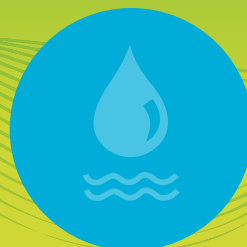


EurEau

Europe's Water in Figures



Snapshot



Amid growing uncertainty for water resource protection, rising investment levels show that water services are stepping up to ensure compliance and resilience, although structural challenges remain.

Every day, Europe's water service providers strive to contribute to these goals. This factsheet shines a spotlight on their vital work, which usually remains behind the scenes.

The key change compared to last year's edition is a strong increase in investment levels in most countries in response to stricter treatment requirements, security needs and climate change - but also rising supply chain costs. This upward trend contrasts with slower income growth from billing, which failed to spur a rise in network renewal rates or a decrease in non-revenue water.

EurEau represents the drinking water and wastewater services from 33 European countries. Each year, we ask our members for the essential facts and figures on the services they provide, starting with a candid look at the key challenges confronting the sector today.

The data presented here covers both EU and EFTA Member States, as well as the United Kingdom.¹

¹ Data are not adjusted for inflation.

Sector outlook

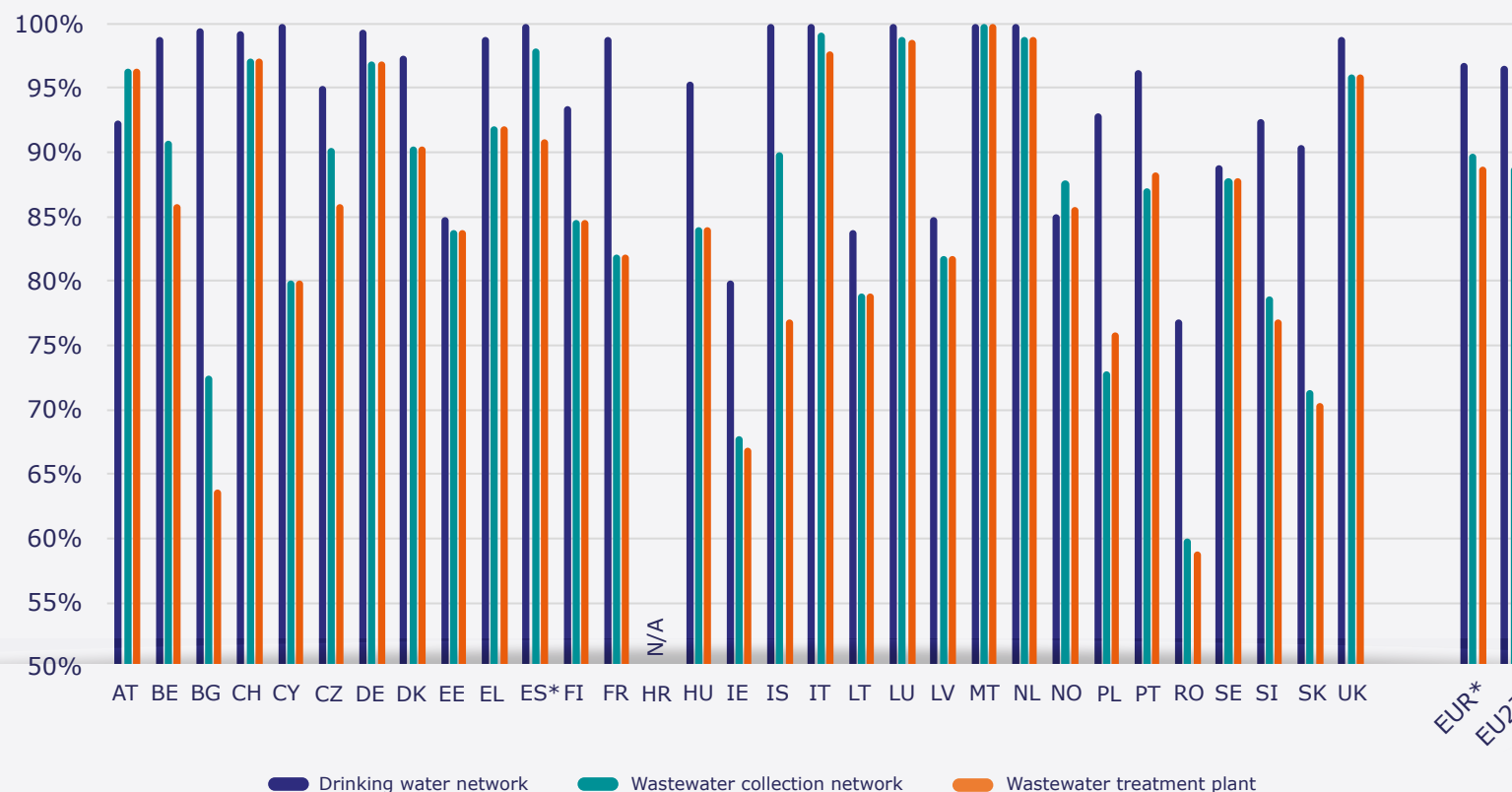


Top challenges facing the water sector

Infrastructure renewal once again tops the list of concerns for the water sector in our second annual survey of EurEau members. This reflects the need to adapt ageing infrastructure to the combined pressures of new requirements and the effects of climate change. Funding this renewal also remains a challenge, alongside other organisational issues such as staffing.

In a context marked by increasingly long and frequent droughts across much of Europe, more EurEau members mentioned water availability and climate change than last year. These challenges can be compounded by pollution pressures on water resources, with members mentioning in particular micropollutants, PFAS and pesticides. This confirms the urgency of implementing fully the Water Resilience Strategy and controlling pollution at source.

Coverage

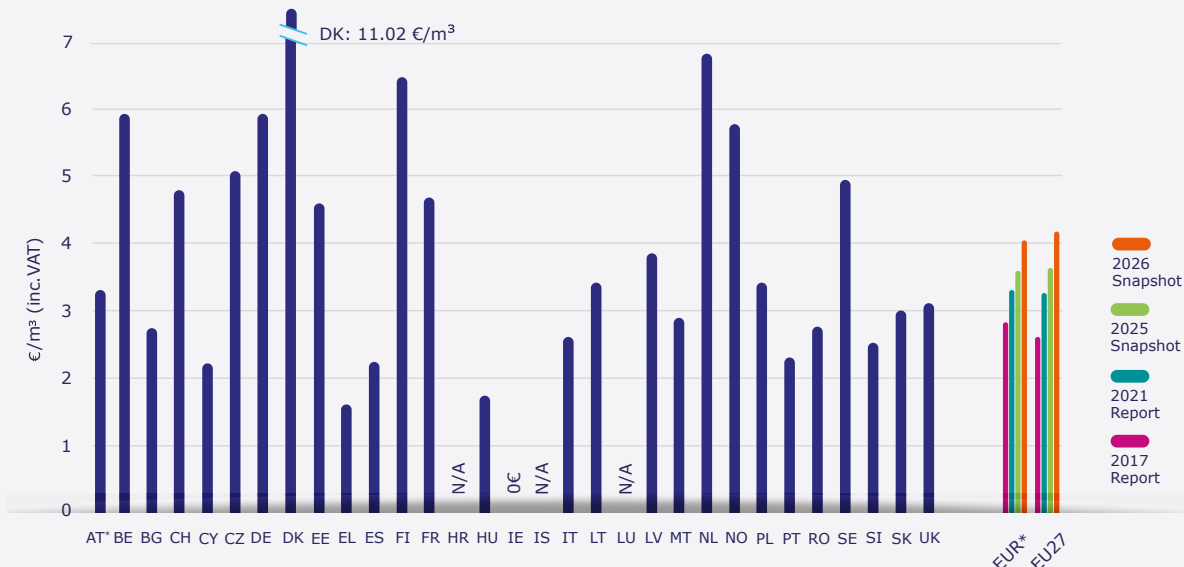


*ES: wastewater figures only consider population living in agglomerations over 2000 p.e

