



PUBLIC UTILITIES REGULATORY COMMISSION (PURC)

Urban Water Sector Performance at a Glance

2026 Quarter 1

September 2026

OVERVIEW

This report provides a high-level assessment of the performance of Ghana's urban water sector during the first quarter of 2026, focusing on three key operational indicators: water production, water sales, and non-revenue water (NRW). It also compares the performance of Ghana Water Limited's (GWL) thirteen operational regions against the applicable 43% regulatory benchmark for NRW. The analysis is based on quarterly operational performance data submitted by GWL to the Commission.

1. GHANA URBAN WATER SUPPLY DASHBOARD

INDICATOR	Q1 2026 PERFORMANCE	CHANGE FROM Q1 2025/BENCHMARK
 WATER PRODUCED	87.88 million m ³	 1.0% vs Q1 2025
 WATER SOLD	44.68 million m ³	 3.7% vs Q1 2025
 NRW	43% benchmark	 3 of 13 regions met benchmark
 GWL NRW PERFORMANCE	49.2%	 6.2 percentage points above benchmark

Q1 Performance Highlights

- National water production increased by **1.0%**, from **86.97 million m³** in Q1 2025 to **87.88 million m³** in Q1 2026
- Water sold increased by **3.7%**, from **43.10 million m³** to **44.68 million m³**.
- The faster growth in water sales relative to production suggests an improvement in the proportion of produced water being converted into billed/sold water.
- NWR performance, however, remains a significant concern. Only three of the 13 operational regions achieved the regulatory benchmark of **43%** or lower, while the remaining 10 regions exceeded the benchmark. GWL's NRW performance of **49.2%** is **6.2** percentage points above the benchmark.

