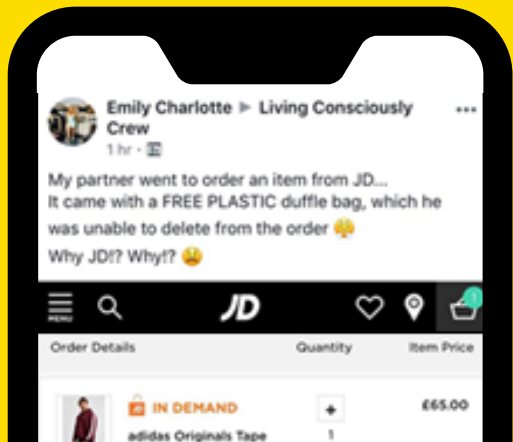


Paper & Plastic, perception & facts...

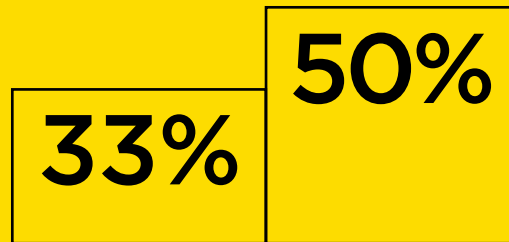
Media and public view - early 2019

- All plastic has a negative environmental impact. Plastic contaminates the sea, and harms marine life. Paper is a more sustainable alternative to plastic
- JD has received a high volume of customer, press, investor, and social media questions and comments on our use of plastic
- We welcome the debate, and respond to all enquiries, outlining our focus on re-use, and positive changes we have made in the last year



Paper vs. Plastic. The facts

- Most alternatives to plastic do not achieve environmental benefits - changes need to consider function, purpose and full-life environmental impact
- UK Gov (2011) recommended the 5p bag levy apply to paper. Plastic re-used just 3-4 times is more environmentally friendly than a single use paper bag
- Paper pre-manufacture, transport and recycling uses more carbon than plastic

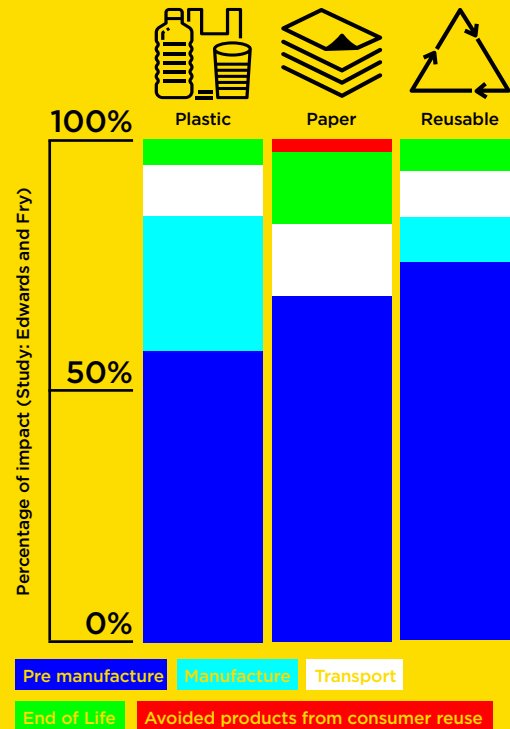


Recycled Materials Increase (2018 to 2019)

Reduce, reuse and recycle - recent milestones

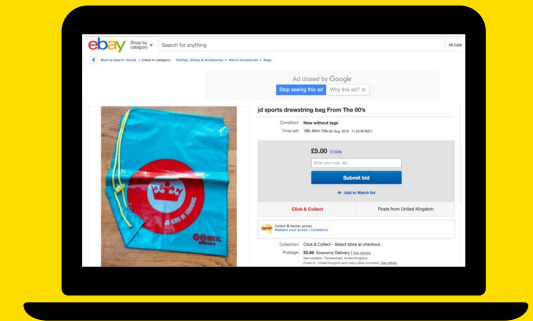
- The 'High Street to High School' viDraw-string (duffles) recycled materials increased from 33% to 50%
- Junior duffel uses 39% less plastic than standard JD duffel
- Outdoor switches c.1m bags from single-use plastic to multi-use paper design

Results - carbon emissions and life stages



Our view

- The 'High Street to High School' visual presence of JD duffles is true re-use in action - eBay (UK) presently lists over 120 JD drawstring bags for sale!
- Decisions on paper vs. plastic should be taken based upon the individual product and purpose. Great design encourages re-use of materials



Don't just take our word for it! Report published under 'Environment agency' states:

"Environmental benefits of reduced plastic bag usage are negated for some indicators by the impacts of increased paper bag usage."

"A paper bag has a more adverse impact than a plastic bag for most of the environmental issues considered. Areas where paper bags score particularly badly include water consumption, atmospheric acidification, and eutrophication of water bodies."

"Heavyweight, reusable plastic bags are more sustainable than all types of lightweight plastic carrier bags if used four times or more. They give the greatest environmental impacts over the full lifecycle."