

Executive Summary

The CEE Commercial Kitchens Program Overview summarizes CEE member programs active in 2020 that aimed to increase the sale and market share of energy and water efficient commercial kitchens equipment. This resource highlights key insights from the CEE 2020 Commercial Kitchens Program Summary that are indicative of the impact of the CEESM Commercial Kitchens Initiative that was adopted in 2005 to advance the efficiency of cooking, refrigeration, and sanitation equipment.¹ Information on the 98 member programs represented in this document reflects the landscape of CEE member program support for the Initiative during the 2020 calendar year. Since each CEE member uses different program development processes and schedules, this document aims to provide the best available snapshot for 2020 and does not attempt to describe how programs have evolved to date or how they are likely to change in the future.

The CEESM Commercial Kitchens Initiative was adopted in 2005 to advance the efficiency of cooking, refrigeration, and sanitation equipment. The overarching Initiative strategy is to support participants to offer a bundle of relevant program offerings to the foodservice market, support energy and water savings and leverage the endorsement value and promotional resources of the water efficiency community to advance shared objectives. A supporting strategy remains to inform and strengthen the relevance of the US Environmental Protection Agency's (EPA) ENERGY STAR[®] and WaterSense[®] programs for energy and water efficiency program administrators. See Appendix A for additional detail on the CEE strategy relative to the ENERGY STAR program.

The suite of products covered in the Initiative include 10 equipment types. The CEE Commercial Kitchens Initiative was last revised in 2022.

CEE Commercial Kitchens Initiative Member Participation

By joining forces at CEE, individual electric and gas efficiency program administrators support strategic Initiatives that influence binational markets. They can partner not only with each other, but also with industry, trade associations, and government agencies. Initiative participation is an opportunity for individual organizations to amplify the impact of their local efficiency program. By giving voice to this Initiative, individual organizations are counted as part of a collective, harmonized effort to advance efficiency. Through

¹ The initiative is available for download here, <https://cee1.force.com/s/resources?id=a0V2R00000sUQbR>.

program summaries and other corporate communications, CEE champions collective Initiative participation to original equipment manufacturers and distribution chain actors, thereby encouraging their ongoing investment in and supply of energy efficient products to local markets throughout the US and Canada. While one program may represent a small fraction of the binational market, collective participation through CEE sends a powerful signal to the national supply chain that energy efficient products are valued and supported across the United States and Canada.

As with all Initiatives of CEE, participation in the Commercial Kitchens Initiative is voluntary. To be considered an Initiative participant, individual efficiency organizations must incorporate at least one of the Initiative specification or guidelines in an educational or incentive-based regional or local program. Utility companies that operate in multiple states or provinces may have multiple participating programs that are each individually counted as Initiative Participants because they are regulated separately by the states or provinces. The geographic scope is significant to Initiative impact.

Key Findings and Program Trends

In 2020, there were 77 Initiative participants out of 98 members with program offerings for commercial kitchens equipment, a decrease from 83 participants in 2019 (see Figure 1). Initiative participants provided service to over 12,357,000 commercial customers in the U.S. and Canada. Over 7,955,000 commercial customers were served by combined electric and gas providers, 3,574,000 commercial customers by electric-only providers, and 827,000 commercial customers by gas-only providers.²

