PROGRESS IN REDUCING FOOD WASTE

A Data Report from the Pacific Coast Food Waste Commitment and the U.S. Food Waste Pact







































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Introduction

Data collection is a central pillar of the Pacific Coast Food Waste Commitment (PCFWC) and the U.S. Food Waste Pact (Pact) in their efforts to reduce food waste through data-driven strategies. Since 2019, PCFWC retailers have been measuring and reporting food waste in their operations. This year, in addition to a fifth year of regional data from PCFWC retail signatories, the Pact is building on this legacy of best-in-class data reporting by publishing national retail and foodservice data for the first time.

Across both initiatives and all food business sectors, food waste measurement is critical for food waste reduction initiatives, as it is used to:

- Establish a baseline for improvement.
- Monitor progress.
- Identify hotspots that need action.
- Highlight successes that can be replicated.

These datasets represent the most recent analysis of retail food waste, the longest year-over-year aggregated dataset in the country, and the first national datasets of their kind, contributing to the larger global body of knowledge about food waste reduction.

Note that all three datasets use the most recent data reported by signatories, which is data from 2023.



Defining Unsold Food Rates

Unsold food includes all food that went unsold in each grocery store food department, including both edible food and inedible scraps (pits, peels, etc.). This is the most important metric for tracking progress in retail because it gives a sense of actual food waste reduction practices rather than market fluctuations or business performance. For more about unsold food rates, please reference the "About Our Methodology" section.

Pacific Coast Food Waste Commitment Regional Data

Retail

50.9% Retail Segment in the PCFWC Region

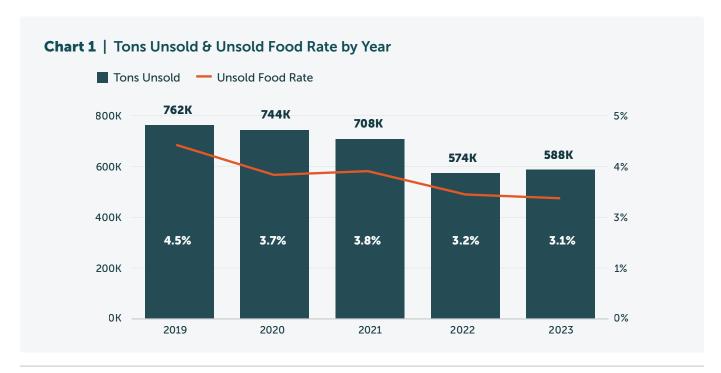
KEY METRICS

3.12% Unsold food rate

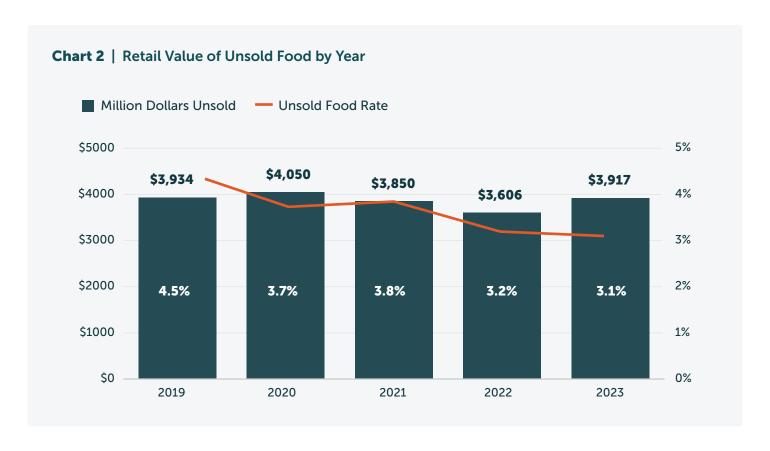
587,596 Tons of unsold food

\$3.92B Lost sales **23 lbs**Per capita unsold¹

Since the first year of data collection in 2019, **unsold food rates have decreased by 30% for reporting PCFWC retailers.**



¹ 22% decrease from 2019's 29.7 lbs per capita



Overview of 2022 to 2023 Trends

The relationship between unsold food rates, total tonnage, and retail value highlights a shifting dynamic driven by consumer behavior. While unsold food rates decreased by 2.8% (a 0.1% reduction) from 2022 to 2023 (Chart 1), total unsold food tons rose by 2.4%. The primary reason behind this seemingly unintuitive trend is the overall expansion of the market, evidenced by the region's 4.1% increase in sales revenue. Retail value of unsold food surged 8.6% (Chart 2), outpacing this sales growth. Notably, a unique trend contributing further to this dynamic is the shift in composition of unsold food, particularly toward higher-value food departments.

