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The Economic Impacts of Food Waste Diversion Policies in Colorado

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Executive Summary

NRDC's Food Waste Reduction programs are evaluating the impacts of statewide food waste diversion policy, which present both significant environmental and economic benefits. This study evaluates the potential economic impacts of several potential policy scenarios in Colorado across key sectors in the waste management industry including hauling, processing, and rescue and recovery organizations. By analyzing potential food waste diversion impacts of the policy and estimated employment growth within these sectors, the report provides a data driven foundation for understanding how a food waste diversion policy could impact Colorado's economy. The findings aim to support informed decision making to reduce waste and strengthen sustainability.

High Level Economic Results

The IMPLAN analysis shows that a food waste diversion policy in Colorado would deliver substantial economic benefits across all scenarios. Under Scenario 1 (comprehensive policy), which includes all generators with no exclusions, diversion reaches 100% (an increase of 83% from the baseline) by Year 8, supporting approximately 9,444 jobs, generating \$765 million in labor income, and producing \$2.4 billion in industry activity, alongside \$79 million in state and local tax revenue. Scenario 2 (geographic exclusion policy), which excludes generators beyond specified geographic buffers, achieves 78% diversion (an increase of 61% from the baseline) by Year 8, resulting in 7,481 jobs, \$606 million in labor income, \$1.9 billion in industry activity, and \$62 million in tax revenue. Scenario 3 (small generator and geographic exclusion policy), combining geographic and generator exclusions, reaches only 23% diversion (an increase of 6% from the baseline) by Year 8, creating 1,620 jobs, \$131 million in labor income, \$418 million in industry activity, and \$13 million in tax revenue. Scenario 4 (less than 20,000 resident county exclusion), reaches only 98% diversion (an increase of 81% from the baseline) by Year 8, creating 9,216 jobs, \$747 million in labor income, \$2.4 billion in industry activity, and \$77 million in tax revenue. Scenario 5 (less than 20,000 resident county and resident exclusion), reaches only 69% diversion (an increase of 52% from the baseline) by Year 8, creating 5,917 jobs, \$479 million in labor income, \$1.5 billion in industry activity, and \$49 million in tax revenue.

Policy Implications Summary

Across the five scenarios analyzed in this report, the comprehensive scenario generated the highest economic impact. In addition, findings from Anglou et al. (2024) suggest that simplicity in the structure of the food waste diversion policy as well as deliberate phased implementation are factors that lead to higher achieved diversion. The geographic and generator classification exclusions considered under Scenarios 2 and 3 are informative

examples of the magnitude of impact difference as various groups are omitted. Geographic exclusions reduce diversion rates at a higher rate early in the food waste diversion policy implementation timeline however they leave room for expansion as additional processing facilities open over time. The generator classification and geographic exclusion in Scenario 3 achieved notably lower early diversion rates to Scenario 1, resulting in a sizable portion of the food waste stream that is excluded from the policy. Both Scenarios 4 and 5 limit eligibility to counties with more than 20,000 residents. Due to the small contribution to aggregate annual tonnage within these counties, both commercial and residential, the exclusion does not reduce the overall diversion as compared to the geographic exclusion of Scenarios 2 and 3.

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Study Background and Methodology

Introduction

In June 2025, the Natural Resources Defense Council (NRDC) contracted ICF to analyze the potential economic impacts to food waste diversion and industry growth in the Colorado food recovery and organic waste industries from implementing a food waste diversion policy. To understand these trends and impacts, ICF conducted background research on the existing industry activity and conducted targeted industry stakeholder outreach. ICF's interviews with organizations focused on understanding current trends, challenges, and future opportunities across the food rescue and organic waste industries, including collection, hauling, and rescue operations. Data and qualitative insights were subsequently synthesized to develop inputs to conduct an economic impact analysis. The economic impact analysis relied on the commonly utilized IMPLAN¹ model to estimate the job creation, gross state production, and tax impact of recent activity in the organics waste industry.

Results from ICF's quantitative and qualitative analyses indicate that food waste diversion activities, including composting and food rescue, are well positioned to grow in Colorado following the adoption of a food waste diversion policy. While these policies have inherently beneficial impacts promoting food waste diversion, an equally important factor is public support and cultural acceptance. While the support for food waste diversion may be strong, stakeholder engagement indicated that key barriers include route density requirements for collection, permitting and market challenges for processors, and rescue capacity due to limited volunteers and drivers. The following sections of this report discuss ICF's study methodology and findings in detail.

Policy Background

Food Waste Diversion Policy Value

Food waste diversion policies represent a critical intervention in advancing sustainable waste management practices. One major value lies in their capacity to reduce methane emissions from landfills, a major contributor to anthropogenic climate change. By mandating the diversion of food scraps (and often other compostable materials) from disposal streams, these policies foster a systemic shift toward circular resource use. Increasing diversion rates yields environmental benefits, including reductions in greenhouse gas intensity and improvements in soil health through compost application. Beyond emissions mitigation, food waste diversion policies promote behavioral change among generators, encouraging upstream waste reduction and heightened awareness of resource

¹ IMPLAN (IMpacts for PLANning) is an input-output model commonly used to assess economy-wide effects associated with industry activity.

efficiency, resulting in more food being directed to more people, among other benefits. This normative influence extends beyond regulated entities, shaping broader societal attitudes toward waste stewardship. While implementation challenges persist, a diversion policy's inherent worth is not contingent upon immediate quantitative success; rather, it resides in its role as a foundational policy instrument that signals long-term commitment to decarbonization and ecological resilience. In this sense, food waste diversion policies function as both a regulatory mechanism and a catalyst for innovation in organics processing infrastructure, reinforcing their enduring significance within integrated sustainability frameworks.

How the Policy Will Stimulate Growth in the Industry

The economic implications of food waste diversion policies extend well beyond compliance costs, encompassing a spectrum of positive externalities and market opportunities. Anglou et al. (2024)² note that jurisdictions with robust enforcement and infrastructure, such as Massachusetts, experienced notable growth in composting enterprises and ancillary service providers. These developments stimulate local economies through job creation in collection, processing, and distribution networks. Secondary markets for compost contribute to regional economic resilience, reducing dependence on imported fertilizers and fossil fuels. In addition to the economic benefits, increased utilization of compost can improve disaster resilience by building soil health, increase water retention, and wildfire resilience. While initial capital outlays for infrastructure can be substantial, long-term cost savings accrue through diminished landfill tipping fees and avoided methane mitigation expenses. The study suggests that states failing to achieve diversion targets often underinvested in these enabling conditions, forfeiting potential economic gains. Thus, food waste diversion policies, when paired with strategic infrastructure development, function as engines of green growth, aligning environmental objectives with economic vitality. This dual benefit underscores the importance of viewing organics diversion not merely as a regulatory burden but as a lever for sustainable economic transformation.

Position Within NRDC's Ongoing Advocacy Work

Food waste diversion policies are deeply consistent with the Natural Resources Defense Council's longstanding advocacy for climate mitigation, resource efficiency, and environmental justice. NRDC's policy agenda emphasizes reducing food waste as a priority strategy for lowering greenhouse gas emissions and conserving natural resources. Moreover, NRDC advocates for systemic solutions that integrate regulatory action with infrastructure investment and public education, a triad mirrored in the successful Massachusetts case

² Anglou et al. (2024). *Of the first five states with food waste bans, Massachusetts alone has reduced landfill waste*. <https://pubmed.ncbi.nlm.nih.gov/39265008/>

study. Food waste diversion policies also advance NRDC’s equity objectives by rescuing and redistributing food as well as reducing reliance on landfills, which disproportionately impact low-income and marginalized communities through localized pollution and odor nuisances. By promoting composting and anaerobic digestion, these policies foster decentralized waste management systems that can deliver economic and environmental benefits across diverse geographies. In sum, food waste diversion policies operationalize NRDC’s vision of a circular economy, translating aspirational sustainability goals into enforceable mandates that drive measurable progress toward climate resilience and social equity.

Methodology

This study utilizes various sources of data to estimate the industry growth within the food recovery and organic materials management sectors resulting from the increased diversion rate caused by the food waste diversion policy. Increased diversion rates lead to additional required hauling and collection, additional capital investment, and employment in the processing segment, and increases to the rescue industry through organized diversion activities through major commercial food waste generators.

Baseline Industry Characterization

To calculate the impact a proposed food waste diversion policy would have on the employment and diversion within a state, it is necessary to first characterize the existing infrastructure and food waste generation to accurately map the forecasts onto a baseline. Baseline industry data were extracted from state reports on waste generation and management from Colorado³. These statewide reports were also used to calibrate the residential proportion of food waste generated within Colorado. Colorado reports, EPA excess food data, crosschecked with ReFED’s Food Waste Monitor,⁴ were then used to calculate food waste generation.

To establish a baseline organics diversion rate, total organics waste diverted for 2020 (MSW + ISW)⁵ was divided by the total organics waste tonnage for 2020 (MSW + ISW)⁴ and multiplied by the proportion of food waste in MSW⁴.

$$\text{Baseline Diversion Rate (17.42\%)} = \frac{\text{Baseline Organics Diverted Tons (599,000 tons)}}{\text{Baseline Organics Waste Tons (3,438,000 tons)}}$$

³ Further details on the specific reports and data used are outlined in the case study section.

⁴ ReFED. (2025). *Food Waste Monitor*. https://insights-engine.refed.org/food-waste-monitor?break_by=destination&indicator=tons-surplus&state=IL&view=detail&year=2024

⁵ CDPHE. (2022). Colorado Statewide Organics Management Plan. Available from: <https://cdphe.colorado.gov/hm/statewide-organics-mgmt-plan>

To establish the baseline industry employment for organic waste hauling, processing, and rescue in Colorado, IMPLAN data for statewide employment in waste management and remediation services as well as community food, housing, and other relief services, including rehabilitation services are combined. Since these sectors cover more than just food waste, and absent a Colorado-specific value, the percentage of these sectors specifically handling food waste in Massachusetts (1.95%) is used as a proxy for Colorado to further refine the employment baseline. Lastly, hauling, processing and rescue segments are split out based on their respective share of the waste management sector based on occupation employment statewide from the BLS⁶. This report estimates that within Colorado's food waste sector there are 2,800 employees in the hauling segment, 1,200 employees in the processing segment, and 700 employees in the rescue segment.

Stakeholder Engagement

Stakeholders within the three core industry segments (Collection and Hauling, Processing, and Rescue and Diversion) were identified and interviewed to elicit the impacts that a food waste diversion policy would have on their operation, capacity constraints, growth, and perceived market dynamics. Feedback from these interviews was synthesized into assumptions that modified the first year of the food waste diversion policy to constrain industry growth based on existing capacity and growth timelines.

Food Waste Diversion Policy Diversion Forecast

NRDC provided proposed food waste diversion policy scenarios for Colorado, with alternate policy scenarios based on geographic exclusions and specific generator exclusions. These policy scenarios, chosen because they reflect other statewide policies across the U.S. and the policy scenario laid out in the Colorado Organics Diversion Study, were used in combination with the baseline data to calculate the covered generators included under the food waste diversion policy in each of the four policy thresholds. Total food waste covered under the food waste diversion policy was divided by the total food waste generated in the state to estimate the total diversion achieved under that year of the policy. Since the growth in diversion will be partially reduced by the existing diversion activities within the state, the percent of excess food generated by the entities covered in the food waste diversion policy was multiplied by the baseline diversion rate⁷. This existing diversion rate was subtracted

⁶ The following OEWS codes were used to establish baseline employment (53-7081 for hauling and processing, and 11-9151 for rescue). A subset, 25%, of the rescue SOC code was used based on data from MA comparables. From the SOC codes, 59.6% of employment is in the hauling segment, 25.5% is in the processing segment, and 14.9% is in the rescue segment.