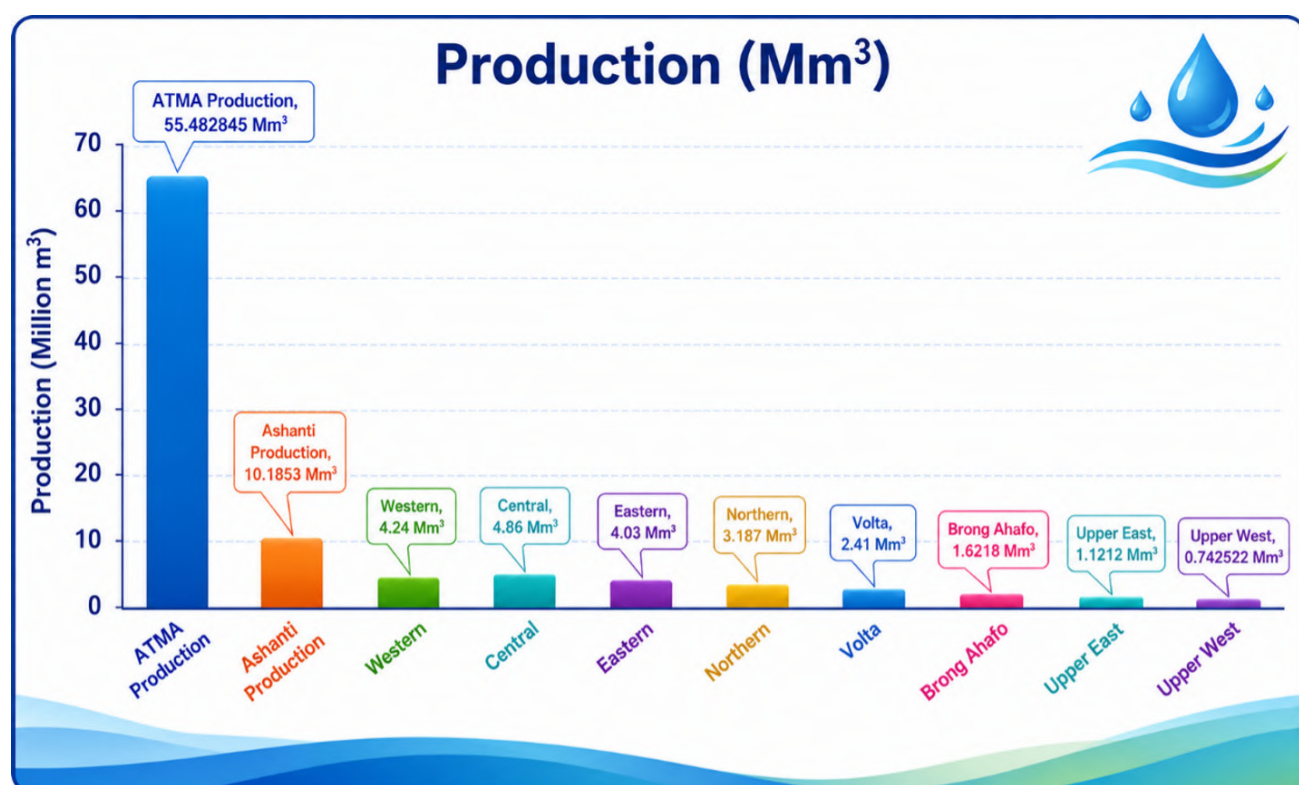
2. WATER PRODUCTION PERFORMANCE

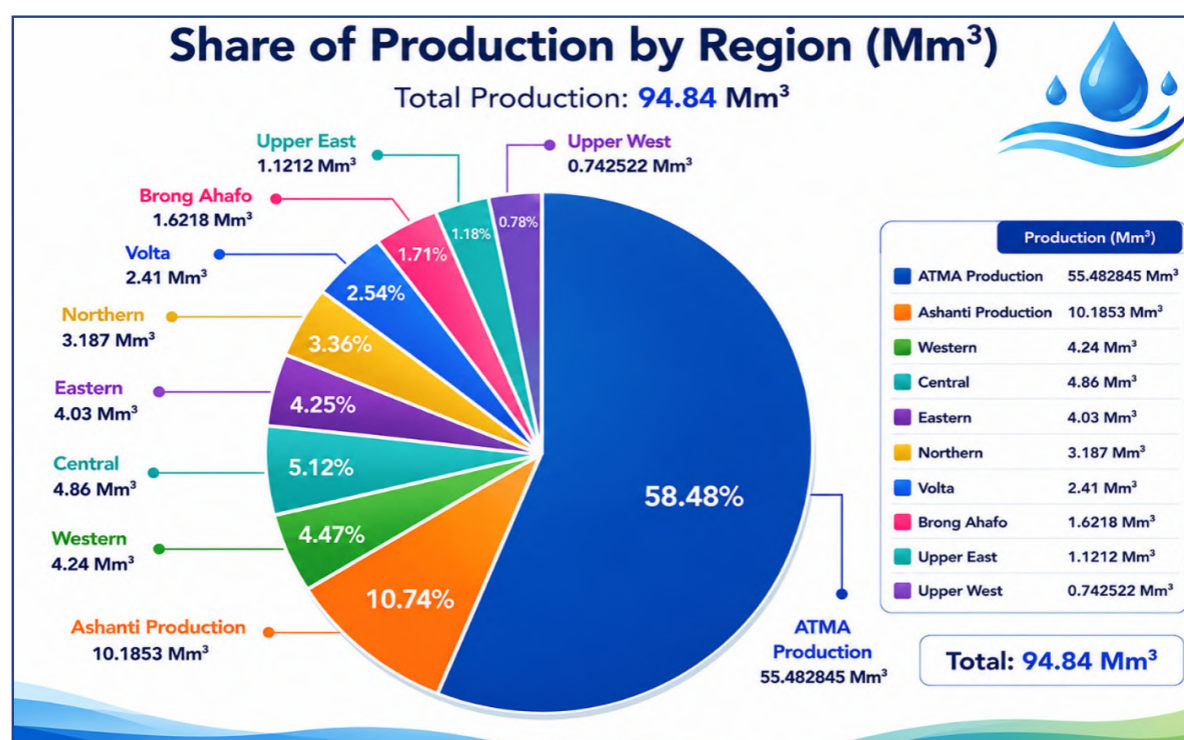
Total national water production during Q1 2026 was approximately 87.88 million m³. Production was heavily concentrated in the Accra-Tema Metropolitan Area (ATMA), which accounted for 55.48 million m³, followed by Ashanti with 10.19 million m³.

Major Production Areas

Rank		Production Area/Region	Q1 2026 Production
1		ATMA Production	55.48 million m ³
2		Ashanti Production	10.19 million m ³
3		Central	4.86 million m ³
4		Western	4.24 million m ³
5		Eastern	4.03 million m ³
6		Northern	3.19 million m ³
7		Volta	2.41 million m ³
8		Brong Ahafo	1.62 million m ³
9		Upper East	1.12 million m ³
10		Upper West	0.74 million m ³

The concentration of production within the ATMA system means that improvements in operational efficiency, distribution management and loss reduction within the Accra-Tema system could have a significant effect on GWL's overall performance.