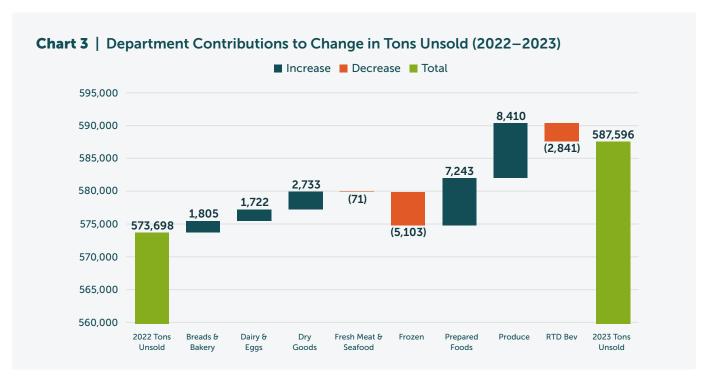
Evolving consumer preferences, potentially linked to post-pandemic demand for convenience, likely challenged traditional demand planning technology and procedures. Evidence of this lies in the rapid growth of unsold food in the Prepared Foods department, which saw a 13% increase in unsold

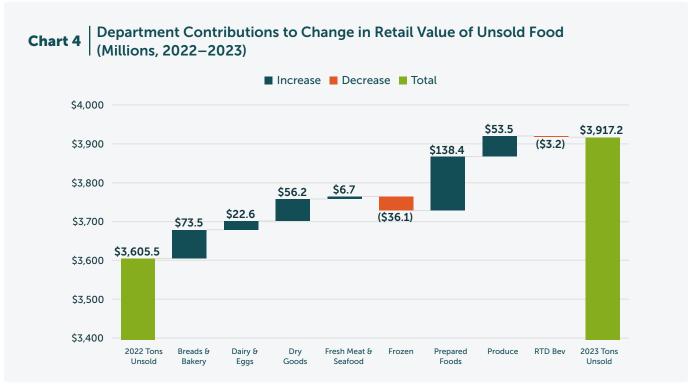
food rates and contributed 33% of the total tonnage increase (Chart 3). Its share of the retail value of unsold food jumped 1.8 points to 23.1% (Chart 4, Chart 5). The Produce department also saw a slight increase in unsold food rate (+4%) and a slight increase in price per pound. However, since Prepared Foods has the highest average price per pound across departments, its increased share disproportionately amplified the financial impact of unsold food, even as Produce remained the largest source of unsold tons (38.9% of total) (Chart 4, Chart 5).

Another high-value department, Fresh Meat & Seafood, saw its unsold food rate decline slightly. The most significant declines in unsold food rate were found in Frozen and Ready-to-Drink Beverages, which both have a relatively lower average price per pound. These trends, which will be explored in more detail throughout this report, point to the outsized role of Prepared Foods in shaping 2023 trends.

Charts 3 and 4 are "waterfall charts" that break down the total change in unsold food tonnage and retail value by department, showing which categories contributed to increases or decreases. Positive values (in dark teal) add to the total, while negative values (in orange) reduce it, illustrating the shifting composition of unsold food in 2023.

For example, Prepared Foods saw the largest increase in both tonnage and retail value, with the change in retail value being larger than the change in tons unsold. In contrast, Frozen had the biggest drop in unsold tons, but its decline in retail value was much smaller, reflecting its lower average price per pound.





Unsold Food Rates & Volume from 2019 to 2023

Chart 5 | Share of Total Tons Unsold & Retail Value of Unsold Food in 2023

Category	% of Total Tons Unsold	% of Total Retail Value of Unsold Food
Breads & Bakery	12.7%	17.1%
Dairy & Eggs	11.8%	6.8%
Dry Goods	9.8%	12.6%
Fresh Meat & Seafood	10.1%	14.7%
Frozen	2.3%	2.6%
Prepared Foods	10.9%	23.1%
Produce	38.9%	22.2%
RTD Bev	3.5%	1.4%



Charts 6 and 7 illustrate the progression of unsold food rates by department over the past five years, revealing both enduring patterns and emerging shifts. The majority of departments saw their unsold food rates decrease, with an average reduction of 27% from 2019 to 2023.

