






Your Water, Your Say
Eich Dŵr, Eich Llais

- Microphones should be left on mute until you need to ask a question
- Refrain from using the Chat function unless you want to raise a question during the Q&A section
- To ask a question, please use 'hand sign' on toolbar 
- After asking a question, please 'deactivate' hand sign and return to mute
- The event will be simultaneously translated with any spoken Welsh into English. Choose your audio feed in the settings menu at the top of the screen, "Three Dots / More"



Cynllun Busnes Dŵr Cymru Welsh Water Business Plan 2025-30

Peter Perry
Chief Executive



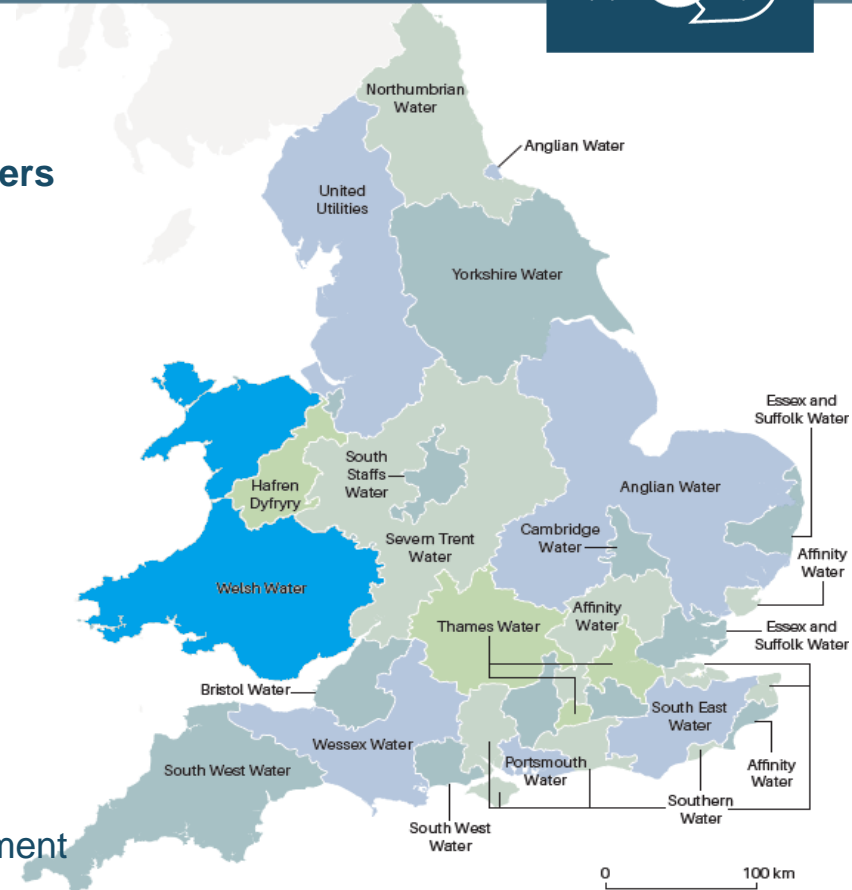
Welsh Water provides water and wastewater services to **1.3 million households** and **110,000 business customers** across Wales, Herefordshire and parts of Deeside.

Assets include

- **27,600km** of water mains
- **36,600km** of sewers
- **2,300** combined storm overflows
- **834** sewage treatment works
- **63** water treatment works
- **3,500** employees

Only not-for-profit water company in England & Wales.

£450 million value generated for customers and environment since 2001.



“A world-class, resilient and sustainable water service for future generations.