⁷ This study acknowledges that it is unlikely that for some industry segments, such as commercial and wholesale food retailers, their percent contribution to existing diversion activities is equal to their percent contribution of diverted excess food. Due to the lack of data on the industry sources of diverted food waste

from the total diversion under the policy to estimate the growth caused by the food waste diversion policy.

Industry Growth Estimation

ICF leveraged its experience analyzing the industry growth resulting from the Massachusetts commercial food waste diversion policy in 2016, 2020, and in 2025⁸, to develop a crosswalk between the achieved diversion rate for food waste and the industry growth achieved by food rescue and food scrap companies in each of the three segments (Collection and Hauling, Processing, and Rescue and Diversion).

Economic Impact Modeling

In addition to analyzing industry trends and projections, to quantify the economic impact associated with the proposed policy scenarios to food waste hauling, processing, food rescue, and other organizations across the respective states, ICF used IMPLAN, an economic impact model.

Understanding the IMPLAN Model

IMPLAN™ is a tool that is widely used by federal agencies and state and local organizations for industry and labor market analyses. The IMPLAN model is an Input-Output model that relies on North American Industry Classification System (NAICS) codes, the standard used by Federal statistical agencies in classifying business establishments, to categorize inputs.

Input-output models describe and predict the economy-wide impact of an economic stimulus occurring in a subset of sectors. ICF used the IMPLAN input-output model to calculate the indirect and induced impacts associated with current organics waste industry activity in Colorado. ICF obtained the latest data from IMPLAN for the state of Colorado and developed a customized model framework for analysis. The model uses region-specific multipliers to trace and calculate the flow of dollars from the industries that originate the impact to supplier industries. ICF utilized two distinct industry sectors for employment: for the Collection and Hauling, and Processing sectors the Waste Management and Remediation Services sector was used, and for the Rescue sector the Community Food, Housing, and Other Relief Services, Including Rehabilitation Services was used. The analysis used IMPLAN outputs to determine three types of impacts:

from each of the states, this approach was selected as the most replicable and accurate based on available data.

⁸ ICF. (2025). *Massachusetts Commercial Organics Waste Ban Economic Impact Analysis*.

<https://www.mass.gov/doc/2025-commercial-organic-waste-ban-economic-report/download>

- **Direct Impacts**, which are impacts in the primary industries that engage with food waste collecting/hauling, processing, and food rescue.
- **Indirect Impacts**, which are impacts in the industries that supply or interact with the primary industries. For example, when a waste collecting/hauling business expands and purchases new equipment, the industry sectors supplying the equipment experience indirect impacts.
- **Induced Impacts**, which represent increased spending by workers who earn money due to increased economic activity, such as when organics processor employees use their wages to purchase goods from local shops.

Whenever new industry activity or income is injected into an economy, it starts a ripple effect that creates a total economic impact that is much larger than the initial input. This is because the recipients of the new income spend some percentage of it and the recipients of that share, in turn, spend some of it, and so on. The total impact of the new activity/income is the sum of these progressively smaller rounds of spending within the economy. This total economic impact creates a certain level of value added jobs, and industry activity. Throughout these rounds of impacts, some proportion of activity within each industry drops out of the region due to a lack of capacity to support additional activity, or a lack of local production for a specific input, these are called leakages. IMPLAN then uses this total impact to calculate subsequent impacts such as total jobs created.

The results of this analysis are reported using commonly used metrics, consistent with best practices. A summary of each metric is provided below:

- **Employment:** Represents the jobs created by industry, based on the output per worker and output impacts for each industry.
- **Labor Income:** Includes all forms of employment income, including Employee Compensation (wages and benefits) and Proprietor Income.
- **Industry Output:** Represents the total industry activity generated by direct spending (sales).
- **Tax Revenue:** The sum of state and local tax revenue.

The model also determines which industry sectors throughout the economy experience the greatest impact. For example, although there is no direct spending from the organics waste industry dedicated to hospital expenditures, hospitals and other healthcare industries may see increased employment due to the secondary effects of activity in the organics waste industry when employees in related sectors spend money on healthcare.

Forecast Variance Factors

The analysis conducted by Anglou et al. (2024) evaluated the effectiveness of state-level food waste diversion policies in diverting organic material from landfills across five U.S. states: California, Connecticut, Rhode Island, Vermont, and Massachusetts. The policies expected diversion rates ranged between 7% and 19%, while realized reductions in landfilled organic waste ranged from -5% to 10%. While this study presents an interesting side-by-side analysis of state-level food waste diversion policies, the study has several limitations including only assessing total disposed municipal solid waste, without separation of the organic portion which makes assessing total organics diversion challenging. Additionally, the timeframe is misleading since many of the states evaluated were early in implementation and did not have robust data to show statistically relevant impacts.⁹ Despite these criticisms, empirical evidence from the study indicates a pronounced discrepancy between these expectations and actual outcomes.

Across the five states examined, the aggregate reduction in total landfilled waste after enacting the policies did not exceed 3.2%, and in four of the five states, the effect was statistically indistinguishable from zero. This finding suggests that, contrary to policy assumptions, the policies failed to produce measurable improvements in total waste diversion.

Massachusetts emerged as the sole exception to this trend. While its initial performance mirrored that of other states, Massachusetts gradually achieved a cumulative diversion rate of 13.2% over the study period. This outcome aligns closely with the original policy target and underscores the role of implementation design in determining effectiveness. The authors attribute Massachusetts' success to three interrelated factors: (i) the state's extensive composting infrastructure, which provided accessible compliance pathways; (ii) regulatory clarity, characterized by minimal exemptions and straightforward language; and (iii) rigorous enforcement, evidenced by inspection rates.

In contrast, states such as California and Connecticut exhibited negligible improvements despite similar legislative frameworks. Within the timeline of the study, the absence of adequate processing capacity and inconsistent enforcement mechanisms constrained their ability to achieve meaningful diversion. These findings collectively indicate that legislative mandates alone are insufficient to drive substantial reductions in food disposal without complementary investments in infrastructure and oversight.

⁹ NRDC. (2025). *How State Organic Waste Ban Policies Can Drive Food Waste Reduction*. <https://www.nrdc.org/bio/darby-hoover/how-state-organic-waste-ban-policies-can-drive-food-waste-reduction>

Overall, the study demonstrates that the realized diversion rates fell significantly short of expectations in most cases, with Massachusetts serving as a benchmark for effective policy design. Acknowledging the states in the study were still early in implementation, the results still call for a reassessment of current strategies, emphasizing the necessity of integrated approaches that combine regulatory action with operational support to achieve intended environmental outcomes. These factors are considered in the sensitivity analysis following the presentation of results.

Case Study: Colorado

Section 3: Colorado Case Study

Colorado Organic Industry Baseline

Colorado's organics management sector is undergoing a period of accelerated development, driven by statewide policy initiatives and local innovation. The passage of SB23-191 and the Statewide Organics Management Plan (SOMP) established ambitious diversion goals, aiming to reduce landfill disposal of organics by 50% by 2030.¹⁰ These measures reflect growing recognition of organics diversion as a climate mitigation strategy, given that food scraps account for 58% of the composting stream in the state.¹¹

The hauling landscape in Colorado is fragmented, with significant disparities between urban and rural regions. Front Range municipalities such as Denver, Boulder, and Superior¹² have implemented curbside organics collection programs,¹³ often through municipal contracts with private haulers. Denver's residential compost program expanded to 75,000 homes in 2024,¹⁴ increasing citywide residential organics diversion by 55%. Conversely, rural areas remain underserved due to high transportation costs and limited economies of scale. The SOMP identifies hauling logistics as a critical barrier to statewide compliance, recommending regional transfer hubs and cooperative hauling models to reduce inefficiencies. Subscription-based services, such as local providers, have gained traction among commercial generators, but coverage gaps persist.

The CDPHE Organics Management Plan (2022) outlines that Colorado's processing infrastructure is expanding but remains insufficient to meet projected demand under new mandates. The state hosts a network of composting facilities, many historically limited to yard waste, now transitioning to accept food scraps under updated permitting standards. Boulder County's feasibility study highlights the need for multi-scale composting systems, including decentralized sites to serve smaller communities. Anaerobic digestion capacity is

¹⁰ Colorado Department of Public Health and Environment. (2022). *Colorado Statewide Organics Management Plan*. <https://oitco.hylandcloud.com/cdphermmpop/docpop/docpop.aspx>

¹¹ Colorado Department of Public Health and Environment. (2022). *Colorado Statewide Organics Management Plan*. <https://oitco.hylandcloud.com/cdphermmpop/docpop/docpop.aspx>

¹² Town of Superior. (2026). Curbside Composting. Available from: <https://www.superiorcolorado.gov/Services/Garbage-Recycling-Compost-and-Yard-Waste-Services/Curbside-Composting>

¹³ Powell. (2025). *Fort Collins pilot program offers discounts on composting food scraps on road to zero waste*. Fort Collins and Compost Queen lower costs for food scrap composting.; Eco-Cycle. (2023). *Composting Guide for Boulder County*. <https://ecocycle.org/guides-and-resources/guides-for-boulder-county/composting-guide-boulder-county/> ;

¹⁴ CoPIRG Foundation. (2025). *New Report: Some Colorado cities see recycling, composting surge*. <https://pirg.org/colorado/foundation/media-center/new-report-some-colorado-cities-see-recycling-composting-surge/>

minimal, with fewer than a dozen operational digesters statewide, primarily located at wastewater treatment plants and agricultural sites. Emerging proposals, such as HB22-1159, which creates the circular economy development center which aims to stimulate end-use markets for compost and digestate, creating economic incentives for processors.

Colorado's food rescue ecosystem is robust, anchored by nonprofits such as Boulder Food Rescue, Denver Food Rescue, Kaizen Food Rescue, and We Don't Waste. These organizations collectively recover millions of pounds of surplus food annually, redistributing it to hunger relief agencies and underserved communities. Kaizen alone has diverted over 17.5 million pounds of food to more than 400,000 households, illustrating the scale of grassroots recovery efforts¹⁵. We Don't Waste rescues an average of 6 million pounds of food per year and has over 1,000 volunteers supporting operations¹⁶. Despite these successes, systemic challenges persist, including limited cold storage capacity and transportation coordination. State-level policy gaps exacerbate these constraints; Colorado currently lacks tax incentives for food donation and offers only minimal liability protections beyond federal standards. Additionally, these nonprofits are all based in the Front Range, as are most food rescue organizations in Colorado; however, there are some organizations such as the Durango Food Bank and the Sharing Ministries Foodbank in Montrose that support communities outside of the Front Range.

Colorado's organics industry is positioned for transformative growth. The Front Range Waste Diversion program's \$18 million in awarded grants for waste diversion infrastructure (CDPHE, 2024)¹⁷ and the forthcoming Extended Producer Responsibility law for packaging signal a systemic shift toward circularity¹⁸. Municipalities such as Aspen and Longmont¹⁹ demonstrate the potential impact of local mandates, with Aspen reporting a 350% increase in food scrap composting following adoption of its Organics Waste Ordinance²⁰. However, achieving statewide diversion targets will require coordinated investment in hauling networks, processing capacity, and food rescue logistics. For example, local ordinances,

¹⁵ Kaizen Food Rescue. (2026). *Our Impact*. Available from: <https://www.kaizenfoodrescue.org/>

¹⁶ We Don't Waste. (2026). *Stakeholder Interview*.

