Personal Services Sector
(Laundry and Dry Cleaning)

A Study on Labour Market Demands in the Laundry and Dry Cleaning Subsector

March, 2016.
Department of Research, Planning and Development.
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ACKNOWLEDGEMENTS

The Department of Research, Planning and Development of the National Training Agency (NTA), would like to express sincere gratitude to all participating owners of Laundry and Dry Cleaning business establishments, for their contribution to this research. Through their kind cooperation, a better understanding of labour market conditions within the Laundry and Dry Cleaning Subsector was gained. This would ultimately provide a basis through which targeted and strategic policy improvements could be formulated in an effort to bridge the employment gap between the supply of and demand for labour.
1. EXECUTIVE SUMMARY

The National Training Agency (NTA), is the government body mandated to coordinate, harmonize, standardize, monitor and evaluate all technical and vocational education and training in Trinidad and Tobago. An essential part of fulfilling this mandate, is the Agency’s frequent collection of up-to-date labour market information. The Government of the Republic of Trinidad and Tobago (GoRTT), in its September 2015 policy document [1], has made sustainable growth, economic diversification and fostering a culture of research and development in tertiary education a high priority [2]. As such, the NTA conducted a labour market survey of the Personal Services Sector (Laundry and Dry Cleaning businesses) in an effort to better align its products and services to the needs of its stakeholders and the economy.

The survey sought to investigate the demand-side factors influencing the labour market for Laundry and Dry Cleaning. A questionnaire was developed in order to capture the relevant information from owners of Laundry and Dry Cleaning business establishments. The main areas of focus included organizational characteristics, employment profiles, job vacancies, new and emerging skill sets and competencies, feedback on current training providers / institutions and suggestions from these stakeholders regarding how best this subsector can be further developed. The data collection process was completed over a period of 30 days. The data collected were analyzed and the results of this survey were reported in this document.

The data revealed that there are currently no training providers and institutions that offer training programmes for Laundry and Dry Cleaning in Trinidad and Tobago. This is a significant challenge being faced by the industry. All surveyed business owners reported providing on-the-job training to their employees, and have preferred this as a solution to their problems, rather than applying for work permits to import labour.
In terms of job vacancies, a total of 7 respondents reported having 9 full-time vacancies for ‘pressers’, ‘counter clerks / customer service representatives’ and ‘delivery driver’. All job vacancies were reported as being difficult to fill.

A small number of business owners anticipated an increase in their demand for jobs within the next 12 months, while the majority expected a reduction. This was mainly due to a slowing down of business activity, which many respondents attributed to the country being in an economic recession, at the time this survey was conducted.

When asked about the emergence of new skill sets and competencies in the Laundry and Dry Cleaning Subsector, most respondents did not expect any new skills to emerge. Respondents who did have this expectation reported that these emerging skills would mainly be required to operate new machinery, to treat new fabric types, and to learn new Laundry and Dry Cleaning techniques.

Owners of Laundry and Dry Cleaning business establishments gave many suggestions to develop the subsector. The main issues raised were the lack of institutional training, given the increasing technological expansion of the industry, and the need for regulation and investment in the subsector by developing proper occupational standards. Respondents believed that this would attract labour to the subsector, and ultimately drive economic growth and generate revenue.
2. INTRODUCTION

International Perspective

Laundry and Dry Cleaning services are offered worldwide. The industry is dichotomized into wet and dry cleaning services. Wet cleaning involves the immersing of a garment in water with detergents and other additives to accomplish the goal of cleaning [3], while Dry Cleaning can be defined as the process of cleaning articles of clothing and fabrics with chemical solvents instead of water. The Laundry and Dry Cleaning Industries of the United States, Canada and the United Kingdom give valuable insight into what the subsector looks like outside of Trinidad and Tobago.