Dod yn wasanaeth dŵr cydnerth a chynaliadwy o’r radd flaenaf er budd cenedlaethau’r dyfodol”

- Addressing the challenges
- Delivering our ambitions
- Maintaining trust and affordability



WATER SERVICE

- Top performer on tap water quality compliance
- 57% reduction in leakage by 2050
- 25% reduction in water consumption per head
- Increase drought resilience to meet 1 in 500 year conditions

ENVIRONMENT

- Net zero carbon by 2040
- 4-star environmental performance rating
- Eliminate significant harm from CSOs by 2050
- Improve river water quality (SAC rivers first)
- Top performer on treatment works compliance

CUSTOMERS AND SOCIETY

- Top performing customer service (C-MeX)
- 50% reduction in sewer flooding by 2050
- Replace 50% customer lead supply pipes by 2050

AFFORDABILITY

- Minimise bill increases through efficiency improvements
- Maintain sector leading support for customers struggling to pay



STAKEHOLDER PRIORITIES

Customer priorities

- Water supply resilience
- River water quality
- Reducing leakage
- Reducing sewer flooding

Regulators priorities (in addition)

- Phosphorous removal from rivers
- Tap water discolouration
- Pollution incidents
- Dam resilience
- Net zero



PROPOSED BUSINESS PLAN 'HEADLINES'

£3.1 billion plan – biggest since privatisation.
Includes:

£900 million environmental programme

- Tackling CSOs with biggest impact first
- 90% reduction in phosphorous discharged to Special Areas of Conservation rivers by 2030

£360 million to improve tap water quality

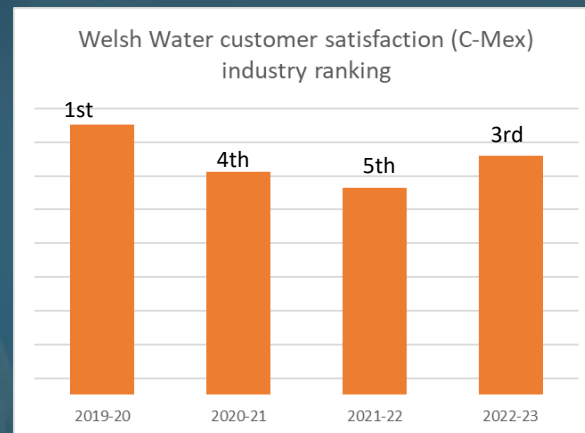
- Partnerships in catchments uplands
- Treatment works maintenance & upgrades
- Replacing ageing pipe materials and customers' lead pipes

£220 million water resilience investment

- £160m towards long-term programme of reservoir dam upgrades
- £60m to connect supply zones

“Earning the trust of customers every day”

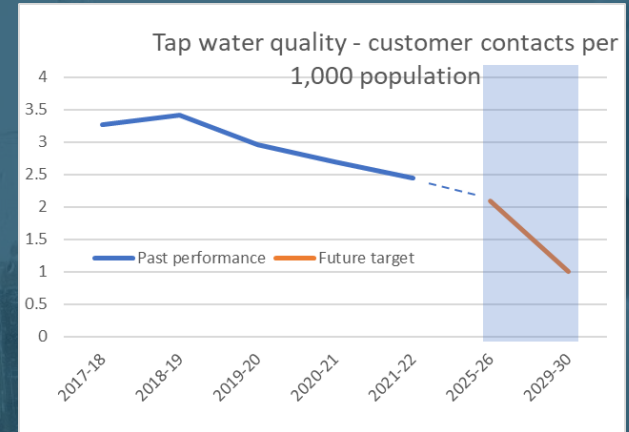
- Continued support for vulnerable customers
- Supporting behaviour change for lower consumption and bills
- £110m for progressive customer metering strategy
- Education programme



Currently 3rd of 17 on Ofwat's
'Customer Measure of Experience'.

“We will ensure great quality drinking water over the long-term”.