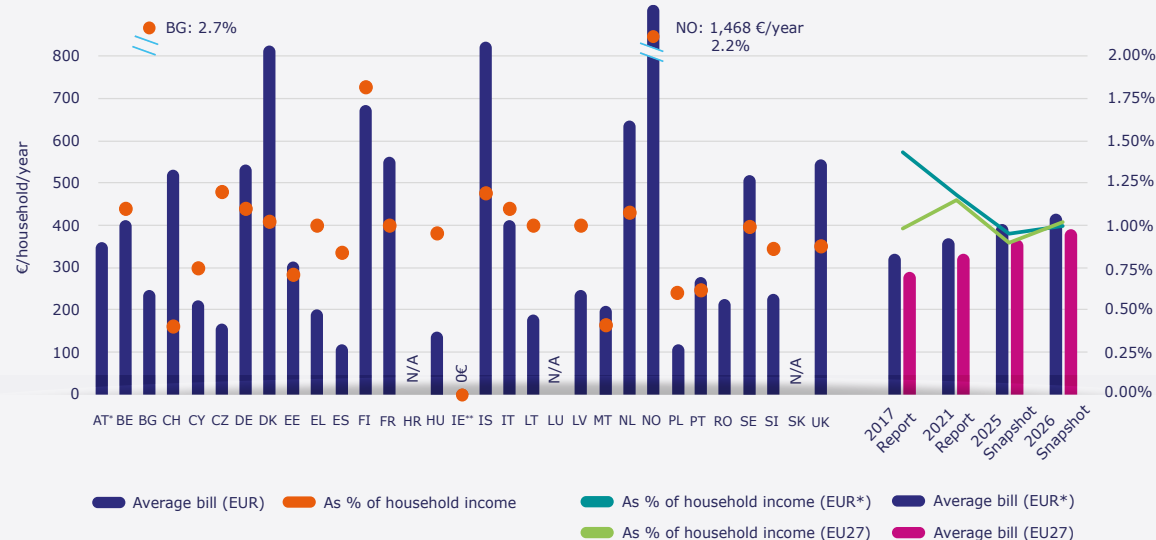
Figure 1
Population
connected to a
public system

Access to safe and affordable water services is a human right. Europe has one of the highest connection rates in the world. **Figure 1** presents the percentage of people connected to a public drinking water network, a wastewater network and a wastewater treatment plant per country as well as the overall percentages for all of Europe. The data shows that water operators are taking their mission to provide these services seriously. Connection rates have increased continuously over the past years, although some countries still need to step up their efforts when it comes to wastewater collection and treatment.

Residential water tariffs



*Wastewater only. Data is not adjusted for inflation.



*Wastewater only. **There are no residential water charges in Ireland. Data is not adjusted for inflation.

Figure 2
Average water tariff for residential consumption

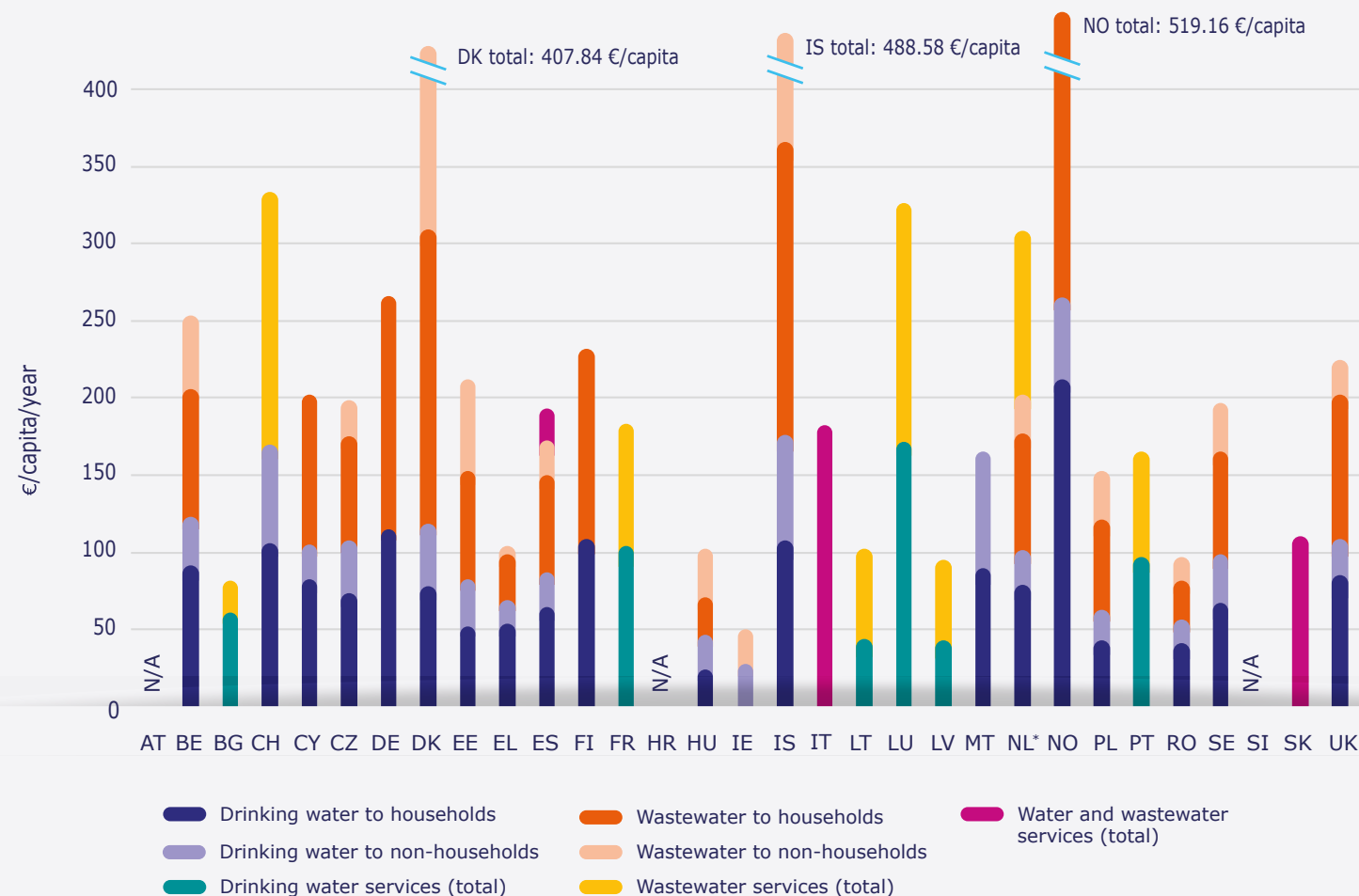
Figure 3
Average household water bill

Figures 2 & 3 present national averages of residential tariffs and of annual household bills for drinking water and wastewater services combined. Tariffs are generally set or approved by a public body, typically either the local government or an independent regulator. They may be impacted by the level of cost recovery, cost levels themselves, salaries, other income (transfers, subsidies), etc.

