

RESTAURANT TRENDS **2023**



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INTRODUCTION

The rollercoaster ride of the past two years has brands pivoting, adapting, and rolling with whatever comes their way. Everything has changed: our daily routines, workspaces, interactions with friends, and so much more. Consumer expectations, media habits, and purchase behaviors are no exception to the change. The familiar environments we find ourselves in have evolved as brands try to stay relevant in this new consumer era.

83% of consumers feel COVID-19 has permanently changed the way we live our lives, and we're seeing this unfold in the restaurant industry.

Restaurants are installing more outside seating than ever before, and nearly all of them offer curbside delivery. To forecast design trends for 2023, we studied the current habits of consumers and found what they crave when dining out: convenience, flexible and unique spaces, authenticity, and most importantly, an experience. Here's an inside look at how brands are achieving this in the coming year.

DISCLAIMER: All views expressed below are the opinions and research of EIS and its design experts and do not necessarily reflect any official position. The content here is for information purposes only.

1

DESIGN TRENDS:

Restaurants are installing more outside seating than ever before, and nearly all of them offer curbside delivery. To forecast design trends for 2023, we studied the current habits of consumers and found what they crave when dining out. Amongst many other things, they want an experience, convenience, flexible and unique spaces, and authenticity. Here's an inside look at how brands are achieving this in the coming year.

