EurEau

Europe's Water in Figures

2025
SNAPSHOT

Snapshot

The European Water Resilience Strategy published in June 2025, sets out a pathway to restore the water cycle, build a water-smart economy, and secure clean and affordable water services.

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.

EurEau represents the drinking water and wastewater services from 33 European countries. Over the past months, we have asked 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.

This snapshot, which we will update annually, is also an excerpt from the new edition of our broader statistical survey, Europe's Water in Figures, which is conducted every five years or so[1].

1 Data are not adjusted for inflation.

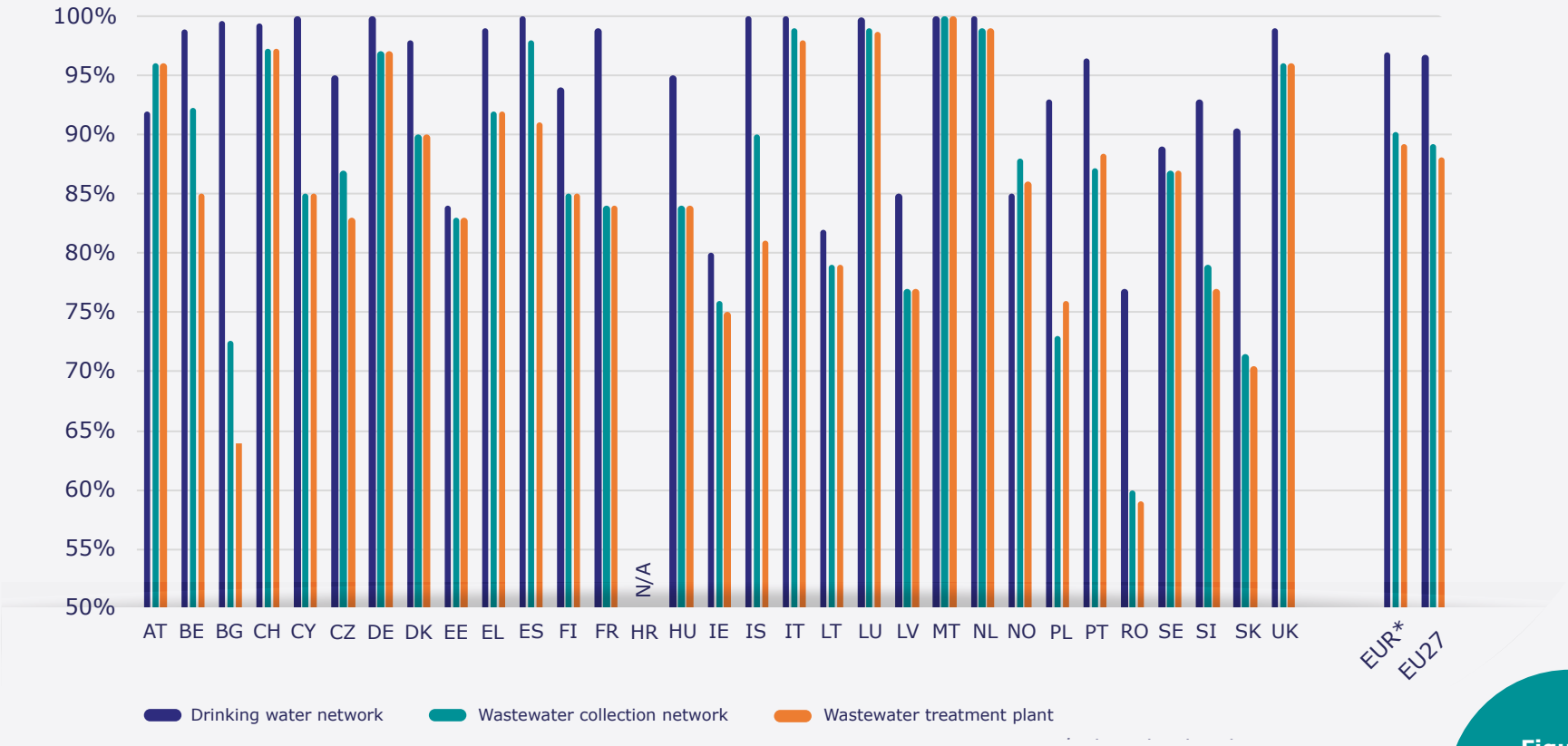
Sector outlook

Top challenges facing the water sector

Infrastructure renewal tops the list of concerns for the water sector in this year's survey of EurEau members. In a context marked by a wave of new requirements for the sector, no fewer than 12 countries named the need to invest in the upgrade of ageing infrastructure as one of their top three challenges. This is a clear indication of the growing investment backlog many operators are facing and confirms the annual investment gap of €23 billion identified by the Water Resilience Strategy. Other organisational challenges also place high on the list, with seven members mentioning financing and staffing.

Members also expressed concern about the availability and quality of water resources (10 and 8 mentions, respectively) with several naming PFAS, pesticides and micropollutants as particular challenges.

