

CEE 3rd Annual Industry Partners Meeting
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Introduction to the CEE Commercial Kitchens Initiative

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Working Together, Advancing Efficiency

CEE Today-a Snapshot

- CEE is a 401c(3) nonprofit organization
- Funded by 81 members in 27 states and 2 provinces as well as government grants
- Governed by BOD drawn from members
- Develop and sponsor 12 initiatives
- Pursuing numerous emerging opportunities
- 18 working program committees
- Staff of 18
- \$2 million budget – 45% from member dues, 30% from US federal sponsors, and 25% from supplemental projects



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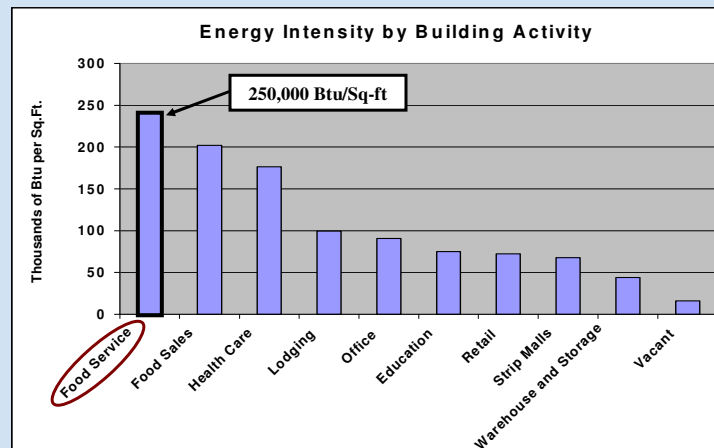
CEE Commercial Initiatives prior to the launch of Commercial Kitchens

- High Efficiency Commercial Air-Conditioning (Jan. 1993)
 - Unitary AC and HP equipment
- Commercial Refrigeration (Dec. 2002)
 - Solid-door Reach In Refrigerators and Freezers
 - Glass-door Reach In Refrigerators
 - Commercial Ice Makers
- High Performance Commercial Lighting (Nov. 2004)
 - 4' 32W T8 Lighting Systems
 - 4' 25W, 28W and 30W T8 Lighting Systems (*in process*)



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Food service is the most energy and water intensive commercial sector.



Source: Energy Information Administration CBECS 1999 Data



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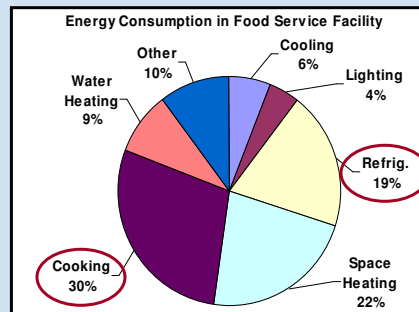
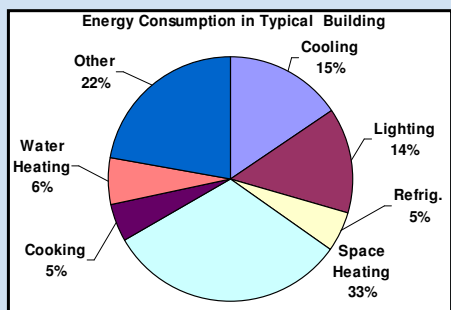
Opportunity for water and energy savings in food service facilities

- Over one million food service facilities in the U.S annually spending \$10 billion on energy and using 300 billion gallons of water.
- This sector, specifically restaurants, while complicated is also experiencing tremendous growth.
- Technologies and practices possible today that can save money on a facilities total operating costs.



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Energy consumption in Food Service is dominated by food preparation and storage



'OTHER' refers to Miscellaneous, Office Equipment and Ventilation
Source: Energy Information Administration CBECS 1999 Data



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CEE's Commercial Kitchens Initiative

- **Goal:** To achieve cost-effective energy savings in the commercial food service market, "Commercial Kitchens"
- **Strategy:** Provide consistent definitions for a set of high performance commercial kitchen equipment (energy and water) and to focus them on key market sector, initially restaurants



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Initiative Background

- Approved by CEE Board of Directors in December 2005.
- Includes Energy and Water Efficient Technologies:
 - New performance specification for electric and gas open, deep-fat fryers
 - Revised CEE spec on ice cube machines
 - Guidelines on pre-rinse spray valves
 - CEE's specs on refrigerators and freezers
- Provides market sector analysis and strategy recommendations, starting with restaurants
- Facilitates joint programming with water agencies



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Initiative Participants

Utilities

- Maine PUC
- Efficiency Vermont
- MidAmerican Energy
- National Grid
- NSTAR
- NYSERDA
- Pacific Gas & Electric
- Puget Sound Energy
- San Diego Gas & Electric
- Seattle City and Light
- Southern California Edison
- Southern California Gas Co.
- Vermont Gas Systems
- WI Dept. of Administration

National/Research Organizations

- ACEEE
- Lawrence Berkeley National Labs
- US EPA

Sponsoring Water Agencies

- City of Austin
- City of Seattle
- City of Toronto
- East Bay MUD
- NYC Dept. of Environmental Protection
- San Diego County Water Authority
- Southern Nevada Water Authority



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Initiative uses a market segmentation approach for program design

- Identify a group of customers primed for an energy efficiency message
- Speak to specific motivations of each group
- Provide specialized technical assistance with detailed knowledge of energy and water end uses



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Restaurants chosen initially as a key opportunity

- Over 900,000 restaurants in the United States
- Full service and fast food restaurants account for two-thirds of all foodservice spending
- \$5.5 billion spent on equipment sales in 2003
- Spending an average of 3% to 5% of their annual sales on gas, electricity and water
- Program administrators have identified this group as a “hard-to-reach” segment



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Market Strategy: Coordination with ENERGY STAR

- ENERGY STAR is an excellent marketing platform for local and regional programs
- On average, 63 percent of households recognize the ENERGY STAR label (2005):
 - 71 percent in areas with program support
 - 53 percent in areas with no program support



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Technology Assessment: Committee Selection Criteria

- Relevance to food service market under evaluation (restaurants)
- Savings potential (electric, gas, water, other)
- Level of effort required to develop performance specification
- Consideration of existing state and federal standards
- Existence of an industry accepted test procedure



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Current technologies addressed in Initiative

Cooking

- Open Deep Fat Fryers
- Steamers (*under review*)

Sanitation

- Pre-rinse spray valves

Refrigeration

- Ice cube machines
- Refrigerators (solid door and glass door reach-ins)
- Freezers (solid door reach-ins)



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Current marketing strategy for Initiative

- Developed *Commercial Kitchens Market Description and Assessment* to determine effective marketing outreach strategies
- Model market approaches
 - developing a series of templates (e.g., press releases, articles, case studies, letters to distributors/specifiers)
 - participating in local industry partner meetings
 - coordinating with local water agencies & restaurant association chapters
 - leveraging national resources such as ENERGY STAR and through associations related to the food service sector such as FCSI, FEDA, MAFSI, NRA and SEFA.



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Initiative results to date

- Improved program delivery between water and energy entities through national consistency in defining technologies
- Initiated industry relationships through coordination in specification development
- Coordination with the ENERGY STAR program through efforts that complement efficiency program offerings and needs



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