



Rooted in Data,
Cultivating Change

Dear Friends,

When ReFED published the first *Roadmap to Reduce U.S. Food Waste* in 2016, we weren't yet an organization. We were a group of philanthropists, food businesses, environmental and hunger organizations, investors, and policymakers who unified around the conviction that food waste is a solvable problem. A decade later, that conviction has grown into a movement of thousands—and the results are starting to show.

We embraced the idea of cultivation this year, both as a theme for how we think about our work and as an honest description of where we are. Movements don't scale overnight. They grow through years of investment in the individuals, institutions, and infrastructure that compound to produce lasting change.

Internally, that meant laying the groundwork for our next chapter: growing our team (to 40!), investing in tech tools that will expand our reach, bringing on an inaugural policy director to deepen our impact, and participating in international forums to assess how we can add value beyond the U.S. We also formalized our fiscal sponsorship of the Zero Food Waste Coalition, ensuring it can mature into an independent force to impact state- and federal-level policy on food waste.

Externally, the field we've spent a decade cultivating is bearing fruit. We deepened partnerships with businesses and organizations working directly on food waste reduction, and for the first time outside of the pandemic, we're seeing the results: **surplus food was reduced by 2.2% overall and 3.7% per capita!**

We're proud of this progress, but we know there is so much more work to do. None of it is possible without the support of our friends, donors, partners, food businesses, nonprofit and political leaders, activists, and everyone who cares about what happens to food in this country.

We simply couldn't do it without you!



A handwritten signature in black ink that reads "Dana Gunders".

Dana Gunders
President



A handwritten signature in black ink that reads "Pamela B. Murphy".

Pamela Murphy
Chair, Board of Directors

Food waste is a systemic failure.

In the United States, 70 million tons of surplus food go uneaten each year—making food the single largest category of material in our landfills. Producing and discarding that food requires over 16 trillion gallons of water, amounts to 3.5% of our greenhouse gas footprint, and occupies an area of land the size of California and New York combined. Meanwhile, over 47 million Americans struggle with food insecurity.

We feed our landfills before we feed our neighbors.

This doesn't happen by accident. Our food system was built to track what is sold, not what is surplus—leaving waste invisible and unactionable. Food waste at one stage of the supply chain is often driven by decisions made at another, requiring coordination across sectors that typically operate in silos.

But this is a solvable problem—and the systems that created it can be re-engineered. ReFED is the U.S.-based nonprofit determined to solve food waste—and the field catalyst mobilizing businesses, funders, innovators, policymakers, and advocates around a shared, data-driven mission.

We address this failure through four interconnected domains:



Data & Insights

ReFED is the definitive source for data and economic analysis about food waste, the solutions to fight it, and accessible methods for tracking progress. Our Insights Engine is the nation's most comprehensive platform on food waste, tracking surplus across the entire supply chain and modeling the impact of nearly 50 solutions.



Capital & Innovation

Food waste solutions remain significantly underfunded relative to their impact potential. To bridge this gap, we connect funders with high-impact opportunities, support innovators through our Catalytic Grant Fund, and build the market infrastructure to move capital toward solutions that work.



Industry Activation

Two-thirds of surplus food originates with the producers and businesses that grow, sell, and serve our food. We turn corporate commitments into measurable outcomes through customized analytics, waste reduction roadmaps, and pre-competitive collaborations like the U.S. Food Waste Pact.



Community Engagement & Policy

Food waste requires coordination across sectors that typically operate in silos. We convene the movement through our annual Summit, mobilize advocates through the Food Waste Action Network, and arm policymakers with the evidence to design effective interventions at every level.

U.S. surplus food declined 2.2% overall between 2023 and 2024, led by a nearly 4% reduction in the residential sector.

For the first time outside of the pandemic, food waste in America is going down. These are the reductions we've been working toward for nearly a decade—and they signal that the seeds planted by this movement are finally bearing fruit.