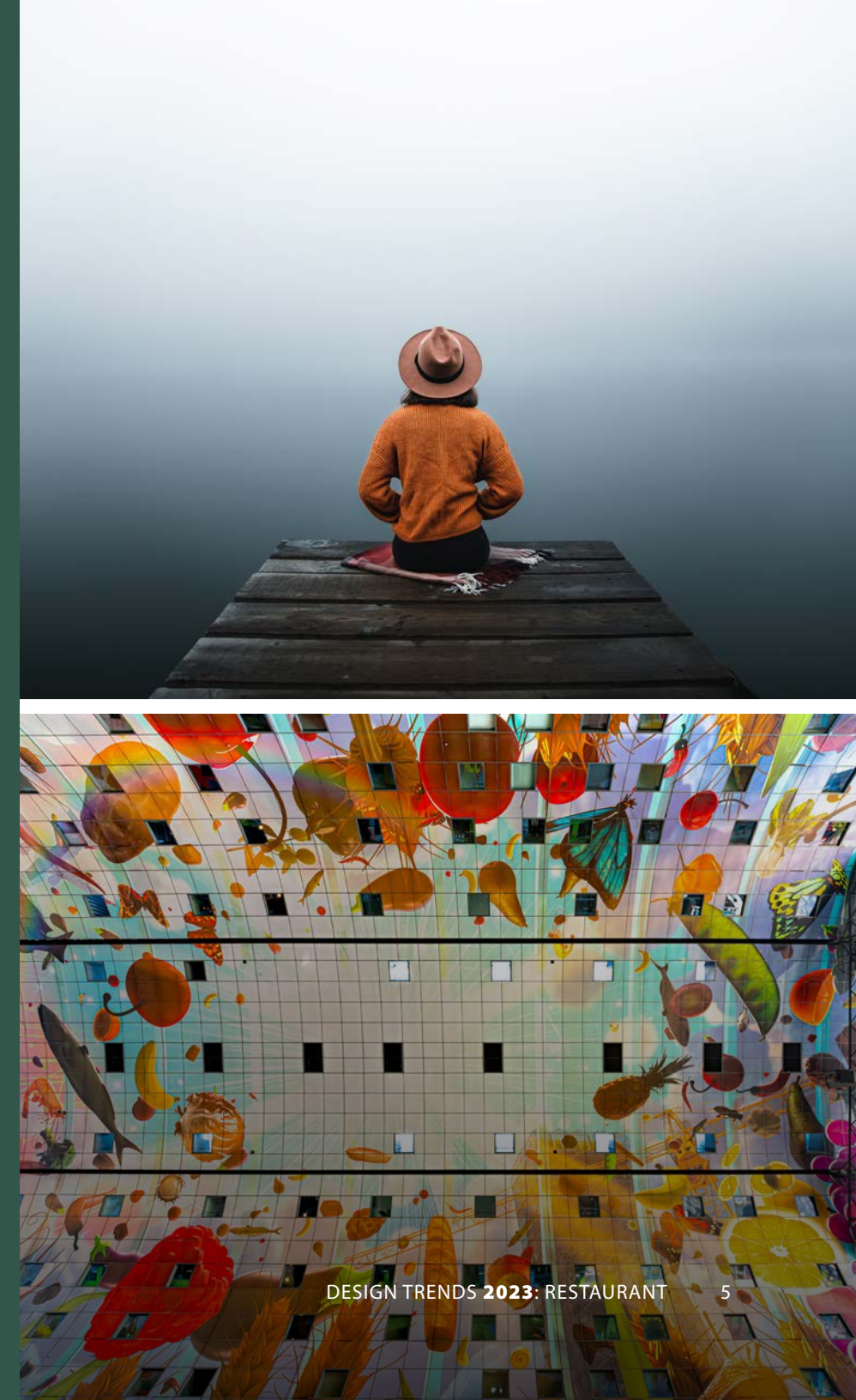
DESIGN TRENDS

Minimalism Versus Maximalism

The movement towards either minimalism or maximalism will become even more prevalent in 2023. The minimalist idea emphasizes simple, pure environments in soft color palettes with very few items as décor. Maximalism highlights bold color palettes to create an eclectic and vibrant interior.

Some might consider minimalism to be boring or less attractive, and others might think maximalism means a cluttered space. Of course, neither are true. Minimalist decor, often referred to as Scandinavian Minimalism, focuses on simple, clean lines with an emphasis on functionality. Though minimal, these spaces are typically very stylish and full of personality. Maximalist designs usually have a lot going on in a space, but every bit of decor has a place and purpose, if examined closely. If that space is well designed, it will have a cohesive feel.

We'll also see different types of finishes fit into one of these categories, with either natural colors like, whites and beiges, or deep statement colors being chosen.





DESIGN TRENDS

Outdoor Environments

We know restaurants were forced to pivot during 2020, and some of these pivots turned into trends that are here permanently. We saw more outdoor seating pop up in restaurants during the midst of COVID-19 due to social distancing, and studies show consumers want these outdoor seating areas to stay. Flexible seating offers more control over a guest's dining experience, and the option of outdoor seating makes customers feel safer. In 2023, restaurants who want to keep current customers and gain new ones will need to cater to design trends and create outdoor environments, so consumers feel safer by not being in enclosed spaces.

Lawmakers are currently passing bills to keep outdoor dining spaces open in the future; otherwise, these special permissions would be coming to an end. Owners that have converted their parking lots and even sidewalks that run alongside their restaurants to dining areas will continue to recover from COVID-19 and are able to create layouts that attract consumers simply walking past the area.

However, it's deeper than tossing umbrellas and a few tables on a patio. In 2023, brands must seamlessly integrate the interior and exterior environments to create a holistic experience tailored to the future needs of customers. Restaurant owners have to find ways to infuse the two environments to keep consumers coming back. It's having a well thought out design and environmental experience that speaks to a brand and its message. Guests are looking for flexible spaces so they choose how long they stay and where to sit, "Insta moments" to share their experiences online, and the harmony of interior and exterior spaces they crave to keep coming back to. The design of the space must improve that experience.



DESIGN TRENDS

Shapes

The onset of COVID-19 left many of us in a sad, depressive state. Not only are round furniture pieces eye-catching, but they give a relaxing and welcoming feel due to a softness they attain. Restaurants are doing their part by incorporating these soft curves and bubbly, puffy shapes into their designs. Studies show these shapes and forms have a positive impact on our mental and physical health, and these shapes that were once considered retrograde are here to stay.

Brands are choosing curved sofas to furnish their outdoor seating spaces and are replacing their squared, boxlike chairs inside with softer ones. We'll also see owners incorporate curves in other ways, like mirrors, rounded tables, pickup counters, booths, and other pieces of statement furniture.

DESIGN TRENDS

Statement Ceiling Décor

More restaurants are realizing their customers want a dramatic, hashtag-worthy space, and ceiling designs are becoming just as important as the rest of the dining area. A continuing trend from the past two years is a holistic and green vibe, but in 2023, we'll see plants and other types of biophilia on the ceiling, both literally and figuratively. The healing power of live plants has been proven and used for centuries, and their therapeutic benefits are shown to improve our lives. Studies have also shown plants reduce stress, anxiety, and even fatigue while improving air quality. Living or artificial plants will create an atmosphere that's warm, natural, and offers a hashtag-worthy backdrop. If customers are comfortable, happy, and calm in a restaurant while being able to brag about the place on their Instagram profile, they'll be repeat customers for life.

