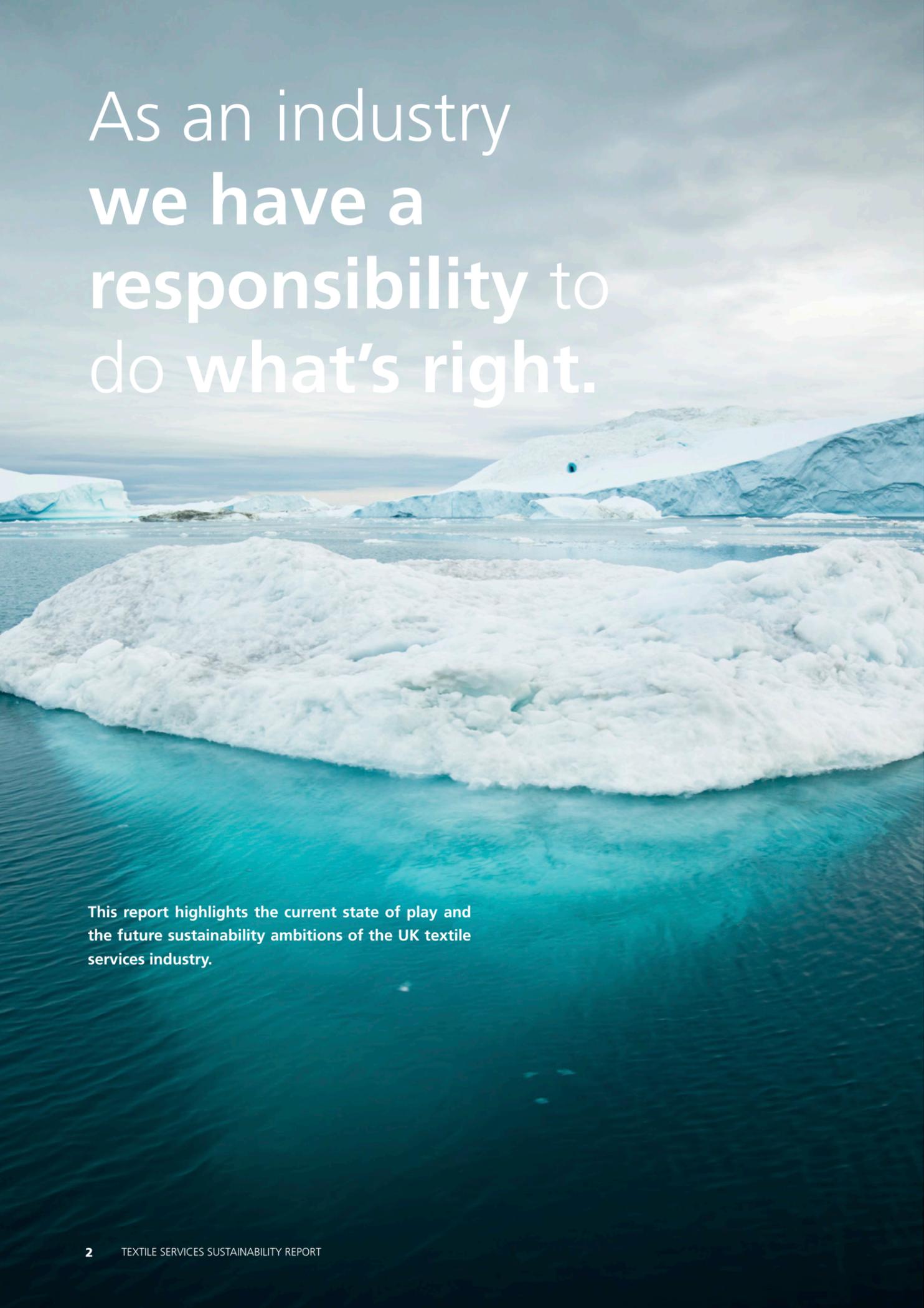


# TEXTILE SERVICES SUSTAINABILITY REPORT 2024

Proposed by **Textile Services Association**





As an industry  
we have a  
responsibility to  
do what's right.

This report highlights the current state of play and the future sustainability ambitions of the UK textile services industry.

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The TSA is the trade association for the UK textile care services industry.

## 01 Introduction

### 1.0 Overview

The TSA (Textile Services Association) is the membership organisation for industrial laundering companies and its immediate supply chain. The TSA also functions as the voice of the industry to the regulatory bodies and boasts of the most open and competent knowledge sharing platform for the industry.

The Association also help to monitor and develop British and international standards, educate and train the workforce, and promote our industry's services to target markets.

The textile services sector sits behind practically every sector of the UK's economy. The service our members provide is core to the operations of many businesses in vital and important sectors of the UK economy.

Re-usability and repairability are recognised as keys to unlocking sustainable use of our limited resources. These aspects are also at the heart of large scale laundering which functions inherently within a circular economy through serviced rental and reusable model.



TSA cares about the environment and promotes sustainability and energy efficiency in all areas of the operations, from textile management to machine maintenance.

The Association is well-placed to steer and guide the conversations about sustainable use of textiles within its membership which represents over 95% of the outsourced market place processing over 55 million pieces of textiles every week.

As the industry evolves, we educate new generations of members in changing technology and practice, ensuring they keep abreast of new developments. We run courses for managers, engineers and technicians and provide training in the systems and machinery used in our industry's processes. As well as running courses, we are actively involved in the development of an industry apprenticeship and a continuous personal development route (CPD).