Coverage

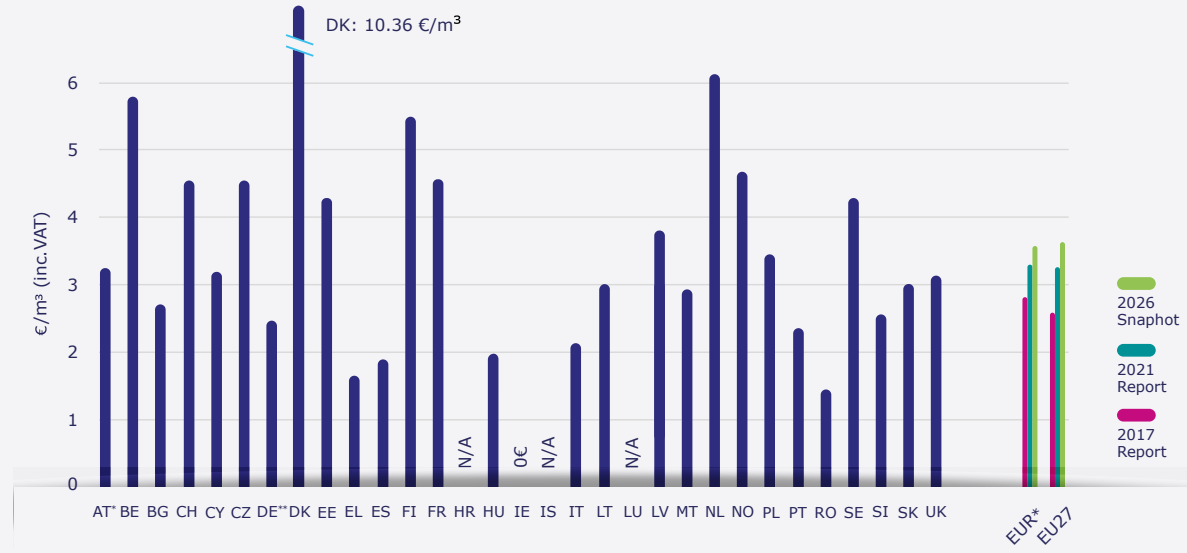


For ease of reading (and because no country reported rates below 50%) this graph displays only the upper half of the percentage scale.

Figure 1 Population connected to a public system

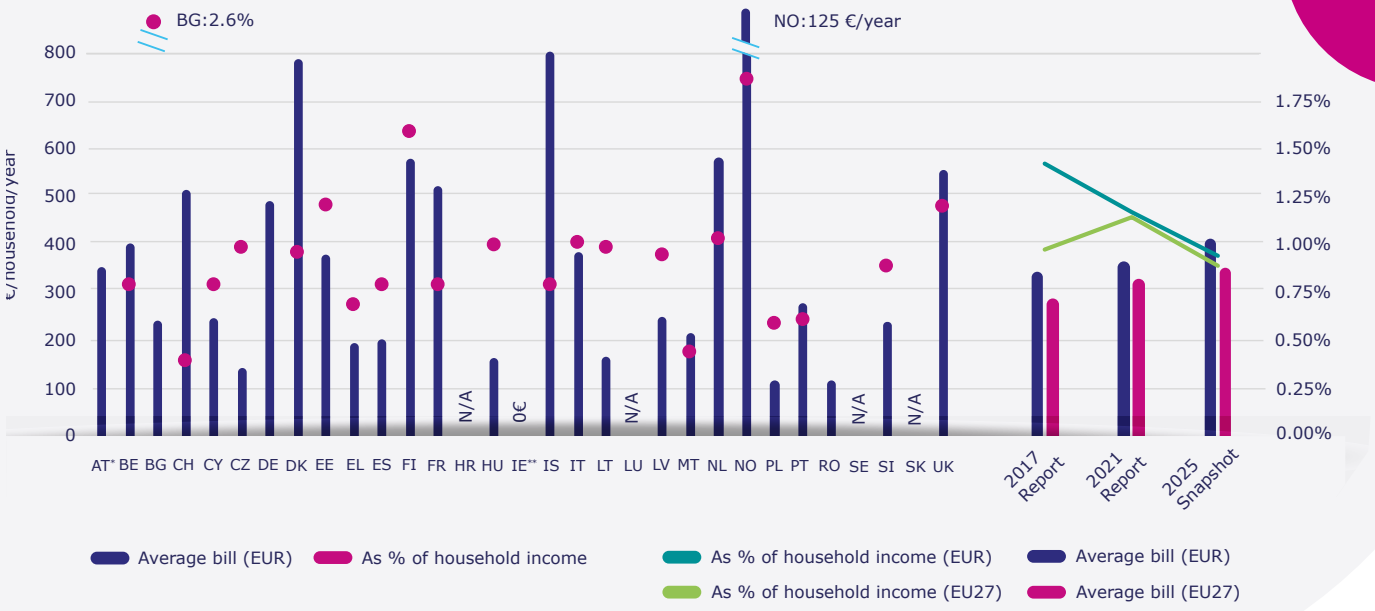
Figure 1 shows the percentage of the population in each country that is connected to water services. In line with the 6th Sustainable Development Goal, water service providers are committed to connecting the highest possible share of citizens to their networks. As the graph shows, this may not be economically feasible for certain remote or isolated dwellings. On the other hand, some countries still need to step up their efforts when it comes to wastewater collection and treatment.

Residential water tariffs



*Wastewater only **drinking water only

Figure 2
Average water tariff for residential consumption



*There are no residential water charges in Ireland (businesses do get charged as of a few years ago.