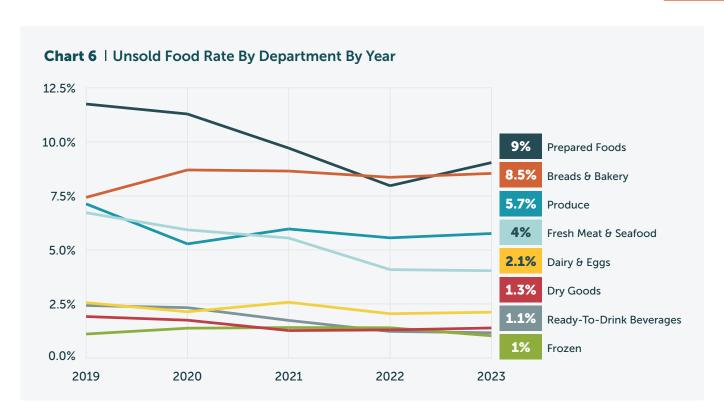
Frozen, Dry Goods, and Ready-To-Drink (RTD)
Beverages consistently achieved the lowest unsold food rates in 2023, both hovering around or below 1%, likely due to their longer shelf lives and steadier demand profiles. While Frozen consistently achieved unsold food rates around 1%, Ready-To-Drink Beverages decreased their unsold food rate by 52% from 2019 to 2023 (Chart 6).

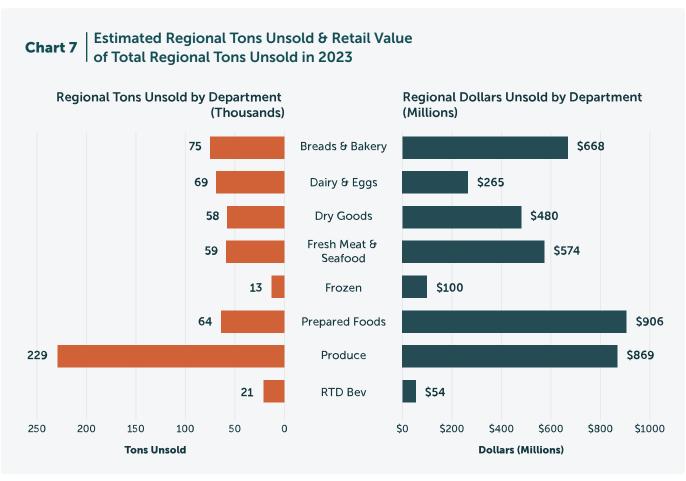
Two categories—Fresh Meat & Seafood and Produce—stand out for their sustained improvements, especially given their perishable nature. Produce remains the largest source of unsold food by weight, accounting for nearly 39% of all unsold tons in 2023. Produce accounted for the highest share of volume reduction since 2019 by reducing its unsold food rate from 7% in 2019 to 5.8% in 2023.

Meanwhile, Fresh Meat & Seafood's unsold food rate dropped from 6.7% in 2019 to 4% in 2023, a 40% reduction (Chart 6). The data suggests that retailers successfully implemented and maintained more precise demand planning processes and technology in these high-priority, perishable departments.

However, another highly perishable department, Breads & Bakery, was the only department to show an increase in unsold food rate and volume each year (7.4% in 2019 to 8.5% in 2023). This is likely a reflection of the short shelf life and fluctuating demand for fresh, ready-to-eat items. Prepared Foods did see a longer-term decline from 11.8% in 2019 down to 8% in 2022, but the bounce back to 9% this year indicates the challenges of accurately forecasting inventory in a post-pandemic landscape.

Taken together, these department-level trends show that while certain perishable categories like Fresh Meat & Seafood retained their gains, departments like Prepared Foods remain vulnerable to rising unsold food rates.





Unsold Food Destinations

Unsold food is sent to a variety of destinations, which the EPA ranked in 2023 with the Wasted Food Scale. If food can't be prevented from becoming surplus, it is preferable to keep it in the human supply chain, first through donation to food banks. If food cannot be recovered for human consumption, recycling it into animal feed is the next most preferable option. Recycling pathways that valorize the food material, such as composting and anaerobic digestion, are preferred if food cannot be recovered for human or animal consumption. Finally, the least preferred destinations are landfill, incineration, or sewer, as they do not utilize that food to its highest and best use.

2023 data indicates that the total tons of unsold food sent to Landfill increased by 22% from 2022 (Chart 8). This may, in part, be attributable to the shift in surplus food types towards Prepared Foods, which can be difficult to divert towards other pathways once it is deemed "surplus,"

for food safety reasons. Because food waste in landfills generates significant methane emissions, the increased input to landfills has resulted in an increased carbon footprint for unsold food in 2023.

Besides Landfill, tons sent to all other destinations decreased, including food that was donated. The volume of food donated from 2022 to 2023 decreased by 9.2%, continuing a decline since the peak in 2021 (Chart 9). The rate of donations also decreased in this same timeframe, from 15% in 2022 to 13% in 2023, returning to approximately 2019 levels despite previously demonstrating an increase during the COVID-19 pandemic from 2020 to 2022. Reductions in tons donated and sent to recycling destinations can be attributed to changes in the cost or availability of infrastructure. They could also be the result of shifts in unsold food types, as discussed earlier. For example, higher rates of unsold Prepared Foods may contribute to higher landfill rates where donation and recycling options are limited.