In April, we published our inaugural *U.S. Food Waste Report*, the first comprehensive analysis of progress, trends, and challenges in reducing food waste across the American food system. This report will now serve as an annual benchmark for the entire field.

The Insights Engine surpassed 250,000 unique users in 2025, a 150% increase since 2023.

Five New Solutions Added to the Insights Engine

Through a months-long research effort with LIDD, Resource Recycling Systems, and sustainability advisor Kai Robertson, we added five new solutions to the Solutions Database:



Field Pre-Cooling Units



Online Marketplace for Surplus Produce



Donation Reverse Logistics



Repackaging Partially Damaged Products



Waste-Derived Processed Animal Feed

Accelerating Discovery with AI

This year, we prototyped an AI-assisted systematic review of academic literature. The results were transformative: in just seven months, 88 new food waste solutions were identified, and waste diversion rates validated for 21 of them.

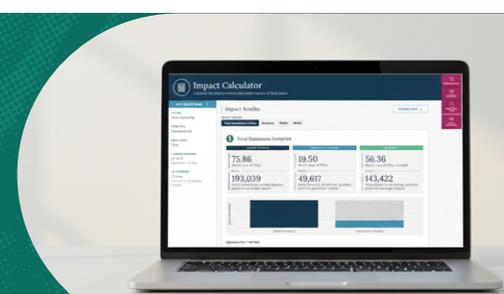
Quantifying the Cost of Inaction

ReFED also integrated the Social Cost of Carbon into the Insights Engine, assigning a direct monetary value to the expected future damages of food waste emissions—encompassing health impacts, agricultural yield losses, and property destruction.

In 2024, U.S. food waste generated nearly \$60 billion in future economic damages.

Redesigned Impact Calculator

We launched a user-friendly, guided experience that helps organizations effectively estimate their food waste footprint and model reduction opportunities.



The U.S. Food Waste Pact grew to 30 signatories this year, adding 14 new organizations to a coalition that represents **\$960B+ in annual U.S. revenue, over half of national retail market share, and 81% of corporate dining foodservice market share.**

For the first time, trade associations joined the effort, extending the Pact's reach to thousands of their member businesses.

New Pact Members

Pact Highlights

- Retail unsold food rate declined to 2.9%
- Foodservice emissions from surplus food down 21%
- 1.21B meals donated across retail, up 31% from 2023

Understanding Loss Across the Supply Chain

Through whole chain studies, the Pact is mapping exactly where waste occurs across the supply chain. A strawberry analysis found that 36% of the harvest was left in fields, including edible berries rejected for size alone. Similar studies on plums, ground beef, yogurt, and bananas are now published or underway.

“The Pact helped us implement a pilot that brought our hotel team together with the meeting planner to achieve less waste. This collaboration and shared vision are essential. We look forward to applying the learnings from this effort into our Meet with Purpose offering, delivering more impactful, lower waste meetings for our customers.”

Jean Garris Hand VP | Global Head, Sustainability, Hilton



Announcing Insights Engine Pro

This year, ReFED launched a new web application that standardized food waste reporting for all U.S. Food Waste Pact signatories—replacing our previous Excel-driven process with built-in version control, error-proofing, and technical assistance. The platform lays the foundation for automated reporting and global scalability in the years ahead.

Expanding Business Services

Our Business Services engagements rapidly increased beyond the Pact through workshops, advisory services, and strategic planning. Key outcomes include:

- Starbucks:** Refined its data management and reporting strategy.
- Wawa:** Established cross-functional coordination to improve operational processes and program effectiveness.

Chick-fil-A: Returned for a third engagement to prepare executive leaders for scaling prevention and donation across its franchise network.



businesses were served by ReFED in 2025

ABOVE: A ReFED workshop co-hosted with the Park City Chamber of Commerce helped local restaurant owners develop food waste reduction plans. The effort received the Mountain Towns 2030 Climate Action Award.

