

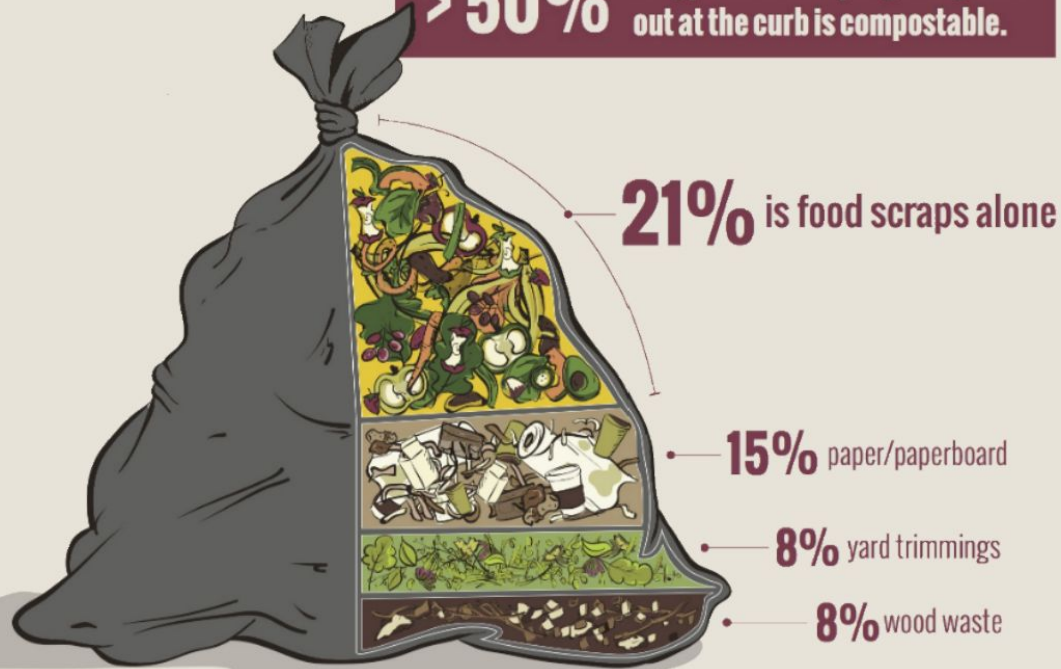
Changing Organics Landscape in VA

Legislation, infrastructure, and movement in the organics space



Every year, U.S. landfills and trash incinerators receive **167 MILLION TONS** of garbage.

> 50% of typical municipal garbage set out at the curb is compostable.



Visualizing the Waste Stream



All About Organics

- **Collection Methods & Challenges**
 - Behavior change required
 - Uncertainty around labeling
 - Lack of infrastructure



COMPOSTABLE
IN INDUSTRIAL FACILITIES

Check locally, as these do not exist in many communities. **Not suitable for backyard composting.**
CERT # SAMPLE



