What Funders Need to Know:

Organics Policy and Food Waste Solutions

Food Waste Funder Circle

This ReFED food waste ("organics") policy snapshot outlines the scope, structure, and likely trajectory of state and local food waste policy in the U.S., alongside how food businesses are responding—providing critical context for funders evaluating solution demand and scalability.

Overview of the Current Organics Policy Landscape

- State and local organics policy aims to divert food scraps and organic materials from landfill toward food recovery and donation and/or recycling (e.g., animal feed, composting, and anaerobic digestion). Policies primarily take two forms:
  - Mandatory organics recycling or disposal bans
  - Mandatory food recovery and donation requirements
- Eleven U.S. states have enacted statewide organics policies over the past approximately 15 years, concentrated in the Northeast and West Coast regions; there are growing indicators of future policy in the Midwest. Select cities and over a dozen municipalities have also enacted policies.
- Most policies are implemented in phases based on the volume of waste generated (typically first applying to the largest entities) shaping compliance timelines; exemptions exist in some cases for businesses located too far from available processing infrastructure.

Why Organics Policy Should Matter to Funders

Policy can help funders distinguish between uncertain business decisions and "nice-to-have" sustainability tools, and must-have operational infrastructure.

- Organics policy may function as a durable demand driver.
- Mandates create:
  - **Market stability** for compliance-enabling services (e.g., donation, collection and/or hauling logistics, depackaging, composting, anaerobic digestion).
  - **Accelerated decision and adoption timelines**, as regulated businesses face compliance deadlines, penalties, and reporting requirements, increasing interest in third-party solutions.
  - **Capital leverage**, as policies are sometimes paired with public grants, technical assistance, and/or infrastructure investment.
- States considering implementing policy represent potential near-term growth markets for solution providers.

How Policy Is Driving Business Behavior and Solution Demand

Organics policy represents an opportunity for funders, as it increases business demand for scalable food waste solutions.

What We Are Hearing From Waste-Generating Food Businesses

- ***Policy as either an opportunity or forcing function:*** Some leading national and multinational companies view the growing momentum behind state organics policy as an opportunity to accelerate organizational alignment, harmonize compliance approaches across multi-state operations, and proactively shape forthcoming policy, particularly when mandates reinforce existing sustainability commitments. Others—especially those with fewer resources or less structural alignment around sustainability—may be slower to respond. For these actors, policy requirements function more as a forcing mechanism.

- ***Centralized compliance and data visibility:*** Multi-state waste-generating entities are increasingly centralizing contracts, guidance, and data systems to ensure consistent compliance across sites within each diversion pathway. Though most donation and organics diversion reporting systems remain separate, some market leaders are beginning to invest in unified, cross-pathway reporting.

- ***Partner preferences shaped by scale vs. local tradeoffs:*** Businesses often prefer streamlined, integrated partnerships to reduce friction and manage complexity across sites. However, fragmented state and local organics policies often require working with a mix of regional and local providers. This creates a tension between efficiency-at-scale and smaller, place-based solutions that strengthen local circular systems.

- ***Operational realism matters:*** Businesses emphasize the need for organics policies to be clear and reflect real-world constraints (e.g., infrastructure access, depackaging, labor turnover, consumer behavior).

- ***Responsiveness:*** Businesses note that to stay ahead of evolving regulatory requirements on food waste, they rely on strong internal government relations capacity and trusted partnerships with NGOs (e.g., Zero Food Waste Coalition[1], ReFED) that help surface emerging policy signals and support operational readiness.

[1]A national effort to inform and influence U.S. food waste policy at the federal, state, and local levels in order to accelerate progress and build momentum by bringing together stakeholders from across the food system. ReFED, NRDC, WWF, and the Harvard Law School Food Law and Policy Clinic are founding members.

Potential Implications for Demand Across Solution Pathways

- ***Food recovery and donation:*** Mandatory donation requirements may increase demand for donation coordination and matching, compliance tracking, and partner management platforms.