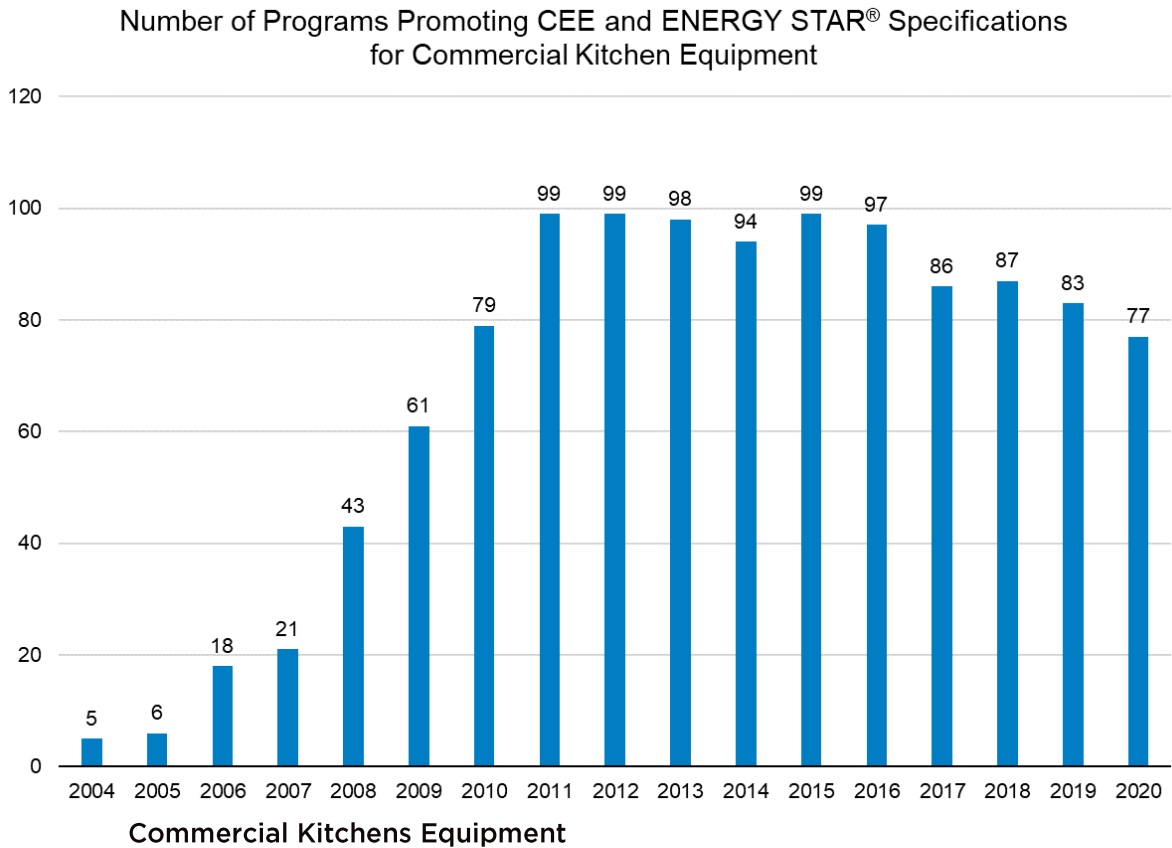
Seventy-one percent of CEE Commercial Kitchens Initiative participants in 2020 were investor-owned utilities (IOUs), 12% were municipal/cooperative utilities, 9% were federally owned utilities, 5% were statewide energy efficiency utilities, and only 3% were nonprofit organizations. Forty percent of participating organizations were electric-only providers, 34% were combined electric and gas, and 26% were gas-only providers. The top five most common measures promoted by CEE members in 2020 were dishwashers (54 programs, 55% of member programs), electric steamers (51, 52%), electric combination ovens (50, 51%), electric convection ovens (50, 51%), and pre-rinse spray valves (50, 51%).

The information in figures 1 and 2 was compiled from CEE program summaries over time. It is intended to support understanding of member adoption of CEE and ENERGY STAR specifications and participation in the CEESM Commercial Kitchens Initiative. The total

² U.S. Energy Information Administration, Annual Electric Power Industry Report, Form EIA-861 detailed data files, (October 6, 2020), distributed by U.S. Energy Information Administration, <https://www.eia.gov/electricity/data/eia861/>.

number of CEE member organizations included in the program summary changes from year to year due to acquisitions, mergers, and ability to participate. The methodology for counting member programs operating in multiple states also changed in 2008.

Figure 1. **Number of Programs Promoting CEE and ENERGY STAR Specifications for**



Since 2005, member programs, ENERGY STAR, and federal minimum standards have worked in concert to advance the market for high efficiency commercial kitchen equipment. As a result of this success, the margin of energy savings above federal minimum standards and CEE tier levels has diminished over time and there has been increasing alignment between CEE and ENERGY STAR specifications. Considering these developments, ENERGY STAR's continued support of high efficiency in the product category, CEE member support for the ENERGY STAR specification, and CEE's assessment that there was not an opportunity for CEE to further differentiate the market with a more stringent performance tier, in 2017 CEE suspended its single-tier specifications for commercial refrigerators and freezers, commercial dishwashers, rack ovens, and fryers and shifted focus to new commercial kitchen equipment categories (not covered by CEE or ENERGY STAR). CEE continues to monitor these equipment categories and work with commercial foodservice industry partners to identify future opportunities to differentiate

and advance the availability of more efficient products above and beyond the ENERGY STAR specifications. This change is reflected in the totals shown in Figure 2 as explained below.