In these countries, [4] [5] [6] Laundry and Dry Cleaning workers generally operate or tend to machines to wash or dry-clean household or industrial articles, such as cloth garments, suede, leather, sportswear, furs, blankets, draperies, linens, rugs, and carpets. They may also do spot cleaning and stain removal. While workers in these countries largely provide Laundry and Dry Cleaning as a personal service, a significant number also work commercially in the health and accommodation sectors through their employment with the laundry departments of hospitals, nursing homes, hotels and resorts. The following is a list of existing job titles in the international markets:

- Drapery Cleaner
- Dry Cleaner
- Dyer
- Fur Cleaner
- Laundry Assistant / Laundry Inspector
- Laundry Machine Operator
- Laundry Technician
- Leather Cleaner
- Spotter / Sprayer
- Suede Cleaner
Additionally, these countries provide several pathways through which persons can obtain Technical and Vocational Education and Training (TVET) in Laundry and Dry Cleaning. In the United Kingdom for instance, the UK Government National Careers Service lists the available National Vocational Qualifications (NVQ’s) on its website, for persons interested in Laundry and Dry Cleaning occupations. For example, the ‘Level 2 (NVQ) Certificate in Laundry Operations’ and the ‘Level 2 Certificate in Laundry and Dry Cleaning Technology’ are listed as being offered by the UK Business and Technology Education Council (BTEC). On-the-job training from experienced staff is also a recognized pathway [7].

In the United States and Canada, the industry derives great value from on-the-job training. Little emphasis is placed on hiring persons with formal TVET qualifications. Both the US Department of Labour, as well as the Canadian Government’s National Occupational Classification (NOC) generally recommend anywhere from a ‘few days to a few months’ of training by an experienced worker [8], [9]. Some secondary school education may also be required for certain positions.

The Laundry and Dry Cleaning Industries of these countries are also supported by private training providers and trade associations. For instance, the Dry Cleaning and Laundry Institute (DLI) International, represents over ten thousand retail dry cleaners in the United States and in this regard, serves as a voice for the industry “through legislative and regulatory policy development, education, professional training, information, garment analysis and research”[10]. Similarly, the Guild of Cleaners and Launderers in the United Kingdom, is a technical and professional society whose aim is to share knowledge and skill in all branches of the Laundry and Dry Cleaning Industry. The Guild is not a training body but works closely with the training providers to promote the free exchange of technical knowledge among all industry members [11].

The contemporary Laundry and Dry Cleaning Industry has also seen new developments in methods and technology which are more environmentally friendly. ‘Green cleansing’ refers to newly diversified methods of wet cleaning that, unlike traditional dry cleaning, avoid the use of
of which the most commonly used is tetrachloroethylene, a potentially carcinogenic substance to humansⁿ¹ (commonly called perchloroethylene or "perc").

Local Perspective

Trinidad and Tobago’s Laundry and Dry Cleaning industry comprises over 25 businesses. The National Occupational Classification of Trinidad and Tobago 2013 lists the following types of personnel as being employed within the local Laundry and Dry Cleaning subsector:⁹⁴

- Laundry Manager
- Laundry Supervisor (I & II)
- Laundry Attendant (receives, inspects and sorts clothes prior to and after laundering)
- Laundry Spotter (determines and applies chemical agents required for stain removal)
- Hand Launderer (washes garments and other items in laundry by hand)
- Laundry Machine Operator (tends machines to clean fabrics)
- Dry Cleaning Machine Operator (tends machines to clean fabrics with chemical)
- Laundry Presser (Operates steam-pressing machine to press cleaned fabrics)
- Bleach-and-Wash Machine Operator (Textiles) (Tends machine to bleach and wash cotton fabric)

According to the Ministry of Finance in 2015, the Personal Services Sector of the economy (which houses the Laundry and Dry Cleaning Subsector), was expected to experience a “robust” growth of 6.3%, up from 4.7% growth in 2014.⁹⁵ Laundry and Dry Cleaning services are carried out by persons with Technical / Vocational Education and Training (TVET). As such, the collection of updated labour market information is crucial in order to facilitate the development of this industry. This would allow the gaps between the employer and job seeking citizen to be effectively bridged.
3. METHODOLOGY

Scope
This study was conducted in Trinidad only. The National Training Agency acknowledges the socio-economic differences between the two islands. It is in this regard, that Tobago will be treated as a separate unit. The survey sought to collect labour market data from Laundry and Dry Cleaning business establishments. This study was designed to capture data on training and current labour market conditions within the subsector.

