

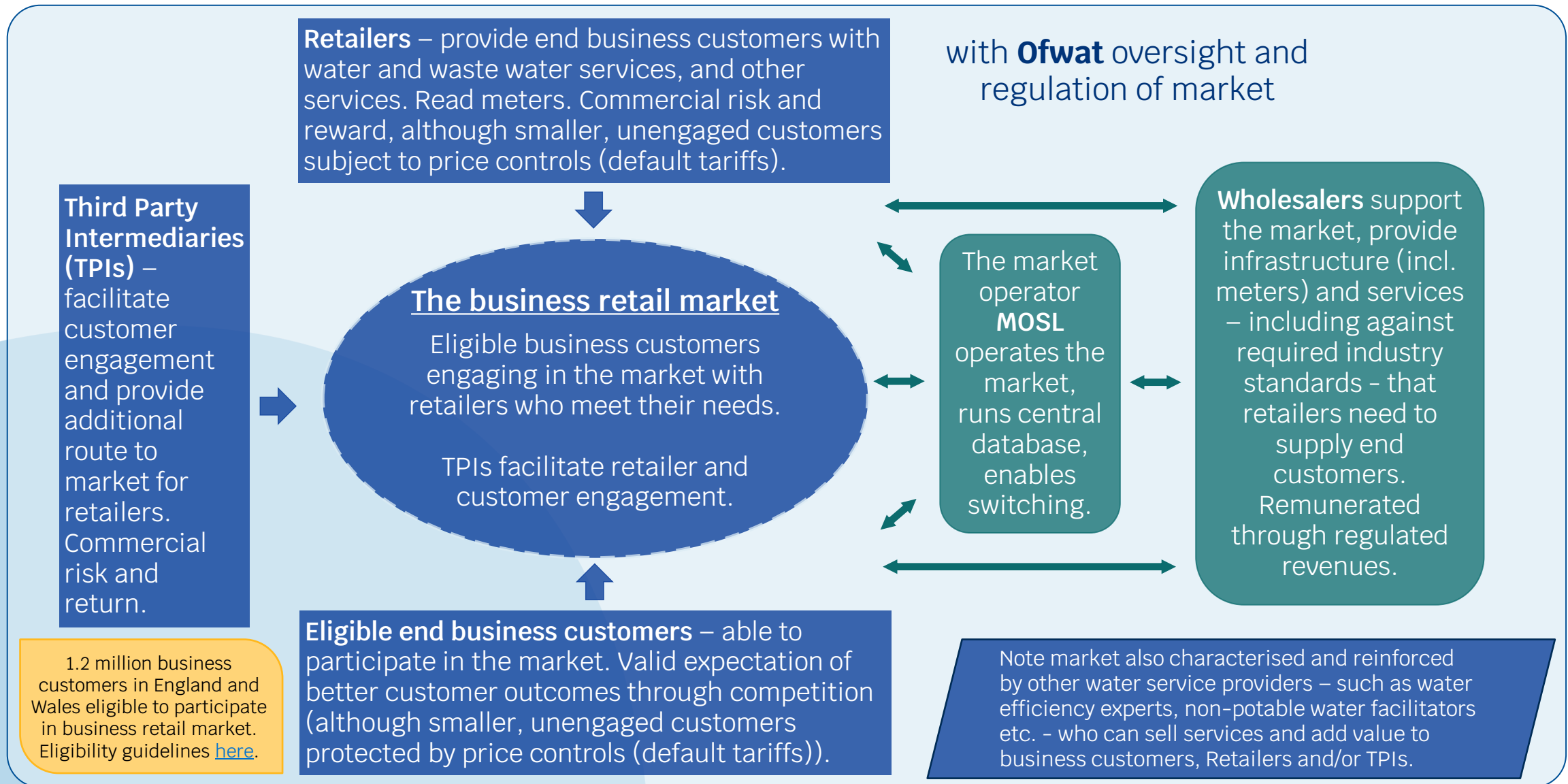
The Business Retail Water Market

Overview

Note – this slide pack overview for illustrative purposes only, and not for publication

