



# Leaders Report 2009

## **The Brand Emissions Leaders Project**

In November 2009 ENDS Carbon and *Marketing* magazine will launch the Brand Emissions Leaders (BEL) project, a major initiative ranking over 600 well-known brands on their carbon performance. The BEL Report 2009 provides detailed coverage and analysis of those rankings.

### **A comprehensive report ranking over 600 brands on:**

- ◆ Carbon disclosure
- ◆ Carbon emissions reduction
- ◆ Carbon intensity
- ◆ Carbon targets

### **Who should buy?**

- ◆ Corporate responsibility, environment and climate change managers
- ◆ Environment and carbon consultants
- ◆ Marketing, communications, PR and brand managers
- ◆ Suppliers of products and services to brands
- ◆ Institutional investors and asset managers



# Marketing

**BRANDREPUBLIC**



UNIVERSITY OF EDINBURGH  
Business School

CARBON DISCLOSURE PROJECT

## **Brand Emissions Leaders Report 2009**

Assessing the carbon performance of over 600 brands

## Report contents

### 1 Introduction

Areas covered include climate change and brands, philosophy and principles of the BEL project, criteria for BE Leaders, eligible universe, evaluation methods, data sources, challenges and future aspirations.

### 2 Carbon performance overview

Overview of BEL ratings performance, including leading and lagging sectors for Brand Emissions Leaders overall. Outline of best and worst performing sectors for disclosure, emissions reductions, intensities and target setting.

### 3 Summary sector carbon performance

Key carbon performance trends on disclosure, emissions reductions, intensity and targets for over 25 sectors; including detailed analytics tables (see below).

### 4 Conclusions and next steps

#### FIGURES

- Proportion of brands achieving Brand Emissions Leader status per sector
- Proportion of brands in 6 Brand Emissions performance categories per sector
- Global average and top 10% of brands for emissions intensity in 2008\* (tCO<sub>2</sub>e/\$million sales)
- % of brands with current emissions reduction targets per sector
- % of brands with current targets compared with average emissions in 2008\* per sector
- Distribution of base year and end year for emissions reduction targets for all brands
- Distribution of target length for all brands
- Distribution of target lengths per sector
- Weighted targets (target strength x 2008\* sector average emissions) per sector
- Distribution of Annualized Equivalent Target amounts for all brands
- Breakdown of reporting quality across Brand Emissions (recognised standards, verification, partial reporting and non-reporters)
- Number of brands per sector
- % of brands reporting increases/decreases in emissions during 2005–09 timeframe
- % of brands reporting increases/decreases in emissions for 2008\*
- Average emissions change per sector during 2005–09 timeframe and for 2008\*
- % of brands reporting increases/decreases in intensity (tCO<sub>2</sub>e/\$m sales) during 2005–09 timeframe
- % of brands reporting increases/decreases in intensity (tCO<sub>2</sub>e/\$m sales) for 2008\*

- Average intensity (tCO<sub>2</sub>e/\$m sales) change per sector within the 2005–09 reporting period and for latest reporting year
- Average emissions intensity (tCO<sub>2</sub>e/\$m sales) per sector in 2008\*
- Average emissions intensity (tCO<sub>2</sub>e/\$m sales) per sector in 2008\* showing sector highs/lows
- Average emissions intensity (tCO<sub>2</sub>e/\$m sales) per sector in 2008\* showing sector highs/lows and excluding outlier brands
- Distribution of reporting history (number of years with reported data during 2005–09 timeframe) for all brands
- Breakdown of reporting history (number of years with reported data between 2005–09) for brands that have public data
- Number of brands achieving reporting quality milestones (using GHG Protocol, 3rd party verification and Scope 3 emissions reporting)
- Breakdown of Scope 1 and Scope 2 emissions for 2008\* in selected sectors, including: Airlines, Computer hardware, Financial services, Food retail, Non-food retail, Oil companies, Telecommunications (landline) and Telecommunications (mobile)