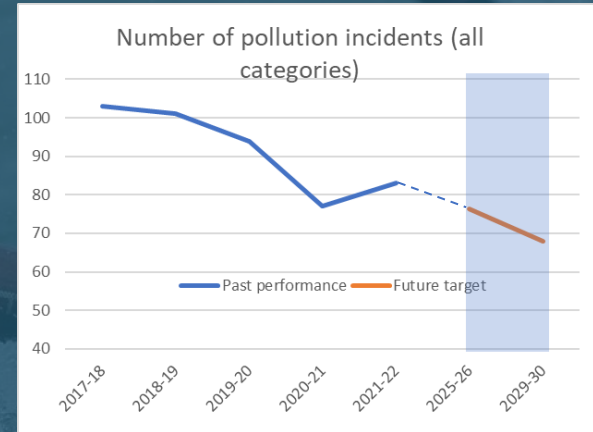
- Drinking water safety our top priority
- Upper quartile on bacteriological performance
- Discolouration, performance currently lagging – recovery plan in place
- Managing long-term threats to raw water quality in catchments



We take a Source to Tap approach to improving water quality

“We will eliminate harm to the environment from CSOs by 2050. Removing 90% of phosphorous discharged to SAC rivers by 2030”.

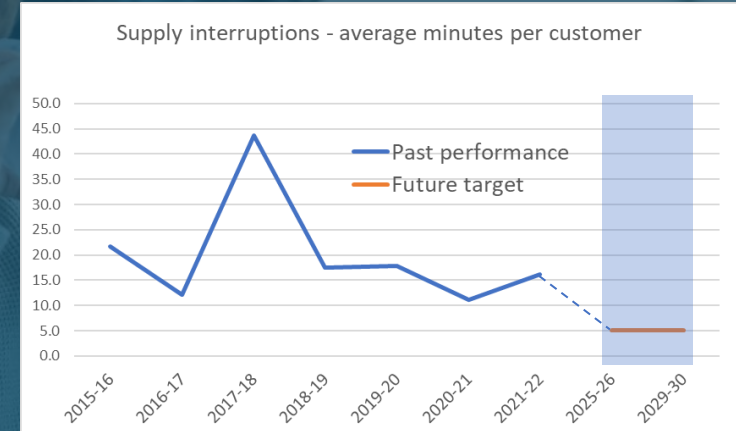
- River water quality – focusing on improving ecological status
- Evidence-based, prioritised approach to tackling Combined Storm Overflows
- Increased use of nature-based solutions
- Estimated £43 billion cost of removing all CSOs



Zero pollution incidents
categorised as ‘serious’ by 2025

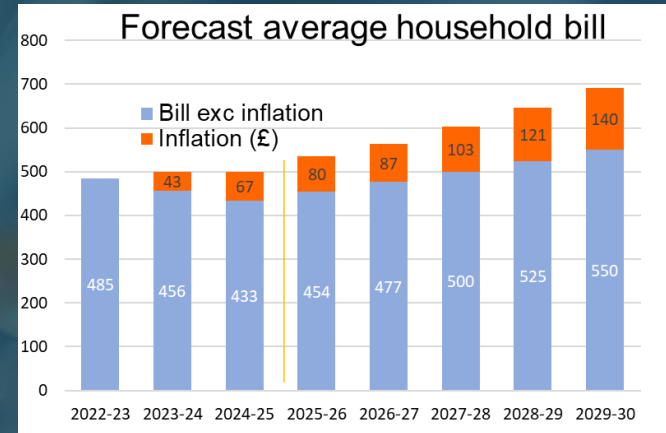
“We will increase the resilience of our water supply system”.

- 25-year Water Resources plan.
- Connecting supply areas to provide greater flexibility and resilience
- Replacing old mains pipes in rural areas
- Dam safety programme – climate change mitigation
- Meeting new demand from housing developments and population growth