# 1.1 Circularity



**Laundry is one of the oldest industries on the planet. Since their inception, laundries have always functioned within a circular model. We aim to wash textiles as many times as possible whilst maintaining functionality of the products.**

When engaging with our consultants, it became apparent that our challenge is to build on the strong existing foundations of our industry. In particular, the upstream product supply and downstream end-of-life of the product. In sustainability language this is commonly known as the **Scope 3 Emissions**.

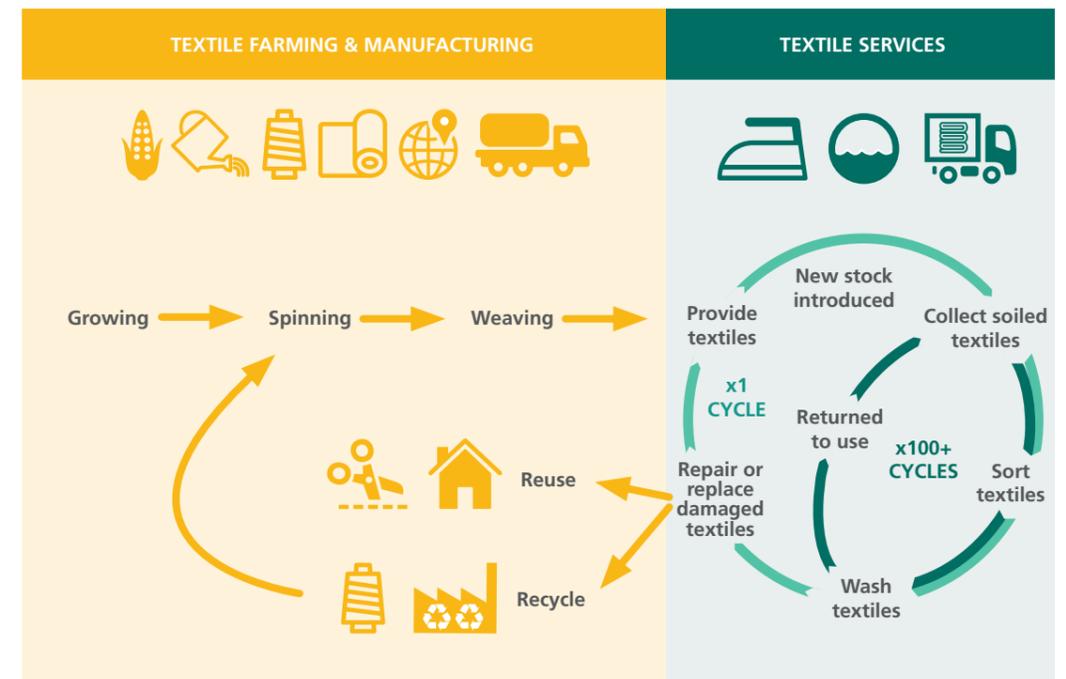
Managed laundry services facilitates a repeated use of textile products returned to the point of use, fit for the intended purpose. This is in comparison to single-use products that need extensive amounts of raw materials and manufacturing for a single use.

Circularity is based on regeneration of materials or products, especially as a means of continuing production in a sustainable or environmentally friendly way.

# 1.1 Circularity ...cont'd

## The Textile Services Process

The laundry industry is of course about caring and maintaining for textile products. This is however made possible by an extensive chain of supply that begins from growing cotton, spinning and manufacturing various textiles products around the world. These products are then used hundreds of times. The value chain then extends to the end-of-life of these products - either through a reuse or recycling process.



## Missing Textiles

Unfortunately many products don't get to complete their life cycle, with around 50% of linen items disappearing from the process. The causes for these missing items vary and range from damage, accidental disposal and theft to being used for alternative purposes. This is far from ideal and needs to be addressed for the benefit of all parties. A key element of our industry's journey will be to work collaboratively with our end-user sectors to address these key challenges.





↓ 31%

Primary energy (gas and electric) per kg processes from 2012 to 2023.

↓ 60%

Water usage per kg processes from 2012 to 2023.

## 02 Our Journey

### 2.0 The Start

**Our journey started before circularity and sustainability had the focus they have today. Our industry has been at the forefront of recognising the criticality of a sustainable future. The TSA and its expert partners have engaged the entire industry to commit to work together towards the net zero ambitions and a genuine positive impact on the planet.**

Laundries are volume-driven operations processing over 55 million textile articles every week. This means that there is a key focus on efficiencies from the beginning. The primary energy management has always been a key priority with energy costs weighing high on total operational costs. The industry was categorised as energy intensive in 2012 and entered into the Climate Change Agreement scheme through the TSA. With the ambitious performance target of 25% by 2020, the industry have proved to be one of the best performing sectors within the CCA scheme.

We have also been intentional about water usage and efficiencies as the laundries are high users of this precious commodity. Again, the technological advances led by water recycling and recovery processes have delivered a staggering 60% improvements in water usage.

#### The Right Direction

Whilst we believed, and still do consider, that we were doing our part for the environment, we had no industry-wide roadmap to a net zero ambition. Our end-user sectors such as hospitality, the NHS and the government's carbon reduction plans acted as a catalyst to ensure that we are collectively aligned in our ambitions.

This led to the formation of the TSA Sustainability Steering Group in 2020. With the appointment of a strategic partner expert, Grain Sustainability, we initiated a project in 2021 that has developed an industry sustainability roadmap enabling individual commercial laundry companies (both small/ medium and large) to pursue their goals within the overarching industry objectives.

**GRAIN**

## 2.1 Stakeholder Engagement

With the support of the Steering Group, the TSA Board and our experts, we started off on our journey beginning with engaging the membership.