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 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. Customers may also face some other costs, such as connection fees, in addition to the tariff.[1]

Annual revenue from water bills

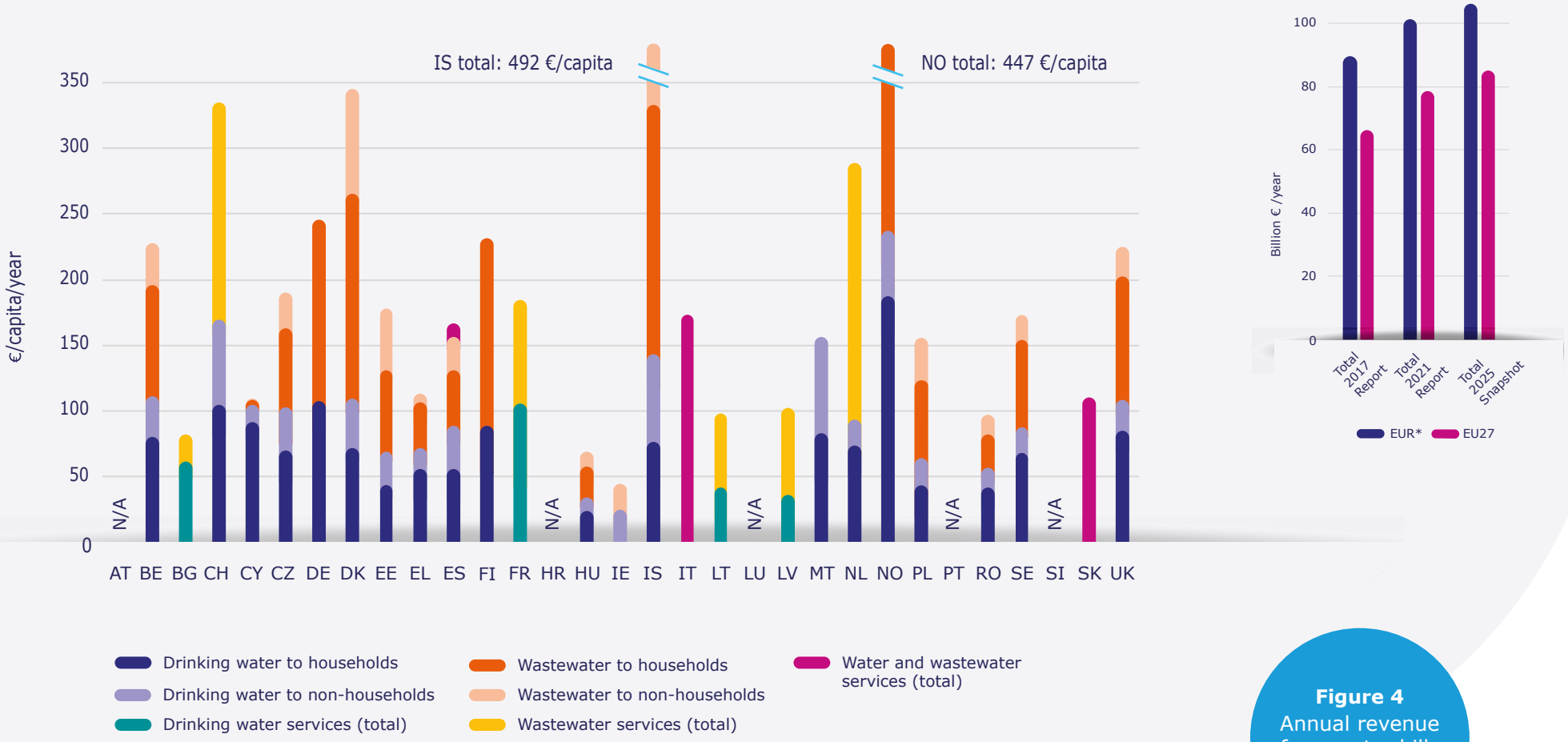


Figure 4
Annual revenue from water bills (VAT excluded)

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). As can be expected, some of the highest figures correspond to countries with high average household incomes (not shown).