#### TABLES

- Annualised emission reductions needed to achieve common reduction targets by 2020
- List of brands with the best targets per sector
- List of brands with the best intensity (tCO<sub>2</sub>e/\$million sales) in 2008\* per sector
- Excluded sectors, with discussion
- More than 60 sector carbon performance tables (see below)

#### Sector carbon performance tables

##### What is included?

- Sector summary:
  - o Number of brands
  - o Proportion of leaders, runners-up and competitors
  - o Number of first time reporters in 2008
  - o % brands with no data
  - o % brands with published targets
- Sector Key Performance Indicators:
  - o Average target strength (reductions per year)
  - o Average target duration (years)
  - o Average target end date
  - o Average emissions change for 2008\*
  - o Average intensity change for 2008\*
  - o Average intensity for 2008\* (tCO<sub>2</sub>e/\$m sales)
  - o Intensity range (best as % of worst in tCO<sub>2</sub>e/\$m sales)

**See the following pages for a full list of the sectors included in the tables above**

*\* These tables and figures include analysis based on the latest year of publicly available data for each brand. In general, this refers to 2008. However in some instances, the latest publicly available data may be drawn from 2009 or prior to 2008.*



## Sectors and brands included in the BEL Report 2009:

### Airlines

Aer Lingus, Air Berlin, Air Canada, Air China, Air France, Air New Zealand, All Nippon Airways, American Airlines, BMI, British Airways, Cathay Pacific, Continental, Easyjet, Emirates, Finnair, Flybe, Globespan, Jet Airways, KLM, Lufthansa, Monarch Airlines, Netjets, Qantas, Qatar Airways, Ryanair, SAS, Singapore Airlines, Southwest Airlines, Swiss Air and Virgin Atlantic.

### Auto Parts

AA, Autoglass, Bridgestone, Castrol, Dunlop, Goodyear, Kwik-Fit, Michelin, NGK Spark Plugs, Pirelli, Snap-on, TI Automotive and Yokohama.

### Banking

Abbey, Alliance & Leicester, Allied Irish Bank, American Express, Anglo Irish Bank, Bank of America, Bank of Ireland, Bank of Scotland, Barclaycard, Barclays, BNP Paribas, Britannia Building Society, Capital One, Cazenove, Citigroup, Clydesdale Bank, Credit Suisse, Deutsche Bank, Direct Line, Goldman Sachs, Halifax, HSBC, ING, JP Morgan, Lazard, Lloyds TSB, Mastercard, Merrill Lynch, Morgan Stanley, Nationwide, Natwest, Northern Bank, Northern Rock, Paypal, Provident Financial, Royal Bank of Scotland, Société Générale, Standard Chartered, Travelx, Triodos, UBS, Visa and Western Union.

### Broadcasting and Film

BBC, CBS, Channel 4, Classic FM, CNBC, CNN, Comedy Central, ITV, MTV, Nickelodeon, Paramount, SKY, Time Warner, Universal, UTV Media, Virgin Media and Walt Disney.

### Business Services Accounting and Consulting

Accenture, Arup, Bain & Company, Baker Tilly, BDO Stoy Hayward, Boston Consulting Group, Capgemini, Capita, Deloitte, Ernst & Young, Grant Thornton, KPMG, Logica, McKinsey & Company, Mercer, PA Consulting, PriceWaterhouseCoopers and Unisys.

### Car Manufacturer

Alfa Romeo, Audi, BMW, Citroen, Daimler, Ferrari, Fiat, Ford, General Motors, Harley-Davidson, Honda, Hyundai, Isuzu, Jaguar, Kia, Lamborghini, Land Rover, Lexus, Marshall, Maserati, Mazda, Mercedes-Benz, Mini, Mitsubishi, Nissan, Peugeot, Porsche, Renault, Rolls-Royce Motors, Saab, Seat, Skoda, Suzuki, Toyota, Vauxhall, Volkswagen, Volvo, Volvo Trucks and Yamaha.