- ***Composting:*** Disposal bans and recycling mandates may expand demand for hauling, processing capacity, and on-site volume-reduction dehydrating and digesting technologies, which reduce recycling costs for waste-generating businesses.

- ***Animal feed[2]:*** Diversion mandates may open markets for depackaging solutions and animal feed partnerships.

- ***Anaerobic digestion:*** Stable feedstock demand may support infrastructure development and long-term offtake agreements.

- ***Data and partnership infrastructure:*** Multi-state compliance may increase the need for centralized systems to track contracts, reporting, and diversion performance across regions, both within companies and across the integrated partners they rely on to manage complexity at scale.

> The ReFED Catalytic Grant Fund has evaluated solutions to advance food recycling among other areas. To learn more, reach out to **capitalinitiatives@refed.org**.

[2]For more information about food waste-to-feed pathways, see ReFED's Closing the Loop: Evaluating Food Waste-to-Feed Pathways for a Circular Food System.

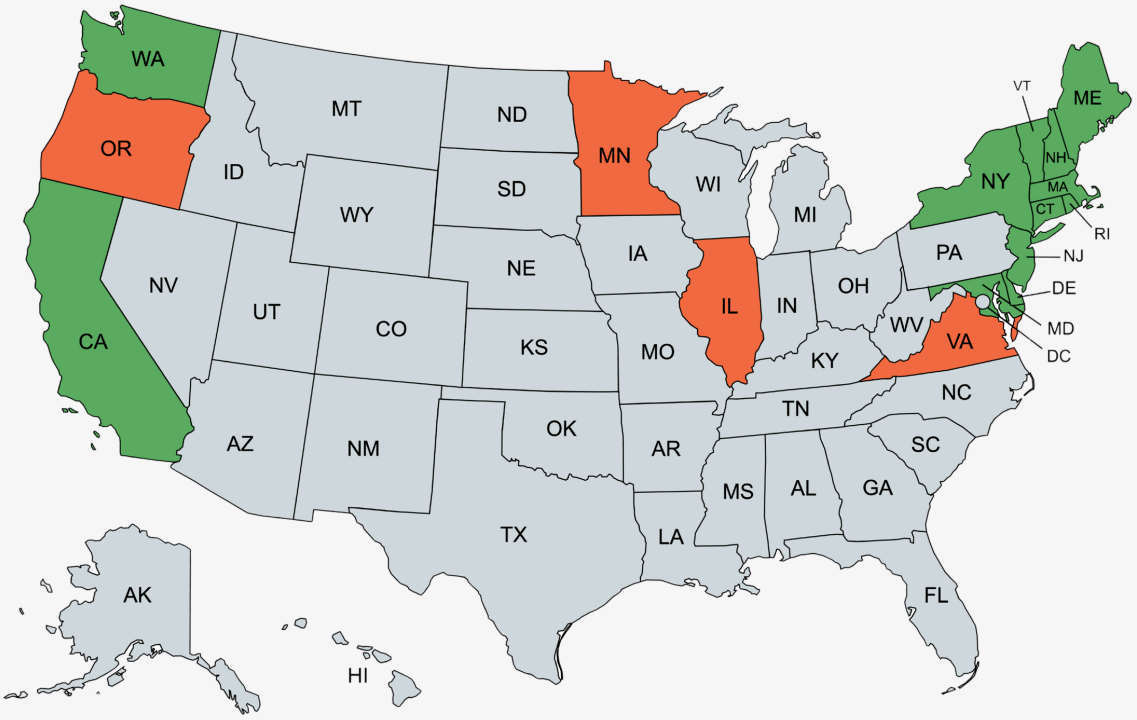
Appendix

Features of Organics Policy

Feature	Explanation
Goal	Organics policy may be designed to advance a range of objectives, including reducing waste, mitigating environmental impacts, reducing pressure on landfill space by keeping organics out of the waste stream, and supporting anti-hunger efforts. The specific underlying goals help explain differences in how policies are designed, implemented, and enforced.
Mechanism	Policy requirements may be established directly in statute, through agency rulemaking, or via a combination of both. In many cases, policy sets high-level direction, while agencies define detailed compliance requirements.
Compliance Mechanism	Policies generally rely on two approaches: *diversion*, which prohibits organic waste from being sent to landfill, or *recycling*, which requires organic waste to be sent to an approved recycling pathway. These approaches are often combined to shift organics away from disposal, ensure diverted waste is managed through approved recycling pathways, and reinforce broader incentives for upstream prevention.
Timeline	Implementation timelines are typically phased based on generator type and volume of waste generated, with highest waste-producing entities subject to earlier compliance. Timelines may also vary based on proximity to processing infrastructure.
Enforcement	Enforcement approaches vary by jurisdiction and may include required reporting, audits, inspections, or penalties for noncompliance.
Exemptions	Exemptions may apply for businesses located beyond a specified distance from available processing infrastructure or when compliance would undermine cost competitiveness. While intended to provide flexibility, exemptions can add complexity by requiring businesses to monitor infrastructure availability and reassess eligibility as local capacity evolves.