Investments

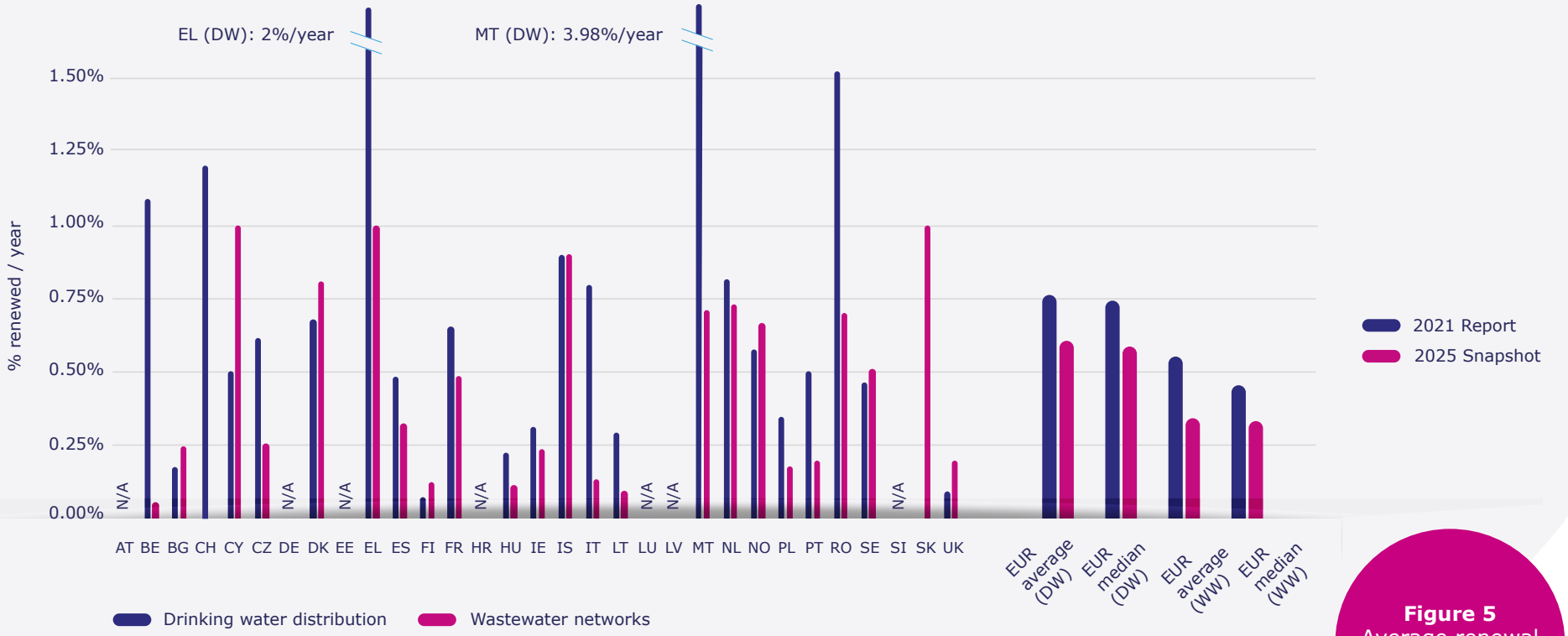


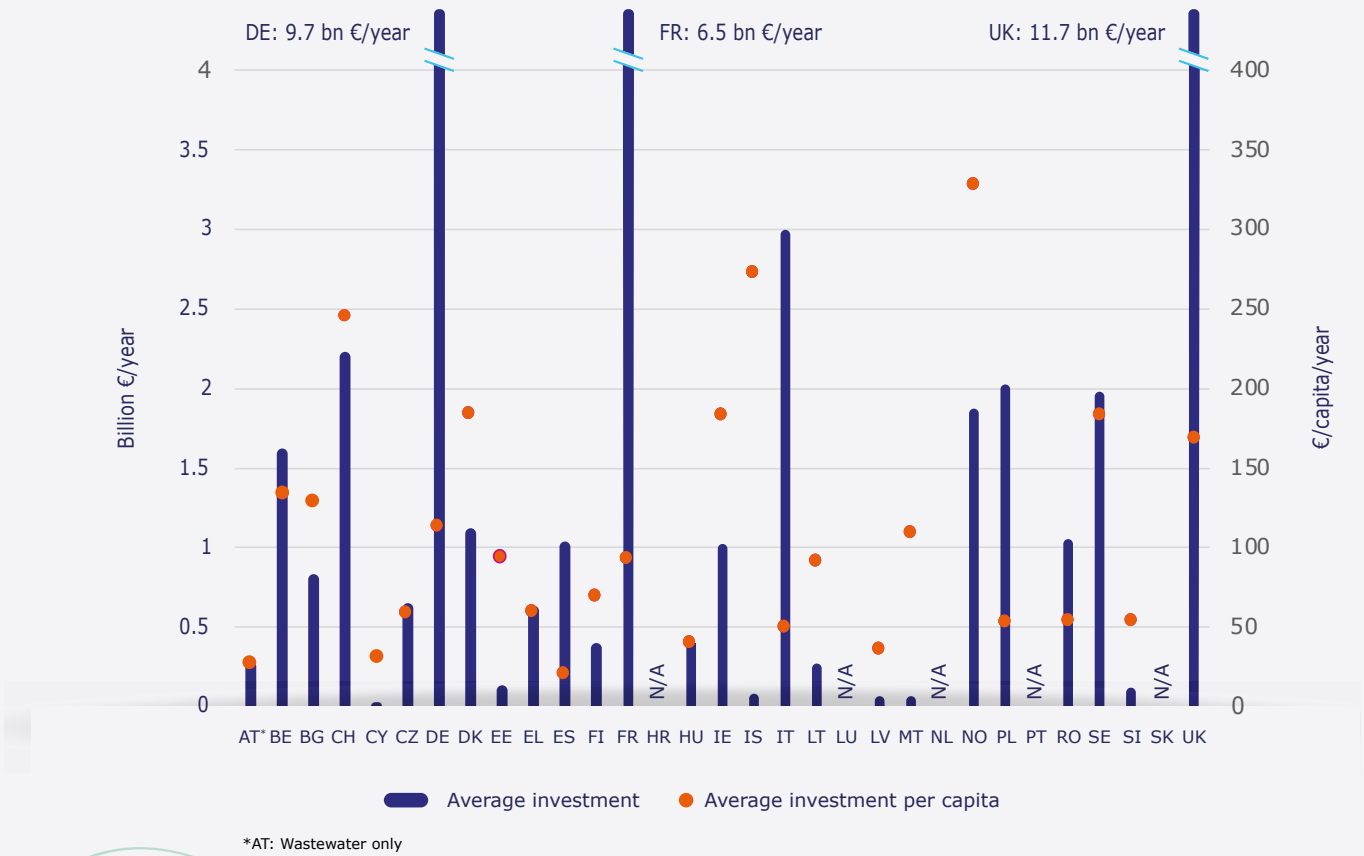
Figure 5
Average renewal rate of water networks

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 orange). These rates can vary significantly year-on-year based on budget decisions, typically made at the local level.

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 have decreased on average compared to our 2021 statistical report.

It should be noted that this may not reflect the level of planned investment.



