



Federatie Textielbedrijf Nederland

“Future market demands according to end users of textile services”

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Roadmap 2030 Textile Services

Dutch government policy:

- Reduction energy consumption
- Reduction emission CO₂
- Long term agreement with 31 industries
- Minimum reduction: **2% yearly**
- Goal period 2005 - 2020: **30% total**
- Average yearly reduction textile services: **2,5% yearly**

Dutch government policy:

- Extra ambition 2030: **50%!**
- Industries: **research how to achieve extra 20%!**
- Pre study (2010)
- Roadmap 2030 (2011)
 - Forecast on development of markets and demands
 - Strategic policy development

Strategic policy development

- Relevant market area's:
 - Health Care (hospitals, nursing homes, home care)
 - Industry & Corporate Image (trade, manufacturing)
 - Hospitality (hotel, restaurant)
- Selection based on market shares textile service

Strategic policy development

- Each market area:
 - Selection relevant business cases
 - For each business case:
 - Service concepts
 - Product concepts
 - Workshops with end users textile service companies, machine suppliers, textile suppliers and consultants

Strategic policy development

- Workshops (**>100 participants**)
- Expert groups (**ca. 50 participants**):
 - Material (textiles e.g.),
 - Logistics and ICT,
 - Treatment technology
 - Potential energy saving
 - Result: 2030 Innovation Program (incl. a Research Agenda)

Market profile Health & Care 2030

- Patients / clients, more demanding, wealthier, have luxury and comfort
- More recovery outside hospital (care hotels, home)
- Shortage of qualified staff
- Increase cost awareness and efficiency
- Insurers more grip on costs and quality
- Sustainability basic requirement



Business cases Health & Care

- Hospital room of the future
- Elderly care room of the future
- Services in districts and at home
- More recovery outside hospitals (care hotels, home)



Customer demand

- Partnership in textile service; total full services concepts (outsourcing responsibility)
- Individual preferences patients; comfort, temperature control, etc. (mass customization)
- Workwear; professional outfit, flexible fit, hygiene control, temperature control, safety, etc.



Business case; Elderly Care Home of the future

- Patients/Clients will be in control (individual preferences and needs)
- More information (**24/7**) is needed for special treatments for individual patients
- More commercial Care Homes
- Number of patients will accelerate
- More working pressure on staff members
- Much more home treatment
- Basic care and extra care
- Home feeling
- Higher average age
- More legislation and standards

Customer / client demand

- Total full service concept
- Care on demand of individual clients; experience of textiles
- Treatment supporting textiles
- Personal textiles; color, shape, texture, smell, etc.
- Cost pressure
- Small scale purchase, integrated delivery

Business case; Service at Homecenters

- Treatments at home
- Professional Logistic Partner
- Growing market for textile service companies
- Package deals; service level , textiles, quality, etc.
- Individual needs clients
- Smart textiles for diagnostic and supporting treatment functions



Market profile Industry & Corporate Image

- Market has enormous potential (market development)
- Protection of staff more and more regulated
- More specialisation
- Commercial / business and public services growing segments
- Warranty and certification increasingly important

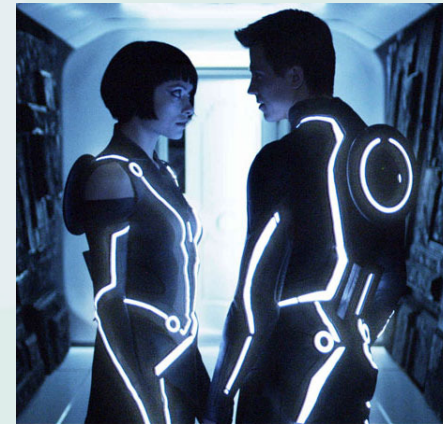
Business cases Industry & Corporate Image

- Protective clothing and PPE
- Corporate Identity in commercial services
- Hygienic textiles in sanitary services



Business case: Protective Clothing & PPE

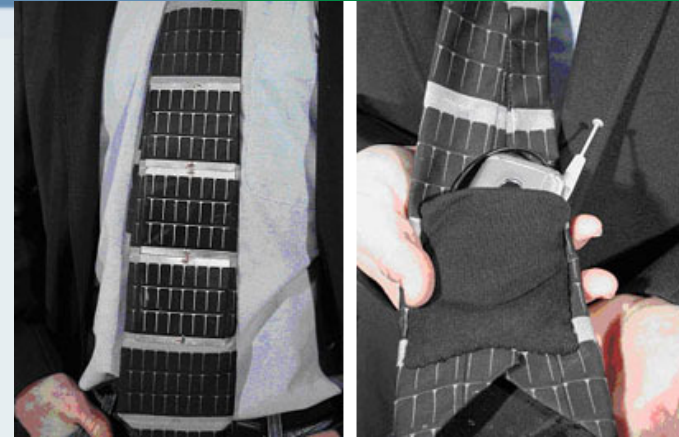
- Safety & Hygiene critical factors
- Communication functions
- Image aspects
- (High-Tech) materials designed for specific situations



Customer / client demand

- Risk control
- Comfort
- Professional advise
- Guaranteed properties and functionalities
- Special care treatments
- Smart textiles; auto shape modelling and sensor technology
- Pre-programmed workwear
- Special communication devices (talk instructions)
- Service directions
- Logistics; tracking tracing

Business case; Promotional Business Wear



- Big chain organizations versus SME companies in niche markets
- Chain organizations; image, name recognition
- More Global Business
- Individual demands; personal preferences
- Total concepts; downstream requirements
- Core business with extra products / services
- Sustainability basic requirement (recycling, Ita)

Client demand

- Total concepts and Partnerships; professional advise, logistics, refunctionalisation
- New (high-tech) materials and quality
- Corporate image

Market demand Hospitality

- Working people wealthier, less time
- More wealthy elderly people
- More short holidays
- Growth of new economies; more different nationalities / tourists
- More individualisation
- Catering offers custom made ‘products and services’
- Sustainability (**mandatory**) marketing feature



Business case Hospitality

- Future Hotel room
- Future Restaurant



Business case Future Hotel room

High Class

- Completely adaptable to personal preferences guests; colors of bedlinen, smell, etc.
- High-tech bedlinen; dirt resistant, auto shape, flexible breathable, soft / stiff, auto temperature preferences, comfort control, electronic support functions
- As new experience
- Uplevel of (transparent) sustainability



Business case Future Hotel room

Middle Class

- Mix of guests; functionality (business) and experience (private)
- Comfortable bed, hygienic clean
- Some extra's for private guests experiences
- Dirt resistant textiles, visual clean (and hygienic), for several nights as new (smell)
- Experience bed linen



Customer demand

- Business partner and total service concepts; Experts in “Sleeping Experience” Concepts, fully organized and controlled by the partner (incl. design, logistics, etc.)
- Pricing per night
- Upgraded bed linen, better as at home
- Guaranteed and transparent calculated sustainable performance
- Creative investment and financial models
- Cost effective and open calculations
- On site re-functionalisation

Conclusions I

Textile cleaner → Textile Service company / Logistic Partner
→ Business Partner



Conclusions II

- Total (textile) service concepts (cooperation in the supply chain).
- High Service to individual end users
- High Tech refunctional materials
- Cost effectiveness
- More service on site of end users

Conclusions III

- Textile Service has a bright future ahead, however, only if changes in market and customer demands are followed!