Figure 2. **Total Member Program Offerings Referencing CEE or ENERGY STAR®**

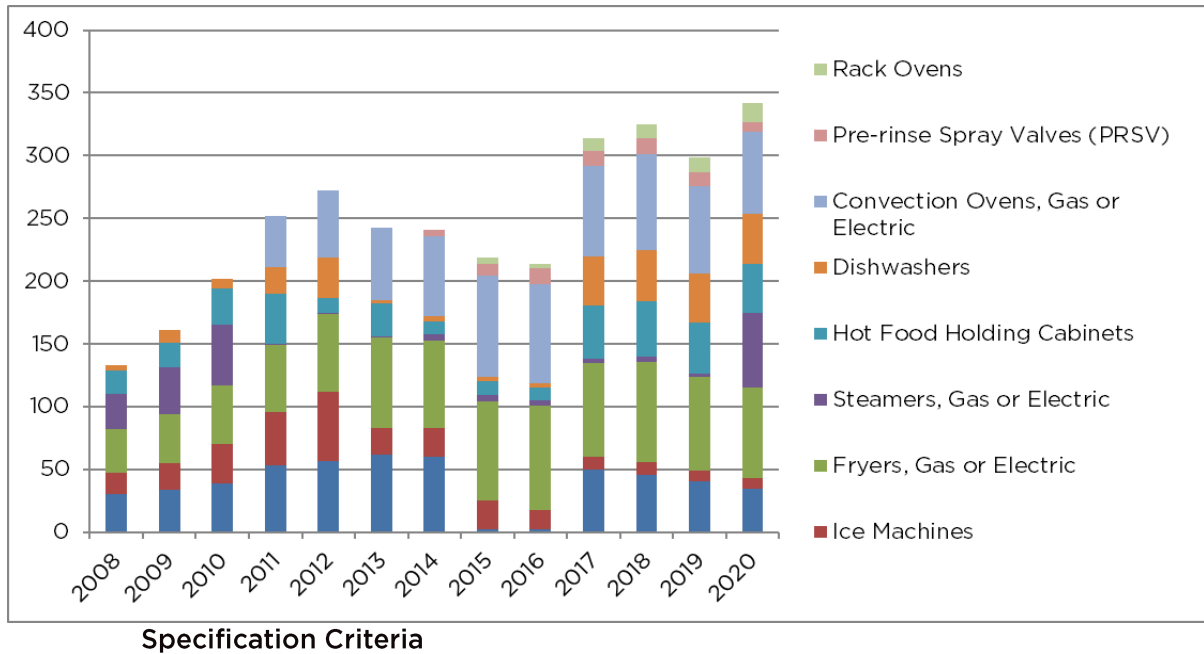


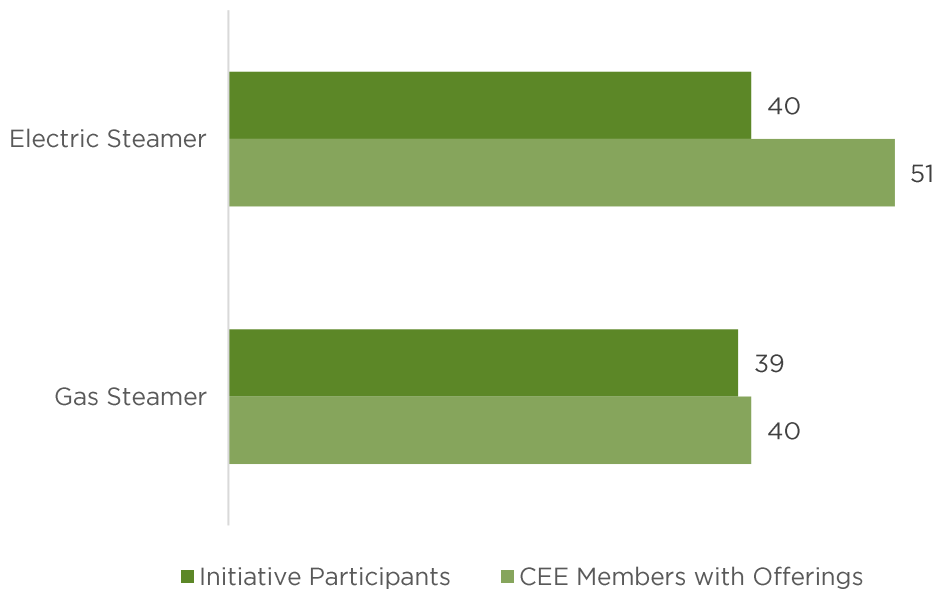
Figure 2 provides another perspective on the scale of Initiative participation. In 2020, the 77 Initiative Participants offered 342 commercial kitchens efficiency measures referencing CEE or ENERGY STAR performance criteria as a basis for qualification. Prior to 2017, the totals for all product categories represented member program offerings referencing the CEE specification as a basis for qualification. Following the suspension of the four CEE specifications described in the previous paragraph, the 2017-2020 totals for refrigeration (self-contained, solid- and transparent-door refrigerators and freezers), fryers, rack ovens, and dishwashers represent member programs requiring ENERGY STAR® qualification. The hot food holding cabinet totals prior to 2017 represented CEE members referencing CEE Tier 2, while the 2017-2020 totals are reflective of CEE members that referenced either CEE or ENERGY STAR®. The ENERGY STAR® specification for HFHC is equivalent to CEE Tier 1. The next section provides additional insight into 2020 program support for specific product categories.