*AT: Wastewater only

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-hand axis, in billion € per year) while dots show the level of investment per capita (right-hand axis, in € per capita per year).

While total investment has risen since our last report, this increase can be largely attributed to the steep inflation of construction costs in recent years. The resulting level of investment remains far short of the sector's needs, and should be contrasted with the slower revenue growth shown in Figure 4.

Figure 6
Annual average investment (over five years)

Drinking water supply

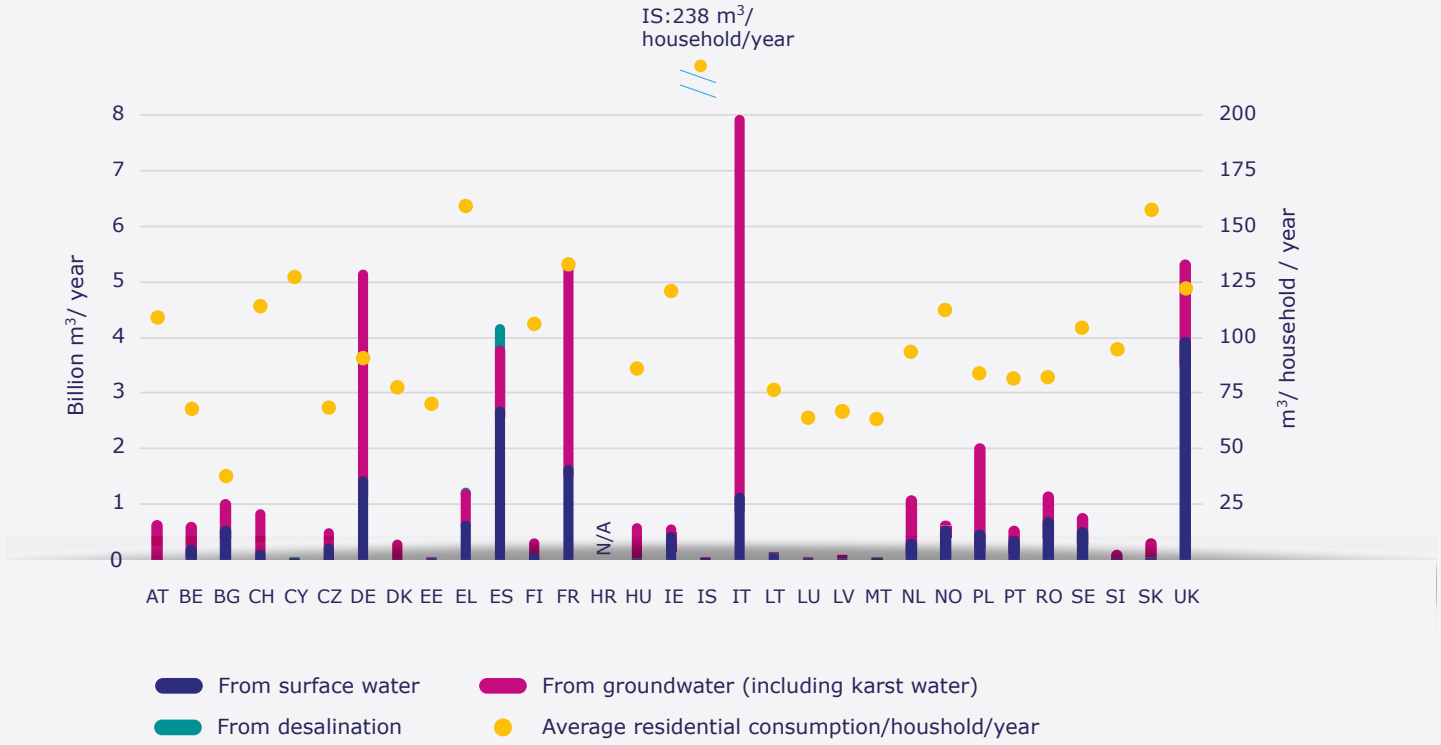
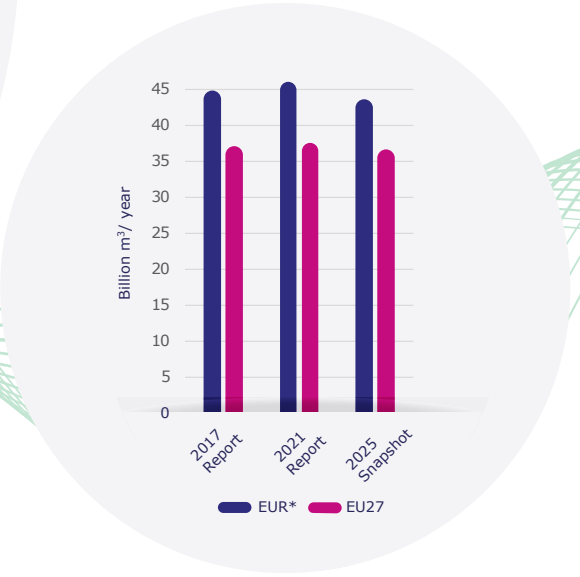


Figure 7 This figure presents the volume of drinking water produced in each country, split by water source, as well as the average household consumption per year on the secondary axis.