Photo Credit: Joe Kusumoto

Solving food waste requires an estimated \$16.2 billion in funding to implement solutions. But capital alone isn't enough—fundors need strategic guidance, solution providers need support to scale, and the market needs infrastructure to connect them.

ReFED bridges these gaps through direct investment, advisory services, and targeted programming for capital and solution providers.



Our Food Waste Funder Circle has helped mobilize more than \$128M into food waste solutions since 2021, with 28 deals completed in 2025 alone.

Catalytic Grant Fund

Since 2022, our Catalytic Grant Fund has deployed patient, flexible capital to 21 solution providers. The results speak for themselves:

-  \$35.6M in follow-on funding secured, leveraging our investment nearly 12x
-  1.2M+ pounds of food diverted from landfills
-  70+ new partnerships or customers established
-  50%+ of grantees with diverse executive leadership

In spring 2025, the Grant Fund targeted on-farm produce loss as a response to the nearly 17 million tons of surplus generated by the sector in 2023. Our open call attracted solutions spanning automated harvesting, mobile cold storage, and new sales channels for surplus produce. Five grantees were selected:



Beyond direct grantmaking, we support solution providers through our Learning Labs and "The Second Serving"—a newsletter connecting solution providers with insights and opportunities.



CGF grantee Freshealth transforms High Rise Broccoli stems into ready-to-eat products for K-12 schools, creating new markets for farmers while improving access to healthy food.



In 2025, we redesigned our Solution Provider Directory for greater usability and added over 170 international organizations to connect funders with solutions worldwide.

Targeting Methane

Our fall 2025 Catalytic Grant Fund open call represents our most strategically-focused grantmaking to date, building on ReFED's foundational research mapping methane's outsized climate impact across the food system. We identified the beef and dairy sectors and landfill disposal as the highest-leverage tipping points for immediate climate impact. Applications are under review, with grants to be awarded at our Food Waste Solutions Summit in May 2026.

Policy drives systems-level change. In 2025, ReFED formalized and expanded our capacity to shape it.

Food waste emerged as a promising point of bipartisan agreement in 2025. The America First Policy Institute named food waste reduction as a priority within its nutrition agenda, and in September, the EPA launched “Feed It Onward”—a national initiative connecting surplus food with communities in need. In June, Maine enacted an organics diversion mandate, with phased compliance beginning in 2030—joining a growing number of states building large-scale diversion capacity.

350+

 local government officials engaged with ReFED’s work.

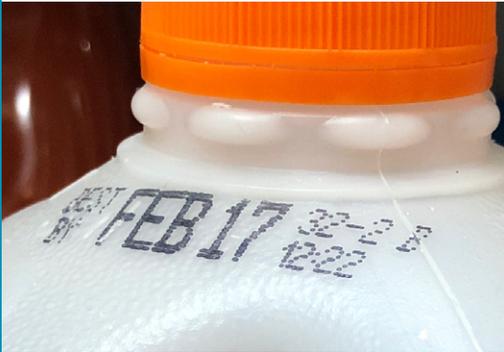
In November, we finalized our fiscal sponsorship of the Zero Food Waste Coalition, strengthening the advocacy infrastructure that coordinates action across over 300 member organizations representing all 50 states. This year, in addition to its existing federal and state advocacy work, ZFWC launched a competitive state policy pilot program, selecting New Jersey and Pennsylvania to receive technical assistance to advance legislation that strengthens food recovery infrastructure and reduces food going to landfills.



In July, Kumar Chandran joined as our inaugural policy director, bringing over 15 years of experience in food and nutrition to the role. Kumar is developing ReFED’s policy strategy, pairing near-term actions with a longer-term pathway to unlock the investment and infrastructure required for large-scale food waste reduction.

