability creates a clear imbalance in the system. As Repak notes, this allows online retailers to "significantly over-package goods with no incentive to reduce the waste they generate."[31]

> **96% of Irish online users declaring they purchased online in 2024, compared to the EU average of 77%.**

Take-away

In the Survey, takeaway has been defined as any vendor of to-go food (with the exception of hot and cold-food from supermarkets). Although it may save people time and effort, takeaway meals typically generate massive amounts of waste through disposable containers and often with single-use cutlery. These items are cited in the SUP directive under the list of top ten beach and marine polluters in the EU.

We believe that takeaway can be win-win. Meaning, consumers can still enjoy the time and effort saving benefits of takeaway while mitigating the environmental downsides, by switching to reusable systems. This includes reusable pizza boxes, tubawares, cutlery, and cups etc. Vytal has recently entinto the Irish market offering reusable containers using a deposit-return scheme. In Ireland, a levy of 20 cents on single-use coffee cups will hopefully soon be introduced. VOICE has long advocated for the introduction of this levy as a way to incentivize reusable coffee cups and kick-start the reuse revolution in the hospitality sector. We want the future of coffee and takeaway food and drink to be more resource conscious. This is not a fantasy, there are workable solutions that benefit businesses, communities and the environment, and they are a lot closer to home than you might think. Hospitality businesses took the leading role in Killarney. Since July 2023, singleuse coffee cups are no longer sold in the Kerry town. The Killarney Coffee Cup Project, was agreed upon by 25 local cafes, restaurant and hotels and is estimated to have diverted roughly 18.5 tonnes of waste from the municipality.[32]

VOICE has also coordinated the development of such an initiative across coffee shops in Rush and Malahide this year in partnership with Fingal County Council and local Tidy Town groups.[33] If local businesses in a regional town can adopt new business practices, we believe the larger commercial sectors across Ireland can follow. Find more about the Fingal Cup Project here.

Recommendations for retail sectors

Recommendations for the Retail Industries In this section Sick of Plastic will lay out our recommendations to the Retail Industries. The Irish retail industry, particularly supermarkets, have a long way to go in reducing their reliance on single-use plastic and packaging. If Ireland is to meet the waste and recycling targets set in our Waste Management Plan and those set in collaboration with our EU partners, the retail industries will need to take real and ambitious actions. The following recommendations have been made based on the research and results gathered for the National Recycling Bin Survey, the focus study on supermarkets as well as targets which have been previously outlined by other NGOs in the sector.

For all retail sectors: we recommend that 25% of consumer packaging should be reusable by 2027, increasing to 50% by 2035

For supermarkets specifically: we recommend a fixed target and practice of 20% of the floor surface of shops over 400 square feet to be fitted with refill systems by 2030

For online-retailers: we recommend 50% reusable packaging by 2030, and 80% by 2035 in e-commerce, for all goods shipped within the EU; All oversea retailers who sell goods in Ireland via Ecommerce, must contribute to Repak for their waste's recycling

For the takeaways: we recommend the following fixed targets:

- **75%** reusable packaging by 2030
- **90%** by 2035

The Role of The Government

In recent years, the Irish Government has recognised the urgency of the single-use packaging crisis and taken steps to promote the circular economy. New legislation on waste reduction is intended to align with both recent European Union policy and the United Nations' Sustainable Development Goals (SDGs). SDG12, Responsible Consumption and Production, calls for a "[substantial reduction of] waste generation through prevention, reduction, recycling and reuse. The actions Ireland has introduced towards these goals, however, are being implemented too gradually and without adequately strong regulatory targets.

In 2020, the Department of the Environment, Climate and Communications released [A Waste Action Plan for a Circular Economy: Ireland's National Waste Policy 2020-2025]. Minister for the Environment, Eamon Ryan, expressed that "a key objective of this Action Plan is therefore to shift the focus away back up the product life cycle, to remove or design out harmful waste, to extend the life of the products and goods we use and prevent waste arising in the first place — consistent with the concept of a zero waste future."[34] Despite the intention to take a more comprehensive approach, the Waste Action Plan's section on "Plastic and Packaging Waste" focuses primarily on resource recovery (incineration) and recycling, requiring all packaging to be either "reusable or recyclable in an economically viable way by 2030,". Yet fails to provide a specific plan for execution.[35]

At VOICE we believe that even if EU legislation are pushing for change, with for example the introduction of the PPWR - Ireland should support the transition with national sub-targets that will solidify the circularity initiatives taken.