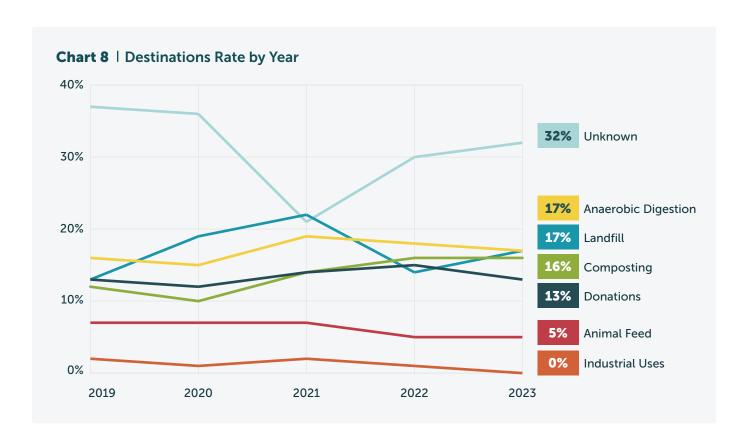


Chart 9 | Regional Tons of Unsold Food by Destination and Year (in Thousands)





Impacts of Unsold Food

Understanding unsold food's environmental and social impacts is pivotal for retailers to measure progress against sustainability and emissions reduction goals. The impacts of unsold food in the Pacific Coast region in 2023 are scaled up from PCFWC signatory data to reflect the entire region, and they are calculated using U.S. average impact factors that underlie ReFED's Impact Calculator.

The total greenhouse gas (GHG) footprint of unsold food for the region decreased by 29% since 2019 (Chart 10). The GHG footprint has two

components—upstream contributions from all of the supply chain activities required to get food from production to retail, and downstream contributions from the destinations of unsold food. The environmental impact of the upstream component vastly outweighs that of the downstream component—at least 93% of emissions from retail unsold food in the PCFWC region are incurred before it leaves the store. This is why solutions that prevent food from becoming waste, keeping it in the supply chain, have such a high impact on reducing emissions.

Chart 10

_	t of Pacific Coast Unsold Food in 2023	Change from 2019	Change from 2022
	MEALS DONATED 129 Million Enough to feed 118,000 people for one year	21 % Decrease	9% Decrease
GHG	TOTAL GHG FOOTPRINT 2.2 Million MTCO₂e Equivalent to driving 514,000 cars for a year	29% Decrease	3% Increase
CH ₄	METHANE FOOTPRINT 26,000 MTCH Equivalent to powering 98,000 homes' energy use for a year	31% Decrease	5% Increase
0	WATER FOOTPRINT 141 Billion Gallons of Water Equivalent to 222,000 Olympic-sized swimming pools	35% Decrease	2% Increase
\$	\$3.92 Billion Equivalent to 3.6% of annual regional food sales	0.4% Decrease	8% Increase

Upstream emissions are determined by factors like production practices, transportation vehicles and distances, and storage conditions. Because multiple factors are at play, emissions vary widely according to food type. Since 2019, the region has seen a decrease in emissions-intensive products in the Fresh Meat & Seafood and Dairy & Eggs categories. Meanwhile, the departments that have increased their relative share of unsold food volume are Prepared Foods and Produce, representing a shift towards food types with lower carbon footprints.

Downstream emissions are determined by the activities and processes that take place along each of the destination pathways once unsold food becomes surplus that must be managed. In 2023, the increase in tons of unsold food sent to Landfill (and relatively high volumes of food ending up in "Unknown" destination, which is assumed to be Landfill) is reflected in higher overall greenhouse gas emissions—and particularly higher methane emissions (a subset of the total GHG footprint)—compared to 2022. While less impactful than food waste prevention, diverting unsold food from landfill represents a clear opportunity for Pacific Coast retailers to reduce emissions.



Methane: A Potent Greenhouse Gas

Methane is a powerful and short-lived greenhouse gas—nearly 30 times more potent than carbon dioxide on a 100-year time frame. However, it only persists in the atmosphere for 12 years. This means that reducing methane emissions now has a cooling effect that will be felt in just a decade or two. The primary sources of methane in the food system are the digestive systems of cattle as they break down fibrous material and landfills where microorganisms similarly break down organic matter. Food businesses can therefore reduce methane emissions from unsold food in two key ways:

- 1) Keeping products like beef and dairy in the human supply chain, and
- 2) Diverting unsold food from landfill.