Ofwat
May 2025

Business retail market – overview of structure



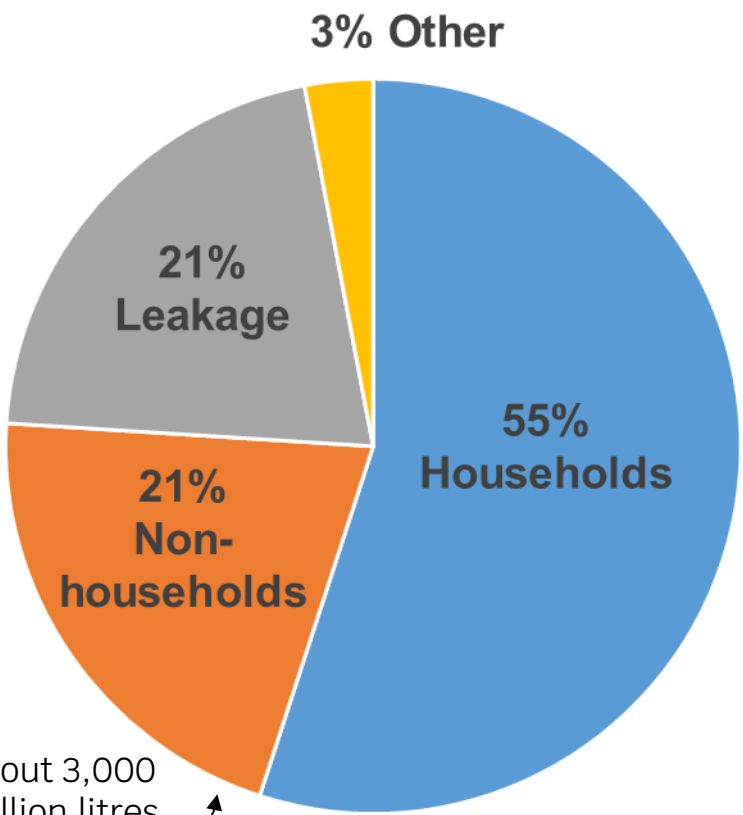
1.2 million business customers in England and Wales eligible to participate in business retail market. Eligibility guidelines [here](#).



Not for wider circulation

ILLUSTRATIVE Business customers (1 of 2) - Non-household sector large and very heterogenous

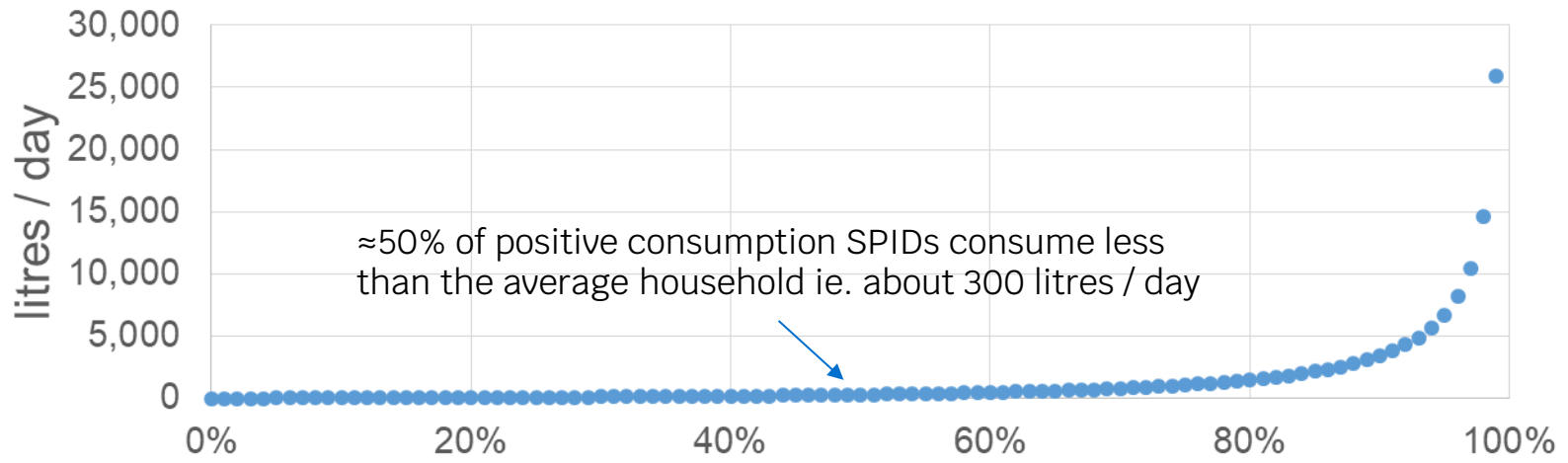
Uses of public water supply 2018-19 averages, England