¹⁷ Colorado Department of Public Health & Environment. (2024). *CDPHE's Front Range Waste Diversion Program announces grant funding to promote recycling and reuse*. Available from: <https://cdphe.colorado.gov/press-release/cdphe-front-range-waste-diversion-program-announces-grant-funding-to-promote>

¹⁸ Colorado Circular Communities. (2026). *About C3*. Available from: <https://www.coloradocircularcommunities.org/about-c3>

¹⁹ City of Longmont. (2026). *Universal Recycling Ordinance Information*. Available from: <https://longmontcolorado.gov/waste-services-trash-recycling-composting/universal-recycling-ordinance-information/>

²⁰ Longwell, Ali. (2026). *The Aspen Times*. *Western Slope communities' efforts to reduce landfill waste lauded in 2025 statewide report*. Available from: <https://www.aspentimes.com/news/western-slope-landfill-waster-colorado-climate-goals/>

such as Boulder’s Universal Zero Waste Ordinance, have improved organics separation efforts but introduced enforcement and contamination issues that complicate downstream processing (Boulder Reporting Lab, 2022)²¹. Strategic partnerships between public agencies, private haulers, and nonprofit organizations will be essential to overcome structural barriers and realize Colorado’s vision of a zero-waste future.

Stakeholder Engagement

ICF interviewed seven stakeholders from the Colorado food rescue and waste industries, two collection companies, two processing companies, and three rescue organizations. The insights they offered are summarized below.

Collectors

Colorado collector companies outlined several key factors that influence their portion of the food waste management industry. One key factor limiting the growth of collection is the density of customers required to establish new routes. They stated that scaling their routes was a short timeline in both sourcing additional trucks and hiring additional employees to both further utilize existing trucks on new routes and operate new trucks. Additionally, it is notable that most were also interested in expanding operations to include processing.

Processors

Colorado processing companies expressed that navigating municipal regulations and obtaining permitting can be difficult, depending on the size of the processing operation and which Class it is categorized as. Larger processors raised concerns about end compost markets, while smaller processors had concerns about expanding operations. Most processors expressed that contamination is a challenge.

Rescue

Some food rescue organizations remarked that generators have increasingly efficient supply chains, producing less food waste, and consequently decreasing food available for them to rescue. Additionally, organizations expressed that a limiting factor is the availability and capacity of volunteers. Limited drivers are a barrier to expanding operations. One organization remarked that competition with other nonprofits can also limit operation growth.

²¹ Mordacq, Jessica. (2022). Boulder Reporting Lab. *After a pandemic-induced pause, the City of Boulder will again require restaurants to report compliance with its Universal Zero Waste Ordinance. What does it mean for local food businesses?* Available from: <https://boulderreportinglab.org/2022/08/11/after-a-pandemic-induced-pause-the-city-of-boulder-will-again-require-restaurants-to-report-compliance-with-its-universal-zero-waste-ordinance-what-does-it-mean-for-local-food-businesses/>

Policy Language

Scenario 1: Comprehensive

Under Scenario 1, there are no exclusions for coverage under the food waste diversion policy. The policy would be implemented over four phases following a two-year period after the adoption. Generators covered, their annual tonnage, and the estimated diversion under each year of the policy are outlined below in Table 1. Estimated Diversion from Policy (%) column represents the increase in diversion over the baseline rate of 17%.

Table 1. Colorado Policy Scenario 1

Year	Food Waste Threshold (tons per week)	Number of Generators (excluding residents)	Food Waste Covered Under the Policy (Tons per year)	Estimated Diversion from Policy (%)
2	2	342	705,798	50% (67% Cumulative)
4	1	759	716,937	52% (69% Cumulative)
6	0.5	1,709	729,414	53% (70% Cumulative)
8	Any amount	15,682	1,038,830	83% (100% Cumulative)

Source: EPA Excess Food Waste, CDPHE

By Year 8 of implementation, 15,682 generators would be covered amounting to slightly over 1 million tons of food waste per year. In Scenario 1, it is estimated that by Year 8, 83% of food waste is diverted. It is also important to note that robust education, tracking, and infrastructure, as outlined by the Colorado Organics Diversion Study, are critical to achieving 83% diversion. Based on the projected diversion under each year of the policy, industry growth within each of the segments are outlined in the table below.

Table 2. Colorado Policy Scenario 1 Food Waste Employment Inputs

Year	Food Waste Threshold (tons per week)	Collection and Hauling Employment Increase	Processing Employment Increase	Rescue Employment Increase
2	2	1,840	230	130
4	1	1,910	240	140
6	0.5	1,950	240	140
8	Any amount	3,050	380	220

Source: ICF Analysis

Employment increases are based on the projected increase in diversion under each year of the policy. After Year 8 when all entities are covered under the policy, 3,650 direct jobs will have been created, a growth of 17% in the waste management sector in Colorado.

Scenario 2: Geographic Exclusion

Under Scenario 2, generators that are outside a buffer distance of 30 miles to the nearest processor are excluded under the food waste diversion policy within the Front Range, and 60 miles to the nearest processor outside the Front Range. Despite significantly reducing diversion rates, Scenario 2 leaves open the opportunity for continued increases in diversion over time as processing, hauling, and rescue access expand across the state. Generators covered under the policy, their annual tonnage, and the estimated diversion under each year of the policy are outlined in Table 3. Note that while the total tonnage of food waste covered under the policy does increase from year 2 to year 4, the estimate percentage change in diversion does not change, resulting in the first 2 phases of Scenario 2 generating the same economic impact. Estimated Diversion from Policy (%) column represents the increase in diversion over the baseline rate of 17%.

Table 3. Colorado Policy Scenario 2

Year	Food Waste Threshold (tons per week)	Number of Generators (excluding residents)	Food Waste Covered Under the Policy (Tons per year)	Estimated Diversion from Policy (%)
2	2	227	467,450	28% (45% Cumulative)
4	1	503	474,828	28% (45% Cumulative)
6	0.5	1,131	483,091	29% (46% Cumulative)
8	Any amount	10,386	819,159	61% (78% Cumulative)

Source: EPA Excess Food Waste, CDPHE

By Year 8 of implementation, 10,386 generators would be covered amounting to 0.8 million tons of food waste per year. It is estimated that by Year 8, 61% of food waste is diverted, reflecting that Scenario 2 is more restrictive than Scenario 1. Based on the projected diversion under each year of the policy, industry growth within each of the segments are outlined in the table below.

Table 4. Colorado Policy Scenario 2 Food Waste Employment Inputs

Year	Food Waste Threshold (tons per week)	Collection and Hauling Employment Increase	Processing Employment Increase	Rescue Employment Increase
2	2	1,030	130	70
4	1	1,030	130	70
6	0.5	1,070	130	80
8	Any amount	2,240	280	160

Source: ICF Analysis

After Year 8 when all entities are covered under the policy, 2,680 direct jobs will have been created, a growth of 13% in the waste management sector in Colorado.

Scenario 3: Small Generator and Geographic Exclusion

Under Scenario 3, generators that are classified as healthcare, K-12 schools, food banks, incidental generators, and residents are excluded under the food waste diversion policy, as well as the same geographic exclusion from Scenario 2. Generators covered under the policy, their annual tonnage, and the estimated diversion under each year of the policy are outlined in Table 5. Note that while the total tonnage of food waste covered under the policy does increase from year 2 to year 4, the estimate change in diversion does not change, resulting in the first 2 phases of Scenario 3 generating the same economic impact. Estimated Diversion from Policy (%) column represents the increase in diversion over the baseline rate of 17%.

Table 5. Colorado Policy Scenario 3

Year	Food Waste Threshold (tons per week)	Number of Generators (excluding residents)	Food Waste Covered Under the Policy (Tons per year)	Estimated Diversion from Policy (%)
2	2	193	218,537	4% (21% Cumulative)
4	1	448	224,268	4% (21% Cumulative)
6	0.5	964	229,711	5% (22% Cumulative)
8	Any amount	8,192	248,784	6% (23% Cumulative)

Source: EPA Excess Food Waste, CDPHE

By Year 8 of implementation, 8,192 generators would be covered amounting to 0.2 million tons of food waste per year. It is estimated that by Year 8, 6% of food waste is diverted. Based on the projected diversion under each year of the policy, industry growth within each of the segments are outlined in the table below.

Table 6. Colorado Policy Scenario 3 Food Waste Employment Inputs

Year	Food Waste Threshold (tons per week)	Collection and Hauling Employment Increase	Processing Employment Increase	Rescue Employment Increase
2	2	150	20	10
4	1	150	20	10
6	0.5	180	20	10
8	Any amount	220	30	20

Source: ICF Analysis

After Year 8 when all entities are covered under the policy, 270 direct jobs will have been created, a growth of 1% in the waste management sector in Colorado.

Scenario 4: Small County (Less than 20,000 residents) Exclusion

Under Scenario 4, generators and residents that are located within counties with less than 20,000 residents are excluded under the food waste diversion policy. Generators covered under the policy, their annual tonnage, and the estimated diversion under each year of the policy are outlined in Table 7. Estimated Diversion from Policy (%) column represents the increase in diversion over the baseline rate of 17%.

Table 7. Colorado Policy Scenario 4

Year	Food Waste Threshold (tons per week)	Number of Generators (excluding residents)	Food Waste Covered Under the Policy (Tons per year)	Estimated Diversion from Policy (%)
2	2	193	640,270	44% (61% Cumulative)
4	1	448	660,590	46% (63% Cumulative)
6	0.5	964	699,040	50% (67% Cumulative)
8	Any amount	8,192	1,018,960	81% (98% Cumulative)

Source: EPA Excess Food Waste, CDPHE

By Year 8 of implementation, 8,192 generators would be covered amounting to 1 million tons of food waste per year. It is estimated that by Year 8, 81% of food waste is diverted. Based on the projected diversion under each year of the policy, industry growth within each of the segments are outlined in the table below.

Table 8. Colorado Policy Scenario 4 Food Waste Employment Inputs

Year	Food Waste Threshold (tons per week)	Collection and Hauling Employment Increase	Processing Employment Increase	Rescue Employment Increase
2	2	1,620	200	120
4	1	1,690	210	120
6	0.5	1,840	230	130
8	Any amount	2,980	370	210

Source: ICF Analysis

After Year 8 when all entities are covered under the policy, 3,560 direct jobs will have been created, a growth of 17% in the waste management sector in Colorado.

Scenario 5: Small County (Less than 20,000 residents) and Residential Exclusion

Under Scenario 5, generators and residents that are located within counties with less than 20,000 residents and all residents across the state are excluded under the food waste diversion policy. Generators covered under the policy, their annual tonnage, and the estimated diversion under each year of the policy are outlined in Table 9. Estimated Diversion from Policy (%) column represents the increase in diversion over the baseline rate of 17%.

Table 9. Colorado Policy Scenario 5

Year	Food Waste Threshold (tons per week)	Number of Generators (excluding residents)	Food Waste Covered Under the Policy (Tons per year)	Estimated Diversion from Policy (%)
2	2	193	640,300	44% (61% Cumulative)
4	1	448	660,590	46% (63% Cumulative)
6	0.5	964	699,040	50% (67% Cumulative)
8	Any amount	8,192	725,040	52% (69% Cumulative)

Source: EPA Excess Food Waste, CDPHE

By Year 8 of implementation, 8,192 generators²² would be covered amounting to 0.7 million tons of food waste per year. It is estimated that by Year 8, 52% of food waste is diverted. Based on the projected diversion under each year of the policy, industry growth within each of the segments are outlined in the table below.

Table 10. Colorado Policy Scenario 5 Food Waste Employment Inputs

Year	Food Waste Threshold (tons per week)	Collection and Hauling Employment Increase	Processing Employment Increase	Rescue Employment Increase
2	2	1,620	200	120
4	1	1,690	210	120
6	0.5	1,840	230	130
8	Any amount	1,910	240	140

Source: ICF Analysis

After Year 8, when all entities are covered under the policy, 2,290 direct jobs will have been created, a growth of 11% in the waste management sector in Colorado.