This began with the materiality assessment for the industry, our customers and suppliers.



### Materiality Assessment Process - Business Interview Snippets

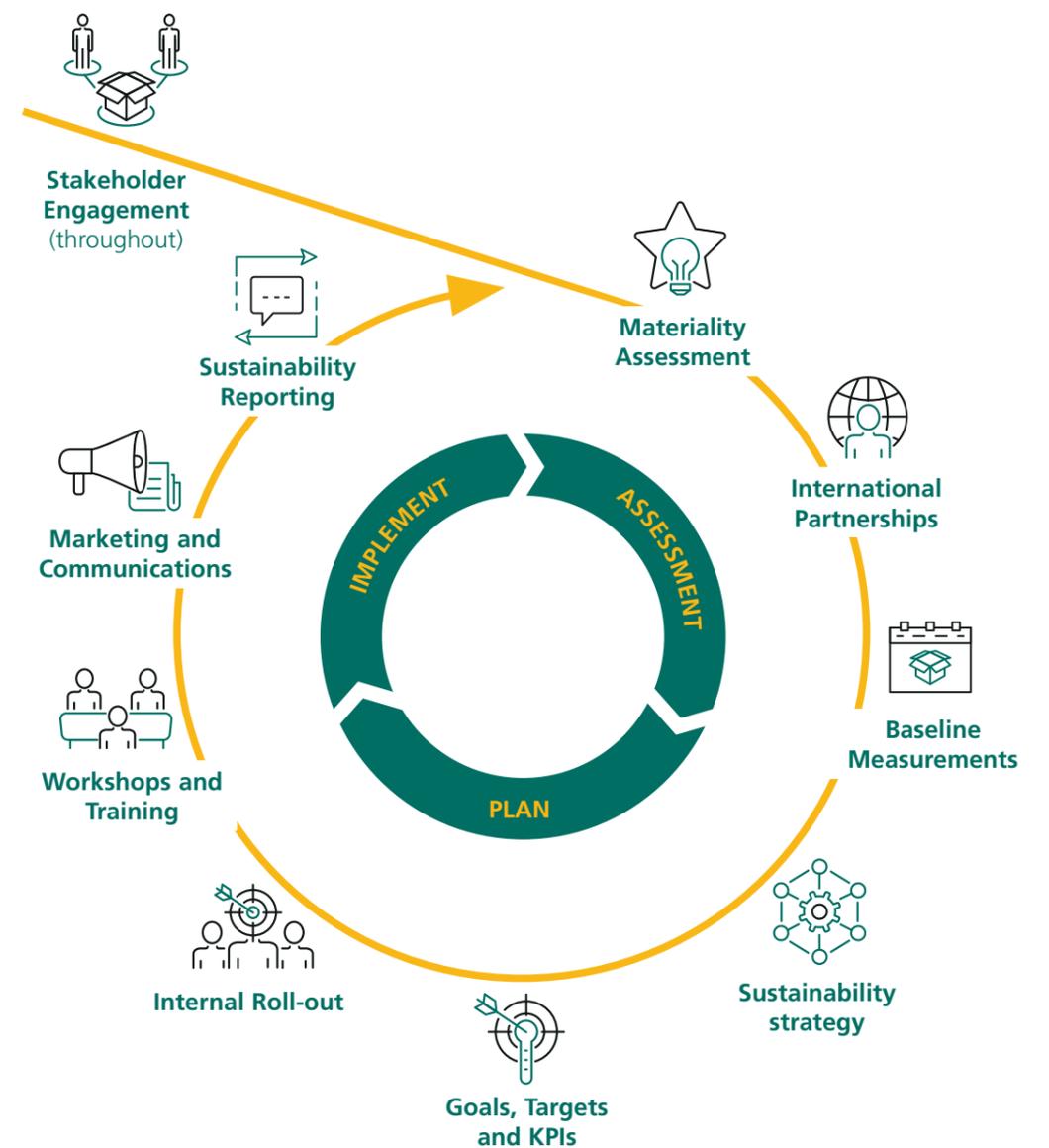


TSA Materiality Report March 2023  
Survey and interviews conducted in Nov-Dec 2022

## 2.1 Stakeholder Engagement ...cont'd

### Our Approach

The industry agreed to adopt a standardised approach with our consultants guiding us on our journey. This is illustrated below beginning at stakeholder engagement to effectively communicate the message.



## 2.2 What Does Sustainability Mean?

For our Laundries?		
1	It's good for the world	86%
2	It's the right thing to do	81%
3	It's a fresh way to look at opportunities for our future growth	60%
4	It's the only way to operate in the world now	49%
5	It allows us to speak a common language with people who share our values	33%
6	It's a business requirement	30%
7	It's a marketing strategy	19%
8	It requires a lot of paperwork and reporting	9%
9	It's a distraction from our main activities	5%

For our Customers?		
1	It's good for the world	76%
2	It's the right thing to do	68%
3	It's a business requirement	50%
4	It's the only way to operate in the world now	42%
5	It's a fresh way to look at opportunities for our future growth	39%
6	It allows us to speak a common language with people who share our values	34%
7	It's a marketing strategy	13%
8	It requires a lot of paperwork and reporting	5%
9	It's a distraction from our main activities	0%

TSA Materiality Report March 2023  
Survey and interviews conducted in Nov-Dec 2022



## 3.0 Materiality

Having completed the questionnaire and the interviews, the following material issues were identified across various sustainability pillars. These issues were then compared among our members and customers. It is surprising how aligned these issues were across the wide ranging user groups. It certainly feels like we are all on the same journey.