> **"Ireland has an even longer way to go: our packaging use has grown since 2018, meaning we'll actually need to cut our packaging by 27% to meet targets**

The PPWR mandates a 15% reduction in packaging (by weight) against 2018 levels and sales of all fruits and vegetables by 2030.

Yet, Ireland has an even longer way to go: our packaging use has grown since 2018, meaning we'll actually need to cut our packaging by 27% to meet targets.

Additionally, the "by weight" metric could represent a major loophole used by industries. It allows producers to shrink packaging thickness without reducing its presence or impact, often making it harder to recycle.

If the focus stays on reducing weight rather than eliminating packaging, we risk making no meaningful changes to waste levels.

This is why Ireland needs additional national regulation: we need to ensure that reduction means actual decline in plastic and packaging use where unnecessary. That entails a roadmap to truly shift the system toward circularity.

Recommendations for the Government

The Government must take more ambitious measures to solve the packaging problem we face in Ireland. Current legislation does not do enough to address the packaging problem. Sick of Plastic advocate the following recommendations to the Irish Government:

- ✓ Set national sub-targets to reduce the quantity of packaging and plastic put on the market.
- ✓ Set legally binding reuse and refill targets for retail industries (see targets above in retail recommendation section)
- ✓ Require industries to submit plans for introduction of reuse and refill systems and make progress updates publicly available.
- ✓ Require industries to submit plans for phase out of SUPs and make progress updates publicly available.

Prioritising the reduction of packaging waste through reuse and refill will better contribute to Ireland's achievement of the waste and recycling targets compared to solely focusing on increasing recycling capacity. A final recommendation we would make to the Government is based on the cost analysis of our 'zero waste shopping basket'. The development of this new system needs to be done in a fair manner. That entails providing incentives and funding existing alternatives to help them scale their activity. This mostly support local small businesses and community groups. Such a scheme would help highlight the financial burdens that consumers who aim to reduce their waste have to bear.

Recommendations for the Government

(continued)

Set quantities-Based Packaging Targets. Introduce national packaging reduction targets by volume (not just weight), with a focus on supermarkets:

- 5% reduction by 2035
- 10% reduction by 2040

Mandate Industry Action on Refill

- Launch pilot grants for retailers to install refill/bulk systems
- Require 20% of floor space in shops over 400m² to be dedicated to refill by 2030

Create a National Observatory for Circular systems and Reuse Establish a central body to monitor packaging reuse and circular food systems, based on France's Reuse Observatory model.

Clear definition of reuse and refill legal framework, involving the HSA
Ireland needs a clear legal definition of reusable packaging and refill system operation, with criteria on durability and safety. The Health and Safety Authority should provide guidance to ensure hygiene and give retailers confidence to scale safe, effective reuse systems.

Support Access to Zero Waste & Healthy Food

- Provide tax relief or subsidies to zero waste retailers
- Fund local refill hubs, mobile zero waste vans, and food co-ops to improve access to affordable loose and organic goods

Individual Responsibility

The responsibility of individuals to act more sustainability, whether taking efforts to reduce their carbon footprint or reducing their waste has long been a focal point of environmental efforts. We, as individuals, are often reminded that we must be very considerate of our resource consumption. At Sick of Plastic, we encourage positive sustainable habits. When presented with the opportunity to consume less resources or produce less waste, this course of action should be taken. However, individual action will only go so far and sometimes is near impossible, as reflected by one survey participant who responded, "I can't believe how much plastic I use - and I try to be good". According the EPA's Plastics: Attitudes and Behaviours in Ireland study, 95 % of the Irish public are concerned about plastic, with 64% indicating they would "use a refill service if available in grocery shops".[36]

However, a Kantar report sheds light on the gap between desire and action, as only 24% of people regularly avoid purchasing plastic packaging.[37] This reflects the opinion of the majority of the Irish public, who believe there are significant barriers to reducing their waste, including the lack of access to alternative packaging and the higher financial cost of more sustainable packaging (as shown by the supermarket study). Considering that zero waste tends to offer healthier food, we believe this relates to social justice issues where supporting the development of circular business models would also enhance access to healthier food.