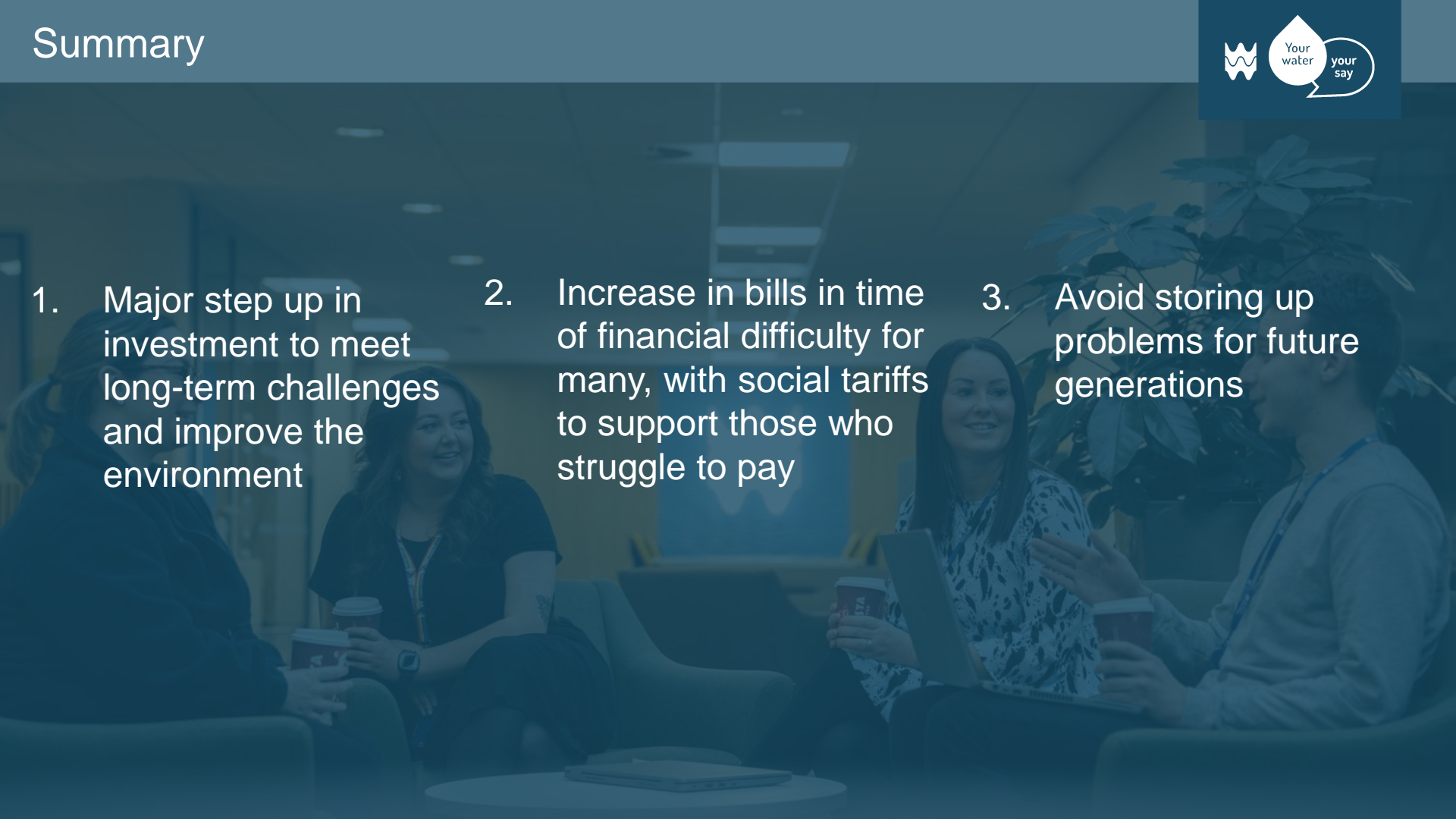


We will improve resilience to drought to meet 1 in 500 year conditions by 2030

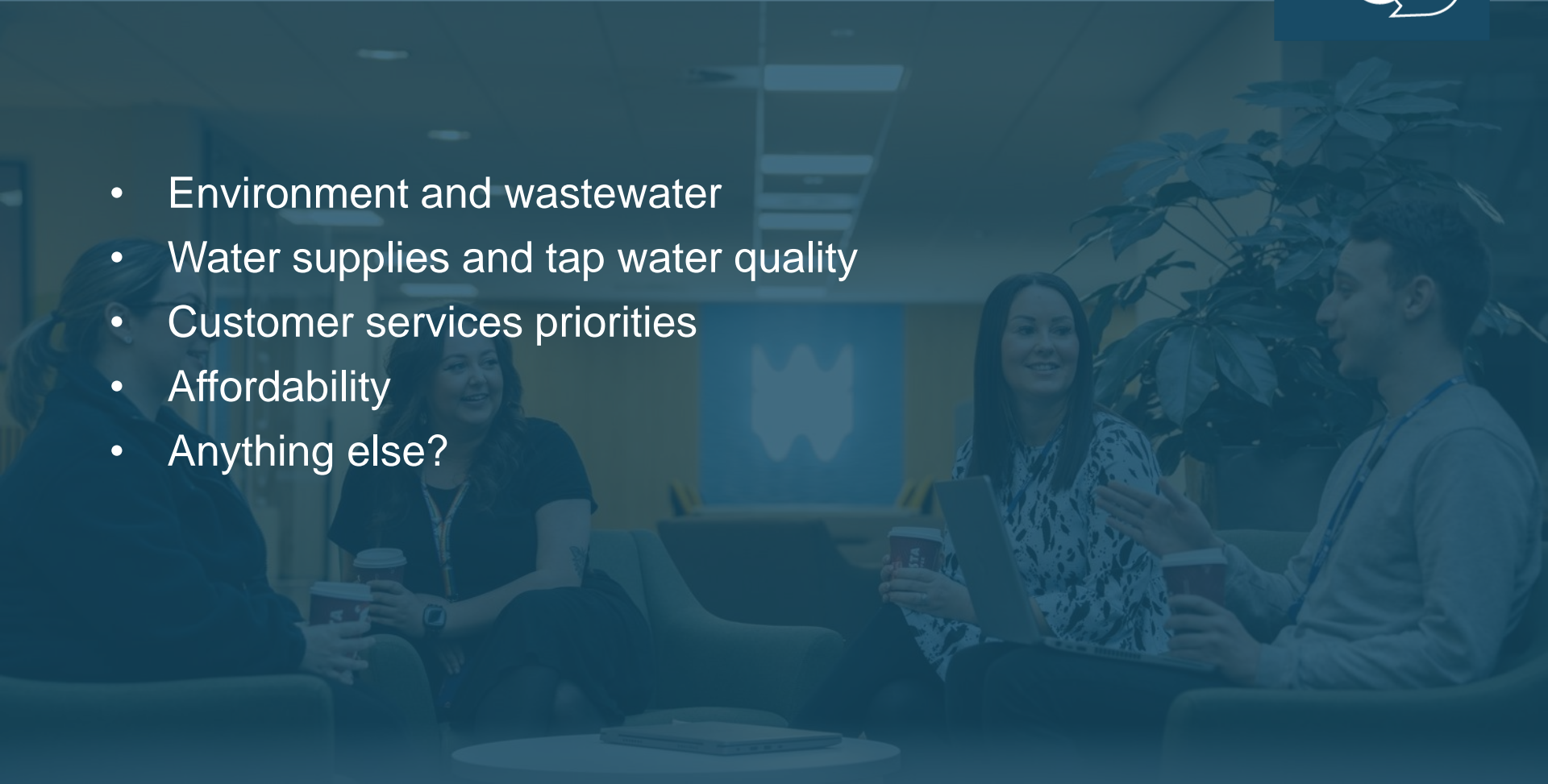
- Bill increase: 5% per year + inflation
- Providing meaningful financial support to support lowest income households



Largest level of support in the industry for customers who struggle to pay

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- The background of the slide is a dark blue-tinted photograph of four people sitting in a modern office lounge. They are engaged in a conversation, with some holding coffee cups and a laptop. The scene is dimly lit, with soft light coming from the background.
1. Major step up in investment to meet long-term challenges and improve the environment
 2. Increase in bills in time of financial difficulty for many, with social tariffs to support those who struggle to pay
 3. Avoid storing up problems for future generations

- Environment and wastewater
- Water supplies and tap water quality
- Customer services priorities
- Affordability
- Anything else?





Cwestiynau Questions





Diolch
Thank you

The text 'Diolch' and 'Thank you' is displayed in a large, white, sans-serif font, stacked vertically on the left side of the image.