### Environmental

- Energy management
- Emissions management/air pollution
- Water supply, waste water/effluent
- Raw materials and goods
- Packaging
- Logistics service routes
- Chemical waste

### Social

- Workforce skills and training
- Diversity, equity and inclusion
- Occupational health & safety

### Economic

- Product and service innovation (RFID tagging, data as a currency, automation, online/digital transformation)
- De-commoditisation (loss of product during service life)
- Supply chain engagement and management



## 3.1 Material Issues Matrix

Material Topics - Ranking Members & Customers

		3	4
ENVIRONMENTAL	Raw materials	□	
	Water (usage/consumption)		○ □
	Energy (electricity and natural gas)		○ □
	Emissions/air pollution	□	○
	Chemical waste	□	○
	Transportation & fuel	□	○
	Packaging & single-use plastics	□	○
SOCIAL	Diversity, equality & inclusion	○ □	
	Employee health & wellbeing		○ □
	Workforce skills & training	□	
ECONOMIC	Supply chain engagement & management	□	
	Product/process innovation	□ ○	
	De-commoditisation (textiles as a business asset)	□	

- Members
- Customers

TSA Materiality Report March 2023

Same products,  
same processes,  
same challenges.

“Sustainability is a top objective and working collaboratively with the TSA is a fantastic- we all learn together.

Elena Lai, Secretary General, European Textile Services Association



## 4.0 Partnerships

### The UK and Beyond

The process to date has been engaging with the UK laundry industry and its UK customer base. As a global industry, it was important to ensure that we share knowledge and expertise beyond national borders. This is all the more important as many customers are global businesses and we want to ensure that we work towards a global solution for the industrial laundry sector and its supply chain.

This process involves engaging with our European, American, Asian and Australian colleagues to ensure that both the objectives and the challenges are understood in the same way.

This is increasingly relevant as we see the businesses in healthcare and hospitality move towards more sustainable outsourced offerings.



“Working as a global industry make so much sense, harmonising our journey, our goal and understanding is proving extremely beneficial.

Joe Ricci, CEO, Textile Rental Services of America



## 5.0 Baseline Measurement

When we started on our journey, we thought the baseline measurements would be the easier part of the project as we have always measured our energy usage and water against textile volumes processed. Then we met Scope 3! We quickly realised the beginning and the end of the life cycle was as important as the core laundry operations. The illustration overleaf explains the emission scopes.

Climate Change Agreement available for eligible energy intensive UK industry sectors, has been a forward looking incentive programme. The TSA signed an umbrella agreement which meant that the participating laundry members needed to measure base year calculations and report subsequent target period energy data. Whilst this has been a significant annual data collection exercise, it has enabled the industry to have its primary energy data since 2008 which is a great starting point for Scopes 1 and 2 emissions.

### Climate Change Agreement Energy Consumption Volumes

2008	2018	2023
Baseline Event	1.7 TWh	2.3 TWh

### Transport

Laundry industry is enabled by an extensive logistics operation to collect and deliver their products to the end user businesses. This is a key area of energy usage within scope 1 emissions and currently not included in the CCA scheme. Depending on the ownership of the freight, the emissions related to transport will either be categorised under scope 1 or scope 3. Our aim is to provide the industry with effective tools to ensure that they can collate and report their transport emissions with consistency and ease.