Though we're seeing lots of greenery above us in restaurants, ceiling décor goes beyond plants. LED lighting is a sustainable trend many owners are incorporating into their restaurants, but ceilings have the potential to be so much more than a cover to four walls. Using energy-efficient windows that soften rays of sun reduce energy consumption and make the space brighter.

Another theatrical ceiling design element is hanging light fixtures. These fixtures can be simple and understated or dramatic and ornate. This concept is not new, but new lighting technology continues to bring fresh new captivating experiences. Either way, creating a warm and inviting ambiance with lighting is critical.

All these trends factor into one major portion of dining out: the experience. Now that consumers are "back" after COVID-19, they're expecting more than a just full belly. They're looking for unique, comfortable, and entertaining experiences that give them a reason to step out rather than ordering in. Design is critical in getting people back to the table and giving a memorable experience.

Here are a few other design trends we'll see in the coming year:

Bold finishes

Lots of texture

Reverence for natural and organic things

Mixed metals

Dining pods

Eclectic furniture

Ceiling décor - LED lighting and greenery/plants

Instagram-worthy walls

Cyberpunk/Digital realism

84% of brands

THAT FOCUS ON GUEST EXPERIENCE SEE AN INCREASE IN REVENUE



DESIGN TRENDS

THE NATIONAL RESTAURANT ASSOCIATION ESTIMATES ABOUT

two thirds of consumers (63%)

WOULD RATHER SPEND MONEY ON AN EXPERIENCE THAN A PRODUCT

2

TECHNOLOGY:

Technology is finding its way in - and even outside - of restaurants in the post-pandemic world, and some may even argue COVID-19 accelerated its presence and advancements. Though some consumers view it as a trend, the idea of all things digital is here to stay.

TECHNOLOGY

Technology: Critical for a Restaurant's Brand

Having a presence on digital platforms today is almost a requirement for restaurants wanting to thrive.

Though restaurants caught on to the technology trend a bit slower than most other industries, COVID-19 expedited that breakthrough. Calling restaurants is a thing of the past, reserving a table digitally is in - and online reservation platforms like OpenTable are creating new ways to dine, like their Experiences program, where restaurants create exclusive culinary events.

Restaurants with up-to-date business hours, menus, and online booking options will succeed. QR codes have come quite a long way and are here to stay, giving access to online menus and even new ways to pay.



Ordering via Kiosk or Mobile App Is the Majority

We're seeing more kiosks in fast casual or quick serve restaurants as they allow customers to easily order without the pressure of a human waiting for them to choose their order. Consumers also want more control over their order, and kiosks offer total customization.

Quick serve restaurants are also hopping on the app band wagon and are offering incentives and coupons to customers who use them. Apps provide another way for restaurants to take orders and reliably track consumer trends and data. When customers use the app, restaurants have so many opportunities to engage with them and build a long-term relationship.

Robots Are Here and Staying

Restaurants have toyed around with the idea of robotics for years, but due to labor shortages, owners are digging deeper into the possibility. Fast food restaurants like White Castle began using Miso Robotics robots at their fry stations. Panera Bread will soon use robots to pour beverages for customers, and Chipotle expects robots to be frying and seasoning tortilla chips.

55% of millennials say

THEY NOT ONLY EXPECT A SIMPLIFIED EXPERIENCE, BUT THEY ALSO PRESUME RESTAURANTS WILL BE INTUITIVE AND PROVIDE AUTOMATED SOLUTIONS WHERE THEY NEED IT.

They want seamless experiences.

TECHNOLOGY

New Sustainable Material Technology

Putting digital technology aside, there are new advances in other areas of tech: Materials. We've seen biophilia in design in the past (think green, living, breathing walls and designs to mimic trees, plants, etc.), but we're seeing now and into 2023 biomimicry and bio fabrication.