Survey Population
The primary data list for this study, was extracted from the Central Statistical Office’s Register of Local Business Establishments, the Trinidad and Tobago yellow pages, as well as through an online search. These sources allowed 67 businesses to be identified as the target population. This number was reduced to 27 businesses after an initial cleaning exercise was conducted. Establishments which were removed from the original list fell into one or more of the following categories: 1) Telephone contact numbers out-of-service; or 2) Companies which went out-of-business. Table 1 illustrates how the final population was distributed:

Table 1 – Population Distribution

<table>
<thead>
<tr>
<th>REGION</th>
<th>LAUNDRY AND DRY CLEANING BUSINESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>North</td>
<td>9</td>
</tr>
<tr>
<td>Central</td>
<td>4</td>
</tr>
<tr>
<td>East</td>
<td>4</td>
</tr>
<tr>
<td>West</td>
<td>6</td>
</tr>
<tr>
<td>South</td>
<td>4</td>
</tr>
</tbody>
</table>
Data Collection

The study was conducted using a census approach. A questionnaire was used as the data collection instrument and it contained both open and close ended questions. This instrument comprised of thirteen (13) questions. Some critical pieces of data were collected from this questionnaire. This included organizational characteristics, employment profiles, job vacancies, new and emerging skill sets, feedback on current training providers and suggestions for further subsector development. One qualitative interview was also conducted with a key industry stakeholder, in an effort to add value and greater validity to this study.

The data collection was done over a period of thirty (30) days. Owners and managers of Laundry and Dry Cleaning business establishments were contacted to request their participation in the survey and to confirm appointments to administer the questionnaire via the telephone or an online medium. Formal letters requesting participation from these industry stakeholders were then sent out via e-mail. The administration of questionnaires was then done by Research Assistants, under guidance of the Manager, Research, Planning and Development.

Data Entry

Data entry was conducted simultaneously with the data collection phase. Each administered questionnaire was cleaned and entered into the database upon receipt in order to achieve effective time management.

Limitations of the Study

The National Training Agency (NTA) has made note of two constraints in the research process. This being the reluctance of some respondents to participate in the survey as well as some telephone contact numbers being out of service.
4. RESULTS

The study was initially intended to be conducted with 27 participants, but the actual number of persons who participated was 18 (17 quantitative questionnaires; 1 qualitative interview). The results of the questionnaires are recorded in this section.

List of Laundry and Dry Cleaning Services offered by the business establishments surveyed:

- Dry cleaning
- Washing (wet cleaning)
- Pressing (with iron as well as steam press machine)
- Spot cleaning
- Stain removal
- Folding
- Delivery of cleaned articles to customer

Type of business

Respondents were asked to classify their business type from among public, private or other. All 18 respondents (100%) reported being private limited liability companies.
**Number of years in operation**

Data were collected regarding the number of years the Laundry and Dry Cleaning businesses surveyed had been in operation. Seven establishments (41%) reported being in existence for the past 1 to 10 years, while the majority had been in operation for over 10 years and accounted for 59% of the population. See Figure 1 below:

![Pie chart showing distribution of years in operation]

- 41% for 1 to 10 years
- 41% for 11 to 20 years
- 18% for more than 20 years

**Number of employees in your organization**

Respondents were asked to state the number of employees currently working in their organization. Most respondents (59%) reported having 1 to 10 employees while 29% had between 10 and 20. Only two establishments reported having greater than 20 employees and accounted for 12% of the population. See Figure 2 below:
**Present Employment**