Results

The following section presents each segment's impact on the economy, based on the results of the IMPLAN economic analysis, and allows for a more nuanced understanding of the relative impacts of haulers, processors, and rescue organizations. Economic impact metrics include employment, labor income, industry activity, and tax revenue. The direct employment and employee compensation inputs described previously initiate a ripple effect throughout the Colorado economy, from which additional jobs, revenue, and economic activity stem. The IMPLAN results below provide quantitative context for comparison across industries and an estimate of the impact on the economy. The figures to the right represent cumulative results across the three industry segments, by policy scenario, for employment and tax revenue metrics.

The results presented under each of the scenarios are high level summaries for each of the scenarios across all industry segments. Detailed results at the segment level are presented in the technical appendix.

²² While the number of generators is consistent across Scenarios 4 and 5, the exclusion of residential food waste results in a reduction of the year 8 tons.

Scenario 1: Comprehensive

The total results in the initial threshold of the policy (Year 2) by segment are shown in Table 11. Combined, the three industry segments supported 5,689 total jobs in Colorado (a 27% increase in the growth of the waste management sector) and generated over \$461 million in labor income. These industries produced approximately \$1.5 billion in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$47 million in state and local tax revenue.

In the following phase of the policy (Year 4), results by segment are shown in Table 11. Combined, the three industry segments supported 5,917 total jobs in Colorado (a 28% increase in the growth of the waste management sector) and generated over \$479 million in labor income. These industries produced nearly \$1.5 billion in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$49 million in state and local tax revenue.

In Year 6 of the policy, results by segment are shown in Table 11. Combined, the three industry segments supported 6,030 total jobs in Colorado (a 29% increase in the growth of the waste management sector) and generated over \$488 million in labor income. These industries produced over \$1.5 billion in industry activity in the state. Additionally, the economic activity in the organics waste industry generated over \$50 million in state and local tax revenue.

In the final threshold of the policy (Year 8), results by segment are shown in Table 11. Combined, the three industry segments supported 9,444 total jobs in Colorado (a 45% increase in the growth of the waste management sector) and generated over \$765 million in labor income. These industries produced over \$2.4 billion in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated \$79 million in state and local tax revenue.

Table 11. Scenario 1 Results (\$Millions, 2025 USD)

Policy Year	Industry Segment	Employment	Labor Income	Industry Output	Tax Revenue
Year 2	Hauling	4,852	\$397.5	\$1,277.6	\$41.5
	Processing	598	\$49.0	\$157.5	\$5.1
	Rescue	239	\$14.7	\$35.9	\$0.9
		5,689	\$461.3	\$1,471.0	\$47.6
Year 4	Hauling	5,046	\$413.5	\$1,328.7	\$43.2
	Processing	622	\$51.0	\$163.7	\$5.3
	Rescue	249	\$15.3	\$37.4	\$1.0
		5,917	\$479.7	\$1,529.8	\$49.5
Year 6	Hauling	5,143	\$421.4	\$1,354.2	\$44.0
	Processing	634	\$51.9	\$166.9	\$5.4
	Rescue	254	\$15.6	\$38.1	\$1.0
		6,030	\$488.9	\$1,559.2	\$50.4
Year 8	Hauling	8,054	\$659.9	\$2,120.8	\$68.9
	Processing	993	\$81.3	\$261.4	\$8.5
	Rescue	397	\$24.4	\$59.6	\$1.5
		9,444	\$765.7	\$2,441.8	\$79.0

Source: ICF Analysis based on IMPLAN model

For more granular results broken out by direct and indirect impacts, please see the Technical Appendix.

Scenario 2: Geographic Exclusion

The total results in the initial threshold of the policy (Year 2) by segment are shown in Table 12. Combined, the three industry segments supported 3,434 total jobs in Colorado (a 16% increase in the growth of the waste management sector) and generated over \$278 million in labor income. These industries produced over \$887 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$28 million in state and local tax revenue.

In the following year of the policy (Year 4), results remain the same.

In Year 6 of the policy, results by segment are shown in Table 12. Combined, the three industry segments supported 3,556 total jobs in Colorado (an 17% increase in the growth of the waste management sector) and generated over \$288 million in labor income. These industries produced approximately \$919 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$29 million in state and local tax revenue.

In the final threshold of the policy (Year 8), results by segment are shown in Table 12. Combined, the three industry segments supported 7,481 total jobs in Colorado (a 36% increase in the growth of the waste management sector) and generated over \$606 million in labor income. These industries produced nearly \$1.9 billion in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$62 million in state and local tax revenue.

Table 12. Scenario 2 Results (\$Millions, 2025 USD)

Policy Year	Industry Segment	Employment	Labor Income	Industry Output	Tax Revenue
Year 2	Hauling	2,928	\$239.9	\$771.1	\$25.1
	Processing	361	\$29.6	\$95.2	\$3.1
	Rescue	144	\$8.8	\$21.6	\$0.6
		3,434	\$278.4	\$887.9	\$28.7
Year 4	Hauling	2,928	\$239.9	\$771.1	\$25.1
	Processing	361	\$29.6	\$95.2	\$3.1
	Rescue	144	\$8.8	\$21.6	\$0.6
		3,434	\$278.4	\$887.9	\$28.7
Year 6	Hauling	3,033	\$248.5	\$798.6	\$26.0
	Processing	374	\$30.7	\$98.6	\$3.2
	Rescue	149	\$9.2	\$22.4	\$0.6
		3,556	\$288.4	\$919.6	\$29.7
Year 8	Hauling	6,379	\$522.7	\$1,679.9	\$54.6
	Processing	788	\$64.5	\$207.4	\$6.7
	Rescue	314	\$19.3	\$47.1	\$1.2
		7,481	\$606.5	\$1,934.3	\$62.5

Source: ICF Analysis based on IMPLAN model

For more granular results broken out by direct and indirect impacts, please see the Technical Appendix.

Scenario 3: Small Generator and Geographic Exclusion

The total results in the initial threshold of the policy (Year 2) by segment are shown in Table 13. Combined, the three industry segments supported 1,080 total jobs in Colorado (a 5% increase in the growth of the waste management sector) and generated over \$87 million in labor income. These industries produced nearly \$280 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated \$9 million in state and local tax revenue.

In the following year of the policy (Year 4), results remain the same.

In Year 6 of the policy, results by segment are shown in Table 13. Combined, the three industry segments supported 1,350 total jobs in Colorado (a 6% increase in the growth of the waste management sector) and generated over \$109 million in labor income. These industries produced approximately \$349 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$11 million in state and local tax revenue.

In the final threshold of the policy (Year 8), results by segment are shown in Table 13. Combined, the three industry segments supported 1,620 total jobs in Colorado (an 8% increase in the growth of the waste management sector) and generated over \$131 million in labor income. These industries produced \$418 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated nearly \$13.5 million in state and local tax revenue.

Table 13. Scenario 3 Results (\$Millions, 2025 USD)

Policy Year	Industry Segment	Employment	Labor Income	Industry Output	Tax Revenue
Year 2	Hauling	921	\$75.4	\$242.5	\$7.9
	Processing	114	\$9.3	\$29.9	\$1.0
	Rescue	45	\$2.8	\$6.8	\$0.2
		1,080	\$87.6	\$279.2	\$9.0
Year 4	Hauling	921	\$75.4	\$242.5	\$7.9
	Processing	114	\$9.3	\$29.9	\$1.0
	Rescue	45	\$2.8	\$6.8	\$0.2
		1,080	\$87.6	\$279.2	\$9.0
Year 6	Hauling	1,151	\$94.3	\$303.1	\$9.9
	Processing	142	\$11.6	\$37.4	\$1.2
	Rescue	57	\$3.5	\$8.5	\$0.2
		1,350	\$109.4	\$349.0	\$11.3
Year 8	Hauling	1,381	\$113.2	\$363.7	\$11.8
	Processing	171	\$14.0	\$44.9	\$1.5
	Rescue	68	\$4.2	\$10.2	\$0.3
		1,620	\$131.3	\$418.8	\$13.5

Source: ICF Analysis based on IMPLAN model

For more granular results broken out by direct and indirect impacts, please see the Technical Appendix.

Scenario 4: Small County (Less than 20,000 residents) Exclusion

The total results in the initial threshold of the policy (Year 2) by segment are shown in Table 14. Combined, the three industry segments supported 5,006 total jobs in Colorado (a 24% increase in the growth of the waste management sector) and generated over \$405 million in labor income. These industries produced nearly \$1,294 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$41 million in state and local tax revenue.

In the following year of the policy (Year 4), results by segment are shown in Table 14. Combined, the three industry segments supported 5,207 total jobs in Colorado (a 24% increase in the growth of the waste management sector) and generated over \$422 million in labor income. These industries produced nearly \$1,346 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated \$43 million in state and local tax revenue.

In Year 6 of the policy, results by segment are shown in Table 14. Combined, the three industry segments supported 5,307 total jobs in Colorado (a 25% increase in the growth of the waste management sector) and generated over \$430 million in labor income. These industries produced approximately \$1,372 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$44 million in state and local tax revenue.

In the final threshold of the policy (Year 8), results by segment are shown in Table 14. Combined, the three industry segments supported 9,216 total jobs in Colorado (a 44% increase in the growth of the waste management sector) and generated over \$747 million in labor income. These industries produced over \$2,382 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated nearly \$77 million in state and local tax revenue.

Table 14. Scenario 4 Results (\$Millions, 2025 USD)

Policy Year	Industry Segment	Employment	Labor Income	Industry Output	Tax Revenue
Year 2	Hauling	4,269	\$349.8	\$1,124.3	\$36.5
	Processing	526	\$43.1	\$138.6	\$4.5
	Rescue	211	\$12.9	\$31.6	\$0.8
		5,006	\$405.9	\$1,294.4	\$41.9
Year 4	Hauling	4,440	\$363.8	\$1,169.2	\$38.0
	Processing	547	\$44.8	\$144.1	\$4.7
	Rescue	219	\$13.5	\$32.9	\$0.8
		5,207	\$422.1	\$1,346.2	\$43.5
Year 6	Hauling	4,526	\$370.8	\$1,191.7	\$38.7
	Processing	558	\$45.7	\$146.9	\$4.8
	Rescue	223	\$13.7	\$33.5	\$0.9
		5,307	\$430.3	\$1,372.1	\$44.4
Year 8	Hauling	7,860	\$644.0	\$2,069.7	\$67.3
	Processing	969	\$79.4	\$255.1	\$8.3
	Rescue	388	\$23.8	\$58.2	\$1.5
		9,216	\$747.2	\$2,382.9	\$77.1

Source: ICF Analysis based on IMPLAN model

For more granular results broken out by direct and indirect impacts, please see the Technical Appendix.

Scenario 5: Small County (Less than 20,000 residents) and Residential Exclusion

The total results in the initial threshold of the policy (Year 2) by segment are shown in Table 15. Combined, the three industry segments supported 5,006 total jobs in Colorado (a 24% increase in the growth of the waste management sector) and generated over \$405 million in labor income. These industries produced nearly \$1,294 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$41 million in state and local tax revenue.

In the following year of the policy (Year 4), results by segment are shown in Table 15. Combined, the three industry segments supported 5,207 total jobs in Colorado (a 24% increase in the growth of the waste management sector) and generated over \$422 million in labor income. These industries produced nearly \$1,346 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated \$43 million in state and local tax revenue.

In Year 6 of the policy, results by segment are shown in Table 15. Combined, the three industry segments supported 5,307 total jobs in Colorado (a 25% increase in the growth of the waste management sector) and generated over \$430 million in labor income. These industries produced approximately \$1,372 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$44 million in state and local tax revenue.

In the final threshold of the policy (Year 8), results by segment are shown in Table 15. Combined, the three industry segments supported 5,917 total jobs in Colorado (a 28% increase in the growth of the waste management sector) and generated over \$479 million in labor income. These industries produced over \$1,529 million in industry activity in the state. Additionally, the economic activity in the organics waste industry has generated over \$49 million in state and local tax revenue.