Biomimicry

Biomimicry is the making of materials, structures, and systems modeled off organic and natural processes and has recently found its way into design for sustainability purposes. The most common example of this phenomenon is Velcro. A 1941 study found several small hooks on a particular plant, and its clinging properties sparked an invention of fastening things together we still use today.

A few other sustainable examples of biomimicry:

- Insulation from down feathers.
- Modern turbine blades – modeled after the design of the flippers of humpback whales. The bumps help provide a smooth flow of air or water.
- Needles – inspired by the structure of a mosquito, creating ease for surgeries and piercings.



TECHNOLOGY



Bio fabrication

Similarly, bio-fabrication consists of components grown using natural processes. It's a growing field as new materials are made. For example, mycelium, or mushroom roots, has a branch-like structure that acts like a strong glue. In design, this material can be made into bricks with industrial-level durability. Using a material's entire form through its lifecycle is the future of design and other industries.

Technology Renaissance or Resistance?

While technology is critical and must be embraced, there's also a technology pushback by some generations. Some restaurants still hold the traditional idea of dining without the presence of new technology. This classic, unplugged experience allows us to be connected and in the moment rather than connecting via a digital device. It takes us back to our gathering roots to enjoy a meal with family and friends and share stories.

Alternatively, technology gives us ways to stay connected and remain forward-thinking. There is a divide in opinions on whether it enhances the guest experience and extends the restaurant experience outside of its walls or if it creates more distractions and takes away from a more classic guest experience. This divide results from generational differences, geographical locations, and personal values, and it remains to be seen how trends will evolve over the next several years.

3

CONSUMER TRENDS:

It's about ME. Consumers don't just want delicious food and drinks and a pleasant ambiance; they want post-worthy experiences.

CONSUMER TRENDS



Everyone's a Brand Ambassador

Increasingly, consumers are driven by things they see on social media. A recent survey found that nearly 50% of consumers choose their dining decisions based on posts on social media. In addition, 22% said the dining establishment's social media presence would entice them to return.

Restaurant brands are introducing "hashtag-worthy" backdrops, environments, or focal walls in their interiors, often with faux greenery, neon signs, or fun graphics, enticing patrons to snap photos and post. This allows for free advertising through hashtagging and social media posts. The consumer becomes the restaurant's brand ambassador.



New Dining Expectations

After spending more time than ever in the comfort of our homes, consumers continue to crave “normal” experiences. It’s not just about the meal. It’s about captivating and enticing customers into new, immersive dining experiences.

*with the
rise of the
“eatertainment”
industry,*

CONSUMERS VALUE QUALITY FOOD
AND BEVERAGES BUT ALSO CRAVE
EXPERIENCES WHERE THEY CAN
CONNECT WITH FRIENDS AND FAMILY
WHILE DINING.



The entire dining journey, from restaurant entrance to exit, is being redefined and streamlined for an uninterrupted, savory experience for the consumer. Using wayfinding in new and creative ways utilizing strong design elements guides people through the experience. Upon entry, a clear pathway flow for ordering and pickup achieved through partitions or signage, guiding guests through the space. These dining experience shifts also impact operational trends.



4

OPERATIONAL TRENDS:

Restaurants are seeing various operational trends come into play, partially due to the pandemic but also due to the experiences consumers want to have while dining.

OPERATIONAL TRENDS

Micro-kitchens, ghost kitchens, and smaller footprints are here to stay.

Ghost kitchens, also called cloud kitchens or micro-kitchens, are commercial kitchens that don't offer in-house dining options. Instead, their small footprint prepares food for online orders and delivery only. These kitchens are often used as coworking spaces for multiple restaurants, requiring fewer start-up and staffing costs. Still, on the other hand, they do not offer a dining experience to their customers and must invest in quality packaging and efficient operations.

Micro-kitchens first came into the picture in the mid to late 90s. With the onset of the pandemic in early 2020, their popularity soared, and it's estimated the online food delivery market, including ghost kitchens, will be worth \$94 billion by 2024. The top companies helping restaurant investors and owners succeed in the ghost kitchen space include Ghost Kitchen Brands, REEF Technology, Cloud Kitchens, Frontier Kitchen, and Foodology.

THE ONLINE FOOD DELIVERY MARKET,
INCLUDING GHOST KITCHENS, WILL BE WORTH
\$94 billion by 2024



Ghost kitchen cold feet.