Table 2 lists the occupations currently held in the surveyed companies. A total of 174 persons were found to be employed by these establishments with the following job titles:

<table>
<thead>
<tr>
<th>JOB TITLES</th>
<th>FULL TIME POSITIONS</th>
<th>PART TIME POSITIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANAGER</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>SUPERVISOR</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>DRY CLEANER</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td>WASHER (WET CLEANER)</td>
<td>12</td>
<td>1</td>
</tr>
<tr>
<td>LAUNDRY / DRY CLEANING MACHINE OPERATOR</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>LAUNDRY / DRY CLEANING ATTENDANT</td>
<td>14</td>
<td>0</td>
</tr>
<tr>
<td>COUNTER CLERK / CSR</td>
<td>43</td>
<td>2</td>
</tr>
</tbody>
</table>

![Number of employees in your organisation chart](chart_image.png)
<table>
<thead>
<tr>
<th>JOB TITLES</th>
<th>FULL TIME</th>
<th>PART TIME</th>
<th>(%) DIFFICULTY SOURCING</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRESSER (IRON / STEAM)</td>
<td>4</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>COUNTER CLERK / CSR</td>
<td>4</td>
<td>0</td>
<td>67%</td>
</tr>
<tr>
<td>DRIVER</td>
<td>1</td>
<td>0</td>
<td>100%</td>
</tr>
</tbody>
</table>

Total = 174 employees

Work Permits

None of the Laundry and Dry Cleaning business establishments reported having applied for work permits within the last twelve (12) months.

Job Vacancies Reported

Employers were asked about the current vacancies within their establishments. Approximately 7 businesses (41%) reported that they had 9 vacancies for 'presser', 'counter clerk / customer service representative', and 'delivery driver'. It should be noted that ‘pressers’ and ‘drivers’ were stated as “Difficult to source” by all respondents who indicated they had vacancies.

See Table 3:
**New and Emerging Skill Sets / Competencies**

Respondents were asked whether or not they anticipated the emergence of any new skill sets or competencies in the Laundry and Dry Cleaning Subsector within the next 12 months. Sixty-five percent (65%) of respondents reported no such expectation, while 35% did in fact anticipate this development taking place. In terms of these new competencies or skills sets that were anticipated, these were mainly to operate new machinery, treat new types of fabric and to learn new Laundry and Dry Cleaning techniques. See Figure 3 below:

![New Skills / Competencies Anticipated](image)

**Demand for Jobs within the next 12 months**

Respondents were asked to indicate whether they anticipated an increase or a reduction in the demand for jobs within the next 12 months. Fifty-nine percent (59%) of respondents anticipated a decrease while 35% expected an increase in the demand for jobs within the Laundry and Dry Cleaning Subsector. See Figure 4 below:
Reasons for Anticipating a Reduction in the demand for Jobs

Respondents were further prompted to give reasons for anticipating a reduction in the demand for jobs. See Table 4:

Table 4 - Reasons for Anticipating a Reduction in Demand for Jobs

<table>
<thead>
<tr>
<th>RESPONSE CODE</th>
<th>NUMBER OF RESPONSES</th>
<th>PERCENTAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business is slow at this time</td>
<td>7</td>
<td>70%</td>
</tr>
<tr>
<td>Machines are replacing human effort</td>
<td>2</td>
<td>20%</td>
</tr>
<tr>
<td>Lack of government assistance</td>
<td>1</td>
<td>10%</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>10</td>
<td>100%</td>
</tr>
</tbody>
</table>

Reasons for Anticipating an Increase in the demand for Jobs

Respondents were also asked to give reasons for anticipating an increase in the demand for jobs. All recorded responses were coded and are presented in Table 5:
Table 5 - Reasons for Anticipating an Increase in Demand for Jobs