For more granular results broken out by direct and indirect impacts, please see the Technical Appendix.

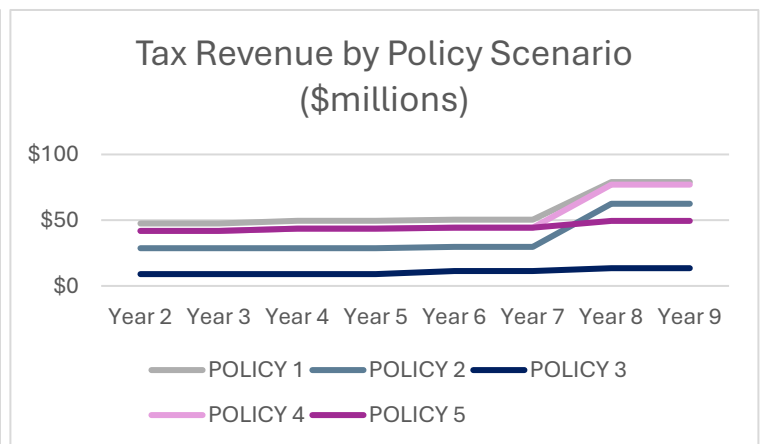
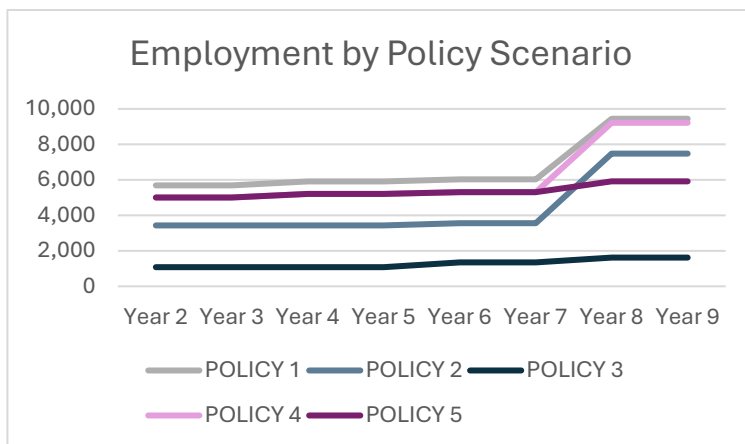
Table 15. Scenario 5 Results (\$Millions, 2025 USD)

Policy Year	Industry Segment	Employment	Labor Income	Industry Output	Tax Revenue
Year 2	Hauling	4,269	\$349.8	\$1,124.3	\$36.5
	Processing	526	\$43.1	\$138.6	\$4.5
	Rescue	211	\$12.9	\$31.6	\$0.8
		5,006	\$405.9	\$1,294.4	\$41.9
Year 4	Hauling	4,440	\$363.8	\$1,169.2	\$38.0
	Processing	547	\$44.8	\$144.1	\$4.7
	Rescue	219	\$13.5	\$32.9	\$0.8
		5,207	\$422.1	\$1,346.2	\$43.5
Year 6	Hauling	4,526	\$370.8	\$1,191.7	\$38.7
	Processing	558	\$45.7	\$146.9	\$4.8
	Rescue	223	\$13.7	\$33.5	\$0.9
		5,307	\$430.3	\$1,372.1	\$44.4
Year 8	Hauling	5,046	\$413.5	\$1,328.7	\$43.2
	Processing	622	\$51.0	\$163.7	\$5.3
	Rescue	249	\$15.3	\$37.4	\$1.0
		5,917	\$479.7	\$1,529.8	\$49.5

Source: ICF Analysis based on IMPLAN model

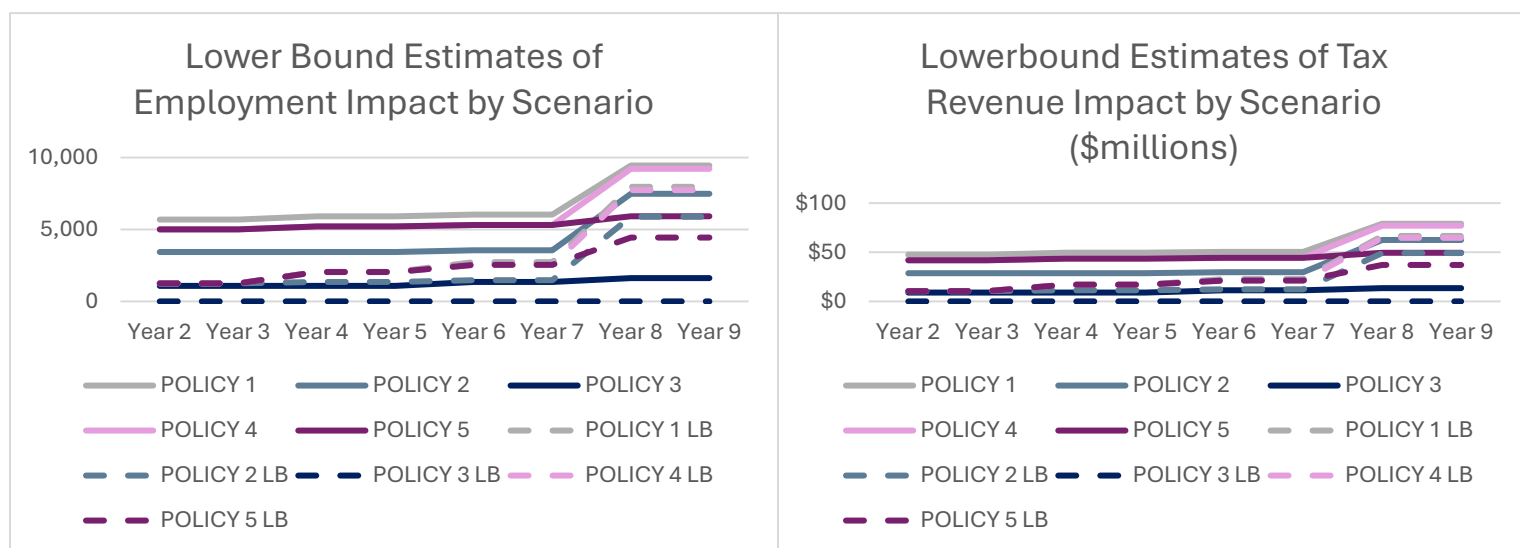
Total Impact

The figures below represent cumulative results across the three industry segments, by policy scenario, for employment and tax revenue metrics. These visuals illustrate the differences in impacts across the five policy scenarios and reflects the inclusivity of each of the policies. Scenario 1, which is the most inclusive, would create the most jobs and generate the most state and local tax revenue. Scenario 2 would generate 83% of the economic activity compared to Scenario 1. The main difference under Scenario 2 is the geographic exclusion that limits the potential coverage. As processor locations expand over time, Scenario 2 could approach the impact of Scenario 1. Scenario 3 would generate 17% of the economic activity compared to Scenario 1. The combination of the geographic exclusion of Scenario 2 with the reduction in covered generators limits the growth of Scenario 3 significantly. Scenario 4 would generate 95% of the economic activity compared to Scenario 1. Scenario 5 would generate 73% of the economic activity compared to Scenario 1.



Sensitivity Analysis

Due to the complex nature and interconnectivity of achieving diversion rates beyond the implementation of a food waste diversion policy, this analysis also considers several scenarios of reduced diversion. The results presented above are the economic impacts associated with achieving the diversion estimated under each of the policy scenarios. In the case where diversion does not achieve the rates expected by the policy, economic impacts will be reduced. Many food waste diversion policies are still in the preliminary stages of implementation and fully matured supply chains have yet to be established. As shown in Anglou et al. (2024), of the five states studied which had implemented food waste diversion policies, estimated diversion by the policy was achieved in one of the five states (Massachusetts). To demonstrate the potential economic variance resulting from different diversion rates under the proposed scenarios, lower bound estimates based on the Anglou et al. (2024) results were generated. For each scenario, a conservative diversion reduction of 16% below expected diversion was applied to the estimated economic impacts. The results are shown below to depict a potential lower bound. Detailed tables of the lower bound estimates of economic impact are included in the technical appendix.



Policy Implications

Based on the scenarios presented, various limitations to the food waste diversion policy coverage results in significant changes in cumulative diversion achieved over time. Under Scenario 1, without any exclusion, full diversion of food waste is achieved by Year 8 of the policy. Scenario 2, which limits the geographic scope significantly reduces diversion rates, but leaves open the opportunity for continued increases in diversion over time as processing, hauling, and rescue access expand across the state. Scenario 3 achieves greatly reduced diversion due to the combination of geographic exemptions and the exclusion of specific generators. Scenarios 4 and 5 achieve similar diversion and economic growth results compared to Scenario 1. Results show that when comparing the impacts between geographic and population limitations, the population exemptions result is minimal diversion reduction compared to Scenario 1, while the geographic exclusion removes the requirement for a sizable portion of the statewide organic waste.

Technical Appendix

IMPLAN Inputs

The following tables show the employment inputs for each scenario and year analyzed in the report.

Scenario 1 (Jobs)

Years since Adoption	Hauling	Processing	Rescue
2 (Phase 1)	1,840	227	132
3	1,840	227	132
4 (Phase 2)	1,913	236	137
5	1,913	236	137
6 (Phase 3)	1,950	240	139
7	1,950	240	139
8 (Phase 4)	3,054	376	218
9	3,054	376	218
10	3,054	376	218

Scenario 2 (Jobs)

Years since Adoption	Hauling	Processing	Rescue
2 (Phase 1)	1,030	127	74
3	1,030	127	74
4 (Phase 2)	1,030	127	74
5	1,030	127	74
6 (Phase 3)	1,067	131	76
7	1,067	131	76
8 (Phase 4)	2,244	276	161
9	2,244	276	161
10	2,244	276	161

Scenario 3 (Jobs)

Years since Adoption	Hauling	Processing	Rescue
2 (Phase 1)	147	18	11
3	147	18	11
4 (Phase 2)	147	18	11
5	184	23	13
6 (Phase 3)	184	23	13
7	221	27	16
8 (Phase 4)	221	27	16
9	221	27	16
10	221	27	16

Scenario 4 (Jobs)

Years since Adoption	Hauling	Processing	Rescue
2 (Phase 1)	1,619	199	116
3	1,619	199	116
4 (Phase 2)	1,693	208	121
5	1,693	208	121
6 (Phase 3)	1,840	227	132
7	1,840	227	132
8 (Phase 4)	2,980	367	213
9	2,980	367	213
10	2,980	367	213

Scenario 5 (Jobs)

Years since Adoption	Hauling	Processing	Rescue
2 (Phase 1)	1,619	199	116
3	1,619	199	116
4 (Phase 2)	1,693	208	121
5	1,693	208	121
6 (Phase 3)	1,840	227	132
7	1,840	227	132
8 (Phase 4)	1,913	236	137
9	1,913	236	137
10	1,913	236	137

Detailed IMPLAN Results

The following tables provide detailed economic impact results for each scenario, segment, and year analyzed in the report.

The results of this analysis are reported using commonly used metrics, consistent with best practices. A summary of each metric is provided below:

- **Employment:** Represents the jobs created by industry, based on the output per worker and output impacts for each industry.
- **Labor Income:** Includes all forms of employment income, including Employee Compensation (wages and benefits) and Proprietor Income.
- **Value Added:** The difference between the cost of intermediate inputs (such as labor) and the value of the final product (industry output). This represents what an industry is adding to the underlying value of the inputs.
- **Industry Output:** Represents the total industry activity generated by direct spending (sales).
- **Tax Revenue:** The sum of state and local tax revenue.