Behind the averages shown here, each country may have a wide variety of tariffs in different regions or local areas. These may combine volumetric and fixed components, which are not differentiated here.

As the trend lines for Figure 3 show, household water bills did not keep up with household income during the 2021-2024 inflation spike. While improved affordability is desirable from a social point of view, insufficient revenue growth hampers urgently needed investment and maintenance works.

Annual revenue from water bills



*NL: differentiated figures for households and non-households are available for wastewater treatment but not for wastewater network services. Data is not adjusted for inflation.

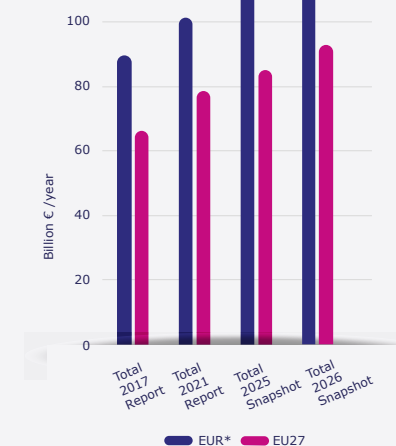


Figure 4
Annual revenue
from water bills
(VAT excluded)

Figure 4 shows the water sector's revenue from water bills in each country on a per-capita basis. Where available, the data reflects the different types of customers (households or non-households) and of services (drinking water or wastewater). Differences between countries may be explained by the share of revenue from non-households, tariff levels, overall water consumption and other local circumstances.

Investments

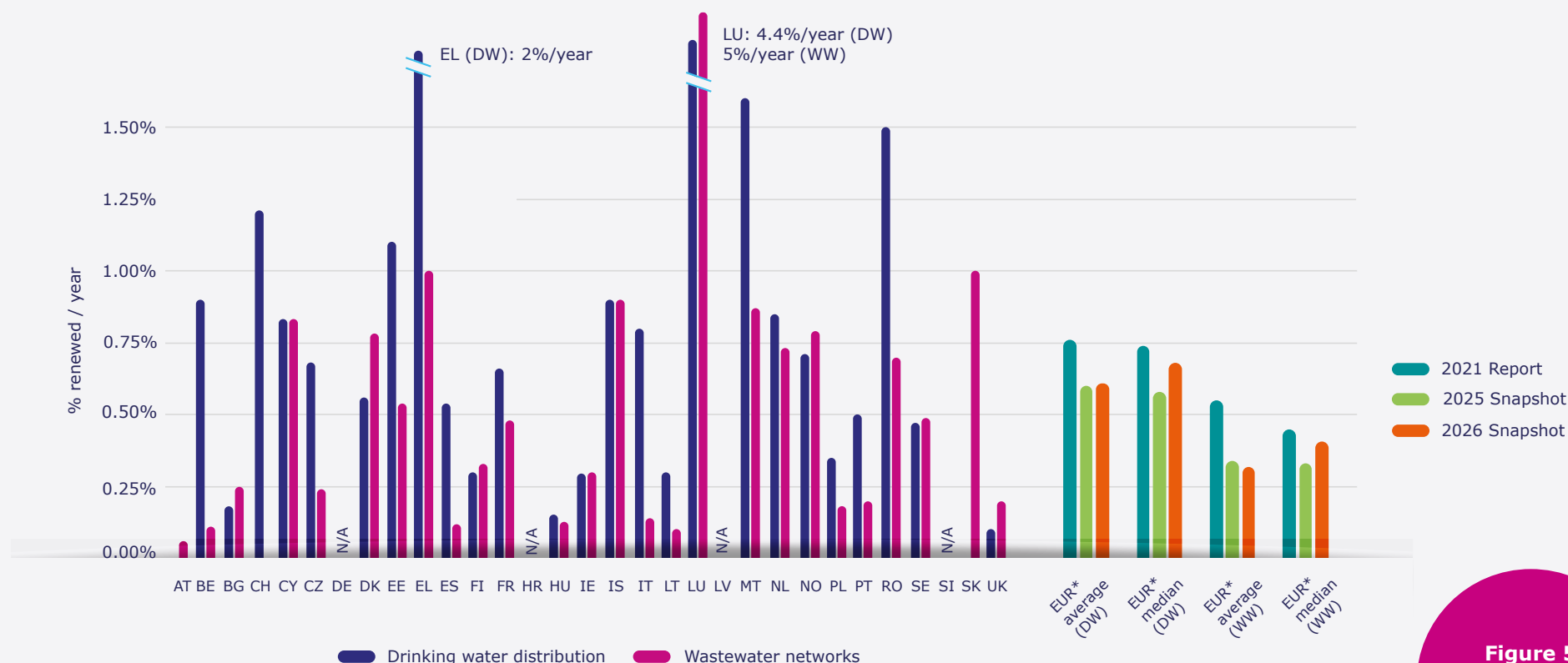
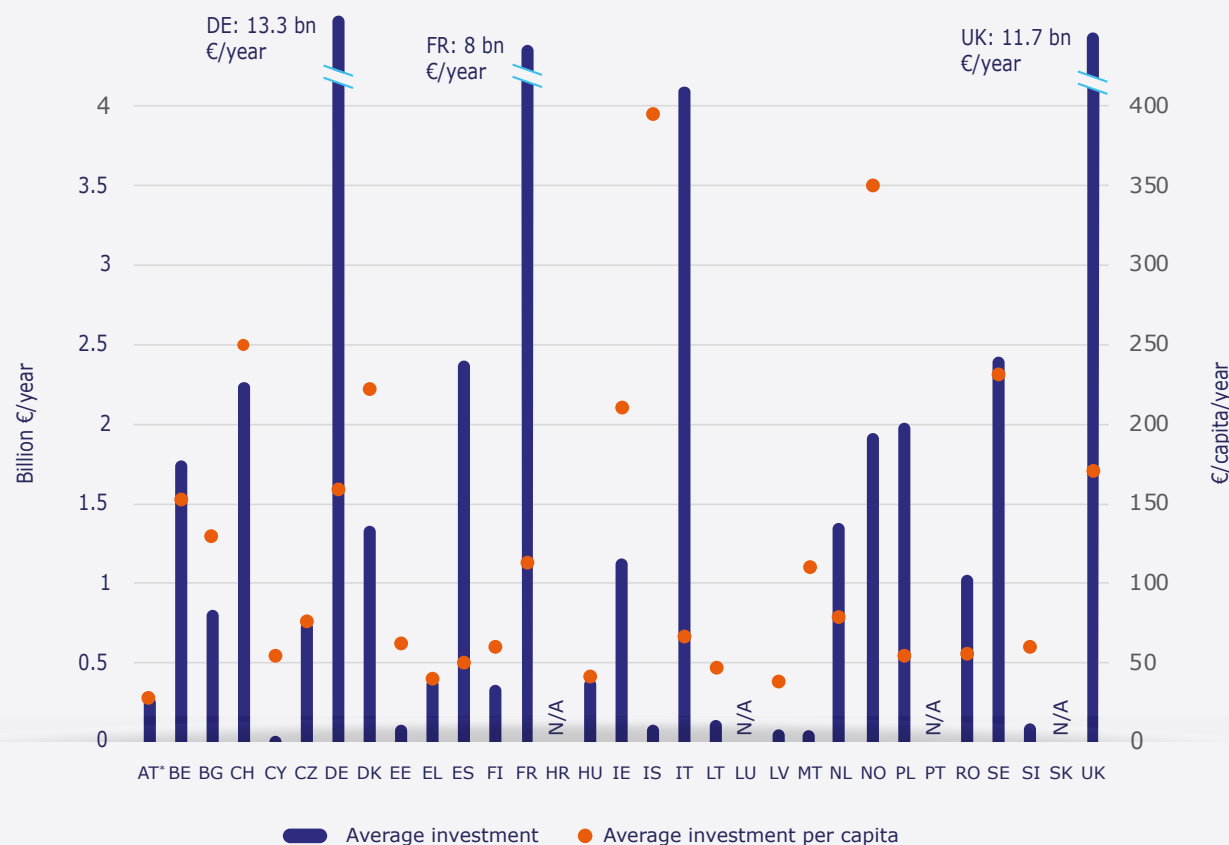


Figure 5
Average renewal
rate of water
networks

Figure 5 shows, side by side for each country, the renewal rate of network assets for drinking water distribution (in blue) and wastewater collection (in pink). These rates can vary significantly year-on-year based on budget decisions, typically made at the local level, making it difficult to discern long-term trends for individual countries.