Outreach and Technical Assistance	Some policies include outreach and technical assistance—such as education efforts and designated points of contact—to support compliance, as well as grant funding to offset implementation costs.

Detail of 10 Existing & Potential Future State-Level Organics Policies

Organics policy is currently concentrated on the West Coast and in the Northeastern states.



**Orange indicates states with potential upcoming policy; green delineates existing statewide organics regulation.*

It appears likely that Hawaii (SB676), Illinois (SB1398), Oregon (HB3018), Minnesota (recently introduced), and Virginia (recently introduced) will be the next adopters of organics policy in 2026 and beyond.

Overview of U.S. Organics Legislation by State

State	Type of Law	Policy Name/ Bill Number	Year Signed Into Law	Initial Implementation Year (Effective for Largest Generators)
California	Mandatory organic waste recycling and food donation for businesses/institutions and residential collection requirements	Short-Lived Climate Pollutants (SB 1383)	2016	2022 (For local jurisdictions, Tier 1 food donors)

State	Type of Law	Policy Name/ Bill Number	Year Signed Into Law	Initial Implementation Year (Effective for Largest Generators)
Connecticut	Commercial food scrap recycling mandate	Organics Recycling Mandate (Public Act 11-217)	2011	2014 (For generators ≥104 tons/year)
Maine	Organics waste ban	Act Regarding Reduction and Recycling of Food Waste (LD 1065)	2025	2030 (For generators ≥2 tons/week, within a proximity)
Maryland	Commercial food residuals recycling mandate	Commercial Food Residuals Recycling Mandate	2020	2023 (For generators ≥2 tons/week)
Massachusetts	Commercial organic material disposal ban	Commercial Organic Material Disposal Ban	2014	2014 (For generators ≥1 ton/week)
New Jersey	Commercial food waste recycling law	Commercial Food Waste Recycling Law	2020	2021 (For generators ≥52 tons/year)
New York	Food donation and food scraps recycling law	Food Donation & Food Scraps Recycling Law	2019	2022 (For generators ≥2 tons/week)
Rhode Island	Commercial organic waste recycling requirement	Commercial Food Waste Recycling Requirement	2016	2016 (For generators ≥104 tons/year)
Washington	Organics management laws for businesses and residential collection requirements	Organics Management Law (HB 1799)	2022	2024 (For businesses ≥8 cubic yards/week of organics)
Vermont	Universal recycling law, banning all food scraps from landfill	Universal Recycling Law (Act 148)	2012	2014 (For generators ≥104 tons/year)

Additional Resources

- Food Waste Policy Finder *[ReFED and Harvard Law School Food Law and Policy Clinic]*
- "2025 Wins for Food Waste and What's Next for 2026" *[NRDC]*
- "How State Organic Waste Ban Policies Can Drive Food Waste Reduction" *[NRDC]*
- "From Mandate to Momentum: How Massachusetts Turned an Organic Waste Ban into a Model for Success" *[ReFED]*
- Food Waste Legislative Tracker *[Divert]*