Scenario 1

Hauling (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	2,134	\$185.2	\$309.8	\$660.8	\$14.5
	Indirect	1,407	\$124.1	\$187.1	\$341.8	\$10.7
	Induced	1,310	\$88.3	\$171.7	\$275.0	\$16.4
	Total	4,852	\$397.5	\$668.6	\$1,277.6	\$41.5
Year 4	Direct	2,219	\$192.6	\$322.2	\$687.3	\$15.0
	Indirect	1,464	\$129.1	\$194.6	\$355.4	\$11.1
	Induced	1,363	\$91.8	\$178.5	\$286.0	\$17.0
	Total	5,046	\$413.5	\$695.3	\$1,328.7	\$43.2
Year 6	Direct	2,262	\$196.3	\$328.4	\$700.5	\$15.3
	Indirect	1,492	\$131.5	\$198.3	\$362.3	\$11.3
	Induced	1,389	\$93.5	\$182.0	\$291.5	\$17.4
	Total	5,143	\$421.4	\$708.7	\$1,354.2	\$44.0
Year 8	Direct	3,542	\$307.4	\$514.3	\$1,097.0	\$24.0
	Indirect	2,336	\$206.0	\$310.5	\$567.3	\$17.7
	Induced	2,175	\$146.5	\$284.9	\$456.5	\$27.2
	Total	8,054	\$659.9	\$1,109.8	\$2,120.8	\$68.9

Processing (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	263	\$22.8	\$38.2	\$81.4	\$1.8
	Indirect	173	\$15.3	\$23.1	\$42.1	\$1.3
	Induced	161	\$10.9	\$21.2	\$33.9	\$2.0
	Total	598	\$49.0	\$82.4	\$157.5	\$5.1
Year 4	Direct	274	\$23.7	\$39.7	\$84.7	\$1.9
	Indirect	180	\$15.9	\$24.0	\$43.8	\$1.4
	Induced	168	\$11.3	\$22.0	\$35.2	\$2.1
	Total	622	\$51.0	\$85.7	\$163.7	\$5.3
Year 6	Direct	279	\$24.2	\$40.5	\$86.3	\$1.9
	Indirect	184	\$16.2	\$24.4	\$44.6	\$1.4
	Induced	171	\$11.5	\$22.4	\$35.9	\$2.1
	Total	634	\$51.9	\$87.3	\$166.9	\$5.4
Year 8	Direct	437	\$37.9	\$63.4	\$135.2	\$3.0
	Indirect	288	\$25.4	\$38.3	\$69.9	\$2.2
	Induced	268	\$18.1	\$35.1	\$56.3	\$3.4
	Total	993	\$81.3	\$136.8	\$261.4	\$8.5

Rescue (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	153	\$8.6	\$8.5	\$17.2	\$0.1
	Indirect	38	\$2.8	\$4.5	\$8.5	\$0.2
	Induced	48	\$3.3	\$6.4	\$10.2	\$0.6
	Total	239	\$14.7	\$19.3	\$35.9	\$0.9
Year 4	Direct	159	\$9.0	\$8.8	\$17.9	\$0.1
	Indirect	39	\$2.9	\$4.7	\$8.9	\$0.3
	Induced	50	\$3.4	\$6.6	\$10.6	\$0.6
	Total	249	\$15.3	\$20.1	\$37.4	\$1.0
Year 6	Direct	162	\$9.1	\$9.0	\$18.3	\$0.1
	Indirect	40	\$3.0	\$4.8	\$9.0	\$0.3
	Induced	51	\$3.5	\$6.7	\$10.8	\$0.6
	Total	254	\$15.6	\$20.5	\$38.1	\$1.0
Year 8	Direct	254	\$14.3	\$14.1	\$28.6	\$0.1
	Indirect	63	\$4.7	\$7.5	\$14.1	\$0.4
	Induced	80	\$5.4	\$10.5	\$16.9	\$1.0
	Total	397	\$24.4	\$32.1	\$59.6	\$1.5

Scenario 2

Hauling (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	1,288	\$111.8	\$187.0	\$398.9	\$8.7
	Indirect	849	\$74.9	\$112.9	\$206.3	\$6.4
	Induced	791	\$53.3	\$103.6	\$166.0	\$9.9
	Total	2,928	\$239.9	\$403.5	\$771.1	\$25.1
Year 4	Direct	1,288	\$111.8	\$187.0	\$398.9	\$8.7
	Indirect	849	\$74.9	\$112.9	\$206.3	\$6.4
	Induced	791	\$53.3	\$103.6	\$166.0	\$9.9
	Total	2,928	\$239.9	\$403.5	\$771.1	\$25.1
Year 6	Direct	1,334	\$115.8	\$193.7	\$413.1	\$9.0
	Indirect	880	\$77.6	\$116.9	\$213.6	\$6.7
	Induced	819	\$55.2	\$107.3	\$171.9	\$10.2
	Total	3,033	\$248.5	\$417.9	\$798.6	\$26.0
Year 8	Direct	2,806	\$243.5	\$407.4	\$868.9	\$19.0
	Indirect	1,851	\$163.2	\$246.0	\$449.4	\$14.0
	Induced	1,723	\$116.0	\$225.7	\$361.6	\$21.5
	Total	6,379	\$522.7	\$879.1	\$1,679.9	\$54.6

Processing (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	159	\$13.8	\$23.1	\$49.2	\$1.1
	Indirect	105	\$9.2	\$13.9	\$25.5	\$0.8
	Induced	98	\$6.6	\$12.8	\$20.5	\$1.2
	Total	361	\$29.6	\$49.8	\$95.2	\$3.1
Year 4	Direct	159	\$13.8	\$23.1	\$49.2	\$1.1
	Indirect	105	\$9.2	\$13.9	\$25.5	\$0.8
	Induced	98	\$6.6	\$12.8	\$20.5	\$1.2
	Total	361	\$29.6	\$49.8	\$95.2	\$3.1
Year 6	Direct	165	\$14.3	\$23.9	\$51.0	\$1.1
	Indirect	109	\$9.6	\$14.4	\$26.4	\$0.8
	Induced	101	\$6.8	\$13.2	\$21.2	\$1.3
	Total	374	\$30.7	\$51.6	\$98.6	\$3.2
Year 8	Direct	346	\$30.1	\$50.3	\$107.3	\$2.3
	Indirect	228	\$20.1	\$30.4	\$55.5	\$1.7
	Induced	213	\$14.3	\$27.9	\$44.6	\$2.7
	Total	788	\$64.5	\$108.5	\$207.4	\$6.7

Rescue (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	92	\$5.2	\$5.1	\$10.4	\$0.0
	Indirect	23	\$1.7	\$2.7	\$5.1	\$0.1
	Induced	29	\$2.0	\$3.8	\$6.1	\$0.4
	Total	144	\$8.8	\$11.6	\$21.6	\$0.6
Year 4	Direct	92	\$5.2	\$5.1	\$10.4	\$0.0
	Indirect	23	\$1.7	\$2.7	\$5.1	\$0.1
	Induced	29	\$2.0	\$3.8	\$6.1	\$0.4
	Total	144	\$8.8	\$11.6	\$21.6	\$0.6
Year 6	Direct	95	\$5.4	\$5.3	\$10.7	\$0.0
	Indirect	24	\$1.8	\$2.8	\$5.3	\$0.2
	Induced	30	\$2.0	\$4.0	\$6.3	\$0.4
	Total	149	\$9.2	\$12.0	\$22.4	\$0.6
Year 8	Direct	200	\$11.3	\$11.1	\$22.6	\$0.1
	Indirect	50	\$3.7	\$5.9	\$11.1	\$0.3
	Induced	64	\$4.3	\$8.3	\$13.3	\$0.8
	Total	314	\$19.3	\$25.3	\$47.1	\$1.2

Scenario 3

Hauling (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	405	\$35.1	\$58.8	\$125.4	\$2.7
	Indirect	267	\$23.6	\$35.5	\$64.9	\$2.0
	Induced	249	\$16.7	\$32.6	\$52.2	\$3.1
	Total	921	\$75.4	\$126.9	\$242.5	\$7.9
Year 4	Direct	405	\$35.1	\$58.8	\$125.4	\$2.7
	Indirect	267	\$23.6	\$35.5	\$64.9	\$2.0
	Induced	249	\$16.7	\$32.6	\$52.2	\$3.1
	Total	921	\$75.4	\$126.9	\$242.5	\$7.9
Year 6	Direct	506	\$43.9	\$73.5	\$156.8	\$3.4
	Indirect	334	\$29.4	\$44.4	\$81.1	\$2.5
	Induced	311	\$20.9	\$40.7	\$65.2	\$3.9
	Total	1,151	\$94.3	\$158.6	\$303.1	\$9.9
Year 8	Direct	608	\$52.7	\$88.2	\$188.1	\$4.1
	Indirect	401	\$35.3	\$53.3	\$97.3	\$3.0
	Induced	373	\$25.1	\$48.9	\$78.3	\$4.7
	Total	1,381	\$113.2	\$190.3	\$363.7	\$11.8

Processing (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	50	\$4.3	\$7.3	\$15.5	\$0.3
	Indirect	33	\$2.9	\$4.4	\$8.0	\$0.3
	Induced	31	\$2.1	\$4.0	\$6.4	\$0.4
	Total	114	\$9.3	\$15.7	\$29.9	\$1.0
Year 4	Direct	50	\$4.3	\$7.3	\$15.5	\$0.3
	Indirect	33	\$2.9	\$4.4	\$8.0	\$0.3
	Induced	31	\$2.1	\$4.0	\$6.4	\$0.4
	Total	114	\$9.3	\$15.7	\$29.9	\$1.0
Year 6	Direct	63	\$5.4	\$9.1	\$19.4	\$0.4
	Indirect	41	\$3.6	\$5.5	\$10.0	\$0.3
	Induced	38	\$2.6	\$5.0	\$8.1	\$0.5
	Total	142	\$11.6	\$19.6	\$37.4	\$1.2
Year 8	Direct	75	\$6.5	\$10.9	\$23.2	\$0.5
	Indirect	49	\$4.4	\$6.6	\$12.0	\$0.4
	Induced	46	\$3.1	\$6.0	\$9.7	\$0.6
	Total	171	\$14.0	\$23.5	\$44.9	\$1.5

Rescue (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	29	\$1.6	\$1.6	\$3.3	\$0.0
	Indirect	7	\$0.5	\$0.9	\$1.6	\$0.0
	Induced	9	\$0.6	\$1.2	\$1.9	\$0.1
	Total	45	\$2.8	\$3.7	\$6.8	\$0.2
Year 4	Direct	29	\$1.6	\$1.6	\$3.3	\$0.0
	Indirect	7	\$0.5	\$0.9	\$1.6	\$0.0
	Induced	9	\$0.6	\$1.2	\$1.9	\$0.1
	Total	45	\$2.8	\$3.7	\$6.8	\$0.2
Year 6	Direct	36	\$2.0	\$2.0	\$4.1	\$0.0
	Indirect	9	\$0.7	\$1.1	\$2.0	\$0.1
	Induced	11	\$0.8	\$1.5	\$2.4	\$0.1
	Total	57	\$3.5	\$4.6	\$8.5	\$0.2
Year 8	Direct	44	\$2.5	\$2.4	\$4.9	\$0.0
	Indirect	11	\$0.8	\$1.3	\$2.4	\$0.1
	Induced	14	\$0.9	\$1.8	\$2.9	\$0.2
	Total	68	\$4.2	\$5.5	\$10.2	\$0.3