Brands like Burger King®, Popeyes, Jack in the Box, and Del Taco recently parted ways from their ghost kitchen partnerships earlier in 2022, while others such as QDOBA and Woworks, parent brands for chains like Zoup! Eatery, Saladworks, and Barberitos are still getting started with their ghost kitchen ventures. Wendy’s is still pursuing ghost kitchens, though they’re paring back on their initial investments.

Ghost kitchens are one of the most profitable types of restaurants because of their convenient locations and lower prices for consumers. They aren’t the right fit for every restaurant concept, but as long as online ordering continues, ghost kitchens will thrive.

Eatertainment

When restaurants opt to have a larger, commercial kitchen on-site, open kitchens represent entertainment and sanitation. An open kitchen, typically visible through glass or partitions, gives clients a transparent food prep experience. Open kitchens provide an “eatertainment” element, where guests can often enjoy a view into the kitchen from the dining room. High visibility from the kitchen to the dining space maintains that sense of engagement but also creates an implied sense of sanitation and transparency.

In addition, the usage of dining space is being redefined. With the rise in takeout and food delivery, to-go and pickup lines are being separated from dine-in customers to create a more streamlined experience. Merchandising trends also lend to a different restaurant layout, with retail displays prominent surrounding ordering pathways. As a result, the overall floor plans are changing to account for less dining space and more merchandise and pickup orders.

While indoor dining footprints may be shrinking, outdoor dining spaces are growing, with many cities proposing ordinances to keep outdoor dining a more permanent thing, with added design elements of landscaping and ambient lighting to create a more aesthetically pleasing look.



5

SUSTAINABILITY:

Sustainability is no longer an option for brands. More and more new consumers value sustainable living, and not only will a brand's reputation improve if they display sustainability efforts, but their profits will also increase.

SUSTAINABILITY

75%

of Gen Zs think sustainable purchases are more important than brand names.

- WORLD ECONOMIC FORUM

SUSTAINABILITY

Current Sustainability Trends

Fast casual and quick serve restaurants have been on the sustainability train for years because it's what their customers want. When a company commits to sustainability, it's in it for the long haul as it's not something to be achieved overnight. We've seen Starbucks nearly eliminate the use of plastic straws, and they promise to create more stores using sustainable manufacturing, delivery, and operations. Other restaurants like Chick-fil-A are involved in composting and changing the way their buildings are constructed to make them more environmentally friendly. and McDonald's Singapore has five buildings with the Building Construction Authority, (BCA) meaning the buildings were constructed with energy and water saving features included in the design.



SUSTAINABILITY

All Things Carbon Negative

We'll see more companies put an emphasis on carbon negative materials in 2023, starting with concrete. Concrete is the most widely used, manmade material on Earth and plays a large role in the creation of buildings. Because it's a top source of climate pollution, companies are finding ways to combat its negative environmental impact.

Technology that takes carbon dioxide directly from the atmosphere is a key factor in fighting climate change. Carbon capture and storage (CCS) is a method that captures emitted carbon from the air and permanently locks it away safely. It involves capturing the carbon dioxide produced by manufacturing activity, like cement production, transporting it, and storing it in rock formations underground. This technology helps significantly reduce carbon dioxide emissions into the atmosphere, which is critical in addressing climate change.



6

FOOD + HEALTH:

Food is becoming a wellness category, and consumers want to see restaurants follow suit. From consumption habits to diets and locally sourced ingredients, it's all about reducing carbon footprints.

FOOD + HEALTH



A RECENT POLL FOUND THAT *almost half of U.S. consumers would definitely or probably change their consumption habits to reduce the environmental impact.*



THAT FIGURE ROSE TO *75% for Millennials willing to pay more for sustainable or environmentally friendly ingredients.*

“Becoming vegan is one of the most important and direct changes we can make to save the planet and its species.”

- CHRIS HEDGES

Veganism

The prioritization of reducing consumption habits and searching for alternative protein sources is, in some cases, leading to the rise of veganism. It's estimated that there are 79 million vegans around the world. Veganism is a health and social movement, but it's also more sustainable. Animal agriculture emissions account for about 16.5% of the total CO2 emissions. A study comparing emissions per 100g of protein found that lamb, poultry, and pork generate 20kg, 6kg, and 7kg CO2, respectively. Grains emit 2.71 kg, soybeans emit 1.98 kilograms, and peas – a common protein found in plant-based meat – emit just 0.44kg.