These data illustrate why 'infrastructure renewal' came out as the top challenge in many European countries.

The average renewal rates are far too low to avoid degradation over time, and are largely stagnating on average.

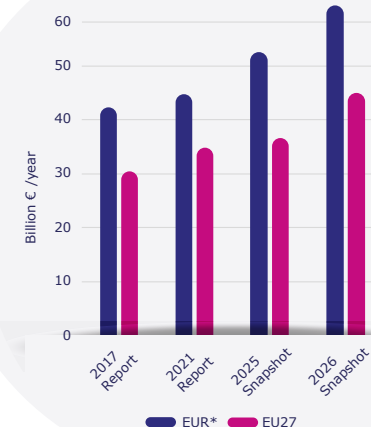


*AT: Wastewater only. Data is not adjusted for inflation.

Figure 6
Annual average
investment
(over five years)

Figure 6 presents the annual investment going into drinking water and wastewater infrastructure in each country, shown as an average of a five-year period. Bars show the overall amount of investment (left axis, in billion € per year) while dots show the level of investment per capita (right axis, in € per capita per year).

The sharp rise in total investment across Europe (+16% this year) shows a promising trend but, over the long term, this is little more than catching up to inflation: since 2017 the ECB's construction price index rose by 42%, while our investments went up by just 44%. This also contrasts with the much slower revenue growth shown in Fig. 4.



Drinking water supply

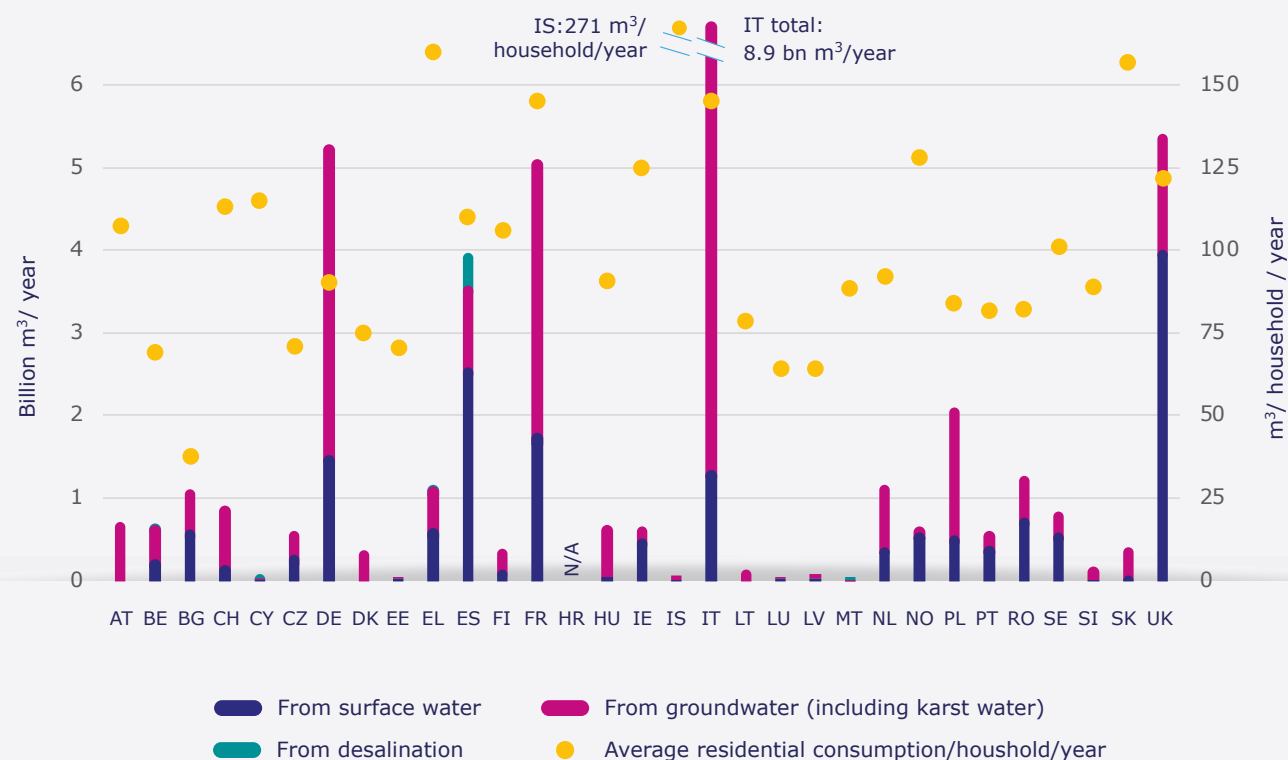
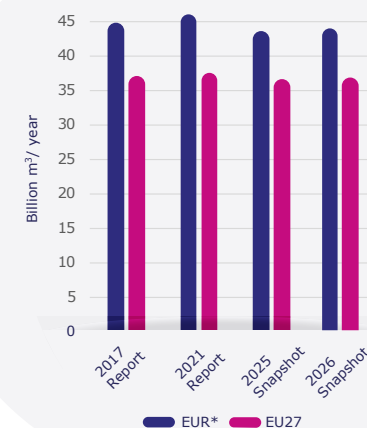