<table>
<thead>
<tr>
<th>RESPONSE CODE</th>
<th>NUMBER OF RESPONSES</th>
<th>PERCENTAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in persons currently seeking employment from the organisation</td>
<td>2</td>
<td>33%</td>
</tr>
<tr>
<td>Busy period for the business</td>
<td>2</td>
<td>33%</td>
</tr>
<tr>
<td>Increase in demand for clerical staff</td>
<td>1</td>
<td>17%</td>
</tr>
<tr>
<td>No response</td>
<td>1</td>
<td>17%</td>
</tr>
<tr>
<td>TOTAL:</td>
<td>5</td>
<td>100%</td>
</tr>
</tbody>
</table>

Current Training Providers and Institutions

All of the respondents reported that no training providers and institutions currently exist in Trinidad and Tobago to train persons seeking to enter the industry. Respondents stated that training was only available through a few local suppliers of machinery, only upon purchasing the machines from these companies.

Do you have an apprenticeship, internship or a mentorship programme?

Owners of Laundry and Dry Cleaning business establishments were asked if they have an apprenticeship, internship or mentorship programme for persons seeking to enter the industry. Forty-one percent (41%) said ‘Yes’, while fifty-nine percent (59%) said ‘No’.
**Laundry and Dry Cleaning Industry Challenges**

When asked about their views regarding how the Laundry and Dry Cleaning Subsector can be further developed, respondents reported being faced with many industry challenges at the time this survey was conducted. These challenges were mainly with regards to training, lack of government investment for the industry and lack of incentive for the labour market to enter the Laundry and Dry Cleaning Subsector. These challenges were recorded in this section:

*Training*

Many respondents indicated that while they try their utmost to train persons on-the-job, the lack of local training providers and institutions that offer training programmes is becoming a major setback, given the technological expansion of the subsector. It was also reported that these machines were very expensive. These respondents reported that establishing these entities would significantly aid the development of Trinidad and Tobago’s Laundry and Dry Cleaning Industry.

*Lack of Government Investment for the Industry*

Respondents reported that there was a lack of developmental effort being put into the industry by government and the relevant entities. It was reported that a fundamental development priority for the sector, should be the creation of proper occupational standards and job profiles, which should include a change in terminology. Terms like ‘washer’, ‘presser’ and ‘dryer’ reportedly sounded arduous and discourage persons from filling these positions. Respondents indicated that this challenge may be overcome by changing the job titles to reflect the true nature of the modern Laundry and Dry Cleaning industry, which is now highly mechanized and technologically advanced. Respondents believed that this kind of investment in the subsector would allow it to remain viable in times of economic recession, as the washing and cleaning of garments is always in demand.
Lack of Incentive for the Labour Market

Local Laundry and Dry Cleaning business owners reported that they exclusively preferred to hire local persons. It was stated that the local pool of labour can be vitalized by legalising the status of certain undocumented immigrants, so that not only can they supplement the labour market, but so that taxes can be collected and invested into the economy. Respondents also reported that although the general work ethic of the local labour market is not always favourable, when compared to that of other Caribbean islands, is fairly productive. As long as the local pool of labour is appropriately trained, business success can be easily achieved. In addition, it was suggested by respondents that general life skills training be a necessary component of any qualification for this industry, as great customer service is mandatory and this training would help persons develop the right overall attitude in order to deliver excellent customer service.
5. ANALYSIS

The Laundry and Dry Cleaning subsector of Trinidad and Tobago is relatively small. Despite some business establishments being in operation for over 20 years, the majority of them have maintained small-business type organisational structures. Many of the surveyed establishments reported being family owned, and ownership has been passed down from generation to generation.