Figure 7
Water production and average household consumption



Linear leakage index

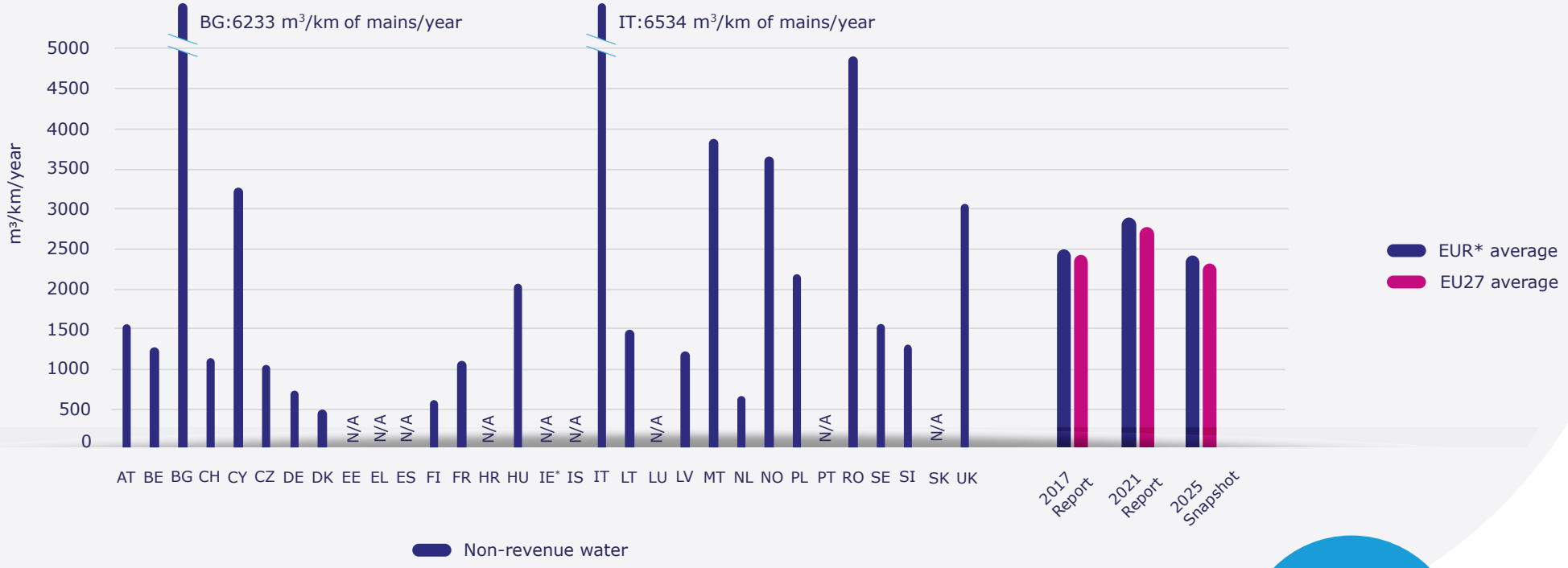


Figure 8
Linear leakage index

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 to the European Commission 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, water used for maintenance, street cleaning, public buildings, fire-fighting, etc.

Wastewater treatment

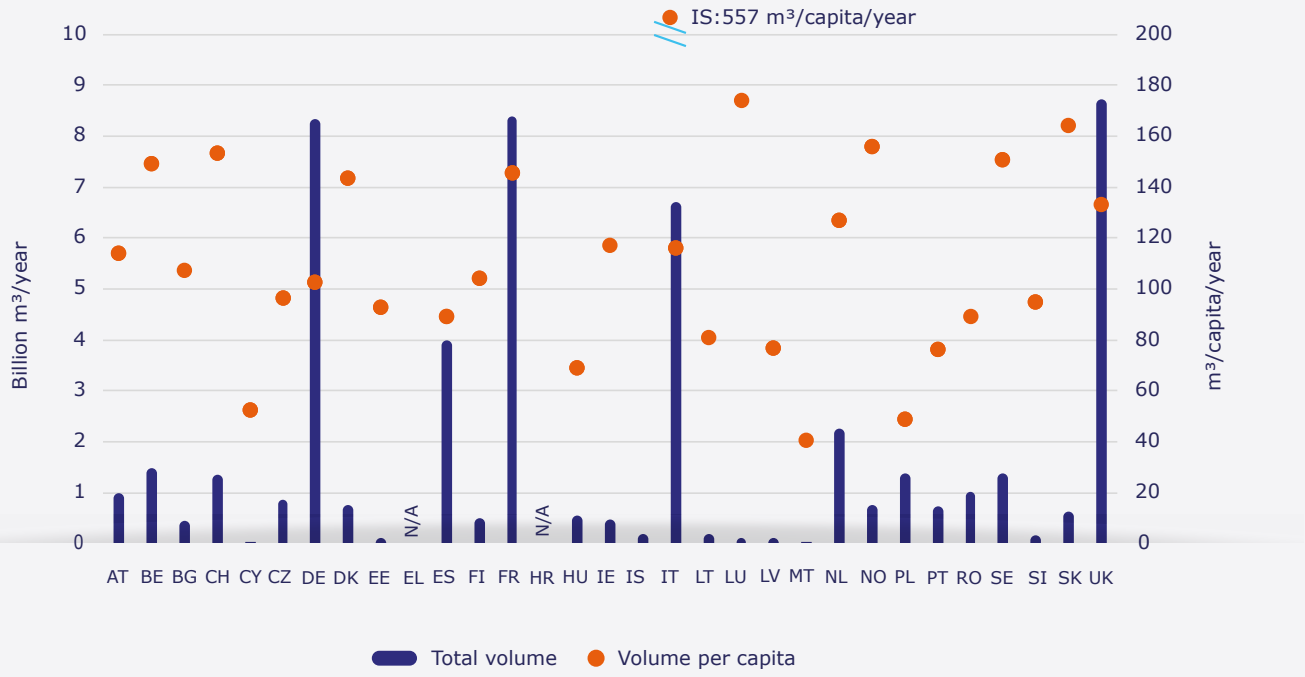


Figure 9 shows the volume of wastewater treated annually in each country, including the volume of rainwater entering urban wastewater treatment plants. For ease of comparison, dots show this volume when divided by the population connected to a WWTP.