Bipartisan Breakthrough on Date Labels

ReFED has long supported the Food Date Labeling Act, which was reintroduced in July with Senator Rick Scott, R-Fla., as its first Republican Senate co-sponsor. With bipartisan support now in both chambers, the legislation addresses one of the most cost-effective federal interventions available—standardizing the confusing date labels that alone lead to an estimated \$19 billion in annual food surplus across households and businesses.



Sharing Insights Beyond Borders

Since the launch of our Insights Engine in 2021, ReFED has attracted international interest in our tools, programming, and knowledge—from Australia, New Zealand, and Turkey, where our original *Roadmap* directly informed national food waste reduction efforts, to growing engagement with stakeholders in Brazil and the Netherlands. In 2025, we formalized our Global Initiatives program, participating in COP convenings, joining forces with international groups including the WRAP Food Pact Network, Low-M, Action Speaks, and Global Action Drive, and beginning to scope project work with partners around the world. **We’re laying the groundwork for a future where ReFED drives change worldwide.**





2025 ReFED Food Waste Solutions Summit

ReFED's annual Food Waste Solutions Summit convened global leaders from business, philanthropy, government, nonprofits, and innovation in Seattle last June. Over three days of insightful sessions, meaningful new connections, and unexpected mainstage moments—from a leftovers cooking demo to sorting through a dumpster of discarded groceries—the Summit catalyzed new ideas, strengthened cross-sector collaboration, and equipped attendees with the insights and relationships needed to advance data-driven solutions.

759 attendees

16 countries represented

85+ speakers

PROJECT DRAWDOWN.

In partnership with Project Drawdown, we co-created a three-part webinar series connecting funders with the science, solutions, and implementation strategies for reducing food waste's climate impact.



Our Impact Capital Showcase Series with CapShift demonstrated how innovative financing structures—including recoverable grants, catalytic capital, and bridge financing—multiply philanthropic power.



We announced the next iteration of the **ReFED Food Waste Action Network** at our Summit in June and formally relaunched it at Climate Week NYC in September. Over 100 inaugural members joined the coalition, ready to share knowledge, identify needs, and commit to collective action.



Climate Week NYC

ReFED made the most of Climate Week NYC in September. In addition to speaking on various panels, we co-hosted a U.S. Food Waste Pact Executive Roundtable, which brought together 25 top food business leaders for candid conversation about scaling waste reduction across their operations.



Photo Credit: Ryan Rose



In a workshop co-hosted with Ingka Group (IKEA) and Action Speaks, experts gathered to tackle a live food waste challenge—exploring how AI tools can accelerate business action and turn concepts into scalable solutions.



In December, chef and content creator Jon Kung joined us for a virtual cooking demonstration with practical techniques for minimizing kitchen waste.

The message is breaking through.

IN 2025

“Food waste” as a topic earned nearly 900 billion media impressions, a 36% increase year-over-year.

“ReFED” was referenced in more than 2,620 articles, producing over nine billion media impressions.



“Your Thanksgiving leftovers are harming the planet. There are ways to shop and cook smarter”



“EPA Says the Cost of Food Waste Has Nearly Doubled”



“Is the Doggy Bag Dead? Restaurateurs in big cities have noticed a somewhat surprising shift in diner behavior”



“US Food Waste Pact debuts new frontline employee toolkit”



“35 million tons of food go to waste yearly in the US. Experts share tips to help stop it”

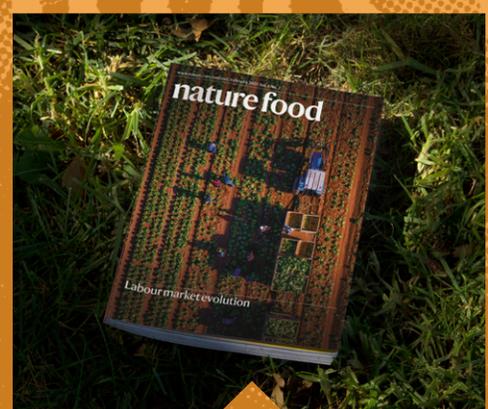


“Chefs are taking food waste off the menu with a little help from AI”