U.S. Food Waste Pact National Data

Retail

50.5% Retail Segment in the United States

KEY METRICS

4.1%Unsold food rate

7MTons of unsold food

\$42.3BLost sales

41.9 lbsPer capita unsold

To build on the last five years of regional retail data, the U.S. Food Waste Pact is reporting first-of-its-kind national retail unsold food, destination, and impact data. The 2023 data shared in this report represents a starting point for future comparisons as the Pact continues to collect data in years to come. For all the same reasons demonstrated in the PCFWC regional data previously, the insights, progress, and hotspots identified by this national dataset will help set the strategy for work going forward.

Unsold Food Rates

This initial year of national retail data reporting shows that seven million tons of food went unsold, representing \$42.3 billion in the value of unsold food. Chart 11 adds additional insight that fresh departments lead in unsold food rates, specifically Breads & Bakery, Prepared Foods, Produce, Fresh Meat & Seafood, and Dairy & Eggs. Produce leads

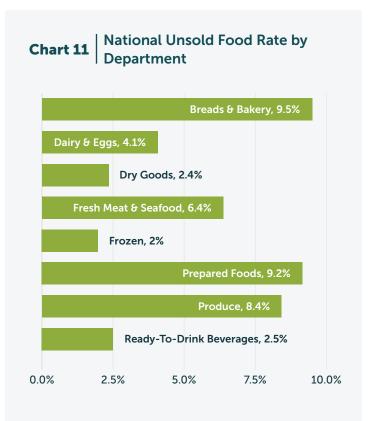
in volume of unsold food by so much that the department also emerges with the highest total value of unsold food waste, leading inherently higher-value product departments like Fresh Meat & Seafood and Prepared Foods. This trend may be attributable to the broader geographic scope, including heavily urban areas, as well as diversified and ever-evolving retail operations. The interplay and variance between these key metrics of rate, volume (tons), and value (dollars) of unsold food start to highlight the complexity of prioritizing the impact of potential solutions, and the importance of taking into account the full picture of unsold food and its impacts (Chart 12).



Comparing Regional and National Unsold Food Rates

The PCFWC and Pact datasets both represent retail unsold food rates and their corresponding metrics. An initial comparison between these datasets shows a slightly higher national unsold food rate of 4.1%, compared to the Pacific Coast regional average of 3.1%. Both the regulatory landscape of the Pacific Coast region, as well as the longevity of regional programs like the PCFWC, may contribute in part to this difference. Year-over-year trends available in future reports will be a better comparison point between national and regional trends.





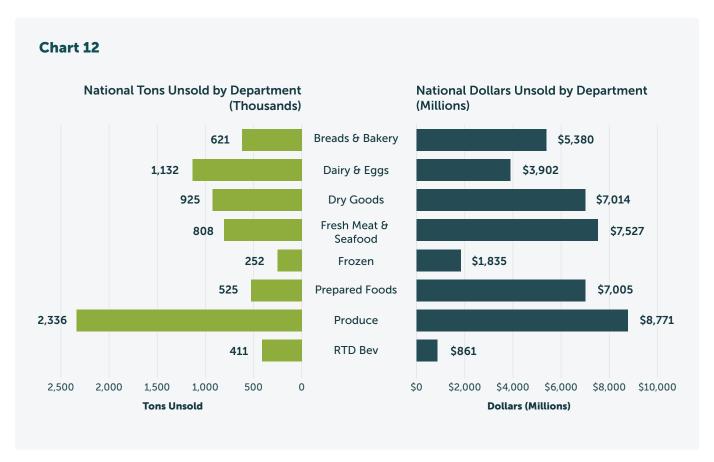


Chart 13 Department Share of Total Unsold & Total Retail Value of Unsold Food in 2023

Category	% of Total Tons Unsold	\$ % of Total Retail Value of Unsold Food
Breads & Bakery	8.9%	12.7%
Dairy & Eggs	16.1%	9.2%
Dry Goods	13.2%	16.6%
Fresh Meat & Seafood	11.5%	17.8%
Frozen	3.6%	4.3%
Prepared Foods	7.5%	16.6%
Produce	33.3%	20.7%
RTD Bev	5.9%	2.0%