Product Snapshot

Steamers

In 2020, 51 CEE members offered incentives for electric steamers, while 40 CEE members provided incentives for gas steamers. Forty members referenced ENERGY STAR® as a basis for qualifying for incentives for electric steamers. CEE Tiers 1A and 1B energy performance levels are equivalent to ENERGY STAR® performance levels. Unlike the CEE specification, the ENERGY STAR® specification does not have a water consumption limit as a performance requirement. For gas steamers, two utilities referenced the CEE specification, while 39 utilities promoted ENERGY STAR® specification. The incentives for electric and gas steamers ranged between \$80 to \$7,880 and \$120 to \$3,200, respectively.

Figure 3. Incentives for Steamers by Fuel Type, 2020



Ice Machines

Eight Initiative participants promoted Tier 1 or Tier 2 of the CEE Commercial Ice Machine Specification, while 23 programs referenced the ENERGY STAR® specifications in 2020. Member incentives range between \$35 to \$2,400. New US federal minimum energy conservation standards (federal minimums) for automatic commercial ice makers took effect January 28, 2018 and are equivalent to current CEE Tier 1 requirements. In the case of self-contained, commercial ice machines, the new federal minimum standards are more

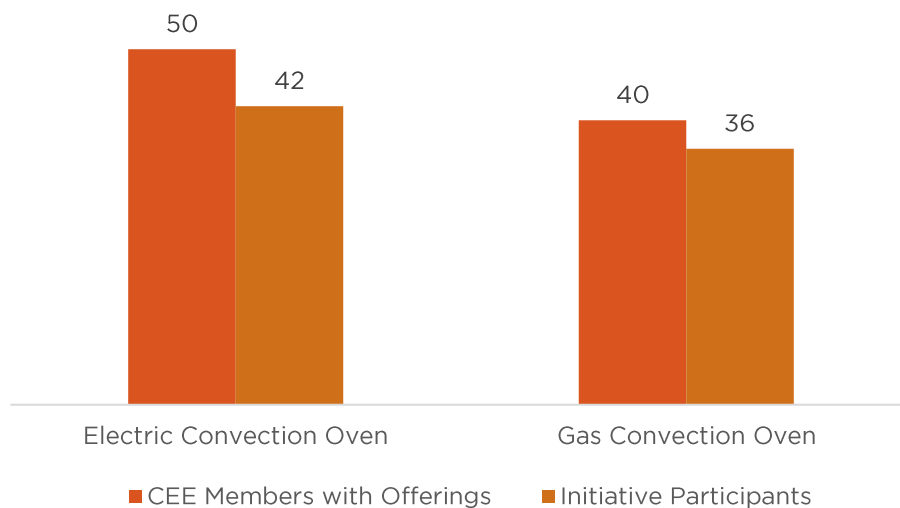
stringent than CEE Tier 2 requirements. On January 28, 2018, updated requirements for ENERGY STAR® Automatic Commercial Ice Machines took effect.

In May 2022, the CEE Board of Directors approved enhancements to the Commercial Ice Machines Specification including an updated Tier 1, new Advanced Tier, and considerations for system connectivity. It went into effect on July 18th, 2022.

Convection Ovens

In 2020, 69 CEE members promoted the ENERGY STAR® Commercial Ovens Specification requirements for electric convection ovens, gas convection ovens, or both. Those requirements are equivalent to CEE Tier 1. Out of 50 members with programs, 42 promoted ENERGY STAR® specification for electric convection oven, while 36 of 40 CEE members specify ENERGY STAR® as a basis for incentives for gas convection ovens. For electric convection ovens, member incentives ranged from \$125 up to \$2,000, while rebates for gas convection ovens ranged between \$150 to \$2,000.

Figure 4. **Incentives for Convection Ovens by Fuel Type, 2020**



Electric Hot Food Holding Cabinets

Forty-two CEE members provided incentives for electric hot food holding cabinets, with four Initiative participants incorporating CEE Tier 2 as a basis for qualification. Thirty-five Initiative participants used the ENERGY STAR® specification to qualify equipment, which is equivalent to CEE Tier 1. Three members referenced the FSTC specification, which was equivalent to CEE Tier 2. Most member incentive amounts ranged from \$100 up to a maximum of \$1,600.

Conveyor Ovens

Thirty Initiative participants and CEE members provided incentives for commercial gas conveyor ovens. Despite the suspension of CEE's specification, two utilities continue to promote the specification, while one utility does not specify any energy criteria or specification. In 2020, incentive ranges between \$300 to \$1,000.

Demand Control Kitchen Ventilation

Since 2010, the CEE Commercial Kitchens Committee has developed several resources to support member program offerings for demand-controlled kitchen ventilation (DCKV). These include Frequently Asked Questions (FAQ) documents, a Program Guide, and a Field Test Protocol that was later adopted and slightly revised by ASTM. As it is not well suited for all foodservice facilities, and challenging as a retrofit, DCKV is typically a custom project. In 2020, 33 members offered incentives for DCKV. The units the incentives were based on varied among utilities, including fan horsepower or air flow in cubic feet per minute (cfm). Twenty-one programs offered incentives based on horsepower that ranged between \$55 to \$1,400. Three members offered incentives based on cfm; two offered \$0.25 to \$0.50 per cfm while the other offered \$300 per 1000 cfm for gas. The remaining programs calculated incentives based on custom analysis and the maximum incentive listed was \$6,600.