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 9
Volume of wastewater treated

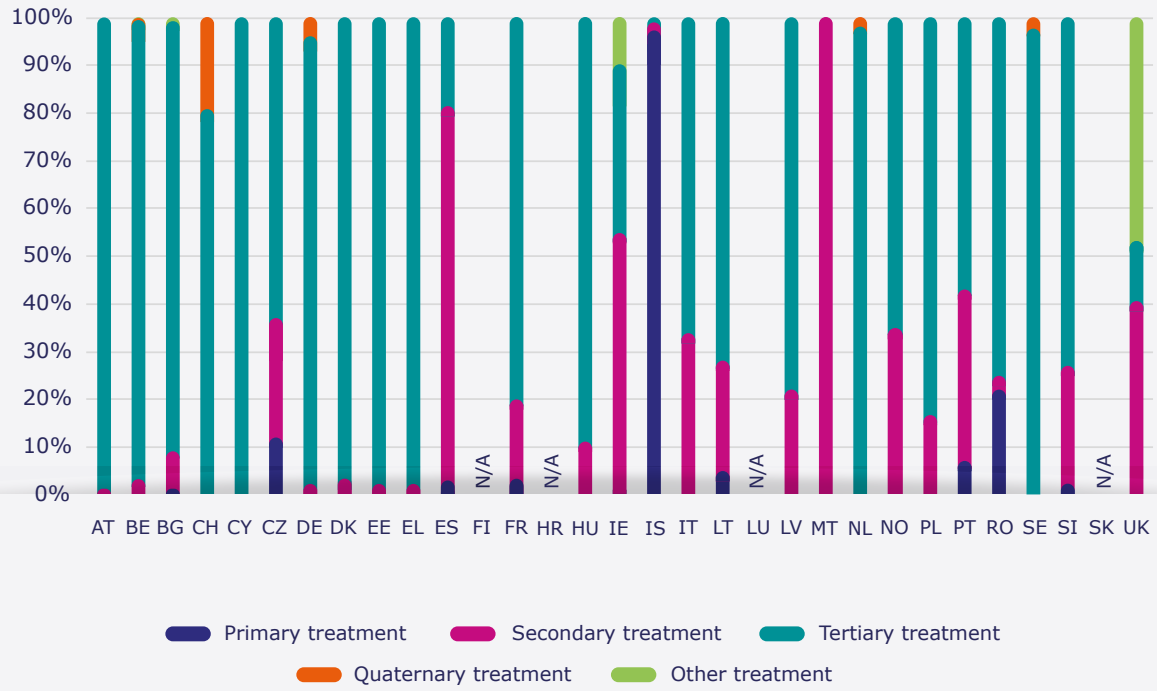


Figure 10 This figure examines the different levels of treatment applied to wastewater in each country. In nearly all responding countries, more than 50% of treated wastewater is treated to at least tertiary level. Micropollutant removal, which will gradually become a requirement for certain treatment 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.