For these systems to succeed, accessibility and affordability must be prioritised. Individuals cannot act conscientiously without systemic change.

Recommendations for Consumers

As previously discussed in the 'Individual Responsibility' section, while Sick of Plastic encourages sustainable consumption at an individual level we also recognise the need for systemic change which will allow consumers to act sustainably. Even with the vast majority of the Irish public concerned about the plastic crisis, according to a Kantar report, 53% of international (includes Ireland) consumers believe that companies only make sustainability claims as a marketing tool rather than with serious intention.[47] If consumers are going to adopt sustainable ways of consumption, their efforts need to be met with by Ireland's Retail Industry. With that we offer the following recommendations to consumers:

- ✔ When available and affordable to you, shop at stores offering refill and reuse options.
- ✔ Invest in reusable containers e.g. water bottles and coffee cups.
- ✔ Contact your local TD or councillor expressing your concern over the plastic and packaging crisis in Ireland.
- ✔ Express your concern to your local supermarket, shop, take-away manager that too much plastic and packaging waste is coming into your home.

Reuse and Refill
The Way Forward

Reuse Over Recycling

For too long, industries and the Government have played off recycling as the ultimate answer to our packaging waste problems. Ireland prides itself on recycling more each year, but fails to recognize that overall we are still generating more waste in the same time.

Recycling is important, but should be considered a last resort and not relied on.

The EU Waste Framework Directive establishes a waste hierarchy that should be considered in all waste policy (see figure below). Prevention is always the first course of action, followed by reuse. Although recycling is a more sustainable option than disposal to landfill or energy recovery, it still comes with a host of problems, especially for plastics. Recycling is a finite process, meaning most plastic products can only be re-processed once before they must be removed from the supply chain. A process known as 'downcycling' sees the degradation of plastic quality after being recycled; most plastic packaging that is recycled cannot be made into packaging again and will instead be used for lower quality plastic items[38]. This perpetuates the growing need for virgin plastic to continue producing single-use packaging.

The environmental benefits extend beyond waste reduction, as reusable packaging is associated with fewer greenhouse gas emissions and less air pollution than single-use plastics. The report also highlights the economic incentives for businesses to participate in the circular economy; offering reuse and refill alternatives improves customer experience and fosters brand loyalty.

According to the Irish EPA's *Plastics: Attitudes and Behaviours* study, **64% of respondents would "use a refill service if available in grocery shops" very frequently or frequently**, indicating that such options are economically viable.[39] In fact, the Ellen MacArthur Foundation estimates that, globally, replacing 20% of all single-use packaging with reusable options is worth up to USD 10 billion.[40]

Current examples across the European Union have shown remarkable potential of reuse and refill systems.

Case study: France

France's legislative approach to packaging waste reduction combines ambitious targets with systemic reforms through two major laws:

- The AGEC Law (2020) sets the foundation for a circular economy, mandating a 50% reduction in plastic bottles use 2029 and the complete phase-out of single-use plastic by 2040. It also introduced sectoral reuse targets and clarified the legal framework for bulk sales and consumer reuse of containers, helping normalize these practices. The establishment of a Packaging Reuse Observatory and dedicated funding through Extended Producer Responsibility (EPR) schemes initiated a long-term investment in reuse infrastructure.

- The Climate and Resilience Law (2021) built on this by mandating that all shops over 400m² dedicate 20% of their sales area to bulk sales by 2030, reflecting citizen-led demands from the Citizens' Climate Convention.

However, implementation has faced some setbacks. Despite the fact that **63% of all fruits and vegetables are already sold loose** across the country, a key decree banning plastic packaging for all unprocessed fruits and vegetables was overturned after industry pushback.