### Car Rentals (excluded from Sector Performance tables)

Alamo Rent A Car, Avis, Budget, Enterprise, Europcar, Hertz and National.

### Clothing and Footwear

Abercrombie & Fitch, Alex & Co., Asics, Aurora Fashions, Benetton, Bonmarche, Burberry, Burton, Calvin Klein, Christian Dior, Clarks, Coach, Diesel, DKNY, Dorothy Perkins, Dr Martens, Foot Locker, French Connection, GAP, George, Gossard, H&M, Hugo Boss, Jaeger, Karen Millen, Kickers, La Senza, Levi's, LG Fashion, Matalan, Miss Selfridge, Monsoon, New Look, Next, Oasis Stores, Paul Smith, Peacocks, Pentland, Primark, Puma, Reef, Rip Curl, River Island, Russell & Bromley, Scholl, Ted Baker, The Edinburgh Woollen Mill, The North Face, Timberland, Topshop, Umbro, Uniqlo, Vans, Warehouse, Wrangler and Zara.

### Computer Hardware

Acer, AMD, Apple, Broadcom, Brother, Dell, Epson, Fujitsu, Hewlett-Packard, IBM, Intel, Lenovo, Lexmark, LG Telecom, Logitech, NEC, Netgear, Nintendo, Palm, Qlogic, Ricoh, Sun Microsystems and Xerox.

### Consumer Shipping

DHL, Fedex Express, Parcel Force, Royal Mail, TNT and UPS.

### Department Stores & Furnishings

Allied Carpets, BHS, Carpetright, Debenhams, DFS, Fenwicks, Habitat, Harrods, Harvey Nichols, House of Fraser, IKEA, John Lewis, Littlewoods, Magnet and Selfridges.

### DIY

B&Q, Focus DIY, Homebase, HSS Hire, Rona, Screwfix, Topps Tiles, Travis Perkins, Wickes and Wyevale Garden Centres.

### Electronics

Bang & Olufsen, Blackberry, Blaupunkt, Bose, Canon, Casio, Ericsson, FujiFilm, Garmin, General Electric, Hitachi, Kenwood, Kodak, LG, Motorola, Nikon, Nokia, Olympus, Panasonic, Pentax, Philips, Pioneer, Polaroid, Samsung, SanDisk Corporation, Sanyo, Sharp, Siemens, Sony, Sony Ericsson, TDK, Texas Instruments, Tomtom and Toshiba.

### Energy Suppliers

British Energy, British Gas, Calor, E.ON, EDF Energy, Npower, Scottish & Southern Energy and Scottish Power.

### Food Retail

Aldi, Asda, Budgens, Co-operative Foods, Costco Wholesale, Costcutter, Farmfoods, Greggs, Iceland, Lidl, Londis, Marks & Spencer, Morrisons, Netto, Sainsbury's, Somerfields, Spar, Tesco, Waitrose, Welcome Break and Whole Foods Markets.

### Hotels

Center Parcs, Champneys, Crowne Plaza, De Vere, Fairmont Hotels, Four Seasons, Hilton, Holiday Inn, Host Hotels & Resorts, Ibis, Intercontinental, Malmaison, Marriott, Millennium & Copthorne, NH Hotels, Novotel, Premier Inn, Radisson Edwardian, Sandals, Sheraton Hotels & Resorts, Starwood, Thistle, Travelodge, Wyndham Worldwide and Wynn Resorts.

### Household Appliances

AEG, Aga, Bosch, De'Longhi, Dyson, Electrolux, Hoover, Miele, Neff, Russell Hobbs, Smeg, Whirlpool and Zanussi.

### Insurance

Admiral Group, Aegon, AIG, Allianz, Aviva, Axa, Co-operative Financial Services, Fortis, Friends Provident, Hiscox, Legal & General, Manulife Financial, Marsh, Prudential, Royal & Sun Alliance, Scottish Widows, Standard Life, Swiss Re and Zurich.

### Internet

Amazon.co.uk, AOL, eBay, Facebook, Google, Thomson Local, Yahoo!, Yellow Pages and Youtube.

