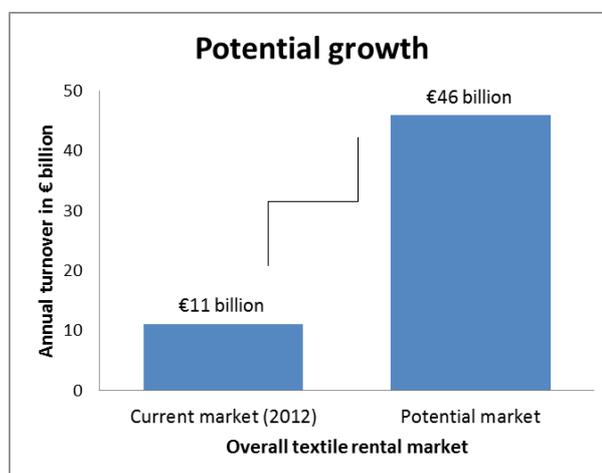


Deloitte estimates textile services in Europe could reach turnover of €46 billion

Brussels, 4 July 2014 – The textile services industry in Europe could reach up to €46 billion turnover, according to a recent Deloitte market sizing study¹, carried out for the European Textile Services Association (ETSA).

As the alternative to customer owned textiles, the future of the textile rental industry shows enormous potential. The textile rental market includes workwear that is rented and laundered by a textile service partner. As many businesses still purchase their workwear today and launder it themselves or leave it to their employees, the potential growth for the textile services industry is large.



The textile services industry is already a major contributor to the European economy, with a current annual turnover of circa €11 billion (2012) and employing 135 000 people in the EU. The textile services market has grown in almost every segment and product type in recent years, despite the negative economic climate.

These are the conclusions of Deloitte's report 'Quantifying the Opportunity'¹, a market sizing study carried out for ETSA and published in June 2014. The growth for five geographic areas is outlined below. Further details are available in the Deloitte report.

Unit : € M	Rental market (2012)	Potential market – conservative scenario	Potential market – aggressive scenario
Area 1	3,450 – 3,650	7,100 – 8,100	11,500 – 13,500
Germany	2,600 – 2,800	5,500 – 6,300	8,500 – 10,500
Area 2	3,400 – 3,600	7,500 – 8,500	14,500 – 16,500
France	1,700 – 1,800	3,000 – 3,500	5,500 – 6,500
Italy	1,000 – 1,050	2,250 – 2,750	5,250 – 6,250
Spain	575 – 600	1,500 – 1,900	2,750 – 3,250
Area 3	1,250 – 1,350	2,000 – 2,300	3,500 – 4,000
Area 4	1,100 – 1,200	1,800 – 2,100	3,200 – 3,700
Area 5	750 – 800	1,550 – 1,750	2,700 – 3,000
TOTAL (*)	10,500 – 11,500	21,500 – 26,000	38,000 – 46,000

(*) Data for countries outside the 5 areas is not disclosed.



Based on a model of current and potential customers outsourcing 100% of their textile requirements, the textile rental market could grow to four times its current size. With the increased trend for outsourcing as a cost effective solution for businesses, the future of this industry looks bright.



"In a global economy in which business processes play a vital role, the textile services industry is more essential than ever. Our high-tech industry saves our customers time and money, while providing an optimal and professional business solution. In the health or food sector, for example, industrial laundering processes and technology combine to ensure a hygienic result. Our steady growth in recent years is testament to the vital role the textile services industry plays in the European economy," says Christina Ritzer, owner of Bardusch and Chair (2011-2014) of ETSA.

About ETSA

For 20 years, ETSA has represented and promoted the interests of the textile service industry in Europe. Today, ETSA is *the* platform for networking and sharing of best practices for its 34 members: leading textile rental and supplier firms, national associations and research institutes. Textile services provide a sustainable, cost effective alternative to disposable textiles, ownership of textiles and washing at home.

**For more information and a copy of the Deloitte report, please contact:
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or click on www.textile-services.eu**

¹ "Quantifying the Opportunity. European Market Sizing Study for ETSA". Report published June 2014. The Deloitte study covers: 30 countries in Europe, grouped in five geographical areas; four industry segments (hotels, restaurants, healthcare, and industry, trade and services); and five textile product ranges (flat linen, workwear, washroom, dust control and cleanroom).