Dishwashers

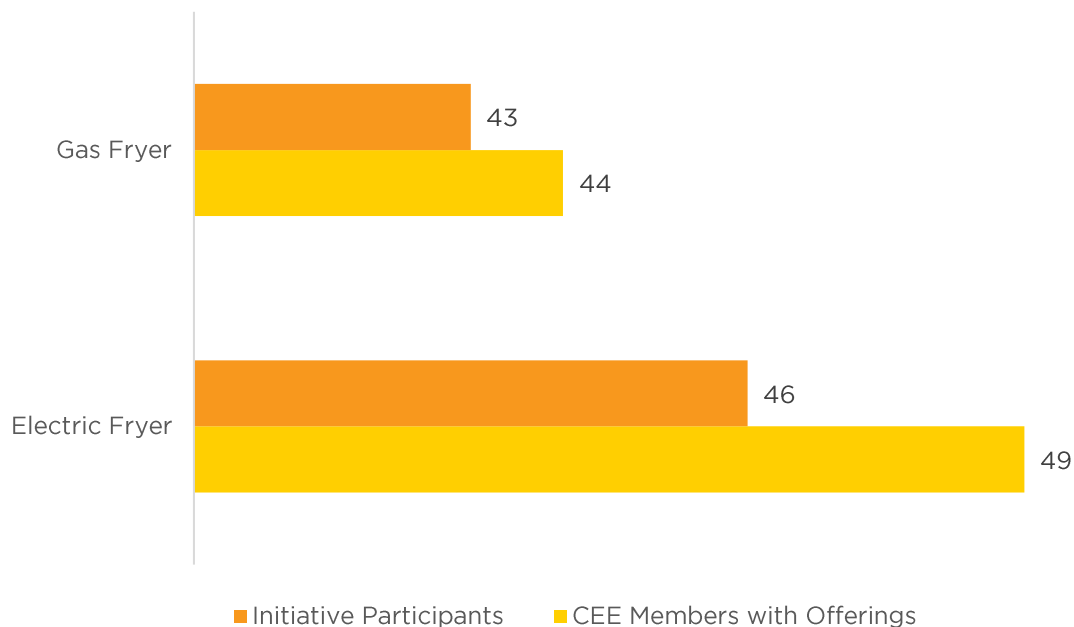
Fifty-four Initiative participants in 2020, which comprises 55% of CEE member programs, provided incentives for commercial dishwashers. CEE suspended its specification for commercial dishwashers on October 18, 2017, for two reasons. First, the ASTM test methods for commercial dishwashers were significantly revised in 2015 to better account for the total energy use of products and cover a broader set of product categories than the 2007 version, which the CEE specification referenced. Second, the ENERGY STAR® Commercial Dishwashers Specification has grown into a trusted platform that meets program needs and has been voluntarily adopted by many CEE members as the performance criterion in their incentive programs. CEE supports and references the ENERGY STAR® Commercial Dishwashers Specification and qualifying products list, which interested stakeholders can use to identify highly efficient equipment. Forty members promoted ENERGY STAR®, while two members continued to reference the suspended CEE specification. Incentive amounts range from \$25 to \$4,000.

Fryers

CEE suspended its specification for commercial fryers as of October 18, 2017, as a review of publicly available performance data found no cost-effective basis for CEE to support an additional tier above ENERGY STAR® in this market at the time. CEE continues to monitor this equipment category for future opportunities to differentiate highly efficient commercial fryers, particularly with respect to natural gas equipment. CEE supports and references the ENERGY STAR® commercial fryers and qualifying products list, which interested stakeholders can use to identify highly efficient equipment.

Incentives for fryers differ by fuel type. In 2020, 46 out of 49 CEE member programs providing incentives for electric fryers, and 43 out of 44 members providing incentives for gas-fueled fryers, used ENERGY STAR as a basis for qualification. Incentives range from \$100 to \$1,600 and \$250 to \$3,000 for electric and gas fryers, respectively.

Figure 5. Incentives for Fryers by Fuel Type, 2020



Pre-Rinse Spray Valves

The Commercial Pre-Rinse Spray Valve (PRSV) Specification was retired on January 15, 2021, resulting in the maintenance of the specification and qualified products list to be discontinued. CEE determined that the market has reached maximum technological potential and no longer presents an opportunity for a voluntary CEE performance specification to differentiate product energy and water performance that would provide meaningful, cost-effective energy savings beyond the new federal minimum standards.

Given the success of market transformation—the wide availability of highly efficient products that meet or exceed the CEE specification tiers—there is an opportunity to use PRSV in program designs aimed at building a relationship with the customer, with CEE members reporting success with using PRSV in direct install. There may also be an early retirement opportunity given the installed base of 1.5 million PRSVs and average product life of five years. CEE updated program guidance to support such programs.