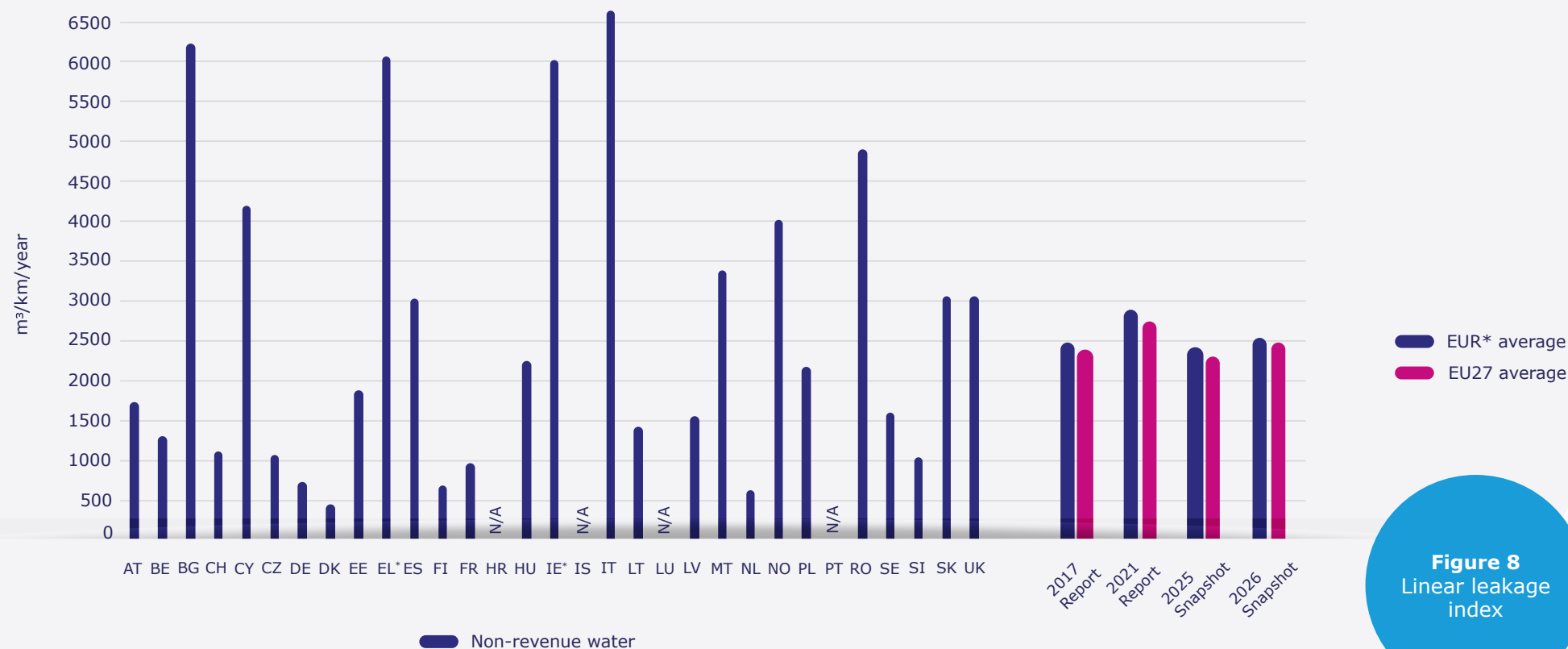
Figure 7
Water production
and average
household
consumption

Figure 7 This figure presents the volume of drinking water produced in each country, split by water source, as well as the average household consumption per year on the secondary axis.

While fluctuations in demand for drinking water result in slight variations in overall production volume, Europe-wide figures remain stable over time, with a slight downward trend.



Linear leakage index



*Excluding smaller water supply zones (delivering ~25% of national DW volume in EL and ~32% in IE).

Figure 8
Linear leakage index

Figure 8 presents an index of water losses in distribution networks, based on the volume of non-revenue water divided by the length of each country's mains network. This index was recommended by EurEau and endorsed by most Member States for their reporting under the Drinking Water Directive. The losses cover all non-revenue water which may include leakage, meter inaccuracies, water used for maintenance, street cleaning, fire-fighting, etc. The rising European averages in this edition are

largely due to having received data from several more countries than last year, most of which had values above the previous average. When excluding these countries from the calculation, the EUR* and EU27 averages rose by less than 0.3%. Comparisons between countries should be made with care: the index does not correct for network density, service pressure or seasonal demand peaks.

Wastewater treatment

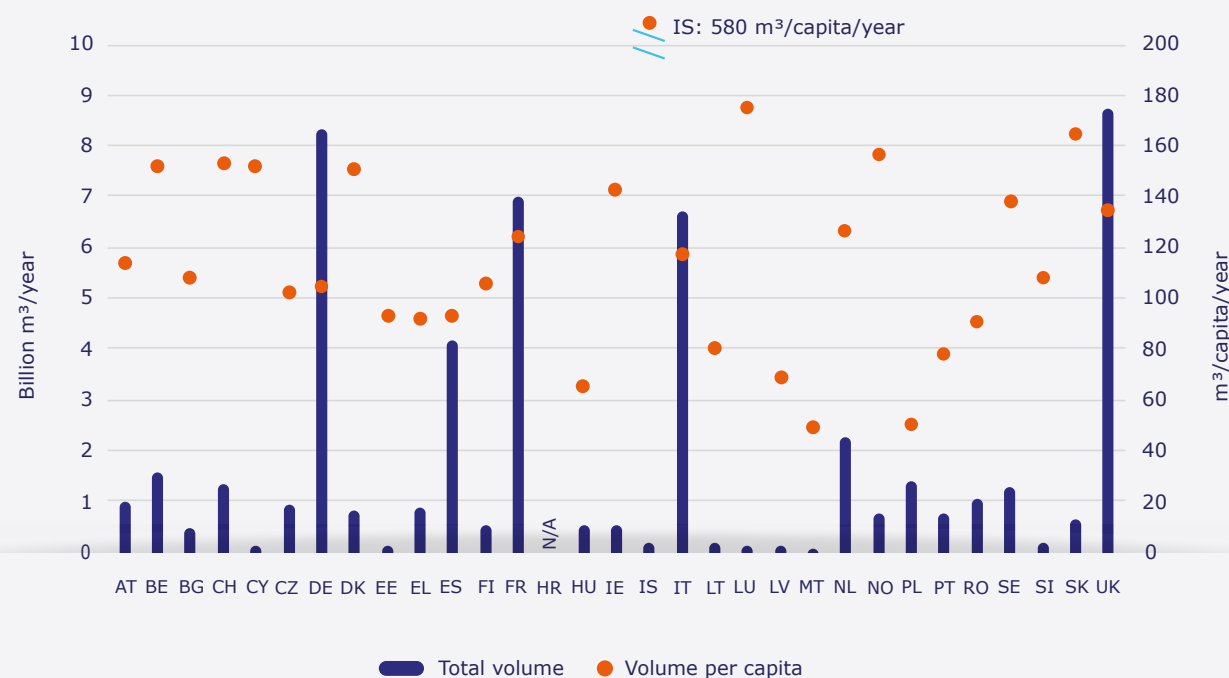


Figure 9
Volume of
wastewater
treated

Figure 9 shows the volume of wastewater treated annually in each country, including the volume of rainwater entering urban wastewater treatment plants. For ease of comparison, dots show this volume when divided by the population connected to a WWTP.

A major factor affecting volume per capita is the proportion of combined sewers in the wastewater collection network: a combined network will result in the WWTP receiving rainwater in addition to wastewater, whereas a separated network will keep rainwater out of the WWTP intake.