Scenario 4

Hauling (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	1,878	\$163.0	\$272.6	\$581.5	\$12.7
	Indirect	1,239	\$109.2	\$164.6	\$300.8	\$9.4
	Induced	1,153	\$77.7	\$151.1	\$242.0	\$14.4
	Total	4,269	\$349.8	\$588.3	\$1,124.3	\$36.5
Year 4	Direct	1,953	\$169.5	\$283.6	\$604.8	\$13.2
	Indirect	1,288	\$113.6	\$171.2	\$312.8	\$9.8
	Induced	1,199	\$80.8	\$157.1	\$251.7	\$15.0
	Total	4,440	\$363.8	\$611.9	\$1,169.2	\$38.0
Year 6	Direct	1,991	\$172.8	\$289.0	\$616.4	\$13.5
	Indirect	1,313	\$115.8	\$174.5	\$318.8	\$10.0
	Induced	1,222	\$82.3	\$160.1	\$256.5	\$15.3
	Total	4,526	\$370.8	\$623.6	\$1,191.7	\$38.7
Year 8	Direct	3,457	\$300.0	\$501.9	\$1,070.6	\$23.4
	Indirect	2,280	\$201.0	\$303.1	\$553.7	\$17.3
	Induced	2,122	\$143.0	\$278.1	\$445.5	\$26.5
	Total	7,860	\$644.0	\$1,083.1	\$2,069.7	\$67.3

Processing (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	231	\$20.1	\$33.6	\$71.7	\$1.6
	Indirect	153	\$13.5	\$20.3	\$37.1	\$1.2
	Induced	142	\$9.6	\$18.6	\$29.8	\$1.8
	Total	526	\$43.1	\$72.5	\$138.6	\$4.5
Year 4	Direct	241	\$20.9	\$34.9	\$74.5	\$1.6
	Indirect	159	\$14.0	\$21.1	\$38.5	\$1.2
	Induced	148	\$10.0	\$19.4	\$31.0	\$1.8
	Total	547	\$44.8	\$75.4	\$144.1	\$4.7
Year 6	Direct	245	\$21.3	\$35.6	\$76.0	\$1.7
	Indirect	162	\$14.3	\$21.5	\$39.3	\$1.2
	Induced	151	\$10.1	\$19.7	\$31.6	\$1.9
	Total	558	\$45.7	\$76.9	\$146.9	\$4.8
Year 8	Direct	426	\$37.0	\$61.9	\$131.9	\$2.9
	Indirect	281	\$24.8	\$37.3	\$68.2	\$2.1
	Induced	262	\$17.6	\$34.3	\$54.9	\$3.3
	Total	969	\$79.4	\$133.5	\$255.1	\$8.3

Rescue (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	135	\$7.6	\$7.5	\$15.2	\$0.1
	Indirect	33	\$2.5	\$4.0	\$7.5	\$0.2
	Induced	43	\$2.9	\$5.6	\$9.0	\$0.5
	Total	211	\$12.9	\$17.0	\$31.6	\$0.8
Year 4	Direct	140	\$7.9	\$7.8	\$15.8	\$0.1
	Indirect	35	\$2.6	\$4.1	\$7.8	\$0.2
	Induced	44	\$3.0	\$5.8	\$9.3	\$0.6
	Total	219	\$13.5	\$17.7	\$32.9	\$0.8
Year 6	Direct	143	\$8.1	\$7.9	\$16.1	\$0.1
	Indirect	35	\$2.6	\$4.2	\$7.9	\$0.2
	Induced	45	\$3.0	\$5.9	\$9.5	\$0.6
	Total	223	\$13.7	\$18.0	\$33.5	\$0.9
Year 8	Direct	248	\$14.0	\$13.8	\$27.9	\$0.1
	Indirect	61	\$4.6	\$7.3	\$13.8	\$0.4
	Induced	79	\$5.3	\$10.3	\$16.5	\$1.0
	Total	388	\$23.8	\$31.3	\$58.2	\$1.5

Scenario 5

Hauling (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	1,878	\$163.0	\$272.6	\$581.5	\$12.7
	Indirect	1,239	\$109.2	\$164.6	\$300.8	\$9.4
	Induced	1,153	\$77.7	\$151.1	\$242.0	\$14.4
	Total	4,269	\$349.8	\$588.3	\$1,124.3	\$36.5
Year 4	Direct	1,953	\$169.5	\$283.6	\$604.8	\$13.2
	Indirect	1,288	\$113.6	\$171.2	\$312.8	\$9.8
	Induced	1,199	\$80.8	\$157.1	\$251.7	\$15.0
	Total	4,440	\$363.8	\$611.9	\$1,169.2	\$38.0
Year 6	Direct	1,991	\$172.8	\$289.0	\$616.4	\$13.5
	Indirect	1,313	\$115.8	\$174.5	\$318.8	\$10.0
	Induced	1,222	\$82.3	\$160.1	\$256.5	\$15.3
	Total	4,526	\$370.8	\$623.6	\$1,191.7	\$38.7
Year 8	Direct	2,219	\$192.6	\$322.2	\$687.3	\$15.0
	Indirect	1,464	\$129.1	\$194.6	\$355.4	\$11.1
	Induced	1,363	\$91.8	\$178.5	\$286.0	\$17.0
	Total	5,046	\$413.5	\$695.3	\$1,328.7	\$43.2

Processing (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	231	\$20.1	\$33.6	\$71.7	\$1.6
	Indirect	153	\$13.5	\$20.3	\$37.1	\$1.2
	Induced	142	\$9.6	\$18.6	\$29.8	\$1.8
	Total	526	\$43.1	\$72.5	\$138.6	\$4.5
Year 4	Direct	241	\$20.9	\$34.9	\$74.5	\$1.6
	Indirect	159	\$14.0	\$21.1	\$38.5	\$1.2
	Induced	148	\$10.0	\$19.4	\$31.0	\$1.8
	Total	547	\$44.8	\$75.4	\$144.1	\$4.7
Year 6	Direct	245	\$21.3	\$35.6	\$76.0	\$1.7
	Indirect	162	\$14.3	\$21.5	\$39.3	\$1.2
	Induced	151	\$10.1	\$19.7	\$31.6	\$1.9
	Total	558	\$45.7	\$76.9	\$146.9	\$4.8
Year 8	Direct	274	\$23.7	\$39.7	\$84.7	\$1.9
	Indirect	180	\$15.9	\$24.0	\$43.8	\$1.4
	Induced	168	\$11.3	\$22.0	\$35.2	\$2.1
	Total	622	\$51.0	\$85.7	\$163.7	\$5.3

Rescue (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	135	\$7.6	\$7.5	\$15.2	\$0.1
	Indirect	33	\$2.5	\$4.0	\$7.5	\$0.2
	Induced	43	\$2.9	\$5.6	\$9.0	\$0.5
	Total	211	\$12.9	\$17.0	\$31.6	\$0.8
Year 4	Direct	140	\$7.9	\$7.8	\$15.8	\$0.1
	Indirect	35	\$2.6	\$4.1	\$7.8	\$0.2
	Induced	44	\$3.0	\$5.8	\$9.3	\$0.6
	Total	219	\$13.5	\$17.7	\$32.9	\$0.8
Year 6	Direct	143	\$8.1	\$7.9	\$16.1	\$0.1
	Indirect	35	\$2.6	\$4.2	\$7.9	\$0.2
	Induced	45	\$3.0	\$5.9	\$9.5	\$0.6
	Total	223	\$13.7	\$18.0	\$33.5	\$0.9
Year 8	Direct	159	\$9.0	\$8.8	\$17.9	\$0.1
	Indirect	39	\$2.9	\$4.7	\$8.9	\$0.3
	Induced	50	\$3.4	\$6.6	\$10.6	\$0.6
	Total	249	\$15.3	\$20.1	\$37.4	\$1.0

Lower Bound Detailed IMPLAN Results

The following tables provided the detailed lower bound economic impact estimates described in the report for each scenario, segment, and year.

Scenario 1

Hauling (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Add	Industry Activity	Tax Revenue
Year 2	Direct	469	\$40.7	\$68.2	\$145.4	\$3.2
	Indirect	310	\$27.3	\$41.2	\$75.2	\$2.3
	Induced	288	\$19.4	\$37.8	\$60.5	\$3.6
	Total	1,067	\$87.5	\$147.1	\$281.1	\$9.1
Year 4	Direct	768	\$66.7	\$111.5	\$237.9	\$5.2
	Indirect	507	\$44.7	\$67.3	\$123.0	\$3.8
	Induced	472	\$31.8	\$61.8	\$99.0	\$5.9
	Total	1,747	\$143.1	\$240.7	\$459.9	\$15.0
Year 6	Direct	1,024	\$88.9	\$148.7	\$317.2	\$6.9
	Indirect	676	\$59.6	\$89.8	\$164.0	\$5.1
	Induced	629	\$42.4	\$82.4	\$132.0	\$7.9
	Total	2,329	\$190.8	\$320.9	\$613.2	\$19.9
Year 8	Direct	2,988	\$259.3	\$433.8	\$925.2	\$20.3
	Indirect	1,970	\$173.7	\$261.9	\$478.5	\$14.9
	Induced	1,834	\$123.6	\$240.3	\$385.0	\$22.9
	Total	6,792	\$556.6	\$936.0	\$1,788.6	\$58.1

Processing (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Add	Industry Activity	Tax Revenue
Year 2	Direct	58	\$5.0	\$8.4	\$17.9	\$0.4
	Indirect	38	\$3.4	\$5.1	\$9.3	\$0.3
	Induced	36	\$2.4	\$4.7	\$7.5	\$0.4
	Total	132	\$10.8	\$18.1	\$34.6	\$1.1
Year 4	Direct	95	\$8.2	\$13.7	\$29.3	\$0.6
	Indirect	62	\$5.5	\$8.3	\$15.2	\$0.5
	Induced	58	\$3.9	\$7.6	\$12.2	\$0.7
	Total	215	\$17.6	\$29.7	\$56.7	\$1.8
Year 6	Direct	126	\$11.0	\$18.3	\$39.1	\$0.9
	Indirect	83	\$7.3	\$11.1	\$20.2	\$0.6
	Induced	78	\$5.2	\$10.2	\$16.3	\$1.0
	Total	287	\$23.5	\$39.5	\$75.6	\$2.5
Year 8	Direct	368	\$32.0	\$53.5	\$114.0	\$2.5
	Indirect	243	\$21.4	\$32.3	\$59.0	\$1.8
	Induced	226	\$15.2	\$29.6	\$47.4	\$2.8
	Total	837	\$68.6	\$115.4	\$220.4	\$7.2

Rescue (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Add	Industry Activity	Tax Revenue
Year 2	Direct	34	\$1.9	\$1.9	\$3.8	\$0.0
	Indirect	8	\$0.6	\$1.0	\$1.9	\$0.1
	Induced	11	\$0.7	\$1.4	\$2.2	\$0.1
	Total	53	\$3.2	\$4.3	\$7.9	\$0.2
Year 4	Direct	55	\$3.1	\$3.1	\$6.2	\$0.0
	Indirect	14	\$1.0	\$1.6	\$3.1	\$0.1
	Induced	17	\$1.2	\$2.3	\$3.7	\$0.2
	Total	86	\$5.3	\$7.0	\$12.9	\$0.3
Year 6	Direct	73	\$4.1	\$4.1	\$8.3	\$0.0
	Indirect	18	\$1.4	\$2.2	\$4.1	\$0.1
	Induced	23	\$1.6	\$3.0	\$4.9	\$0.3
	Total	115	\$7.1	\$9.3	\$17.2	\$0.4
Year 8	Direct	214	\$12.1	\$11.9	\$24.1	\$0.1
	Indirect	53	\$3.9	\$6.3	\$11.9	\$0.3
	Induced	68	\$4.6	\$8.9	\$14.2	\$0.8
	Total	335	\$20.6	\$27.1	\$50.3	\$1.3