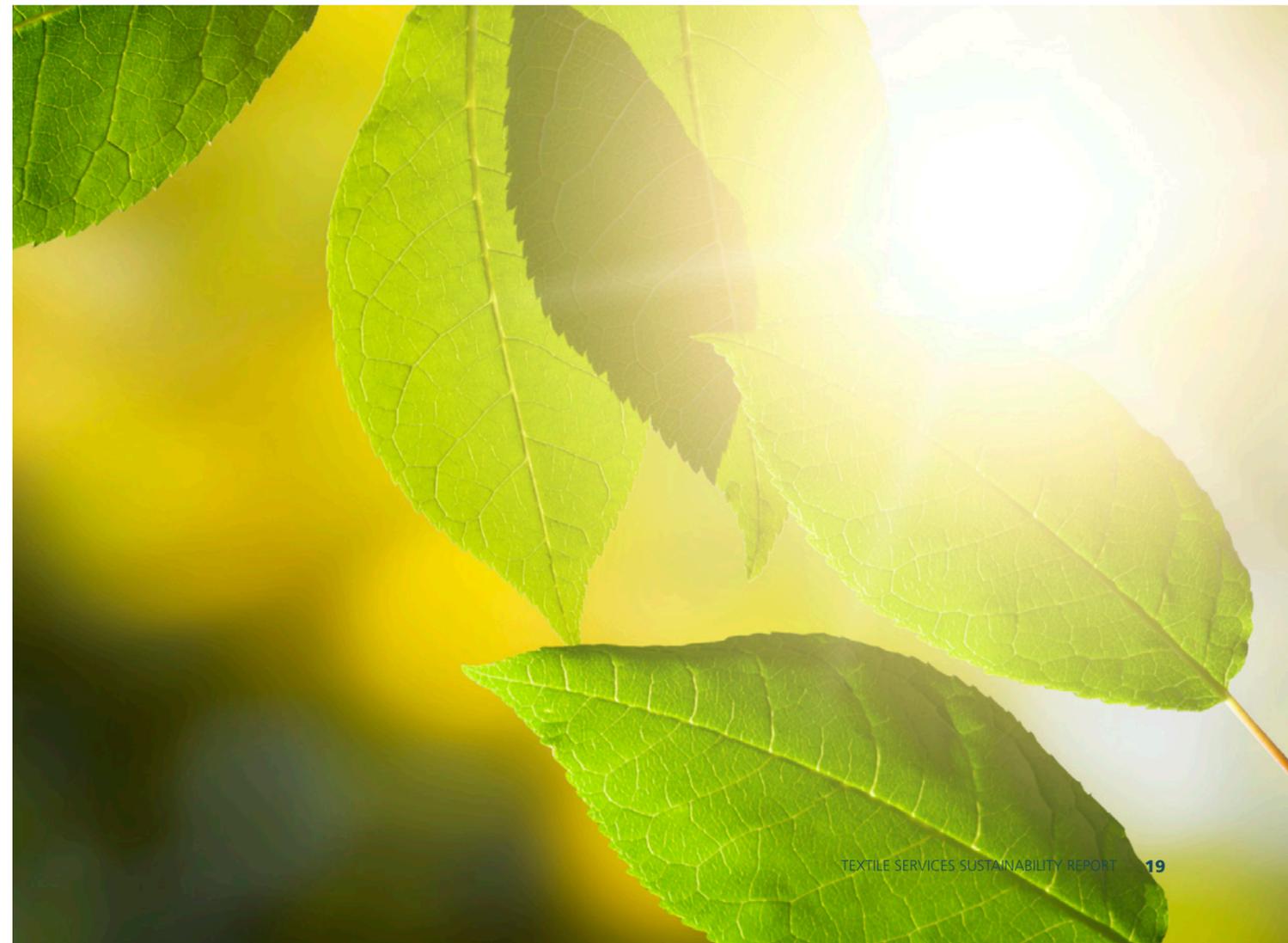


## 5.1 Scope 3

**Scope 3 is much more complex and is now forming the key focus of the industry roadmap. It needs total supply chain engagement and there is no quick fix!**

However, the conversation has started and it is clear that the long-term outputs are going to deliver a positive difference to the entire supply chain - ranging from a cotton farmer in India, to a detergent supplier in the US, to a high-tech laundry machinery manufacturer in Europe.

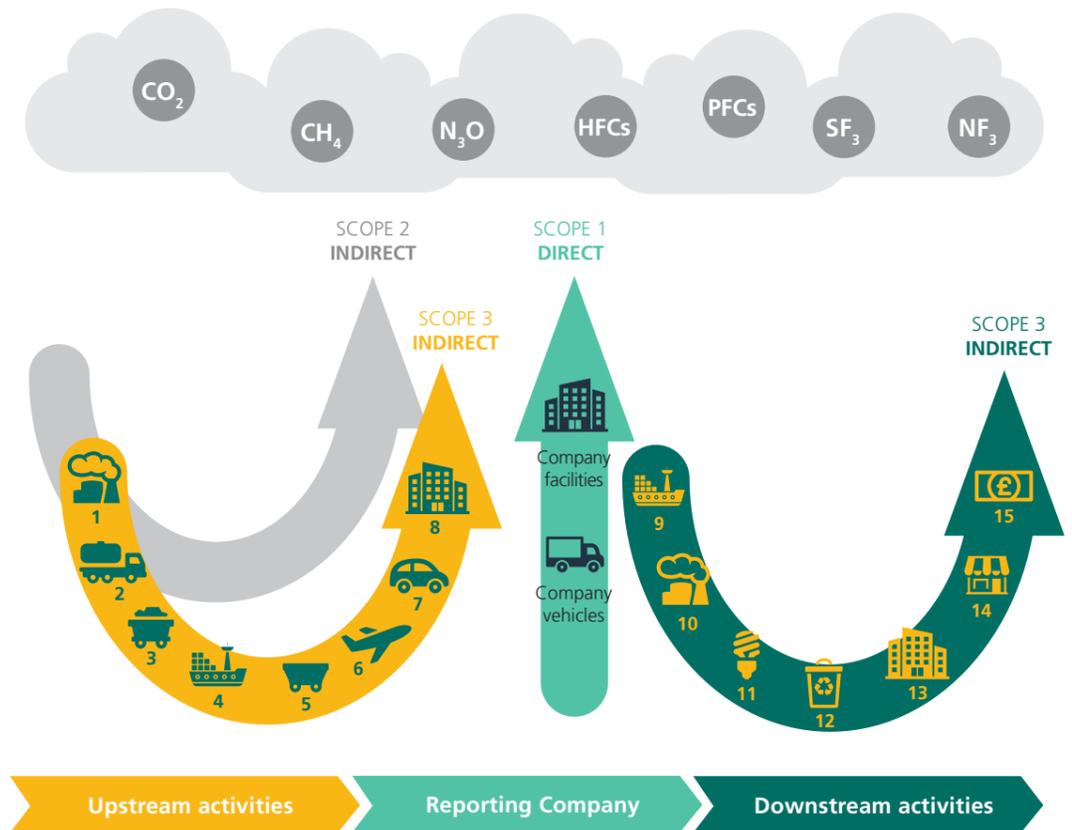
It is the LONG journey! But as they say, the thousand mile journey begins with that very first step. This first step for us is a robust measurement platform using emissions factor calculations that adhere to the Greenhouse Gas Protocol's Corporate Accounting and Reporting Standard for procured products.





## 5.2 Direct & Indirect Emissions

### Scope 3 Emissions



#### UPSTREAM

1. Purchased goods and services
2. Capital goods
3. Fuel and energy - related activities not included in scope 1 or scope 2
4. Upstream transportation and distribution
5. Waste generated in operations
6. Business travel
7. Employee commuting
8. Upstream leased assets

#### DOWNSTREAM

9. Downstream transportation and distribution
10. Processing of sold products
11. Use of sold products
12. End-of-life treatment of sold products
13. Downstream leased assets
14. Franchises
15. Investments



Creating a clear, defined pathway will help smooth out any unwelcome creases along the way.



