

## **THE TEXTILE CARE INDUSTRY IN ITALY**

### **Industrial Laundries**

This segment includes nearly 600 businesses\*, 220 of which employ more than 15 persons, for a total of over 15,000 employees. Yearly revenues (2003) amount to some 1.3 billion euros, and have shown growth over the past 8 years in excess of 50%.

The current industrial laundry market, which developed in Italy more recently than in other countries, interfaces with hospitals, hotels, collectives in general (university dormitories, institutes, rest homes, armed forces quarters, ferry and cruise ship companies, etc.), and deals—to a lesser extent but showing a strong growth trend—with the care of industrial work clothing.

Industrial laundries provide a highly technological service for the treatment, disinfection and sterilization of garments and linens.

These laundries are characterized by a capital-intensive rather than labor-intensive industrial model. The highly automated machines, incorporating innovative technology, are capable of handling nearly the entire work cycle. Human resources fulfil a merely ancillary role, handling the treated goods and carrying out quality control.

Some industrial laundries are equipped with sterilization lines for processing hospital operating room sets. Industrial laundries also rent garments and linens. As a matter of fact, almost all garments and linens processed in industrial laundries are the property of the laundry itself, and the service they offer is not washing and treating, but rather the use of the good. Most industrial laundries also offer laundry pickup and delivery services.

\*not including laundries operating in the restaurant industry.

*(Source: 1<sup>st</sup> report of the Ente Bilaterale on Industrial Laundries)*

#### **Member Associations:**

- *Associazione Unitaria Industrie di Lavanderia [Industrial Laundry Association]*
- *Associazione Italiana Puliture a Secco Tintorie [Italian Drycleaner Association]*
- *Associazione Fornitori Aziende Manutenzione dei Tessili [Association of Suppliers to Textile Care Companies]*

## **Drycleaners**

In Italy there are approximately 18,000 dry-cleaners. This rather high figure is the outcome of a period marked by a high turnover rate, i.e. establishment of new firms and closing down of old ones. This has resulted in a decline from the 25,000 units in 2000 to today's figure. In any case the potential clientele for this segment is relatively meager (3,350 inhabitants for each laundry).

This high number places Italy at the forefront internationally and, in a certain sense, supports the image of Italians as a society particularly concerned about cleanliness. A comparison with other countries speaks volumes: in France, the UK, and the USA there is one store per 7,100 to 7,700 inhabitants. The Japanese are the closest to Italy with one store per every 3,100 persons.

The 18,000 drycleaners each handle approximately 10,000 articles per year for a total of 24 kg per day.

The segment brought in estimated total revenues in 1997 of some 800,000 euros, a figure which has remained substantially unchanged over the years, even though the revenues of individual dry-cleaners have decreased as a result of the economic crisis and changes in lifestyles.

It is also important to emphasize, in spite of the predominance of traditional, craftsmanship-like operations, that there appears to be a growing trend towards companies offering an all-round high level service, including management and comfort for the processed articles and garments.

70% of the laundries use closed loop dry-cleaning systems with a perchloroethylene consumption that ranges between 1% and 3% in fabric weight. According to the data published by the Ministry of the Environment, the drycleaner-laundry industry is one of the most active in complying with the environmental regulation.

*(Source: Assosecco)*

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