Fifty members provided incentives for pre-rinse spray valves in 2020. Eight CEE members based their incentives on either CEE or WaterSense® specifications. Rebate amounts range from \$7 to \$875, and three CEE members offered free direct installations or covered 50% of equipment and installation costs.

Rack Ovens

CEE suspended its gas rack oven specification as of October 18, 2017, because there was not an opportunity for a CEE specification to differentiate highly efficient rack ovens in a cost-effective manner beyond the ENERGY STAR® performance criteria. Accordingly, CEE supports ENERGY STAR® while continuing to monitor the market for new opportunities to advance highly efficient commercial rack ovens. In 2020, 37 CEE member programs provided incentives for commercial rack ovens, which ranged from \$300 to \$5,000.

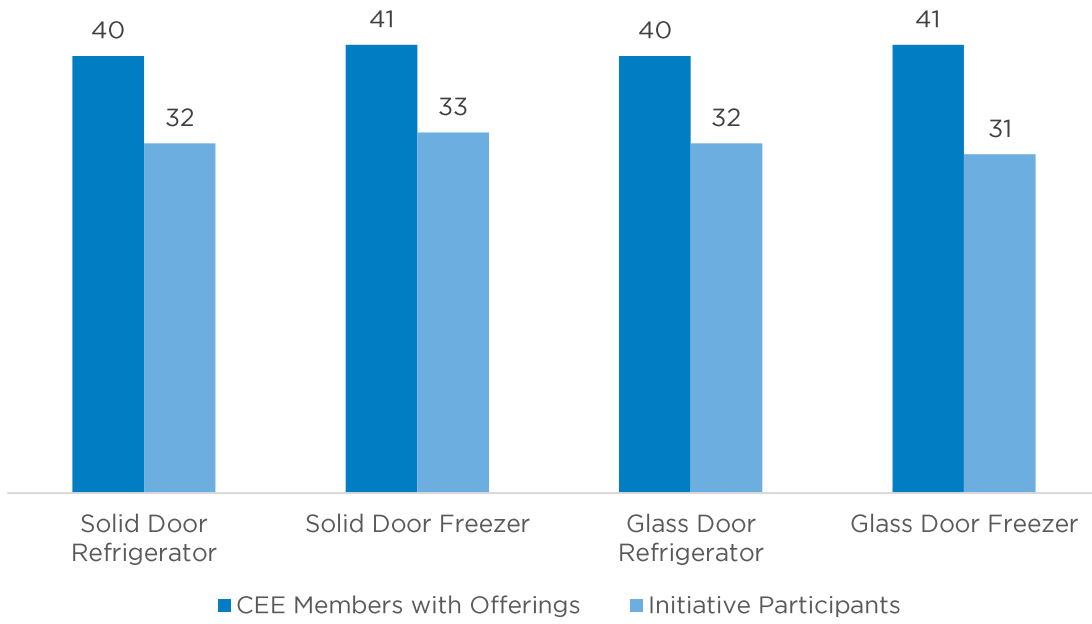
Reach-in Refrigeration

Overall, there were 42 prescriptive CEE member program offerings for reach-in refrigerators or freezers in 2020.

Forty member programs offered incentives for reach-in refrigerators with glass doors, while 41 provided incentives for glass door freezers. Thirty-two programs used ENERGY STAR as a basis for their glass door refrigerator rebates and 31 programs promoted ENERGY STAR specifications for glass door freezers. Incentive amounts ranged from \$15 to \$2,400 for glass door refrigerators and \$35 to \$3,200 for glass door freezers. For both glass door refrigerator and freezer, one member referenced the suspended CEE specification.

Thirty-two of the 40 CEE member programs providing incentives for solid door refrigerators, and 33 of the 41 member programs providing incentives for solid door freezers referenced ENERGY STAR as basis for qualification, respectively. For solid door refrigerators, incentives ranged between \$25 to \$2,600, while incentive amounts ranged from \$20 to \$3,200 for solid door freezers. Similarly, for both solid door refrigerator and freezer, one member referenced CEE specification.

Figure 6. Incentives for Reach-In Refrigerators by Door Type, 2020



Appendix A

CEE Member Program Offerings

See Table 1 below for commercial kitchens measures promoted by CEE members in 2020.