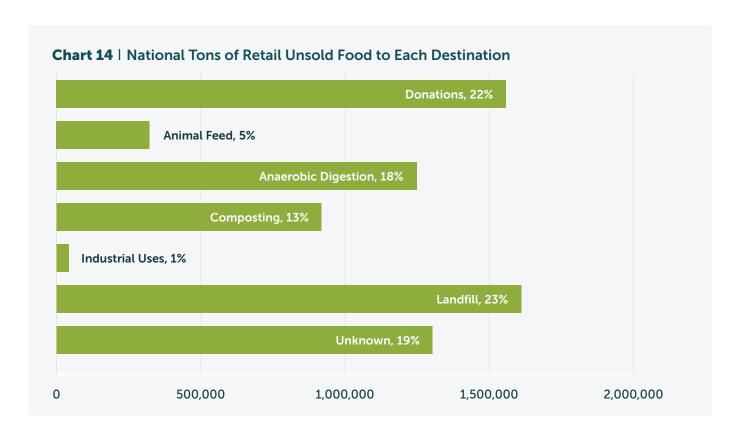
Unsold Food Destination Rates

As mentioned previously, if food can't be prevented from becoming surplus, it is preferable to keep it in the human supply chain, through donation to food banks, then in the animal supply chain by recycling it into animal feed. Following these options are pathways that valorize the food material, such as composting and anaerobic digestion. The least preferred destinations are landfill, incineration, or sewer, as they do not utilize that food to its highest and best use.

The first year of data from U.S. Food Waste Pact retail signatories indicates high donation rates (22%) compared to the Pacific Coast region (Chart 14). The mix of Pact retailers overall represents larger, national brands than the mix of PCFWC retailers. It's possible that these larger businesses have more sophisticated internal infrastructure, partnerships, and processes as a result of larger budgets and more resources, making it more feasible to donate food.

National 2023 data also shows comparatively higher landfill rates. This could, in part, be attributed to lower relative availability and higher cost of food recycling infrastructure compared to the PCFWC region, as well as a less stringent regulatory landscape around landfill diversion.



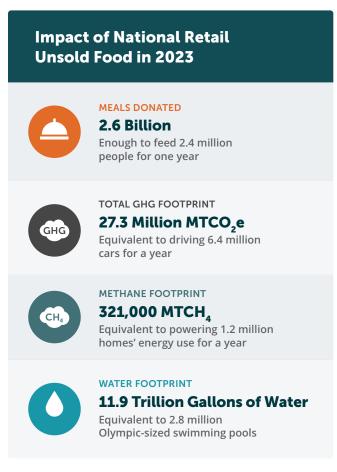


Impacts of Unsold Food

Understanding unsold food's environmental and social impacts is pivotal for retailers to measure progress against sustainability and emissions reduction goals. The impacts of retail unsold food across the country in 2023 are scaled up from Pact signatory data to reflect the entire country, and they are calculated using U.S. average impact factors that underlie ReFED's Impact Calculator (Chart 15).



Chart 15



U.S. Food Waste Pact National Data

Foodservice

27.2% Foodservice (Business & Industry) Segment in the United States

KEY METRICS

2.75%

Food efficiency rate

12,942

Tons of unsold food

\$45M

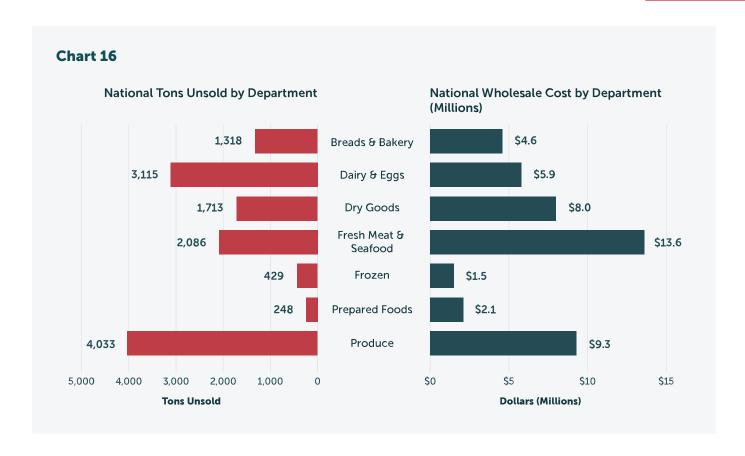
Wholesale cost of unsold food

For the first time, the U.S. Food Waste Pact is reporting national foodservice unsold food, destination, and impact data. As with the national retail dataset and the long-standing PCFWC regional dataset, this first-of-its-kind national foodservice data represents an opportunity not only to create a baseline upon which to measure progress but also inform future strategy through insights and hotspot identification.

Recognizing the complexity and diversity of the many foodservice subsectors, as well as the need to test a new foodservice data methodology, this year's reporting focuses solely on corporate dining operations for the inaugural year of national foodservice reporting. As an industry, foodservice varies widely in service delivery models, budget, and clientele—understandably, foodservice in a healthcare setting has notable differences from K-12, collegiate, or corporate dining. Foodservice is a business of transforming and preparing food, which

can generate non-edible food like trim waste. This differs significantly from retail in an operational sense. Due to these differences, destinations and unsold food department data in the foodservice dataset was expected to diverge from trends in the retail datasets. Finally, the data below is extrapolated to the corporate dining industry, not total foodservice.