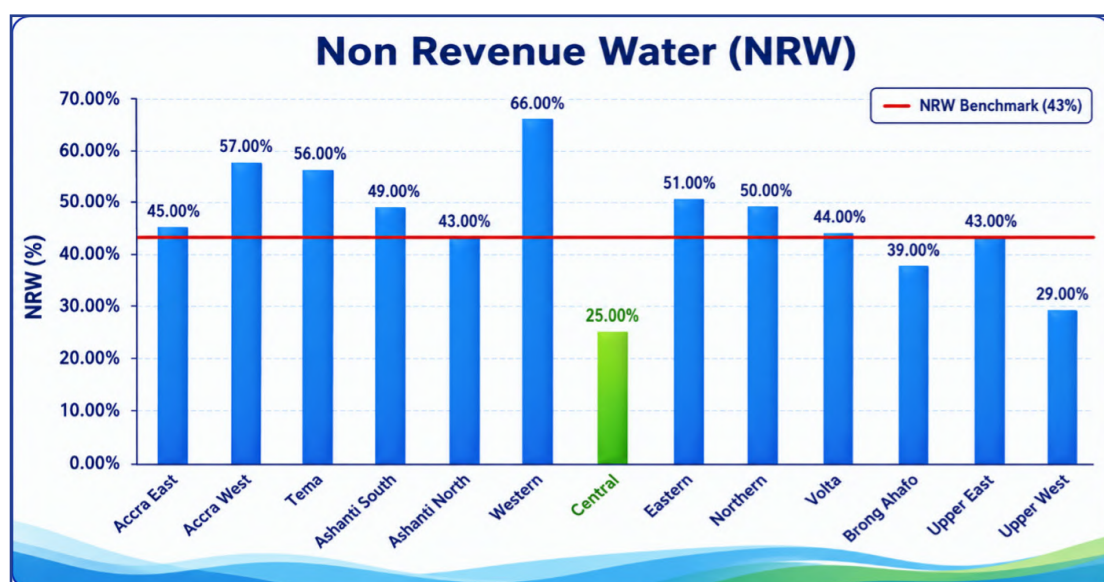


3. NON-REVENUE WATER PERFORMANCE AGAINST REGULATORY BENCHMARK

NRW remains the most significant operational performance challenge identified in Q1 2026. Against the regulatory benchmark of 43%, only three of the 13 operational regions achieved compliance.

Regional NRW Performance

Rank	Region	NRW	Benchmark Status	Variance from Benchmark
1	Central	25.4%	✓ Meets Benchmark	17.6 pp better
2	Upper West	29.6%	✓ Meets Benchmark	13.4 pp better
3	Brong Ahafo	39.4%	✓ Meets Benchmark	3.6 pp better
4	Ashanti North	43.2%	✗ Exceeds Benchmark	0.2 pp
5	Upper East	43.8%	✗ Exceeds Benchmark	0.8 pp
6	Volta	44.1%	✗ Exceeds Benchmark	1.1 pp
7	Accra East	45.0%	✗ Exceeds Benchmark	2.0 pp
8	Ashanti South	49.0%	✗ Exceeds Benchmark	6.0 pp
9	Northern	50.1%	✗ Exceeds Benchmark	7.1 pp
10	Eastern	51.0%	✗ Exceeds Benchmark	8.0 pp
11	Tema	56.8%	✗ Exceeds Benchmark	13.8 pp
12	Accra West	57.2%	✗ Exceeds Benchmark	14.2 pp
13	Western	66.1%	✗ Exceeds Benchmark	23.1 pp