Additionally, packaging reuse is slow to develop, with only 2.22% in 2023 (from 1% in 2020) against a 5% target set for 2025.

Nonetheless, pilot initiatives like Carrefour's deposit return trials for glass containers demonstrate growing industry engagement and local job creation potential.

The French case highlights the importance of going beyond EU mandates and change them into targets that fit the national context. Ireland needs to integrate reduction and reuse into its policy frameworks. We can also learn from France's uneven progress and clear data gaps to implement more efficient measures that will ensure better outcome.

Lessons learned are: the need for binding sectoral targets, monitoring systems, and the potential integration of reuse within our existing DRS scheme. These are critical steps for any country seeking to move up the waste hierarchy and reach real circularity.

> “ **France already sells 63% of all fruits and vegetable loose**

Read the full case study here.

Conclusion

The National Recycling Bin Survey, is a pioneering Sick of Plastic campaign and the first waste characterization study in Ireland that traced the sources of domestic recycling waste. In total, 129 people from 50 households, across 14 counties in Ireland contributed. The scale and spread of the Survey, truly made it a National effort. Participants recorded 9,407 waste items based on their source and material, giving an in depth look into the average recycling bin. The research and results of the Survey, send a clear and urgent message: **Ireland has a plastic and packaging problem that is being perpetuated and a lack of strong government legislation**.

Of the four Retail Industry sectors in the Survey, supermarkets stood out as the largest source of domestic recycling waste at 66%. This is an unsurprising yet disappointing discovery for Sick of Plastic as we formed five years ago to tackle Irish supermarkets' over reliance on plastic packaging. Despite previous campaigns and reports such as the 2022 Refill, and Reuse in the Grocery Sector Report and the 2022 Under Wraps? Report, supermarkets continue to stall on creating meaningful and ambitious change through reducing single-use plastic and packaging, and introducing refill and reuse systems.

The Irish Government is failing to meet waste and recycling targets set in collaboration with our European and international partners. A plastic packaging recycling rate of 55% by 2030 was agreed upon in the EU Waste Directive Framework, our results show this is likely to be an difficult target to achieve. Ireland is also failing to meet commitments set under SDG 12 of the UN's Sustainable Development Goals. In order to meet these targets, the Irish government cannot solely rely on increasing recycling capacity. It must also prioritise waste reduction in the first instance, this can be done through the setting of mandatory reuse and refill targets across Ireland's Retail Industries. Ireland has led on plastic waste measures in the past, such as being the first EU country to place a consumer levy on plastic bags.

Despite this early leadership, some 24 years later we are taking home more plastic than ever in our reusable shopping bags. Ireland now has the opportunity to use the data collected in this report to drive real change. These efforts are all necessary to create a sustainable and circular economy and to contribute to the international goal of limiting rising global temperatures to 1.5°C of pre-industrial levels.

At Sick of Plastic, on behalf of VOICE Ireland, we would like to thank all those who participated in the National Recycling Bin Survey. This campaign was only possible due to your citizen science effort.