## 6.0 Strategy

**Having a clear sustainability strategy in place enables the organisation and industry to embrace a shared purpose, vision and goals for responsible business practices.**

Embedding sustainability into business-as-usual activities builds ownership, trust, and credibility among all stakeholders. It can also identify new opportunities, while reducing risk.

### Ambition Levels

Whilst the industry roadmap will adopt a better and bold approach to our sustainability journey, it is the domain of each laundry operator to articulate their own ambitions and timelines. The objective of the industry roadmap is to provide the membership with the tools and knowledge to enable the alignment of these ambitions at a pace that is appropriate and commercially viable for each individual company.

#### BASIC

**Ambition:** Compliance

The sustainability strategy marks the early stage of the sustainability journey leveraging what's in place and allowing time to shape industry directions.

#### BETTER

**Ambition:** Evolving

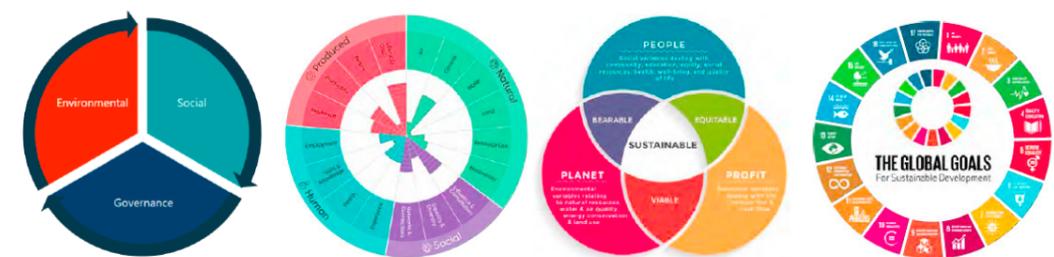
The sustainability strategy aligns with operational/supply chain best practice and industry expectations around material topics.

#### BOLD

**Ambition:** Leading

The leading strategy pulls together and effectively communicates all aspects of relevant sustainable practice, setting a strong pace for the industry, together with the industry.

### Example Frameworks





## 6.1 Materiality Strategised

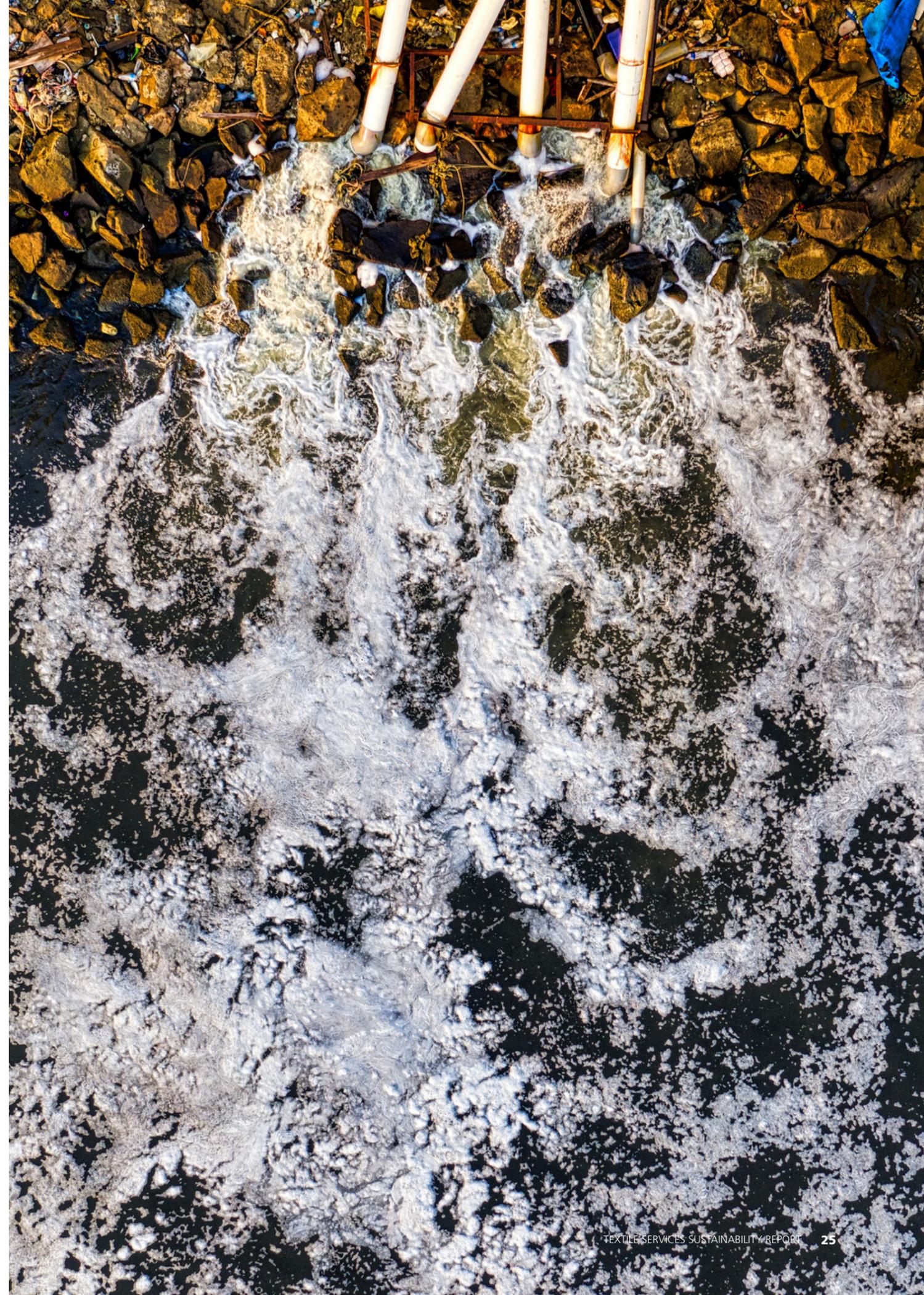
From the materiality assessment of both our members and their customers, the key elements have been identified within the strategy enabling the development of the road map action plan. The strategy takes forward the three pillars of: **Environmental** | **Social** | **Economic**