In addition, all of the Laundry and Dry Cleaning business owners reported never resorting to the importation of labour from other countries by applying for work permits. All respondents expressed preference for locally sourced labour and would provide on-the-job training. Respondents reported that local training providers and institutions that provide training programmes, did not exist and this was a key contributor to the size of the industry remaining small. Respondents also indicated that this lack of institutional training was becoming a major setback for the industry, due to the increasingly high degree of mechanization involved in providing modern Laundry and Dry Cleaning services. For instance, modern day ‘pressing’ has evolved from the use of the conventional hot iron, to the use of special steam-pressing machinery, which requires a greater degree of training. There were 9 (nine) job vacancies at the time the survey was conducted and 4 (four) were for these ‘pressers’. Training for ‘pressers’ was reportedly only available when purchasing these pressing machines from local suppliers. In addition, business owners reported great difficulty in sourcing trained and experienced ‘pressers’. Other reported job vacancies included the need for 4 (four) counter clerks / customer service representatives and 1 (one) delivery driver. All job vacancies were reportedly difficult to fill.

In terms of technological setbacks, not only was the lack of institutional training to operate the machines a significant challenge, but the cost of procuring these machines was also equally burdensome. Many respondents reported that the Laundry and Dry Cleaning industry was supplied with such capital machinery by one or two major local suppliers. This reportedly created a new barrier to entry for persons wishing to open a Laundry and Dry Cleaning business, or to gain further competitive advantage.
When asked about the demand for labour within the next 12 months, most of the surveyed respondents anticipated a reduction. However, a number of businesses also reported an increase in the demand for jobs. It was important to note that respondents viewed the Laundry and Dry Cleaning Industry as one which can remain viable even in times of economic recession, since the washing and cleaning of garments is always in demand. This may imply that if efforts are made by government to diversify the economy by investing in the subsector’s development, it may support the economy in times of recession. In December 2015, the Central Bank of Trinidad and Tobago officially declared that this country was in a recession\footnote{17}. 
6. CONCLUSION

The Laundry and Dry Cleaning Subsector has the potential to become a viable contributor to Trinidad and Tobago’s economy as despite the many issues and challenges being faced by the local industry, businesses have nevertheless managed to provide services of similar quality and variety as their international counterparts. Furthermore, the fact that many of these business owners have been able to provide these services in the absence of local training providers and having never applied for work permits, speaks volumes about the industry’s economic potential. Quite evidently, the Laundry and Dry Cleaning industry has sensibly adapted to this challenging environment by making full use of on-the-job training.

This willingness to hire and train exclusively local persons may serve as an indicator to government that this subsector will benefit greatly from its efforts to diversify the economy. Given the issues and concerns raised, as well as the increasing technological expansion of the subsector, a useful proposition to government would be to initiate consultation with industry stakeholders toward the development of proper occupational standards, as well as the establishment of local training programmes and setting up of new institutions led by industry captains. This should be done with the strategic vision of economic diversification and sustainable growth.
END NOTES

- People's National Movement Trinidad and Tobago [1], [2]

- What’s the Difference in Dry Cleaning and Wet Cleaning? [3]

- Statistics Canada [4][9]

- 51-6011.00 - Laundry and Dry-Cleaning Workers [5][8]
  http://www.onetonline.org/link/summary/51-6011.00

- Laundry worker Job Information [6]
  https://nationalcareersservice.direct.gov.uk/advice/planning/jobprofiles/Pages/LaundryWorker.aspx

- BTEC Specialist [7]

- DLI: The Premier Association for Drycleaners [10]
  http://www.dlionline.org/Drycleaners

- Guild of Cleaners Launderers [11]
  http://gcl.org.uk/about-the-guild/

- Wet Clean US [12][14]
  http://wetcleanus.com/about/about-us

- Tetrachlorethylene (Perchloroethylene) [13]
  http://www.cancer.org/cancer/cancercauses/othercarcinogens/intheworkplace/tetrachlorethylene-perchloroethylene

- National Occupational Classification [15]
  http://moe.edu.tt/messages-releases/item/341-national-occupational-classification

- Ministry of Finance [16]

- Trinidad Express Newspapers: News [17]