Figure 10 Wastewater treatment levels

Energy

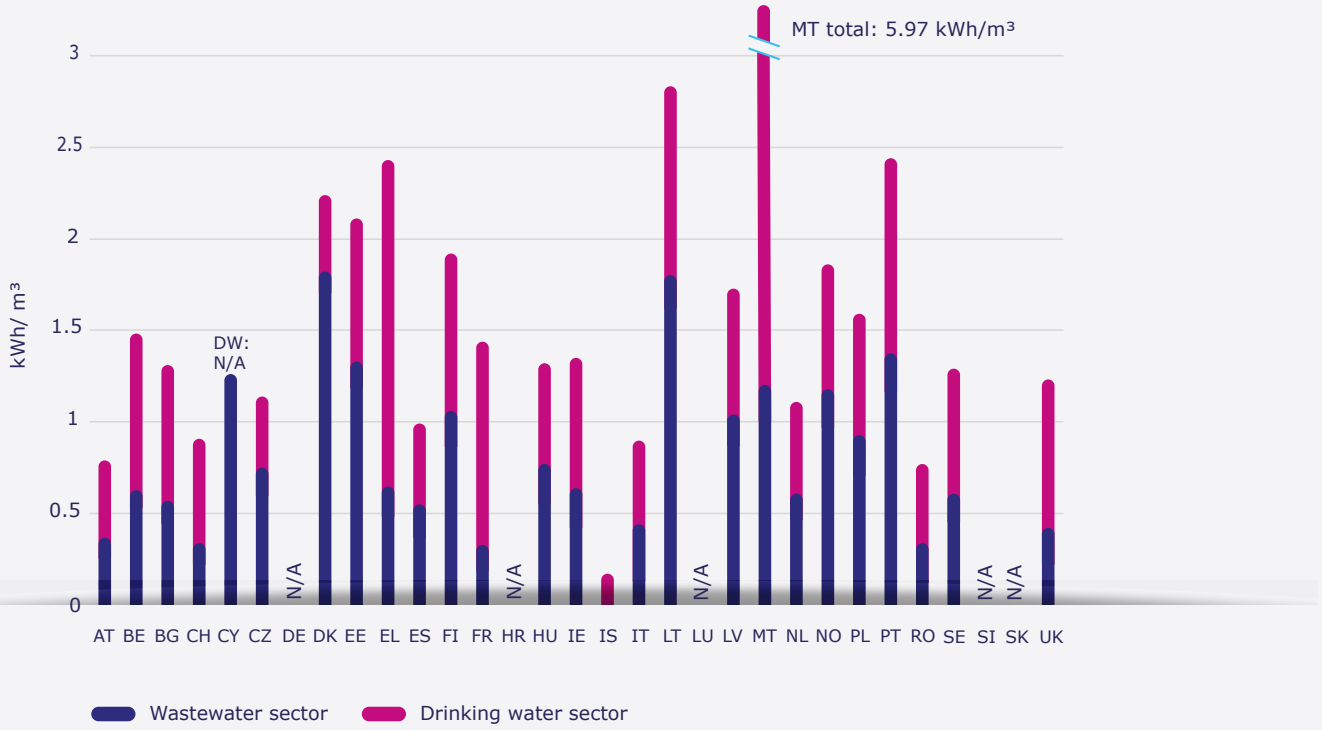


Figure 11 shows the gross energy intensity of water services in each country, in kWh per m³ of water sold. The data here do not account for the production of renewable energy by water services, which can cover some (or in rare cases all) of their energy needs.

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. The data shown here are national averages.

Figure 11
Energy consumption (gross)

Water reuse

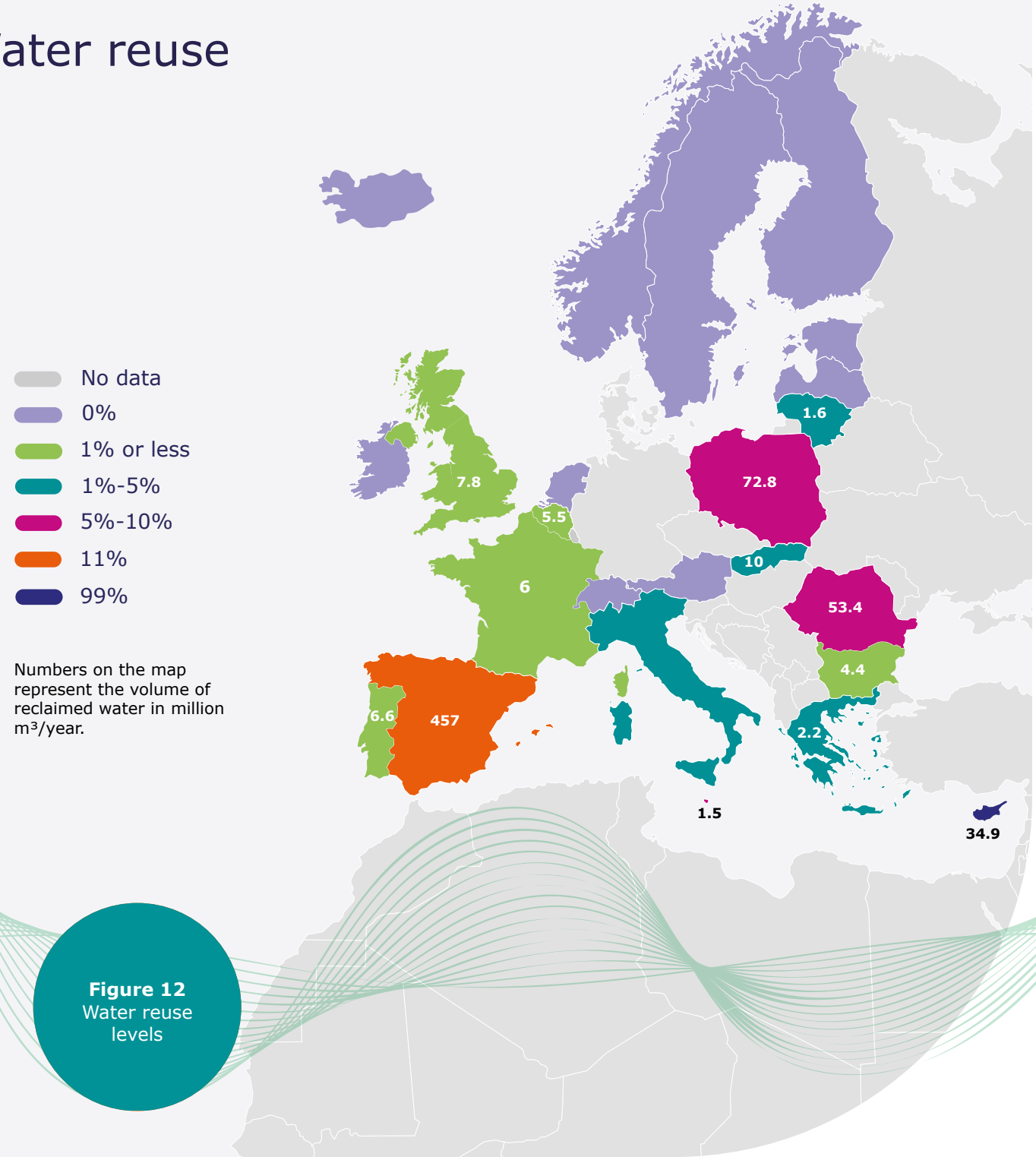


Figure 12
Water reuse levels

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. It shows that Mediterranean countries are most advanced, driven as they are by declining annual precipitation patterns and depleting water reserves.

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