

Statement of significant changes

2025-26 Final Wholesale Non-Household Charges

Wholesale charges for the majority of non-household customers (who are metered) will rise by more than the level of inflation next year. You can read more about [why bills are changing](#) further on in this document.

Illustrative bills – wholesale non-household

Customers will see different bill changes depending on whether they are metered or unmetered and the amount of water they use. Illustrative bill changes for a range of customers are set out below.

Wholesale bills for typical customers (all areas except Chester)

Wholesale	24-25 Water	Waste	Total	25-26 Water	Waste	Total	Incr %	£ per month
<i>Unmetered</i>								
Low	£246	£246	£493	£345	£236	£581	17.9%	+£7.25
Average	£301	£296	£597	£421	£282	£703	17.8%	+£8.75
High	£342	£333	£675	£478	£317	£795	17.8%	+£10.00
<i>Metered</i>								
V Small (60m3)	£137	£222	£358	£185	£218	£403	12.5%	+£3.75
Small (120m3)	£319	£345	£664	£446	£361	£807	21.5%	+£12.00
1,000m3	£1,847	£1,566	£3,412	£2,636	£1,719	£4,355	27.6%	+£78.50
5,000m3	£9,140	£8,410	£17,549	£13,087	£9,089	£22,177	26.4%	+£385.50
25,000m3	£40,985	£33,110	£74,095	£60,164	£37,587	£97,751	31.9%	+£1,971
75,000m3	£107,148	£108,087	£215,236	£159,506	£121,355	£280,860	30.5%	+£5,469
<i>Trade effluent</i>								
Small (120m3)	£319	£387	£706	£446	£420	£866	22.7%	+£13.25
1,000m3	£1,847	£5,894	£7,740	£2,636	£7,241	£9,878	27.6%	+£178.00
5,000m3	£9,140	£5,894	£15,033	£13,087	£7,241	£20,328	35.2%	+£441.25
25,000m3	£40,985	£28,649	£69,635	£60,164	£35,428	£95,592	37.3%	+£2,163
<i>Band T</i>								
1,000m3	£1,847	£2,001	£3,847	£2,636	£2,265	£4,902	27.4%	+£88.00
5,000m3	£9,140	£6,941	£16,080	£13,087	£7,967	£21,054	30.9%	+£414.50

Note that these are all **wholesale bills** for retailers. Final bills for customers will depend on retailer charges.

We also provide water services in the Chester area. We don't provide sewerage services there, so the wastewater charges for these customers will be set by either Dŵr Cymru Welsh Water (DCWW) or United Utilities. We've estimated overall bills including DCWW wastewater bills because they supply the majority of Chester customers.

Wholesale¹ bills for typical customers in Chester area

Wholesale ¹	24-25 Water	Waste ¹	Total	24-25 Water	Waste ¹	Total	Incr %	£ per month
<i>Unmetered</i>								
Low	£144	£290	£434	£201	£361	£561	29.4%	+£10.75
Average	£249	£345	£594	£348	£433	£781	31.4%	+£15.50
High	£319	£403	£721	£447	£507	£954	32.2%	+£19.25
<i>Metered</i>								
V Small (60m3)	£129	£247	£377	£173	£294	£466	23.8%	+£7.50
Small (160m3)	£299	£461	£760	£413	£564	£977	28.5%	+£18.00
1,000m3	£1,723	£2,463	£4,186	£2,431	£3,085	£5,516	31.8%	+£110.75
5,000m3	£8,520	£11,366	£19,885	£12,063	£14,290	£26,353	32.5%	+£539.00
25,000m3	£42,414	£54,180	£96,593	£60,125	£68,276	£128,401	32.9%	+£2,651
75,000m3	£107,148	£162,233	£269,381	£159,506	£202,317	£361,823	34.3%	+£7,704

1. Estimate based on information from Dŵr Cymru.

Dŵr Cymru sewerage bills for 2025-26 are estimates because we didn't have their final charges at the time of publication. We've worked with them to understand the likely changes and adjusted for the actual value of inflation.

Why bills are changing

Each year the revenue controls set by [Ofwat](#) (our regulator) allow us to recover a fixed amount of revenue from our customers. For most of our charges this is modified by inflation, adjustments for performance and any over or under-recovery in previous years.

The level of charges is also influenced by volume. When we set our charges, we divide our allowed revenue over the properties we serve and the volume we expect them to use. When the volume increases, this lowers our average charges and if it falls then we need to increase charges to raise the same level of revenue.

If business demand falls, this leads to a lower contribution to the cost of running the services we provide and upward pressure on bills for all customers. We also expect some household and business customers to move to lower tariffs, which reduces their contribution. This will inevitably lead to increases for customers that continue to be billed in the same way as they were last year.