Table 1. Commercial Kitchens Measures Promoted by CEE Members, 2020

| CEE Member Name | Fryer | Griddle | Hot Food Holding Cabinet | Electric Induction Cooktop | Combination Oven | Convection Oven | Electric Deck Oven | Steamer | DCKV | Rack Oven | Conveyor Oven | Gas Broiler | Gas Charbroiler | Gas Salamander | Gas Rotisserie | Gas Pasta Cooker | Dishwasher | PSRV | Ice Machine | Reach-in Refrigerator |
|------------------------------------|-------|---------|--------------------------|----------------------------|------------------|-----------------|--------------------|---------|------|-----------|---------------|-------------|-----------------|----------------|----------------|------------------|------------|------|-------------|-----------------------|
| Ameren Illinois | √ | √ | √ | | √ | √ | | √ | √ | √ | | | | | | √ | √ | √ | | √ |
| Austin Energy | | | | | √ | √ | | √ | | | | | | | | | √ | √ | | |
| Avista—Idaho | √ | √ | √ | | √ | √ | | √ | √ | √ | | | | | | | √ | √ | √ | |
| Avista—Oregon | √ | | √ | | √ | √ | | √ | √ | √ | | √ | | | | | √ | | | |
| Avista—Washington | √ | √ | | | √ | √ | | √ | √ | √ | | √ | | | | | √ | √ | | |
| Baltimore Gas and Electric Company | √ | √ | | | √ | √ | | √ | | | | | | | | | √ | √ | √ | √ |
| BC Hydro | | | √ | | | | | | | | | | | | | | | | | |
| Berkshire Gas | √ | √ | | | √ | √ | | √ | | √ | √ | | | | | | | √ | | |
| Cape Light Compact | √ | √ | √ | | √ | √ | | √ | | | | | | | | | √ | √ | √ | |
| Columbia Gas of Massachusetts | √ | √ | | | √ | √ | | √ | | √ | √ | | | | | | | √ | | √ |
| Commonwealth Edison Company | √ | √ | √ | | √ | √ | | √ | | | | | | | | | | √ | √ | √ |
| Connecticut Natural Gas | √ | √ | √ | | √ | √ | | √ | | √ | √ | √ | | | | | √ | √ | | √ |

| CEE Member Name | Fryer | Griddle | Hot Food Holding Cabinet | Electric Induction Cooktop | Combination Oven | Convection Oven | Electric Deck Oven | Steamer | DCKV | Rack Oven | Conveyor Oven | Gas Broiler | Gas Charbroiler | Gas Salamander | Gas Rotisserie | Gas Pasta Cooker | Dishwasher | PSRV | Ice Machine | Reach-in Refrigerator |
|-----------------------------------|-------|---------|--------------------------|----------------------------|------------------|-----------------|--------------------|---------|------|-----------|---------------|-------------|-----------------|----------------|----------------|------------------|------------|------|-------------|-----------------------|
| Enbridge Gas Distribution—Quebec | | | | | | | | | | | | | | | | | | | | |
| Énergir | | | | | | | | | | | | | | | | | | | | |
| Energy Trust of Oregon—Oregon | √ | √ | √ | | √ | √ | | √ | √ | √ | | √ | | | | | √ | | | |
| Energy Trust of Oregon—Washington | √ | | | | √ | √ | | √ | √ | √ | | √ | | | | | √ | √ | | |
| Eversource—Connecticut | √ | √ | √ | | √ | √ | √ | √ | | √ | √ | √ | | | | | √ | √ | √ | √ |
| Eversource—Eastern Massachusetts | √ | √ | √ | | √ | √ | | √ | | √ | √ | | | | | | √ | √ | √ | |
| Eversource—New Hampshire | | | | | | | | | | | | | | | | | | | | |
| Eversource—Western Massachusetts | √ | √ | √ | | √ | √ | | √ | | | | | | | | | √ | √ | √ | |
| Focus on Energy—Wisconsin | √ | √ | √ | | √ | √ | | √ | √ | √ | | √ | | √ | | | √ | √ | √ | √ |
| FortisBC | √ | √ | √ | | √ | √ | | √ | √ | √ | √ | √ | | | | | √ | | √ | √ |
| Georgia Power | | | | | | | | | √ | | | | | | | | √ | √ | √ | √ |
| Hawai'i Energy Efficiency Program | √ | √ | √ | | √ | √ | | √ | √ | | | | | | | | | | √ | √ |
| Hydro-Québec | | | | √ | | | √ | | | | | | | | | | | | | |
| Idaho Power—Idaho | √ | | | | √ | √ | | √ | √ | | | | | | | | √ | | | |
| Idaho Power—Oregon | √ | | | | √ | √ | | √ | √ | | | | | | | | √ | | | |