In addition, almost 90% of the world's marine fish stocks are fully exploited, overexploited, or depleted. Fish provide 17% of the world's total meat consumption, meaning 3.1 billion people rely on fish or seafood for 20% of their daily protein intake. Because of this, another trend we are seeing is the introduction of plant-based seafood made from soy, peas, mushrooms, or seafood. Reducing meat consumption in wealthy countries is one of the best things we can do to curb climate change.

Cannabis Restaurants

The first cannabis restaurant opened in the U.S. right before the pandemic, and since there's been an increase in cannabis-infused foods and drinks on restaurant menus. The laws get tricky, though, since cannabis is still federally illegal. Some states allow the recreational use of cannabis, but even in those states, serving THC-infused food is not permitted, except for Delta 8, which is THC extracted from legal hemp plants and is legal to infuse in food and beverages in a few states like Illinois. CBD-infused items seem to be okay because they're not intoxicating. Things like CBD mocktails, cocktails, bakery items, candies, and more are popping up all over the country.

There are many different kinds of non-euphoric cannabinoids used in infused drinks and dishes. Here are some of the most popular strains:

THC	CBN	THCV	THCA
CBD	CBG	CBC	CBDA

Locally Sourced

Cafes, contemporary casual, or fine dining restaurants often source local ingredients. The farm to table movement, also called farm to fork, has been around since the 1960s and 70s, highlighting local and organically grown foods in restaurant dishes. It continues to expand in popularity. Now, cocktails are following suit with garden to glass seasonal produce and freshly grown herbs.

There are some challenges to farm to table. By using seasonal ingredients, restaurants must change the menu to continue using what's available and in season. Additionally, some restaurants claim to use farm to fork ingredients as a marketing tactic without actually sourcing locally, creating skepticism. It's also more expensive to source local ingredients, resulting in the restaurant having to charge more for their dishes.

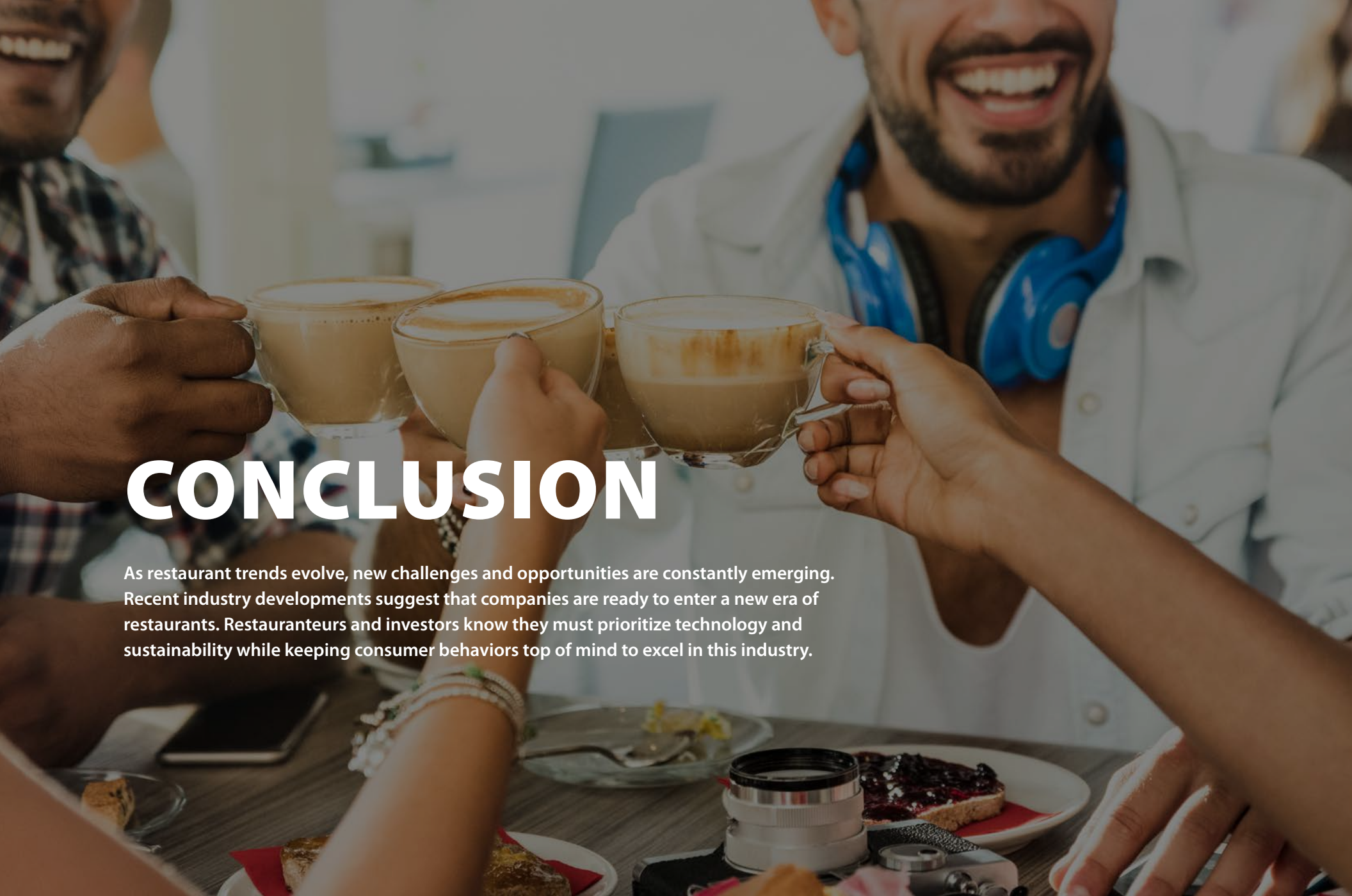
The positives? It supports local farmers, helps boost the local economy, and makes organic food more accessible to the community. This also speaks to the restaurant owner's support of sustainability, as the ingredients don't have to travel as far to be used in the restaurant's dishes, thus reducing fuel consumption and the restaurant's carbon footprint.