### Strategy Approach

ENERGY & EMISSIONS MANAGEMENT	WATER MANAGEMENT	PACKAGING & SINGLE USE	CHEMICAL WASTE	WORKFORCE SKILLS & TRAINING	EMPLOYEE H&S & WELLBEING
Establish a clear understanding of Scope 1,2, 3 data and set targets for emission reductions	Develop emissions optimised processes and manage water as well as to improve quality of waste water by product innovation in textiles, filtration processes and chemistry	Work in partnership with customers and suppliers to establish new process to eliminate all single use packaging and replace with efficient reusable solutions for both delivery and receipt of products	Develop partnerships to eliminate the use of high impact chemicals while developing improved methods of collection and managing of chemical waste (water, ground & air)	Improve training and personal development for workforce to deliver the highest quality service	Build on high performing H&S standards and create a work environment that attracts and retains the right staff
Governance to facilitate implementation of sustainability ambitions					
Communications supporting change and engaging all stakeholders					

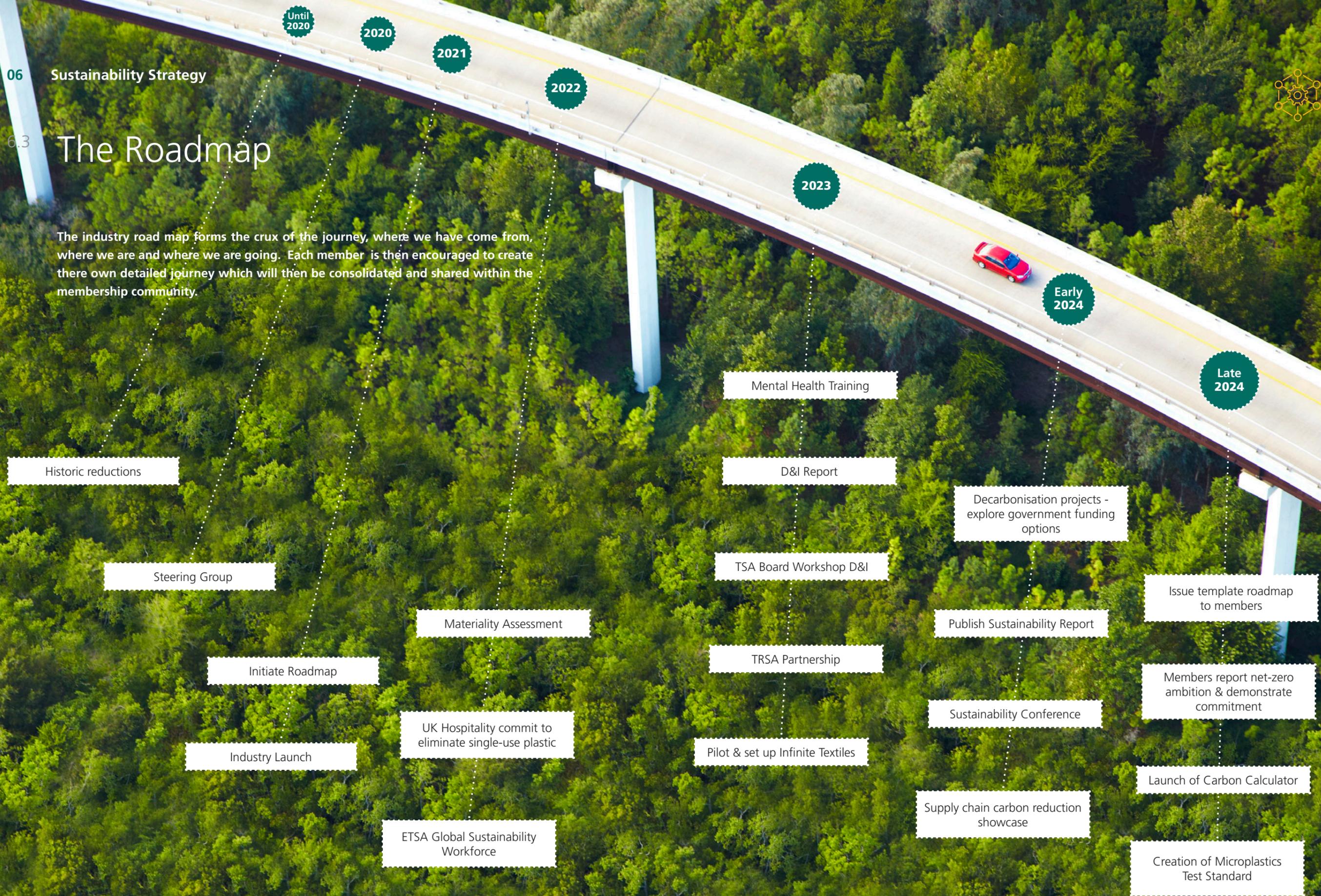
## 6.2 The Bird's Eye View

A clear sustainability strategy and commitment not only enhance business performance but also encourage the adoption of best practices. This together with support from the leadership with the full backing of policies and resources enables the laundries to withstand market pressures and effectively manage risks. A well-thought through sustainability plan is not all about the 'immediate future'. It carefully considers the past, the present and the future in varying bandwidths. One must be able to 'pan in and out' of the picture at an industrial scale allowing individual participants the clarity on where they fit in.



