Water Utilities Market Report

Description: In 1997/1998, the UK demand for water and sewerage services was estimated to be worth £7.21bn and, by 1998/1999, this figure is estimated to be £7.76bn. The volume of water supplied in 1996/1997 was 19,680 megalitres per day.

The market is served by two types of company, water and sewerage companies (WSCs) and by water-only companies (WOCs). In England and Wales, there are ten WSCs and these also supply sewerage services to the WOCs. There are 18 WOCs, a major reduction on the 29 which existed in 1989 at privatisation. In Scotland, there are three water authorities and in Ireland, the Water Service - all of which are government controlled.

The water industry in England and Wales is highly regulated, prices and investment being subject to proposals made by the Office of Water Services (Ofwat). In 1997/1998, WSCs supplied 89.3% of the requirements for water services in England and Wales in value terms.

In recent years, there have been significant changes in ownership of the supply companies. Four WSCs are now part of major groups, with widespread interests often including other utility activities. Two are now owned by major French groups with multinational operations. Recently, one of the WSCs was bought by a US company. In the WOC sector, French companies also own four WOCs and have a stake in others.

As a regulated business of fundamental importance, the water industry is in a strong position. However, there is currently considerable discussion regarding the next 5-year price review, particularly how the proposed £8.5bn quality improvement programme will be phased. Current proposals are that there will be a reduction in prices in 2001, after which there will be a series of price increases. Efficiency targets recently set by Ofwat are also causing concern as to how they are to be met whilst maintaining other criteria, many of them mandatory.

Allowing for the significant price reduction in 2000/2001, the sales of the water industry are estimated to be £7.22bn in 2003/2004. During the 5 years after 2001, total investment could be around £3.5bn a year.

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