Can QSR chains keep up with sustainable trends?

We know that the most popular restaurants in the world are quick-service restaurants. Because these chains are globalized and strive for consistency in each location, they commonly purchase food from large wholesale distributors. Some chains offer local dishes depending on the region or country, but they likely aren't sourcing their ingredients from a farmer down the street. It's more costly, time-consuming, and complex. When a restaurant becomes a chain, it's more difficult to ensure quality control in each location.

It can be done, though - we see success in sourcing local ingredients from chains like Chipotle Mexican Grill. In 2021, they reached 31M pounds of locally sourced produce, contributing more than \$500,000 to local farmers as part of their corporate sustainability strategy. Even though this accounts for about 10% of their total produce, it's more than most QSR chains are doing, and every bit helps.



CONCLUSION

As restaurant trends evolve, new challenges and opportunities are constantly emerging. Recent industry developments suggest that companies are ready to enter a new era of restaurants. Restauranters and investors know they must prioritize technology and sustainability while keeping consumer behaviors top of mind to excel in this industry.

GET STARTED

Design Services

The design of your space impacts the experience your guests have. Taking a consultative approach, we work with you every step of the way to bring your vision to life. We use our expertise and creativity to design interior environments that are profitable and engaging. Whether you require integrating your brand's approved design into your existing space or developing an entirely new concept, EIS has the experience and capability to design an environment that fits your guests' needs.

About EIS

Elkay Interior Systems (EIS) is a tight-knit team of industry-leading designers, commercial-grade manufacturers, innovative engineers, resourceful project managers, and sourcing experts committed to every stage of your project by guaranteeing quality and reliability. We stand out from the crowd with our 40+ years of global experience in the restaurant, hospitality, retail, and education markets. We believe in simplifying the complicated.

CONTACT US:

800-837-8373
eisinfo@elkayinteriorsystems.com

Contact EIS to learn more about the latest restaurant trends, tips to elevate customer experience, and design and build solutions.

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www.elkayinteriorsystems.com

NORTH AMERICA

+1.800.837.8373

ASIA-PACIFIC

+852.2261.2071

LATIN AMERICA

+52.55.5814.1000

EUROPE

+43.3362.530.10

CHINA

+82(21)3656.6968

MIDDLE EAST-AFRICA

+971(4)428.5526