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|---|-------|---------|--------------------------|----------------------------|------------------|-----------------|--------------------|---------|------|-----------|---------------|-------------|-----------------|----------------|----------------|------------------|------------|------|-------------|-----------------------|
| Northwest Energy Efficiency Alliance | | | | | | | | | | | | | | | | | | | | |
| Oncor | √ | | √ | | √ | √ | | √ | | | | | | | | | √ | √ | | √ |
| Orlando Utilities Commission | | | | | | | | | | | | | | | | | | | | |
| Pacific Gas and Electric Company | √ | √ | √ | | √ | √ | | √ | | √ | √ | √ | | | | | √ | | √ | √ |
| PNM | √ | √ | √ | | √ | | | √ | | | | | | | | | | | √ | √ |
| Potomac Electric Power Company (Pepco)—Maryland | √ | √ | √ | | √ | √ | | √ | | | | | | | | | √ | √ | √ | √ |
| PSEG Long Island | | | | | | | | | | | | | | | | | | | | |
| Puget Sound Energy | √ | √ | √ | | √ | √ | √ | √ | √ | √ | √ | | | | | | √ | | √ | |
| Sacramento Municipal Utility District | √ | √ | √ | | √ | √ | | √ | √ | | | | | | | | √ | | √ | √ |
| Seattle City Light | √ | √ | √ | | √ | √ | | √ | | | | | | | | | | | √ | |
| Snohomish County PUD | √ | √ | √ | | √ | √ | √ | √ | √ | | | | | | | | √ | | √ | |
| SoCalGas | √ | √ | | | √ | √ | | √ | | √ | √ | √ | | | | | √ | | | |
| South Jersey Gas | √ | √ | | | √ | √ | | √ | √ | √ | √ | | | | | | √ | | √ | √ |
| Southern California Edison | √ | √ | √ | | √ | √ | √ | √ | | | | √ | √ | | | | √ | | √ | √ |
| Southern Connecticut Gas | √ | √ | | | √ | √ | | √ | | √ | √ | √ | | | | | √ | √ | | √ |

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|---|-------|---------|--------------------------|----------------------------|------------------|-----------------|--------------------|---------|------|-----------|---------------|-------------|-----------------|----------------|----------------|------------------|------------|------|-------------|-----------------------|
| Southern Minnesota Municipal Power Agency | √ | √ | √ | | √ | √ | | √ | √ | √ | √ | √ | √ | √ | √ | √ | √ | √ | √ | √ |
| Southwest Gas—Arizona | √ | | | | | | | √ | | | | | √ | | | | √ | √ | | |
| Southwest Gas—California | √ | √ | | | √ | √ | | | | | √ | | | | | | | | | |
| Southwest Gas—Nevada | √ | | | | √ | √ | | | | | √ | | | | | | | √ | | |
| Tacoma Power | √ | √ | √ | | √ | √ | √ | √ | | | | | | | | | | | | √ |
| Tampa Electric | | | | | | | | | | | | | | | | | | | | |
| TECO Peoples Gas | √ | | | | | | | | | | | | | | | | | | | |
| Tennessee Valley Authority (AL, GA, KY, MS, NC, TN, VA) | √ | √ | | | √ | √ | √ | √ | | | | | | | | | | √ | | √ |
| United Illuminating Company | √ | √ | √ | | √ | √ | √ | √ | | | | | | | | | √ | | √ | √ |
| Unitil—Massachusetts | √ | √ | √ | | √ | √ | | √ | | √ | √ | | | | | | √ | √ | √ | |
| Unitil—New Hampshire | √ | √ | | | √ | | | √ | | √ | √ | | | | | | | √ | | |
| Vectren Corporation—Ohio | √ | | | | | √ | | √ | | | | | | | | | | | | |
| Vermont Gas | √ | | | | √ | √ | | √ | √ | √ | | | | | | | | √ | | |
| Xcel Energy—Colorado | | | | | | | | | √ | | | | | | | | √ | | | √ |
| Xcel Energy—Michigan | √ | √ | | | √ | √ | | √ | √ | √ | | √ | | | √ | √ | √ | | | √ |

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|--------------------------|-------|---------|--------------------------|----------------------------|------------------|-----------------|--------------------|---------|------|-----------|---------------|-------------|-----------------|----------------|----------------|------------------|------------|------|-------------|-----------------------|
| Xcel Energy—Minnesota | √ | | √ | | √ | √ | | | √ | √ | √ | √ | √ | √ | √ | √ | | | | |
| Xcel Energy—New Mexico | | | √ | | | | | | √ | | | | | | | | √ | | | |
| Xcel Energy—North Dakota | | | | | | | | | | | | | | | | | | | | |
| Xcel Energy—South Dakota | | | | | | | | | | | | | | | | | | | | |
| Xcel Energy—Texas | | | | | | | | | | | | | | | | | | | | |
| Xcel Energy—Wisconsin | √ | √ | √ | | √ | √ | | √ | √ | √ | | | | √ | | | √ | √ | √ | √ |

CEE Commercial Kitchens Initiative Participants

See Figure 1 below for a map of *CEE Commercial Kitchens Initiative* participants and members with program offerings in the United States and Canada in 2020.

Figure 7. CEE Commercial Kitchens Initiative Participants with Program Offerings, 2020



For More Information

We encourage comments on this document, particularly suggestions for information that would be useful to include in future versions. To offer such input or ask any questions, please contact Bjorn Jensen at bjensen@cee1.org.