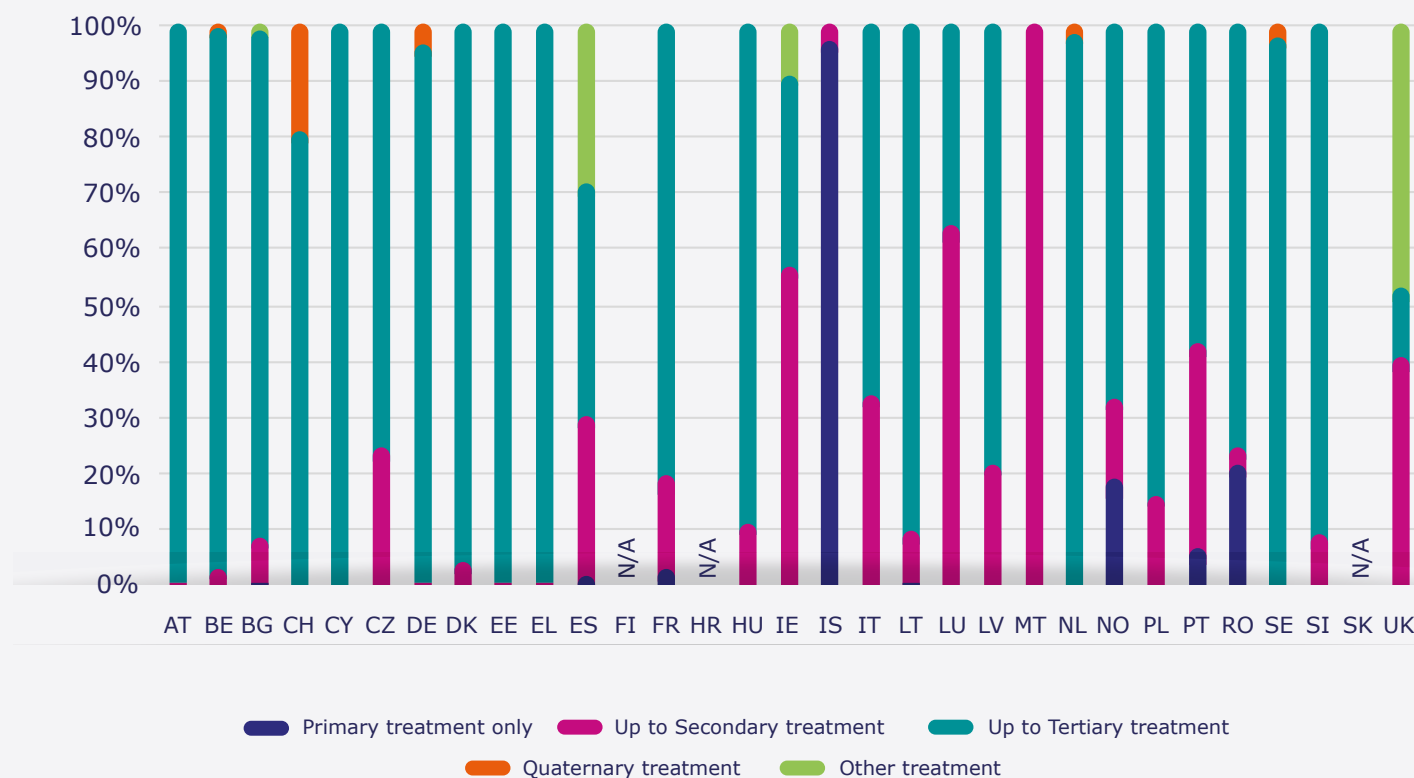


Figure 10
Wastewater
treatment
levels

Figure 10 This figure examines the different levels of treatment applied to wastewater in each country. Wastewater treatment steps are typically consecutive: wastewater treated by a treatment level has first passed through the previous levels. In nearly all responding countries, most wastewater is treated to at least tertiary level.

Micropollutant removal, which will gradually become a requirement for certain treatment plants under the revised Urban Wastewater Treatment Directive,

is already performed at some sites in Switzerland and to a lesser extent in Germany and other countries. The treatment levels shown here refer not to compliance with specific treatment requirements but to what is removed from urban wastewater: reduction of suspended solids (primary treatment), organic matter (secondary treatment), nutrients (tertiary treatment) and micropollutants (quaternary treatment). "Other treatment" refers to additional treatment processes with aims different from any of these.

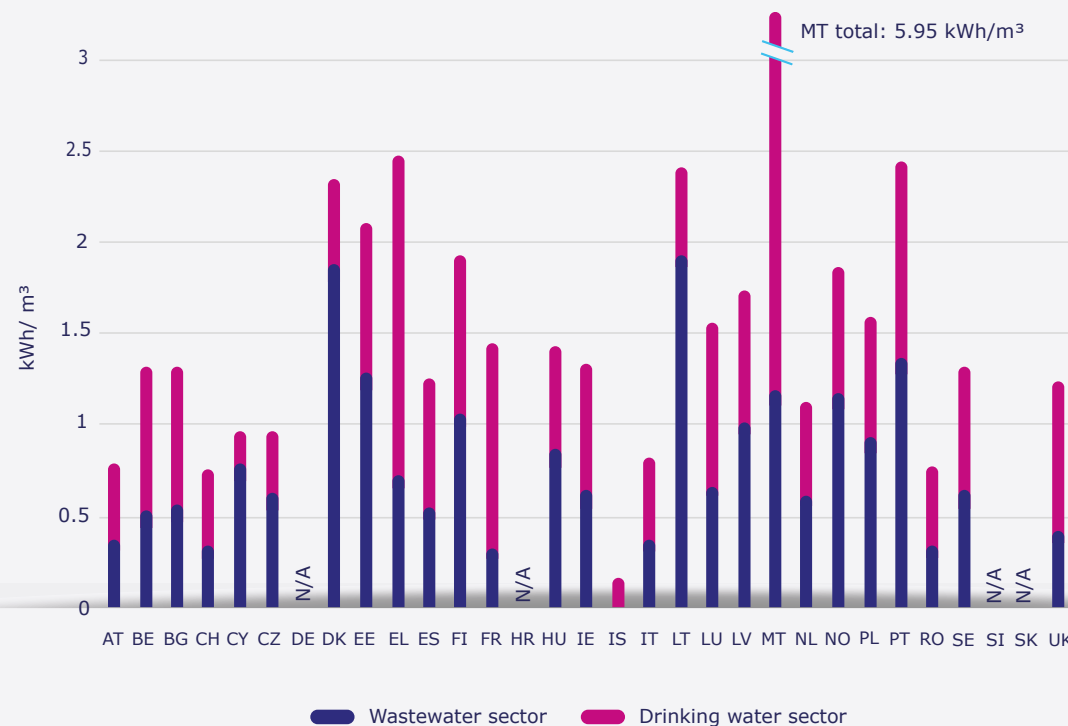


Figure 11 shows the gross energy intensity of water services in each country, in kWh per m³ of water sold. The data here do not account for the production of renewable energy by water services, which can cover some (or in rare cases all) of their energy needs.

A wide variety of factors can influence the amount of energy needed by water services in different cities, regions and countries: topography affects the amount of pumping needed (or not) in the networks, different treatment techniques will require different energy inputs, as will different influent pollution loads, etc.

Seawater desalination and water reuse are typically much more energy-intensive than conventional treatment processes. This can have an impact on national averages in countries where these practices are widespread.

The data shown here are national averages.

Figure 11
Energy
consumption
(gross)

Water reuse



Figure 12 This map shows the level of water reuse performed in each responding country, measured as the percentage of the country's treated wastewater that is further processed for reuse applications each year. Notably, not all countries with the highest levels of water reuse are in Southern Europe, although Cyprus and Spain top the ranking: Poland and Romania are next, with Italy and Greece far behind. Smaller-scale reuse schemes, meanwhile, are dotted around various parts of the continent.

Figure 12
Water reuse
levels

Methodology

As in previous editions, the data contained in this report were collected from EurEau members. Our members used either their own information or figures from official statistical services. EurEau is only responsible for assembling, checking for general consistency, extrapolating for missing data and presenting the result. EurEau cannot take responsibility for any inaccuracy in individual data points.

For many indicators, we present total values, or medians and averages, at the European level and at the EU27 level. Because data were not always available for all countries, we have extrapolated missing data when possible to obtain the totals (unless indicated otherwise). This extrapolation was carried out by our partners Utilitatis, typically using regression analysis based on a factor related to the indicator in question (e.g. population connected to drinking water or to wastewater services), with occasional country-specific adjustments.

Averages and medians are calculated based on the data we received from members, without extrapolation. Averages shown in this report are weighted averages, with weighting factors chosen based on the nature of the data being presented (by default, the weighting was by population connected).