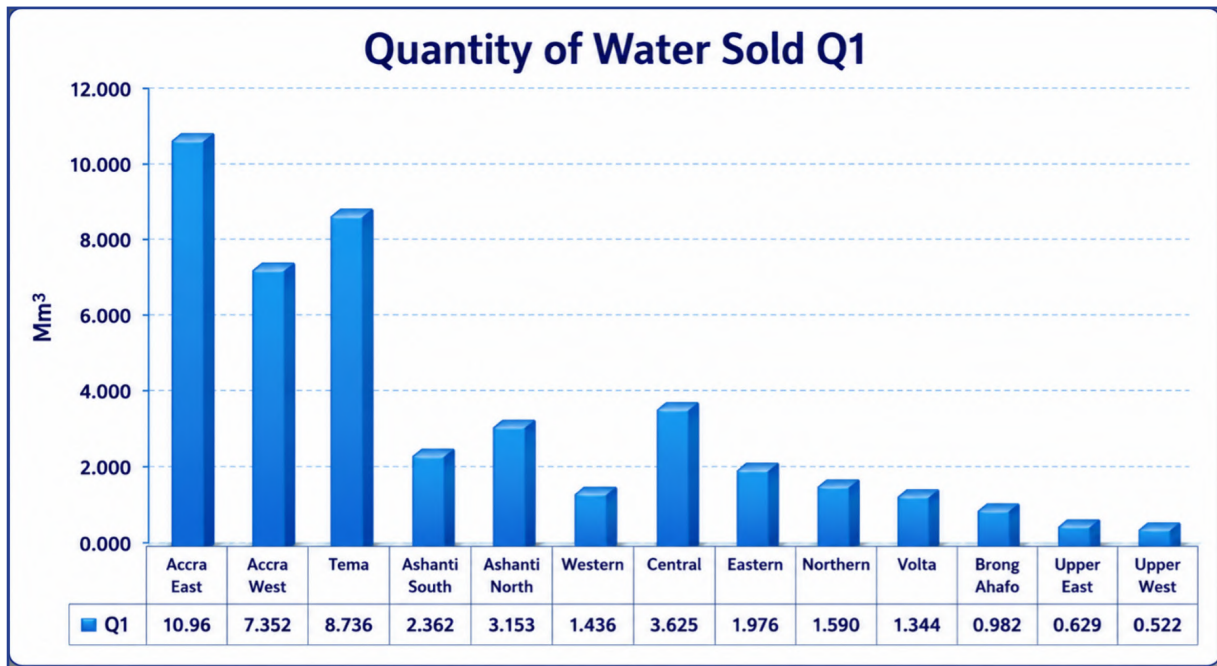
- * The regional NRW results present a mixed performance picture.
- * Central recorded the strongest performance at 25.4%, followed by Upper West at 29.6% and Brong Ahafo at 39.4%. These three regions were the only operational regions to meet the 43% regulatory benchmark.
- * The situation is more critical in Western, Accra West and Tema, where NRW stood at 66.1%, 57.2% and 56.8%, respectively. These regions exceeded the benchmark by 23.1, 14.2 and 13.8 percentage points, respectively, and therefore warrant priority loss-reduction interventions

4. WATER SOLD BY OPERATIONAL REGIONS

GWL reported total water sales of 44.68 million m³ during Q1 2026. Sales were concentrated in the three major metropolitan operational areas, with Accra East, Tema and Accra West accounting for the largest volumes.

Water Sales

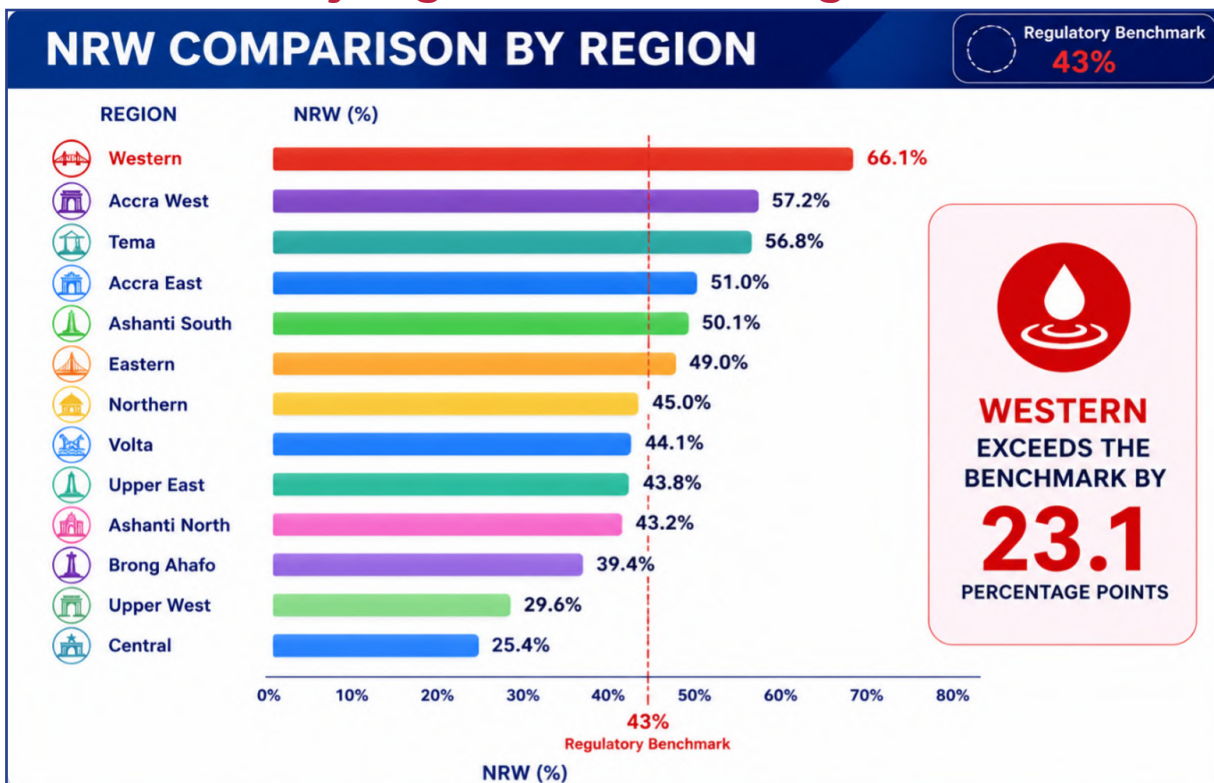
Rank	Region	Water Sold
1.	Accra East	10.97 million m ³
2.	Tema	8.74 million m ³
3.	Accra West	7.35 million m ³
4.	Central	3.63 million m ³
5.	Ashanti North	3.15 million m ³
6.	Ashanti South	2.36 million m ³
7.	Eastern	1.98 million m ³
8.	Northern	1.59 million m ³
9.	Western	1.44 million m ³
10.	Volta	1.34 million m ³
11.	Brong Ahafo	0.98 million m ³
12.	Upper East	0.63 million m ³
13.	Upper West	0.52 million m ³