About 3,000 million litres per day

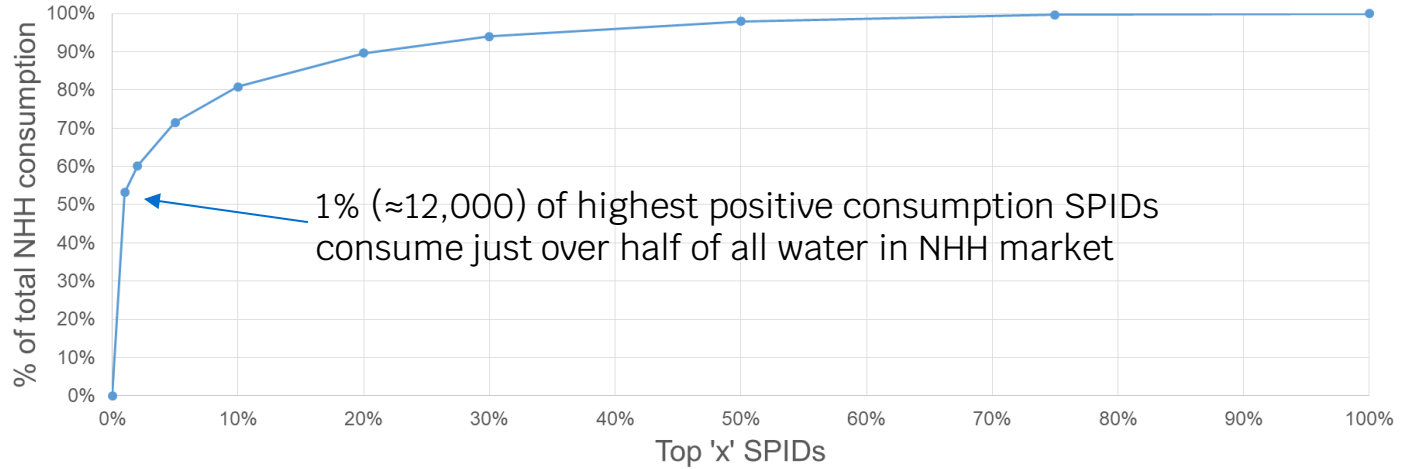
Source: Environment Agency [The National Framework for Water Resources](#) March 2020

Consumption by Supply Point ('SPID')



Excludes around 250,000 zero consumption SPIDs
Source: MOSL. Data relate to 2019.

Consumption skew by Supply Point 'SPID'



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ILLUSTRATIVE

Business customers in the market (2 of 2) – Majority of business customers small

Business customer annual water consumption	(illustrative litres per day)	Typical / example customer	Estimated number of customers	Estimated proportion of total eligible customers	Estimated proportion of total market consumption	Estimated proportion of total market retail revenue	Average annual expenditure, illustrative
<0.05MI	≈100 l/d	Single site sink / WC	583,000	49.4%	2.3%	21.2%	£500
0.05 – 0.5MI	≈750 l/d	Church, bank, pub, hairdresser, local garage	415,000	35.2%	8.3%	18.6%	£800
0.5MI – 5MI	≈7500 l/d	Smaller SMEs or organisations – Hotel, warehouse, farm, mine Larger SMEs or organisations – Supermarket, university, large hospital	163,000	13.8%	24.1%	24.7%	£4,500
5-50MI	≈75,000 l/d	Chemical factory, brewery	17,000	1.4%	22.4%	20.6%	£37,500
>50MI	>140,000 l/d	Airport, power plant, oil refinery, port	2,000	0.2%	43.0%	14.9%	£493,000
Total			1,180,000	100.0%	100.0%	100.0%	

Note average household usage is ≈0.1 MI per year (around 300 litres per day)

*Estimated proportions based on retailer information. Excludes unmetered customers and vacant sites.