EurEau's membership includes all EU Member States, alongside some non-EU members. To reflect this diversity, we are providing extrapolations, averages and medians for the EU27 as well as for a broader European level (noted as EUR* in charts), comprising EU and EFTA countries, as well as the United Kingdom.

Associate EurEau members Serbia and Ukraine were unable to provide data and we have refrained from extrapolating for these countries: extrapolated totals, averages and medians marked as EUR* in this report therefore exclude them from their scope.

When reading charts displaying the evolution of an indicator since the 2017 edition of Europe's Water in Figures, it should be borne in mind that marginal changes in EurEau membership over time may have contributed to some of the differences observed. Some indicators also had a higher response rate from members than in previous reports, with the result of improving the accuracy of related averages, medians and/or extrapolations.

As different countries collect data at different frequencies, there is no single reference year encompassing every data point in this Snapshot. What is shown is the latest available data for each indicator in each country. In the majority of cases, in this edition, this is either 2024 or 2025.

With support from



Annex

Fig.	Indicator	Unit	AT	BE	BG	CH	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IS
1	Pop. connected to a DW network	%	92.5%	98.9%	99.6%	99.4%	100%	95.1%	99.5%	97.5%	85%	99%	100%	93.6%	99%	N/A	95.5%	80%	100%
	Pop. connected to a WW network	%	96.5%	90.9%	72.6%	97.3%	80%	90.3%	97%	90.4%	84%	92%	98%	84.7%	82%	N/A	84.2%	68%	90%
	Pop. connected to a WWTP	%	96.5%	86%	63.9%	97.3%	80%	86%	97%	90.4%	84%	92%	91%	84.7%	82%	N/A	84.2%	67%	77%
2	Avg residential tariff	€/m ³	3.30 (WW only)	5.93	2.73	4.80	2.21	5.08	5.93	11.02	4.60	1.60	2.23	6.48	4.69	N/A	1.74	0.00	N/A
3	Avg household water bill	€/household/y	360.72 (WW only)	411.80	246.10	531.12	223.32	169.00	544.52	824.00	314.00	200.00	119.00	686.23	562.80	N/A	146.13	0.00	836.00
	...as a % of household income	%	N/A	1.10%	2.70%	0.40%	0.75%	1.20%	1.10%	1.02%	0.71%	1.00%	0.84%	1.82%	1.00%	N/A	0.96%	0.00%	1.19%

Fig.	Indicator	Unit	IT	LT	LU	LV	MT	NL	NO	PL	PT	RO	SE	SI	SK	UK	EUR*	EU27
1	Pop. connected to a DW network	%	99.9%	84%	99.9%	85%	100%	100%	85.2%	93%	96.4%	77%	89%	92.6%	90.5%	99%	96.9%	96.7%
	Pop. connected to a WW network	%	99.3%	79%	99%	81.9%	100%	99%	88%	73%	87.2%	60%	88%	78.8%	71.5%	96%	89.9%	88.8%
	Pop. connected to a WWTP	%	97.8%	79%	98.7%	81.9%	100%	99%	85.7%	76%	88.4%	59%	88%	77%	70.5%	96%	88.9%	87.7%
2	Avg residential tariff	€/m ³	2.60	3.41	N/A	3.85	2.90	6.84	5.78	3.41	2.31	2.75	4.94	2.52	3.00	3.10	4.08	4.20
3	Avg household water bill	€/household/y	411.00	187.52	N/A	247.41	205.70	648.02	1,467.98	117.20	278.26	226.00	511.00	238.69	N/A	554.73	426.01	390.96
	... as a % of household income	%	1.10%	1.00%	N/A	1.00%	0.41%	1.08%	2.18%	0.60%	0.62%	N/A	0.99%	0.86%	N/A	0.88%	1.00%	1.02%

Fig.	Indicator	Unit	AT	BE	BG	CH	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IS
4	Annual bil. DWH	Million €	N/A	1,083	394	970	57	802	9,515	466	71	561	3,208	612	7,226	N/A	230	0	42
	Annual bil. DWNH	Million €	N/A	378		580	16	369	N/A	240	42	157	1,127	N/A		N/A	216	149	27
	Annual bil. WWH	Million €	N/A	979	135	1,500	67	733	12,482	1,140	95	310	3,115	700	5,423	N/A	233	0	75
	Annual bil. WWNH	Million €	N/A	569			N/A	261	N/A	587	82	50	1,108 + 1,059 uncategorised	N/A		N/A	302	123	48
	Annual bil. DWH	€/capita	N/A	91.23	61.16	106.13	82.31	73.67	115.00	78.08	52.27	54.09	64.56	108.32	104.60	N/A	24.11	0	107.36
	Annual bil. DWNH	€/capita	N/A	31.84		63.46	23.11	33.90	N/A	40.21	30.67	15.14	22.68	N/A		N/A	22.62	27.34	69.04
	Annual bil. WWH	€/capita	N/A	82.46	20.94	164.11	97.22	67.33	150.85	191.02	69.40	29.89	62.69	123.89	78.50	N/A	24.41	0	189.85
	Annual bil. WWNH	€/capita	N/A	47.96			N/A	23.98	N/A	98.36	59.81	4.82	22.30 + 21.31 uncategorised	N/A		N/A	31.64	22.50	122.34
5	Avg renewal rates – DW networks	%/year	N/A	0.90%	0.18%	1.21%	0.83%	0.68%	N/A	0.56%	1.10%	2.00%	0.54%	0.30%	0.66%	N/A	0.15%	0.30%	0.90%
	Avg renewal rates-WW networks	%/year	0.06%	0.11%	0.25%	N/A	0.83%	0.24%	N/A	0.78%	0.54%	1.00%	0.12%	0.33%	0.48%	N/A	0.13%	0.30%	0.90%

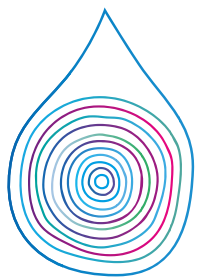
Fig.	Indicator	Unit	IT	LT	LU	LV	MT	NL	NO	PL	PT	RO	SE	SI	SK	UK	EUR*	EU27
4	Annual bil. DWH	Million €	10,744	127	117	79	53	1,424	1,193	1,623	1,041	788	711	N/A	600	5,810	114,232	92,572
	Annual bil. DWNH	Million €					45	397	298	737		291	330	N/A		1,610		
	Annual bil. WWH	Million €		168	105	97	N/A	Collection: 1,821 Treatment: H: 1,370 NH: 451	1,430	2,186	740	479	711	N/A		6,372		
	Annual bil. WWNH	Million €					N/A		N/A	1,177		293	330	N/A		1,574		
	Annual bil. DWH	€/capita	182.31	43.83	171.61	42.56	89.35	79.15	212.07	43.29	96.84	41.33	67.20	N/A	110.61	85.11	Average: 210.50 Median: 189.94	Average: 200.31 Median: 177.27
	Annual bil. DWNH	€/capita					76.31	22.06	52.96	19.66		15.26	31.19	N/A		23.58		
	Annual bil. WWH	€/capita		58.11	154.37	52.53	N/A	206.80	254.13	58.31	68.84	25.12	67.20	N/A		93.34		
	Annual bil. WWNH	€/capita					N/A		N/A	31.40		15.37	31.19	N/A		23.06		
5	Avg renewal rates – DW networks	%/year	0.80%	0.30%	4.40%	N/A	1.60%	0.85%	0.71%	0.35%	0.50%	1.50%	0.47%	N/A	N/A	0.10%	Average: 0.61% Median: 0.68%	Average: 0.69% Median: 0.66%
	Avg renewal rates-WW networks	%/year	0.14%	0.10%	5.00%	N/A	0.87%	0.73%	0.79%	0.18%	0.20%	0.70%	0.49%	N/A	1.00%	0.20%	Average: 0.32% Median: 0.41%	Average: 0.34% Median: 0.33%