The inaugural year of corporate foodservice reporting indicates that the industry had 12,942 tons of unsold food, which cost foodservice companies an estimated \$45 million. Chart 16 details that the leading category of unsold food by volume, like retail, is Produce, with the second largest cost of unsold food. While Fresh Meat & Seafood account for merely 16% of the unsold food tons, it accounts for over 30% of financial impact as a higher-value product. Another notable feature of the dataset is that Dairy & Eggs accounts for nearly a quarter of unsold tons, while only making up 13% of the total wholesale cost.



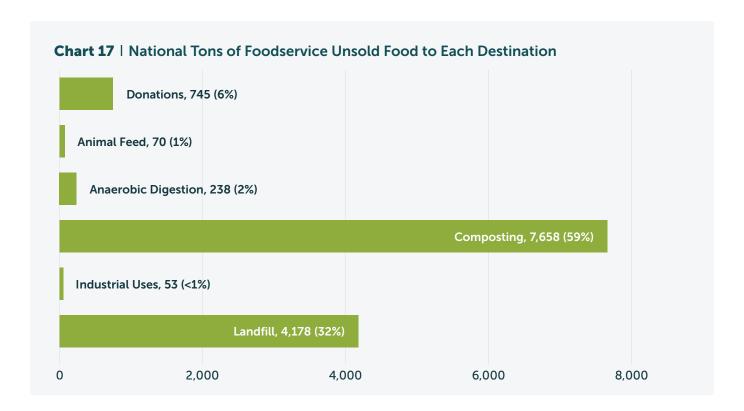
Unsold Food Destination Rates

The data indicates a very high composting rate (59%), which is understandable given the scope of this year's data collection was pre-consumer food waste only (Chart 17).2 Additionally, some states have mandatory landfill diversion legislation, which can improve the availability of composting infrastructure. A number of factors can drive a moderate landfill rate, including lack of composting infrastructure in certain regions, as well as a higher cost and sparser availability of compost hauling services. Additionally, donation rates in foodservice are much lower than those seen in the retail sector, as prepared foods can be more logistically challenging to donate than other categories. The foodservice industry sends only 6.7% of total unsold food to pathways further up the EPA's Wasted Food

Scale than composting, anaerobic digestion, and landfill. An area of improvement for the industry is to shift food waste from the landfill to donation to food banks, recycling into animal feed, or industrial uses where appropriate and feasible.



² It is important to note that this year's data collection included only pre-consumer food waste. Pre-consumer, or back-of-house waste, does not include any post-consumer or plate waste. This is because there are inconsistent measurement methodologies across the foodservice industry.

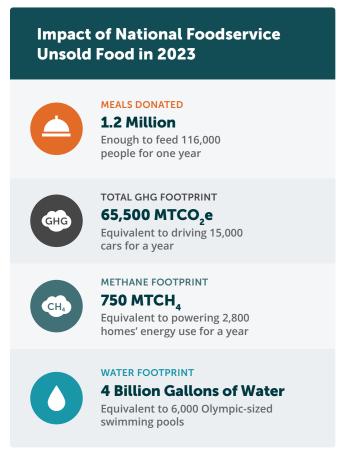


Impacts of Unsold Food

Understanding unsold food's environmental and social impacts is pivotal for foodservice companies to measure progress against sustainability and emissions reduction goals. The impacts of corporate foodservice unsold food across the country in 2023 are scaled up from Pact signatory data to reflect national corporate dining operations, and they are calculated using U.S. average impact factors that underlie ReFED's Impact Calculator.



Chart 18



About Our Methodology

The PCFWC and the Pact centralize their data collection efforts by leveraging ReFED sector-based Calculators, tools designed to consolidate and simplify food waste data reporting across diverse platforms. ReFED enhances these tools with comprehensive measurement guidelines, personalized technical support for data identification and refinement, and meticulous data review to ensure accuracy, completeness, and gap identification. All collected data undergoes anonymization and aggregation, with publication contingent on meeting strict criteria regarding market share and the number of contributing entities to maintain anonymity.

At the heart of this work is the conviction that robust data collection is indispensable for any successful food waste reduction strategy. By deepening the understanding of the dynamics of food waste—its origins, causes, and trends—targeted, efficient interventions can be crafted more effectively. The PCFWC and the Pact go further than merely diagnosing the issue; they empower businesses with actionable, decision-ready data by establishing baselines, benchmarking, monitoring progress, and prioritizing interventions, thereby enabling substantial and meaningful cuts in food waste.

It is important to note that as the programs progress, measurement practices are becoming more entrenched. Therefore, in these first few years, changes seen in the data from year to year may reflect improvements in measurement and reporting in addition to actual increases or decreases in unsold food.