### Luxury

Cartier, Chanel, Giorgio Armani, Gucci, Hermes, Louis Vuitton, Prada, Rolex, Tiffany & Co. and Yves Saint Laurent.

### Newspapers, Magazines and Books

Business Week, Cosmopolitan, Daily Mail, Esquire, FT, Getty Images, Good Housekeeping, Men's Health, New York Times, News of the World, Pearson, Random House, Reed Elsevier, The Daily Telegraph/The Sunday Telegraph, The Economist, The Guardian/The Observer, The Sun, The Times/Sunday Times, The Wall Street Journal and The Washington Post Company.

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## How to order

The BEL Report 2009 costs £599

To order your copy please contact:

Stewart McMahon

T: +44 131 651 5254

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ENDS Carbon  
University of Edinburgh Business School,  
William Robertson Building, George  
Square, Edinburgh EH8 9JY, UK

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### Non-food Retail

Adams Kids, Argos, Bargain Booze, Blacks Leisure Group, Blockbuster Entertainment, Body Shop, Boots, Carphone Warehouse, Clinton Cards, Comet, Currys, Dollond & Aitchison, Dunnes Stores, Fitness First, Game, GameStop, Goldsmiths, Halfords, Hallmark Cards, Hamleys, HMV, Holland and Barrett, HomeSense, Homestyle, JCT600, JD Sports, Jessops, Jewson, JJB Sports, L Rowland & Co, Laura Ashley, Listers, L'Oreal, Lush, Mappin & Webb, Martin McColl, Mothercare, Oddbins, Pets at Home, Phones 4U, Poundland, Redcats, Shop Direct, Signet, Specsavers, Superdrug, Swatch, The Disney Store, The Tech Guys, Thorntons, TJ Hughes, TK Maxx, Toni & Guy, Toys 'R' Us, Waterstone's, WH Smith, Wilkinson Hardware Stores, Wine Cellars, Wolseley and World Duty Free.

### Office Equipment & Supplies

Avery, Basildon Bond, Conqueror, Dymo, Initial, Kimberly-Clark Professional, Letts, Office Depot, Oxford Black n' Red, Oyez Straker, Papermate, PC World, Pitney Bowes, Rexel, Ryman, Staedtler, Staples and Viking.

### Oil Companies

BP, Esso, Jet, Shell, Texaco and Total.

### Pharmaceuticals

Abbott, Astrazeneca, Baxter, Bayer, Bristol-Myers Squibb, Eli Lilly, Glaxosmithkline, Merck, Novartis, Pfizer, Roche, Sanofi-Aventis, Schering-Plough, Shire, Smith & Nephew, Unichem and Wyeth.

### Rail and Other Mass Transport

Arriva, Citylink, Eurostar, First, Gatwick Express, Go-Ahead, Groupe Eurotunnel, Heathrow Express, National Express, Network Rail, Stagecoach, Stena Line and Virgin Trains.

### Restaurants and Cafes

Burger King, Caffe Nero, Costa, Darden Restaurants, Dominos, Harry Ramsden's, KFC, McDonald's, Pizza Express, Pizza Hut, Pret A Manger, Quiznos, Starbucks, Subway, Upper Crust and Wagamama.

### Software

3COM, Adobe, Autocad, Firefox, McAfee, Microsoft, Norton, Novell, Opera, Oracle, Quark, Sage, SAP, Symantec, Unix and Verisign.

### Sports

Adidas, Berghaus, Billabong International, Decathlon, Jansport, Lee, Nike, Raleigh, Reebok, Slazenger, Speedo and Sports Direct.

### Telecommunications

3, BT, Cable & Wireless, Nokia Siemens Networks, O2, Orange, T-Mobile, Virgin Mobile and Vodafone.

### Water and Waste

Anglian Water Group, Northumbrian Water, Severn Trent Water, Southern Water, Thames Water, United Utilities, Veolia, Viridian and Yorkshire Water.