

EXECUTIVE SUMMARY



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Professional laundry service or On Premise Laundry (OPL) and home washing
- What is more sustainable?



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Background

The professional textile services industry is an important contributor to the European economy, with an annual turnover of around €11 billion in 2012. Throughout the EU, the industry is employing around 135 000 individuals, many times providing a very important first contact with the job market for immigrants, disabled people and young people (ETSA, 2017)¹. According to Deloitte (2014)² the market for rental textile service could more than double if more companies, municipalities and institutions chose professional textile service rather than On Premise Laundry (OPL) or home washing for workwear, linen and other textiles, and thus provide more jobs and tax-incomes in European countries.

The aim of the present report is to investigate the sustainability performance of professional textile service industry, in comparison to OPL and home washing of workwear and other textiles used in a professional context, including environmental, social and economic aspects, as well as overall quality of textile services. The report is based on analysis of relevant statistics and official data describing the textile service industry. The report also contains an extensive review and analysis of previous studies, investigating different aspects of sustainability within the textile service industry and scientifically based comparisons between professional and non-professional alternatives. The aim of the present report is not to investigate the performance of individual companies, but rather the professional textile service industry as a whole, within the framework of the three pillars of sustainability, including environmental, social and economic aspects. The study is limited to the European market, with a special focus on Germany, Belgium, Switzerland, Sweden and Denmark.

Results

Results from the study shows that:

- The European professional textile service industry has a strong focus on reducing the environmental impacts from the industry, with average use of water, electricity, chemicals and fuel constantly decreasing.
- Extending the lifetime of textiles is crucial for the environmental performance of textile service. The technical knowhow, selective substitution/repairing of smaller damages and use of professional machine parks and high quality chemicals used in professional textile service companies can increase the lifetime of textiles, thereby decreasing environmental impacts.
- The rental business model commonly used in professional textile service will also stimulate use of high quality textiles, while lower quality textiles might be a more attractive solution in case of OPL, in order to minimize initial investment costs.

¹ ETSA, 2017. About ETSA. <http://www.textile-services.eu/about/>.

² Deloitte, 2014. Quantifying the opportunity European Market Sizing Study for ETSA. June 2014.



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- Previous LCAs have demonstrated 20-30% savings of CO₂-emissions from professional textile service compared to home washing. Optimization of the washing process was identified as one of the main reasons to these results.
- These savings can motivate transport distances of textiles distances more than 800 km long.
- The textile service industry is an important creator of jobs with limited needs of language skills amongst workers. The industry has an important role in integration of people newly arrived to Europe. Many companies are already involved in programs providing internships and employments and there is a strong will from the industry to develop this even further, through close collaboration with local and national governments.
- In OPL, textile service is not the core activity of the company. Thereby, tasks that could have been done by persons with developing language skills are done by persons that could focus on other activities where their skills are needed. Thus, using staff trained for other core activities to handle textile service in OPLs or using home washing is a lost chance for integration.
- According to academic studies, professional textile service commonly result in lower costs per kg of textile and year when compared to OPL, as investments in machinery and costs for administration (including routines and fees needed to fulfill with safety and environmental legislation) are divided between a higher number of customers in professional laundries.
- Professional textile service relies on a business model built on sharing, in line with the concept of sustainable resource use and circular economy. Through sharing of investment, professional textile service can invest in more efficient technology.
- Externalizing textile service to experienced professionals, presenting high levels of know-how and with an inherent incentive to constantly improving quality and reducing environmental impacts, gives clients more time to focus on their core activities.



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Summary of outcomes.

Area	Parameter	Professional textile service	OPL/Home washing
Environment	WECO (use of water, electricity, chemicals and oil/fuel)	WECO data is commonly investigated and presented by companies as a part of benchmark/marketing. Incentives from industry associations and competition between companies result in constant improvements.	WECO data can be difficult to distinguish from other consumption data and difficult to follow up.
	Chemicals	Commonly automatic systems, avoiding over dosage.	Commonly overdosed in home washing. Smaller OPLs might not invest in automatic dosage, increasing risks for overdosing.
	Optimization	Larger possibilities to adjust to appropriate machine capacity.	In home washing as well as smaller OPLs, machines are commonly not filled prior to use, resulting in unnecessary environmental impacts.
	Control from authorities	Professional textile service companies are closely monitored by authorities in relation to environment impacts, but also working environment, payment of just salaries is commonly monitored.	As laundry not is core business in OPLs, controls (if any) are likely to become less rigorous and frequent.
	Transports	Commonly performed according to optimized logistic schemes and more and more often using biofuels. The increased efficiency compared to home washing makes transports worthwhile.	In home washing, risk of contamination of private textiles and/or vehicle during transports.
Social sustainability	Hygiene	Hygiene is a priority, closely monitored in periodic controls, by business associations and through international certification schemes (EN 14065 (RABC) or RAL 992 1/2) or national schemes (such as Care4Quality in Belgium).	Risk of laundry being performed “in between” other tasks in OPL, resulting in re-contamination. Common mixing of clean/unclean textiles and use of inadequate temperature in home washing.
	Working environment	One of the main concerns in the industry. Management systems such as OHSAS 18001.	Risk of inadequate lightning, ventilation, temperatures and ergonomic conditions when laundry is placed in equipment rooms, linen storage rooms or other rooms initially not intended for textile service.
	Workers’ rights	The leading unions organizing workers in the industry commonly have good knowledge about potential risks and for textile service company staff.	Workers in OPLs are commonly not organized in unions with knowledge about the textile service industry.

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	Workers' health	Well known and continuously checked routines for use of protections and giving of vaccines as well as routines in cases of emergencies.	Potential lack of knowledge of adequate precautions to avoid risking workers health (vaccines, protections etc.) in OPLs where textile service not is core business, as well as in washing at home.
Economic sustainability	Hidden costs	Commonly lower overall costs according to objective research.	Costs for administration, service of machines, training of staff etc. are commonly not included in the budget.
	Costs for the society	Lower cost for society when companies have in-house treatment of wastewater – which is common in professional textile service plants, but not in OPLs.	
	Risk management	Reduced risk for delivery failures due to technical problems, due to larger machine parks	Commonly smaller machine parks, making OPL and home washing more sensitive to technical problems, followed by vast economic impacts. Potential “wrong-use” of machinery by unexperienced staff can damage both textiles and machines and become costly.
Quality	Knowhow	Many times persons with decades of know-how in textile care leading positions and continuous training of staff.	In OPL, staff is trained mainly for other tasks than textile service.
	Process and product quality	Professional laundries commonly monitor their processing quality by periodic controls or by becoming members of a quality assurance organization. An increasing number of companies have implemented the ISO 9001 quality management system.	Process and product quality is commonly not monitored. As a result of lack of know-how and experience among the staff, process failures might remain undiscovered for longer periods of time.



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This report was developed by ÅF Infrastructure AB on behalf of:

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Textile Services Association (TSA) UK

Verband Textilpflege Schweiz (VTS) CH

Wirtschaftsverband Textil Service e.V. (WIRTEX) DE

ETSA- European Textile Service Association

Deutscher Textilreinigungs Verband e.V. DE

TRSA USA

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