Scenario 2

Hauling (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	506	\$43.9	\$73.5	\$156.7	\$3.4
	Indirect	334	\$29.4	\$44.4	\$81.0	\$2.5
	Induced	311	\$20.9	\$40.7	\$65.2	\$3.9
	Total	1,150	\$94.3	\$158.5	\$302.9	\$9.8
Year 4	Direct	506	\$43.9	\$73.5	\$156.7	\$3.4
	Indirect	334	\$29.4	\$44.4	\$81.0	\$2.5
	Induced	311	\$20.9	\$40.7	\$65.2	\$3.9
	Total	1,150	\$94.3	\$158.5	\$302.9	\$9.8
Year 6	Direct	552	\$47.9	\$80.1	\$170.9	\$3.7
	Indirect	364	\$32.1	\$48.4	\$88.4	\$2.8
	Induced	339	\$22.8	\$44.4	\$71.1	\$4.2
	Total	1,255	\$102.8	\$172.9	\$330.5	\$10.7
Year 8	Direct	2,208	\$191.6	\$320.6	\$683.8	\$15.0
	Indirect	1,456	\$128.4	\$193.6	\$353.6	\$11.0
	Induced	1,356	\$91.3	\$177.6	\$284.5	\$17.0
	Total	5,020	\$411.3	\$691.7	\$1,321.9	\$43.0

Processing (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	62	\$5.4	\$9.1	\$19.3	\$0.4
	Indirect	41	\$3.6	\$5.5	\$10.0	\$0.3
	Induced	38	\$2.6	\$5.0	\$8.0	\$0.5
	Total	142	\$11.6	\$19.6	\$37.4	\$1.2
Year 4	Direct	62	\$5.4	\$9.1	\$19.3	\$0.4
	Indirect	41	\$3.6	\$5.5	\$10.0	\$0.3
	Induced	38	\$2.6	\$5.0	\$8.0	\$0.5
	Total	142	\$11.6	\$19.6	\$37.4	\$1.2
Year 6	Direct	68	\$5.9	\$9.9	\$21.1	\$0.5
	Indirect	45	\$4.0	\$6.0	\$10.9	\$0.3
	Induced	42	\$2.8	\$5.5	\$8.8	\$0.5
	Total	155	\$12.7	\$21.3	\$40.8	\$1.3
Year 8	Direct	273	\$23.7	\$39.6	\$84.4	\$1.8
	Indirect	180	\$15.9	\$23.9	\$43.7	\$1.4
	Induced	167	\$11.3	\$21.9	\$35.1	\$2.1
	Total	620	\$50.8	\$85.4	\$163.2	\$5.3

Rescue (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	36	\$2.0	\$2.0	\$4.1	\$0.0
	Indirect	9	\$0.7	\$1.1	\$2.0	\$0.1
	Induced	11	\$0.8	\$1.5	\$2.4	\$0.1
	Total	57	\$3.5	\$4.6	\$8.5	\$0.2
Year 4	Direct	36	\$2.0	\$2.0	\$4.1	\$0.0
	Indirect	9	\$0.7	\$1.1	\$2.0	\$0.1
	Induced	11	\$0.8	\$1.5	\$2.4	\$0.1
	Total	57	\$3.5	\$4.6	\$8.5	\$0.2
Year 6	Direct	39	\$2.2	\$2.2	\$4.4	\$0.0
	Indirect	10	\$0.7	\$1.2	\$2.2	\$0.1
	Induced	12	\$0.8	\$1.6	\$2.6	\$0.2
	Total	62	\$3.8	\$5.0	\$9.3	\$0.2
Year 8	Direct	158	\$8.9	\$8.8	\$17.8	\$0.1
	Indirect	39	\$2.9	\$4.6	\$8.8	\$0.3
	Induced	50	\$3.4	\$6.5	\$10.5	\$0.6
	Total	247	\$15.2	\$19.9	\$37.0	\$0.9

Scenario 3

Hauling (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0
Year 4	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0
Year 6	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0
Year 8	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0

Processing (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0
Year 4	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0
Year 6	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0
Year 8	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
Year 2	Total	0	\$0.0	\$0.0	\$0.0	\$0.0

Rescue (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0
Year 4	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0
Year 6	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0
Year 8	Direct	0	\$0.0	\$0.0	\$0.0	\$0.0
	Indirect	0	\$0.0	\$0.0	\$0.0	\$0.0
	Induced	0	\$0.0	\$0.0	\$0.0	\$0.0
	Total	0	\$0.0	\$0.0	\$0.0	\$0.0

Scenario 4

Hauling (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	469	\$40.7	\$68.2	\$145.4	\$3.2
	Indirect	310	\$27.3	\$41.2	\$75.2	\$2.3
	Induced	288	\$19.4	\$37.8	\$60.5	\$3.6
	Total	1,067	\$87.5	\$147.1	\$281.1	\$9.1
Year 4	Direct	764	\$66.3	\$111.0	\$236.7	\$5.2
	Indirect	504	\$44.4	\$67.0	\$122.4	\$3.8
	Induced	469	\$31.6	\$61.5	\$98.5	\$5.9
	Total	1,737	\$142.4	\$239.4	\$457.5	\$14.9
Year 6	Direct	955	\$82.9	\$138.7	\$295.9	\$6.5
	Indirect	630	\$55.6	\$83.8	\$153.0	\$4.8
	Induced	587	\$39.5	\$76.9	\$123.1	\$7.3
	Total	2,172	\$178.0	\$299.3	\$572.0	\$18.6
Year 8	Direct	2,902	\$251.9	\$421.4	\$898.7	\$19.7
	Indirect	1,914	\$168.8	\$254.4	\$464.8	\$14.5
	Induced	1,782	\$120.0	\$233.4	\$374.0	\$22.3
	Total	6,598	\$540.7	\$909.2	\$1,737.5	\$56.5

Processing (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	58	\$5.0	\$8.4	\$17.9	\$0.4
	Indirect	38	\$3.4	\$5.1	\$9.3	\$0.3
	Induced	36	\$2.4	\$4.7	\$7.5	\$0.4
	Total	132	\$10.8	\$18.1	\$34.6	\$1.1
Year 4	Direct	94	\$8.2	\$13.7	\$29.2	\$0.6
	Indirect	62	\$5.5	\$8.3	\$15.1	\$0.5
	Induced	58	\$3.9	\$7.6	\$12.1	\$0.7
	Total	214	\$17.5	\$29.5	\$56.4	\$1.8
Year 6	Direct	118	\$10.2	\$17.1	\$36.5	\$0.8
	Indirect	78	\$6.8	\$10.3	\$18.9	\$0.6
	Induced	72	\$4.9	\$9.5	\$15.2	\$0.9
	Total	268	\$21.9	\$36.9	\$70.5	\$2.3
Year 8	Direct	358	\$31.0	\$51.9	\$110.8	\$2.4
	Indirect	236	\$20.8	\$31.4	\$57.3	\$1.8
	Induced	220	\$14.8	\$28.8	\$46.1	\$2.7
	Total	813	\$66.6	\$112.1	\$214.1	\$7.0

Rescue (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	34	\$1.9	\$1.9	\$3.8	\$0.0
	Indirect	8	\$0.6	\$1.0	\$1.9	\$0.1
	Induced	11	\$0.7	\$1.4	\$2.2	\$0.1
	Total	53	\$3.2	\$4.3	\$7.9	\$0.2
Year 4	Direct	55	\$3.1	\$3.0	\$6.2	\$0.0
	Indirect	14	\$1.0	\$1.6	\$3.0	\$0.1
	Induced	17	\$1.2	\$2.3	\$3.6	\$0.2
	Total	86	\$5.3	\$6.9	\$12.9	\$0.3
Year 6	Direct	69	\$3.9	\$3.8	\$7.7	\$0.0
	Indirect	17	\$1.3	\$2.0	\$3.8	\$0.1
	Induced	22	\$1.5	\$2.8	\$4.6	\$0.3
	Total	107	\$6.6	\$8.7	\$16.1	\$0.4
Year 8	Direct	208	\$11.7	\$11.5	\$23.4	\$0.1
	Indirect	52	\$3.8	\$6.1	\$11.6	\$0.3
	Induced	66	\$4.4	\$8.6	\$13.8	\$0.8
	Total	326	\$20.0	\$26.3	\$48.9	\$1.2

Scenario 5

Hauling (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	469	\$40.7	\$68.2	\$145.4	\$3.2
	Indirect	310	\$27.3	\$41.2	\$75.2	\$2.3
	Induced	288	\$19.4	\$37.8	\$60.5	\$3.6
	Total	1,067	\$87.5	\$147.1	\$281.1	\$9.1
Year 4	Direct	764	\$66.3	\$111.0	\$236.7	\$5.2
	Indirect	504	\$44.4	\$67.0	\$122.4	\$3.8
	Induced	469	\$31.6	\$61.5	\$98.5	\$5.9
	Total	1,737	\$142.4	\$239.4	\$457.5	\$14.9
Year 6	Direct	955	\$82.9	\$138.7	\$295.9	\$6.5
	Indirect	630	\$55.6	\$83.8	\$153.0	\$4.8
	Induced	587	\$39.5	\$76.9	\$123.1	\$7.3
	Total	2,172	\$178.0	\$299.3	\$572.0	\$18.6
Year 8	Direct	1,665	\$144.5	\$241.7	\$515.5	\$11.3
	Indirect	1,098	\$96.8	\$145.9	\$266.6	\$8.3
	Induced	1,022	\$68.8	\$133.9	\$214.5	\$12.8
	Total	3,784	\$310.1	\$521.5	\$996.5	\$32.4

Processing (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	58	\$5.0	\$8.4	\$17.9	\$0.4
	Indirect	38	\$3.4	\$5.1	\$9.3	\$0.3
	Induced	36	\$2.4	\$4.7	\$7.5	\$0.4
	Total	132	\$10.8	\$18.1	\$34.6	\$1.1
Year 4	Direct	94	\$8.2	\$13.7	\$29.2	\$0.6
	Indirect	62	\$5.5	\$8.3	\$15.1	\$0.5
	Induced	58	\$3.9	\$7.6	\$12.1	\$0.7
	Total	214	\$17.5	\$29.5	\$56.4	\$1.8
Year 6	Direct	118	\$10.2	\$17.1	\$36.5	\$0.8
	Indirect	78	\$6.8	\$10.3	\$18.9	\$0.6
	Induced	72	\$4.9	\$9.5	\$15.2	\$0.9
	Total	268	\$21.9	\$36.9	\$70.5	\$2.3
Year 8	Direct	205	\$17.8	\$29.8	\$63.5	\$1.4
	Indirect	135	\$11.9	\$18.0	\$32.9	\$1.0
	Induced	126	\$8.5	\$16.5	\$26.4	\$1.6
	Total	466	\$38.2	\$64.3	\$122.8	\$4.0

Rescue (\$ Millions, 2025 USD)

		Employment	Labor Income	Value Added	Output	Tax Impact
Year 2	Direct	34	\$1.9	\$1.9	\$3.8	\$0.0
	Indirect	8	\$0.6	\$1.0	\$1.9	\$0.1
	Induced	11	\$0.7	\$1.4	\$2.2	\$0.1
	Total	53	\$3.2	\$4.3	\$7.9	\$0.2
Year 4	Direct	55	\$3.1	\$3.0	\$6.2	\$0.0
	Indirect	14	\$1.0	\$1.6	\$3.0	\$0.1
	Induced	17	\$1.2	\$2.3	\$3.6	\$0.2
	Total	86	\$5.3	\$6.9	\$12.9	\$0.3
Year 6	Direct	69	\$3.9	\$3.8	\$7.7	\$0.0
	Indirect	17	\$1.3	\$2.0	\$3.8	\$0.1
	Induced	22	\$1.5	\$2.8	\$4.6	\$0.3
	Total	107	\$6.6	\$8.7	\$16.1	\$0.4
Year 8	Direct	119	\$6.7	\$6.6	\$13.4	\$0.1
	Indirect	30	\$2.2	\$3.5	\$6.6	\$0.2
	Induced	38	\$2.5	\$5.0	\$7.9	\$0.5
	Total	187	\$11.5	\$15.1	\$28.0	\$0.7