The factors affecting a **combined wholesale bill** for a typical customer are:

- Inflation added **+3.5%** to wholesale bills
- [Ofwat](#) revenue controls allowed for an effective real increase of **+14.2%**.
- **Volume** and other changes increased charges by **+3.8%**.

The increases will deliver huge investment in our service over the next five years (2025-2030) – particularly, improving our environment. You can read more about what this is delivering for customers and the environment [here](#).

Stakeholder views

As part of our “customer tracker”, we survey a group of customers to understand the level of increase that might have a significant impact on their household finances. Around 60% of household customers thought that an increase of £5 per month would have some impact on their household finances and that this would have a big effect on around 20% of households. This would equate to an increase of about 13% on the average household bill. There is no average non-household customer, but the largest group are small businesses with usage similar to metered households.

Our illustrative bills above show that increase for small business customers will be significant next year. This is necessary in order to deliver on [customer priorities for improvement](#) to service and the environment. We talked to households and business customers across our region when we were putting together our plans. When we explained what our plan would deliver, customers generally thought that our [plan was acceptable](#) and focussed on the right things.

Some customers only receive one of their wholesale services from us, with water or wastewater being provided by another company. The largest group of these get their water from South Staffs. We’ve worked with them to understand the combined impact on customers that have wholesale water supplies from them. Our assessment of the impact on South Staffs bills is [here](#). We’ve also worked with Dŵr Cymru to understand the combined bill impact on water-only customers in [Chester](#).

We showed a draft view of our charges to the Consumer Council for Water ([CCW](#)), who represent the views of water customers. Given the level of change in bills for most customers, CCW was concerned about the level of increases for customers who might struggle to pay. We discussed the profile of [ODI](#) rewards we have applied within our charges this year in light of our investment proposals for the years after 2025 (you can read more about this in our [Business Plan](#)). CCW believe that customers prefer a more stable bill profile without sharp increases from one year to the next, and this was supported by our own customer research.

Our final charges are very similar to the draft view from September but have increased a little due to a lower estimate of non-household volume and revenue. Our retail account managers engage with retailers directly and we talk to retailers at a national level regarding the way our charges are structured in CMOS¹.

Managing changes in wholesale bills

Where we introduce new charges, or different forms of charging, we do this gradually:

Unmetered customers

We are gradually reducing the proportion of the unmetered customers bill that is linked to the [Rateable Value](#) (RV) of their property and replacing this with fixed charges. There are few non-household customers that are still charged on the basis of RV and the wholesale unit rate is the same as for residential properties. Nonhouseholds charged in this way can ask for a metered charge and where it is not practical to install a meter they can opt for an assessed charge.

There are no changes to the structure of our wholesale charges this year.

¹ Central Market Operating System

Illustrative wholesale bills for sewerage only customers

The largest group of sewerage only customers in our region receive wholesale water from South Staffs. While we don't know what their final charges will be at the time of publication, we have estimated a combined bill impact based on their indicative charges.

Estimated wholesale bills for typical South Staffs customers

Wholesale	24-25 Water ¹	Waste	Total	25-26 Water ¹	Waste	Total	Incr %	£ per month
<i>Unmetered</i>								
Low	£130	£246	£376	£149	£236	£386	2.6%	+£0.75
Average	£164	£296	£459	£188	£282	£471	2.4%	+£1.00
High	£189	£333	£523	£218	£317	£535	2.3%	+£1.00
<i>Metered</i>								
V Small (60m3)	£103	£222	£325	£118	£218	£336	3.5%	+£1.00
Small (120m3)	£232	£345	£577	£266	£361	£627	8.6%	+£4.25
1,000m3	£1,314	£1,566	£2,880	£1,511	£1,719	£3,230	12.2%	+£29.25
5,000m3	£6,467	£8,410	£14,877	£7,443	£9,089	£16,532	11.1%	+£138.00
25,000m3	£32,233	£33,110	£65,343	£37,101	£37,587	£74,689	14.3%	+£778.75
75,000m3	£93,872	£108,087	£201,960	£107,934	£121,355	£229,289	13.5%	+£2,278

1. Estimate based on information from South Staffordshire Water

Note that these are all **wholesale bills** for retailers. Final bills for customers will depend on retailer charges.

There are smaller numbers of customers at the borders of our region that receive wholesale sewerage services from us and wholesale water services from Anglian Water, Dŵr Cymru Welsh Water, Thames Water or Yorkshire Water. While we have not estimated the wholesale bill changes for all customers, given the level of inflation we would expect a similar impact.

Glossary

Rateable Value

A property's rateable value was originally assessed by the District Valuer on behalf of the Inland Revenue. The value was based on the size of the property, the number of rooms, the amenities available and the overall location. No new rateable values have been set since March 1990 following the introduction of the Poll Tax (since replaced by Council Tax). Water companies are still legally entitled to use rateable value as the basis for charges, but we are not able to use Council Tax banding. New properties built since 1990 do not have a rateable value and are metered.

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