# 6.3 The Roadmap

The industry road map forms the crux of the journey, where we have come from, where we are and where we are going. Each member is then encouraged to create their own detailed journey which will then be consolidated and shared within the membership community.





## 7.0 Goals, Targets and KPI's

**Setting realistic goals within your strategy ambition is key to delivering the plan.** The industry, through the TSA board, will set the aspirations for the membership to strive towards. Some will exceed while some will need support but as an industry we are committed to get there and the TSA will monitor, encourage and facilitate the journey for all.

### Key Milestones

- **2024** - all membership engaged in sustainability mapping
- **2025** - adoption of carbon emissions calculator platform and a detailed gap analysis
- **2030** - 20% carbon reduction target measured against 2022 baseline measurements
- **2035** - 60% carbon reduction target measured against 2022 baseline measurements
- **2040** - a net zero\*, well-informed industry that nurtures diverse and inclusive culture



\*An expert group from the TSA membership to track the progress of net zero requirements as there are differing positions across the value chain.



## 8.0 Internal Rollout

We have already started, you wouldn't be here on page 29 otherwise! Onboarding the industry has been easy, as the materiality assessment demonstrates 86% of the membership were keen to join on this journey together. Our conference programmes have focussed on the topics for three years.

Our Supply Partners are actively participating with planned knowledge sharing days, and a dedicated sustainability conference showcase.

The Climate Change Agreement platform has been driving our industry forward for over 10 years but the broader sustainability agenda and pillars has enabled a focused and clear platform to continue to challenge our membership.

Well-known for its hands-on approach and technical inclination, it is easy for an industry of this kind to lean towards just the energy efficiency and carbon reduction aspects. The TSA's aim is to prepare our industry to achieve that balance on all three identified overarching areas. Environmental, Social and Economic. It is encouraging to note that the training and awareness programmes for mental health and well-being have been sold out in 2023. We are continuing to develop engaging workshops to help our industry become champions of a diverse and inclusive work culture whilst pursuing carbon reduction plans and driving sustainable investments for the future.





## 9.0 Workshops & Training

**24,000 people are working on delivering our sustainability journey.** The TSA's role is to provide the support and training across three key main areas.

### Environmental

- Infinite Textiles
- CCA
- Laundry Technology course
- 14001 training
- Carbon literacy
- Carbon emission platform data training

### Social

- Mental health awareness
- Health & Safety
- Risk assessment
- Staff recruitment

### Economic

- Supply chain engagement
- Marketplace development
- DMU microbiological control research
- Re-usables in the NHS



## 10.0 Marketing & Communications

**We want to tell everyone about what we're doing. We're proud and excited and we want our industry to be seen as a shining example of what can be done.**

This is why we are engaging with the government, the NHS, the press and several other associations.

Embedding the sustainability strategy in the vision and mission should happen at the leadership level to build commitment and accountability, and ensure consistency across all communications. This needs to flow into the culture and values of both TSA and all members.

### The TSA's Mission:

To protect, nurture and develop the textile services industry and the supply chains in which it participates, creating an environment in which our members can thrive and the services provided are seen as great value by customers and end-users, making a positive contribution to a sustainable future.

**“The strongest governments on earth cannot clean up pollution by themselves. They must rely on each ordinary person, like you and me, on our choices, and on our will.”**

**Chai Jing, journalist, author and environmental activist**



## 11.0 Reporting

**All of the sustainability efforts, investments and communication boils down to the true impact it is making to our communities and the planet.** Reporting requirements and choices are going to be key in how we can express what we have done in the past, what we are doing now and what is in the pipeline.

Depending on your organisational structure and individual preferences, you may choose a framework that works for you. Some of the key consideration for this choice are as follows:

- Recognised by the regulatory requirements, investors, stakeholders and suppliers
- Provides structure and credibility to the strategy
- Enables the assessment of target performance
- Easier for future third-party assurance
- Useful checklist against material issues (e.g., energy and emissions management, health, safety and compliance, waste), and framed in a way to identify potential actions
- Ability to allow structure for data gathering for future reporting (GRI, SECR etc.) and reporting linkages

Now it's (fairly) easy to say what you are doing, but when it comes to your Scope 3 Emissions, it all becomes much more complex. We understand this isn't easy, but we are launching a calculator platform specifically for the industry in partnership with Green Element Group's **Compare your Footprint™** - to enable the textiles industry, in the UK and overseas, harmonise its approach to carbon reporting. As we work to develop more industry specific data the platform will allow members to calculate their footprint using emissions factor calculations that adhere to the Greenhouse Gas Protocol's Corporate Accounting and Reporting Standard.



### *Keeping track of your carbon emissions*

[compareyourfootprint.com](https://compareyourfootprint.com)

One of the most effective ways to become more sustainable is to measure and reduce the greenhouse gas emissions emitted by your organisation. Calculating your entire operation's carbon footprint will help you to set realistic science-based net-zero targets that align with your company and industry.

**“ We are the first generation to feel the impact of climate change and the last generation that can do something about it. ”**

**Barack Obama**





# Sustainability Report

Proposed by **TSA**

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