More about Unsold Food Rates

Unsold food rates measure the share of inventory retailers fail to sell, directly impacting their revenue and contributing to broader societal and environmental issues. This surplus represents wasted resources and unnecessary emissions to produce the food that goes unsold, leading to lost sales and inflated consumer prices.

Efficiently managing unsold food transcends waste reduction; it is vital for the sustainability of the food system and an equitable society. By focusing on prevention and optimizing the redirection of surplus food into the human supply chain, retailers can decrease environmental impacts, feed more people, and lower consumer costs, enhancing food distribution sustainability. Addressing unsold food rates demands comprehensive strategies that prioritize waste prevention, effective redistribution, and, as a last resort, environmentally conscious disposal.



About the Unknown Destination Rate

The Unknown Destination Rate quantifies the proportion of unsold food whose final destination cannot be accounted for within a retailer's tracking system. ReFED's Calculator model operates under the assumption that untracked food waste, shown in the unsold food categorized in "Unknown" destination, is destined for landfill. As a result, reported emissions could be overestimated if unsold food categorized as "Unknown" is actually sent to Donations or other destinations with a smaller carbon footprint than landfill.

A high Unknown Destination Rate is a critical metric, suggesting that the actual amounts of food donated or wasted are likely much higher than reported. Conversely, a low Unknown Destination Rate can indicate improved measurement and tracking.

The Unknown Destination Rate underscores the need for robust waste tracking systems. In the retail industry, reporting inaccuracies are often caused by lack of standard procedures or employee training, outdated supply chain technology, or other operational gaps. Enhanced accuracy in tracking is not just a matter of operational efficiency but is crucial for environmental sustainability. By identifying and addressing the gaps in food waste reporting, retailers can take more effective steps toward reducing their environmental footprint.

About the Foodservice Food Efficiency Rate

The Food Efficiency Rate (FER) quantifies food waste as a percentage of total food purchases.

A lower FER indicates less food waste. This blended metric accounts for both unutilized ingredients and overproduction. Due to the differences in business model and data collection from retail, foodservice demanded a specific metric to help calculate unsold food. No post-consumer or plate waste was included in this year's dataset due to inconsistent measurement methodology in the industry.

The food efficiency rate is a newly developed metric built on a solid methodology; however, current data collection practices suggest the FER in this report may conservatively reflect the true scale of food waste in the B&I segment of foodservice. The ReFED team will continue to refine this approach, collaborating with signatories to support ongoing data collection efforts.



What's Next for Data Collection

Data collection remains a vital component of the PCFWC, the Pact, and food waste reduction initiatives more broadly as they aim to both measure progress, as well as identify and accelerate solutions. In addition to the data collected from business signatories, both initiatives are committed to improving data collection methods and deepening data analysis in order to improve the process and accuracy of what is reported. For example, priority focus areas to improve back-end methodology include:

- Exploring the measurement of solution adoption rates to capture traction behind and progress against food waste reduction goals.
- Refining foodservice scope beyond corporate dining environments and exploring a methodology to account for front-of-house, or plate, waste.

This was the first year for national data collection, as well as the first year for any kind of foodservice data collection. Continued refinement and expansion of these methodologies, as well as additional year-over-year reporting will allow for more detailed and informative analysis of trends and progress over time. In addition to the sectors reported here, the PCFWC and the Pact also collect data from manufacturers and quick-service restaurants. While the market share thresholds necessary for public reporting have yet to be met, the time and knowledge that the businesses in these sectors have given provides an important foundation for future data collection.

Measurement is critical in the fight against food waste, and this information will support those efforts by highlighting where attention and resources need to be directed—by PCFWC and Pact signatories, and by businesses across the food system. Reporting data of this magnitude is a tremendous effort and will facilitate informed, high-impact on-the-ground solutions to continue progress towards the shared commitment to reduce food waste.



Acknowledgements

Contributing Authors and Designers

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About the PCFWC

The Pacific Coast Food Waste Commitment (PCFWC) arose out of the Pacific Coast Collaborative in 2016 and is an innovative public-private partnership made up of West Coast jurisdictions, U.S. food industry leaders, and nonprofit resource partners that together seek to eliminate food waste in the region by 50% by 2030. Learn more about the initiative and its members at pacificcoastcollaborative.org/food-waste.



About the U.S. Food Waste Pact

The U.S. Food Waste Pact is a national voluntary agreement that uses the "Target, Measure, Act" framework to reduce food waste across the supply chain. The Pact works with waste-generating food businesses to collect and analyze data about food waste in their operations, share best practices through precompetitive working groups, and pilot and scale solutions through intervention projects. The Pact is an initiative between nonprofits ReFED and the World Wildlife Fund. For more information about the U.S. Food Waste Pact, visit usfoodwastepact.org.



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