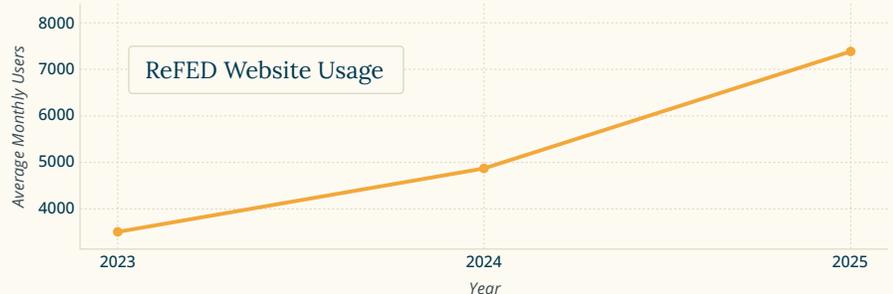
30th Heinz Awards Laureate

ReFED President Dana Gunders received the prestigious Heinz Award for Environment, recognizing her career-spanning work to catalyze national awareness of food waste and activate solutions across industry, policy, and consumer behavior.



Published in Nature Food

ReFED data underpinned a peer-reviewed study published in Nature Food (February 2025) examining state-level food waste policies—the first comprehensive analysis of its kind. The research, drawing on ReFED’s Solutions Database, found that current state policies alone cannot meet the federal 50% reduction goal, reinforcing the need for coordinated action at every level.



As the food waste movement gains momentum, more stakeholders are turning to ReFED as the field’s central source for data and direction.

As a result of increased financial support from donors and partners, 2025 marked the largest year of team growth in our history. We are not, however, growing for growth's sake—we are growing for impact's sake. Our 30% increase in staffing was dedicated to building the capacity of our core program work and professionalizing our operations.

ReFED Leadership

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Executive Director

Shawn Shepherd
Vice President,
Operations & Finance

Asch Harwood
Vice President,
Data & Insights

Alexandria Coari
Vice President, Capital,
Innovation, & Global Initiatives

Jackie Suggitt
Vice President, Business
Initiatives & Community
Engagement

Travis Wright
Vice President,
Product

Kumar Chandran
Director, Policy

Jeffrey Costantino
Director,
Communications

Katy Hart
Director, Finance &
Administration



Board of Directors

Our board is comprised of leaders in the business, technology, philanthropic, and nonprofit sectors who inform the organization's strategic initiatives, offer technical expertise, and provide a holistic analysis of the challenges and opportunities for food waste reduction across the food system.

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Philanthropist and Nonprofit
Board Leader

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President & CEO, Hana Group

Emily Ma
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Special Thanks to Our Funding Partners

The partnership, generosity, and trust of our donors power ReFED's impact. Philanthropic support provides over 90% of our funding, without which our programs and services would not be possible. We're truly thankful for our funders' commitment to our shared mission of catalyzing the food system toward evidence-based action to stop wasting food.



* = Perennial Partner | A special thanks to our Perennial Partners, whose sustained commitment provides the foundation ReFED needs to drive lasting, systemic change across the food system.

Foundational Data Contributors:



Our Four-Star Rating from Charity Navigator and Platinum Seal of Transparency from Candid mean that you can donate with confidence! We're also proud to be a partner of 1% for the Planet.



With Gratitude

Just as ReFED works to cultivate the food waste movement, our donors cultivate ReFED to make our work possible, and for that we are deeply grateful. If you are interested in supporting the next chapter of our impact at ReFED, please visit us at refed.org/about/become-a-funder to learn how.

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The progress in this report was made possible by a growing coalition of partners who believe food waste is a solvable problem. Whether you're a business looking to reduce food waste, a funder seeking high-impact opportunities, a policymaker exploring evidence-based solutions, or simply someone who believes our food system can do better—we'd love to hear from you.

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