Fig.	Indicator	Unit	AT	BE	BG	CH	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IS
6	Annual investment average	Million €	280	1,808	831	2,263	37	769	13,264	1,328	62	380	2,415	340	8,003	N/A	415	1,171	123
	Annual investment average	€/capita	30.53	152.00	129.64	249.09	52.77	74.70	160.31	223.00	62.62	36.60	50.00	60.26	115.85	N/A	43.50	214.74	394.30
7	Drinking water production	Million m³/year	709	686	1,100	916	75	594	5,290	362	51	1,150	3,966	389	5,095	N/A	674	650	63
	Surface water	%	0%	38%	57%	19.8%	19%	52.3%	28.7%	0%	58%	55%	65%	37%	35%	N/A	6%	79%	3%
	Groundwater	%	100%	61.6%	43%	80.2%	1%	49.4%	71.3%	100%	42%	44%	25%	63%	65%	N/A	94%	21%	97%
	Desalination	%	0%	0.4%	0%	0%	80%	0%	0%	0%	0%	1%	10%	0%	0%	N/A	0%	0%	0%
	Avg residential consumption	m³/household/y	107.4	69	37.6	113	115.1	70.7	90.3	74.8	70.2	160	109.9	105.9	145	N/A	90.7	125	271
8	Non-revenue water	m³/km/year	1,725	1,306	6,233	1,120	4,201	1,065	733	456	1,876	6,063	3,035	687	958	N/A	2,252	6,026	N/A
9	Volume of WW treated	Million m³/year	1,000	1,544	440	1,350	83	944	8,329	810	105	865	4,148	500	7,000	N/A	513	516	176
	Volume of WW treated	m³/capita/y	112.9	151.3	107	151.8	150.5	100.9	103.8	150.1	91.4	90.6	91.7	106.1	123.6	N/A	63.9	141.2	580.1

Fig.	Indicator	Unit	IT	LT	LU	LV	MT	NL	NO	PL	PT	RO	SE	SI	SK	UK	EUR*	EU27
6	Annual investment average	Million €	4,134	136	N/A	74	64	1,360	1,944	2,018	N/A	1,046	2,433	128	N/A	11,744	61,002	44,928
	Annual investment average	€/capita	70.00	47.04	N/A	40.26	111.00	75.58	350.00	53.83	N/A	54.90	229.92	60.09	N/A	172.00	Average: 117.53 Median: 72.35	Average: 102.03 Median: 62.62
7	Drinking water production	Million m³/year	8,872	140	44	87	40	1,160	658	2,091	608	1,263	842	169	398	5,409	43,868	36,823
	Surface water	%	15.1%	0%	50%	23.1%	0%	34.4%	89%	26%	70.8%	61%	70%	1.9%	15%	74%	39.9%	34.6%
	Groundwater	%	84.8%	100%	50%	76.9%	29%	65.6%	11%	74%	29.2%	39%	30%	98.1%	85%	26%	58.9%	64%
	Desalination	%	0.1%	0%	0%	0%	71%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1.2%	1.4%
	Avg residential consumption	m³/household/y	145	78.6	63.9	64.3	88.3	91.9	128	84	81.6	82.2	101.2	88.9	157	121.8	111.1	109
8	Non-revenue water	m³/km/year	6,643	1,429	N/A	1,554	3,376	632	4,015	2,180	N/A	4,905	1,603	1,040	3,053	3,056	2,547	2,479
9	Volume of WW treated	Million m³/year	6,700	180	117	103	28	2,229	751	1,390	727	1,005	1,275	176	628	8,717	52,349	41,355
	Volume of WW treated	m³/capita/y	116.2	78.6	174	67.8	48.4	125.1	155.7	48.8	76.5	89.3	136.9	107.1	164.2	133	110.9	105.4

Fig.	Indicator	Unit	AT	BE	BG	CH	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IS
10	WW – Primary treatment	%	0%	0%	1%	0%	0%	0%	0%	1.2%	0%	0%	1.8%	N/A	3%	N/A	0%	0%	97%
	WW – Secondary treatment	%	1%	2.9%	8%	0%	0%	25%	1%	4.6%	1%	1%	28.6%	N/A	17%	N/A	11%	57%	3%
	WW – Tertiary treatment	%	99%	96.5%	90%	81%	100%	75%	95%	95.4%	99%	99%	41%	N/A	80%	N/A	89%	34%	0%
	WW – Quaternary treatment	%	0%	0.5%	0%	19%	0%	0%	4%	0%	0%	0%	0%	N/A	0%	N/A	0%	0%	0%
	WW – Other treatment	%	0%	0.1%	1%	0%	0%	0%	0%	N/A	0%	0%	28.7%	N/A	0%	N/A	0%	9%	0%
11	Ener. cons. DW	kWh/m ³	0.42	0.77	0.74	0.42	0.19 (distrib. only)	0.34	N/A	0.46	0.82	1.75	0.70	0.86	1.11	N/A	0.55	0.69	0.17
	Ener. cons. WW	kWh/m ³	0.37	0.54	0.57	0.34	0.78	0.63	N/A	1.88	1.28	0.72	0.55	1.06	0.33	N/A	0.87	0.65	N/A
12	Percentage of water reuse	% of treated WW	0%	0.34%	1%	0%	99%	N/A	N/A	0.5%	0%	2.7%	17.7%	0%	1%	N/A	N/A	0%	0%

Fig.	Indicator	Unit	IT	LT	LU	LV	MT	NL	NO	PL	PT	RO	SE	SI	SK	UK	EUR*	EU27
10	WW – Primary treatment	%	0%	0.1%	0%	0%	0%	0%	19.4%	0%	7%	22%	0%	0%	N/A	0%	1.4%	1.3%
	WW – Secondary treatment	%	34%	9.9%	64%	21.6%	100%	0%	14.3%	16%	36%	3%	0%	9.6%	N/A	40.8%	19.3%	16.8%
	WW – Tertiary treatment	%	66%	90%	36%	78.4%	0%	98%	66.3%	84%	57%	75%	97.5%	90.4%	N/A	12.4%	68.7%	76.7%
	WW – Quaternary treatment	%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	2.5%	0%	N/A	0%	1.1%	0.8%
	WW – Other treatment	%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	N/A	46.8%	9.5%	4.4%
11	Ener. cons. DW	kWh/m ³	0.45	0.49	0.90	0.71	4.76	0.51	0.68	0.66	1.07	0.43	0.66	N/A	N/A	0.81	N/A	N/A
	Ener. cons. WW	kWh/m ³	0.37	1.92	0.66	1.02	1.19	0.61	1.18	0.93	1.37	0.34	0.65	N/A	N/A	0.42	N/A	N/A
12	Percentage of water reuse	% of treated WW	4%	2%	N/A	0%	5.6%	N/A	0%	5%	0.9%	5%	0%	N/A	2%	0.09%	N/A	N/A



EurEau

CONTACT

EurEau

European Water Services

Rue du Luxembourg 47-51
B-1050 Brussels, Belgium

T: +32 2 706 40 80

E: info@eureau.org

W: www.eureau.org

 EurEau

 @eureauinsta

 @eureau.bsky.social