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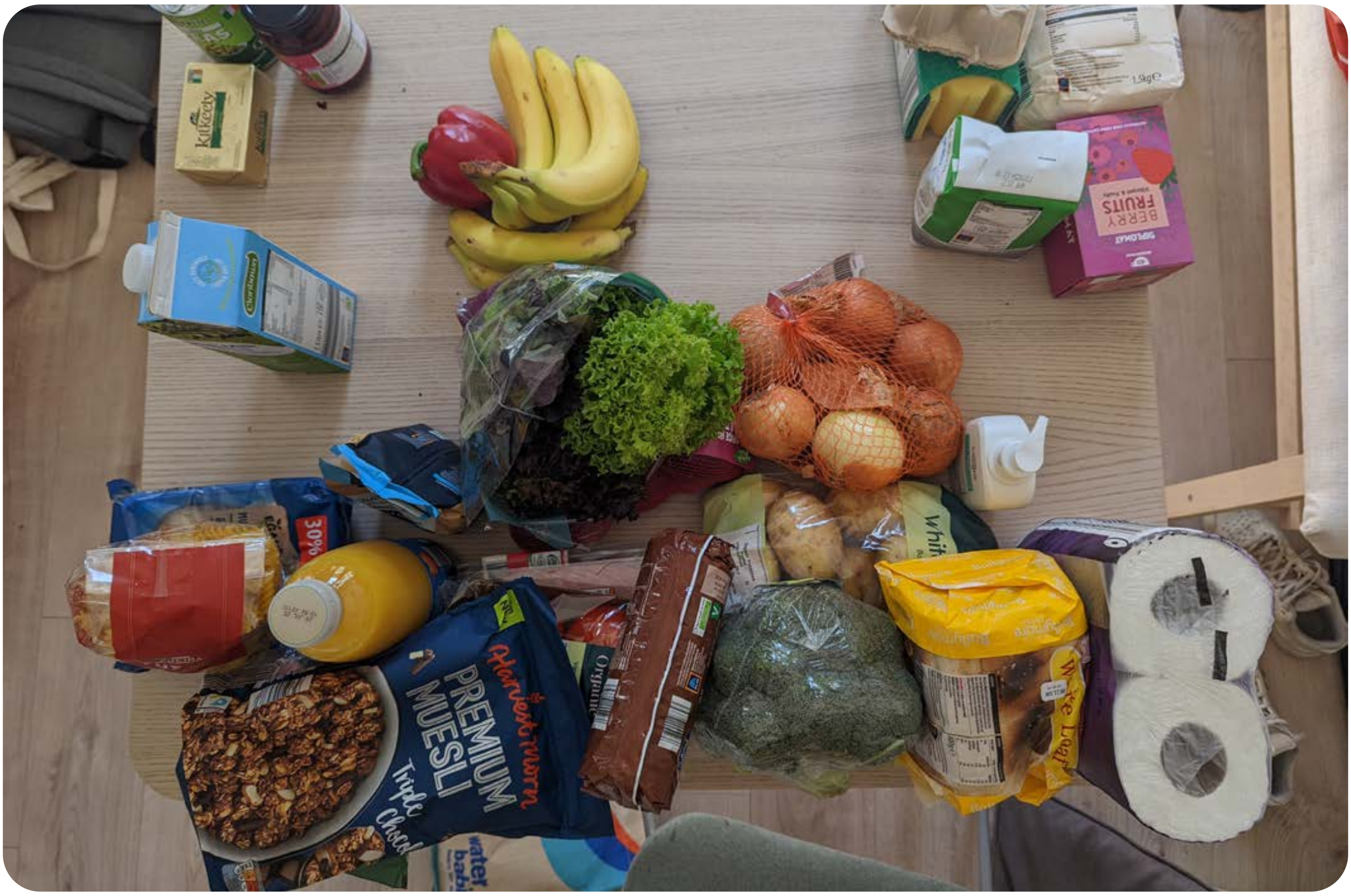

Annex

Grocery list.

- ✓ 1kg flour
- ✓ White bread: 500g
- ✓ Pasta: 500g
- ✓ 500g of beef
- ✓ A mix of onions/garlic
- ✓ Ham
- ✓ Pork sausages
- ✓ 1L of milk or milk substitute
- ✓ Irish cheddar
- ✓ Half a dozen eggs
- ✓ Butter
- ✓ Grapes
- ✓ Bananas
- ✓ Lettuce
- ✓ 4 tomatoes
- ✓ 1 brocoli
- ✓ 1 pepper
- ✓ Peas/beans
- ✓ Mushrooms
- ✓ 1-2 kg potatoes
- ✓ Jam
- ✓ Tea
- ✓ Coffee
- ✓ Sugar
- ✓ Cereals
- ✓ 1 hygiene product
- ✓ 1 Cleaning product
- ✓ Toilet paper
- ✓ Orange juice
- ✓ 1 snack

VOICE is a member-based Irish environmental charity that empowers individuals and local communities to take positive action to conserve our natural resources. VOICE is the NGO expert in Ireland on waste reduction and circular economy since 1998. As thought leaders in this space, we lead the way and set a high ambition for Ireland’s circular economy, and push for effective national and local policy development and adoption.

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