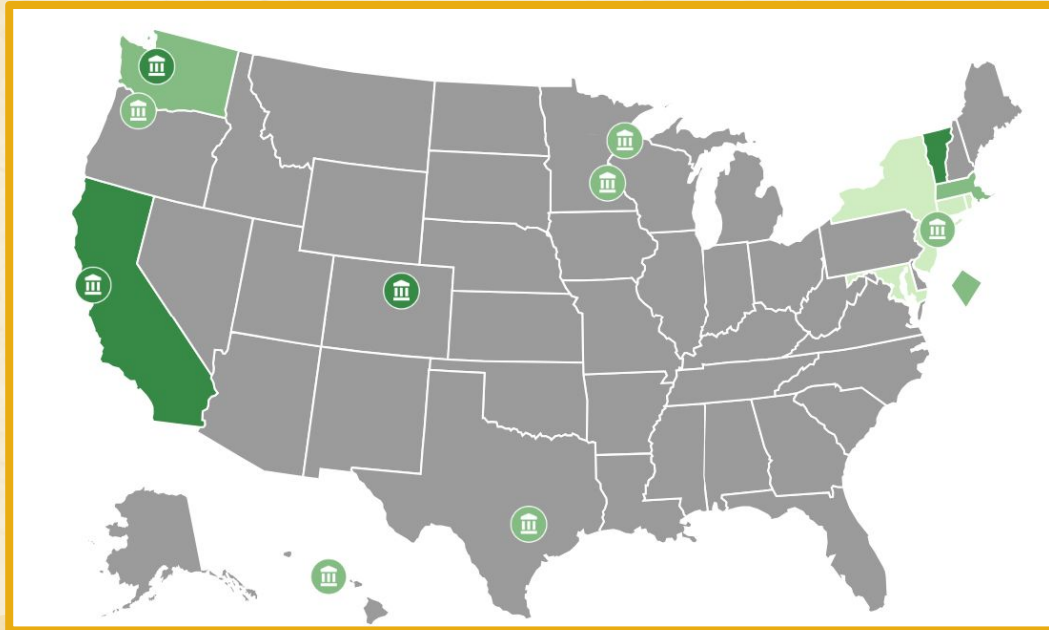
The Changing Landscape

- **Food Waste Bans**
- **Curbside Collection Pilots**
- **Public/Private Partnerships**
- **M&A re: Infrastructure**



Food Waste Bans

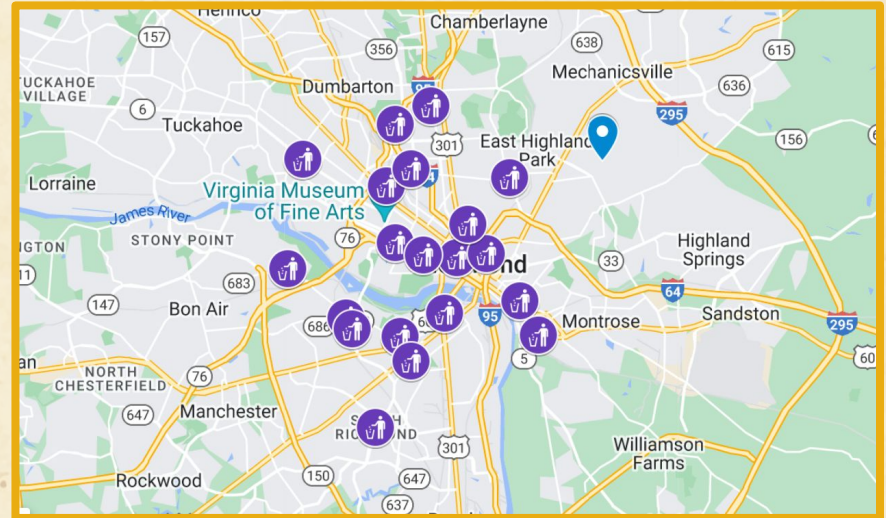
- State bans in CA, CT, MD, MA, NY, NJ, OR, RI, VT, WA, and DC



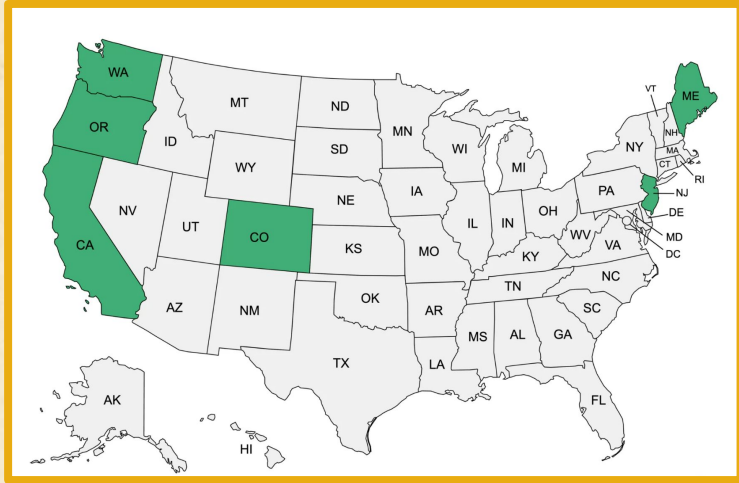


Curbside & Dropoffs

- City of Alexandria
- Fairfax County
- City of Richmond



EPR Laws



- **What they are & who they affect**
- **Most do not include compostable materials or organics programs**
- **Currently six states have packaging EPR laws**

How to Process SSO

- **Compost**
- **Anaerobic Digestion**





Composting in Virginia





Grants

- **USDA RD FPEP Grants**
- **EPA SWIFR Grant Program**
- **COMPOST Act**



M&A in Organics

- M&A in waste industry reached a historic \$6.3 billion in 2022
- In the organics space: **WM, Republic, Atlas Organics, Bootstrap Compost**