- The concentration of water sales in Accra East, Tema and Accra West highlights the importance of these operational areas to GWL's overall commercial performance.
- At the same time, the relatively high NRW recorded in Tema and Accra West suggests significant potential for improving the efficiency of water delivery and increasing the proportion of produced water converted into sales.

5. MANAGEMENT ATTENTION AREAS

A. Critical Priority: High NRW Western Region



Western Region – 66.1% NRW

- Western recorded the highest NRW of all operational regions, exceeding the regulatory benchmark by 23.1 percentage points.
- The region should be prioritised for a comprehensive NRW reduction programme, including detailed water-balance assessment, leakage detection, metering interventions and investigation of commercial losses.

Accra West – 57.2% NRW

Accra West exceeded the benchmark by 14.2 percentage points. Given its significant contribution to national water sales, reducing NRW in this region could generate a particularly important improvement in overall operational and commercial efficiency.

Tema – 56.8% NRW

Tema exceeded the benchmark by 13.8 percentage points. Its combination of high-water sales and high NRW makes it a particularly important area for management intervention.

B. Immediate Improvement Opportunity

- Ashanti North, Upper East and Volta recorded NRW levels of 43.2%, 43.8% and 44.1%, respectively.
- These regions are close to the regulatory benchmark and should be considered priority areas for relatively focused corrective action.
- Potential interventions include:
 - » Intensifying leakage detection and repair;
 - » Improving meter accuracy and accelerating replacement of defective meters;
 - » Strengthening detection and regularisation of illegal connections;
 - » Improving billing and customer database accuracy; and
 - » Strengthening district-level water balance monitoring and reporting.

C. Sustaining Strong Performance

- Central, Upper West and Brong Ahafo were the only regions to meet the 43% NRW benchmark.
- Their performance should be reviewed to identify operational practices, systems and management approaches that could be replicated, where appropriate, in higher-loss regions.

6. KEY TAKEAWAYS

Production

- National water production increased by 1.0% to 87.88 million m³ in Q1 2026. However, production remains highly concentrated in the ATMA system, making efficiency improvements in this system particularly important to overall GWL performance.

Water Sales

- Water sold increased by 3.7% to 44.68 million m³, exceeding the growth in production. This represents a positive indication of improved conversion of production into billed/sold water.

NRW

- NRW remains the principal operational efficiency challenge. Only 3 of 13 operational regions met the 43% regulatory benchmark, while 10 regions exceeded it.

Priority Regions

- Western, Accra West and Tema recorded the largest deviations from the regulatory benchmark and should receive priority attention under NRW reduction initiatives.

Near-Term Improvement

- Ashanti North, Upper East and Volta are close to compliance and represent immediate opportunities for targeted interventions to bring NRW below the regulatory benchmark.



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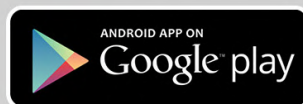
Service Charge (GHS):

Total NM Charge (GHS):

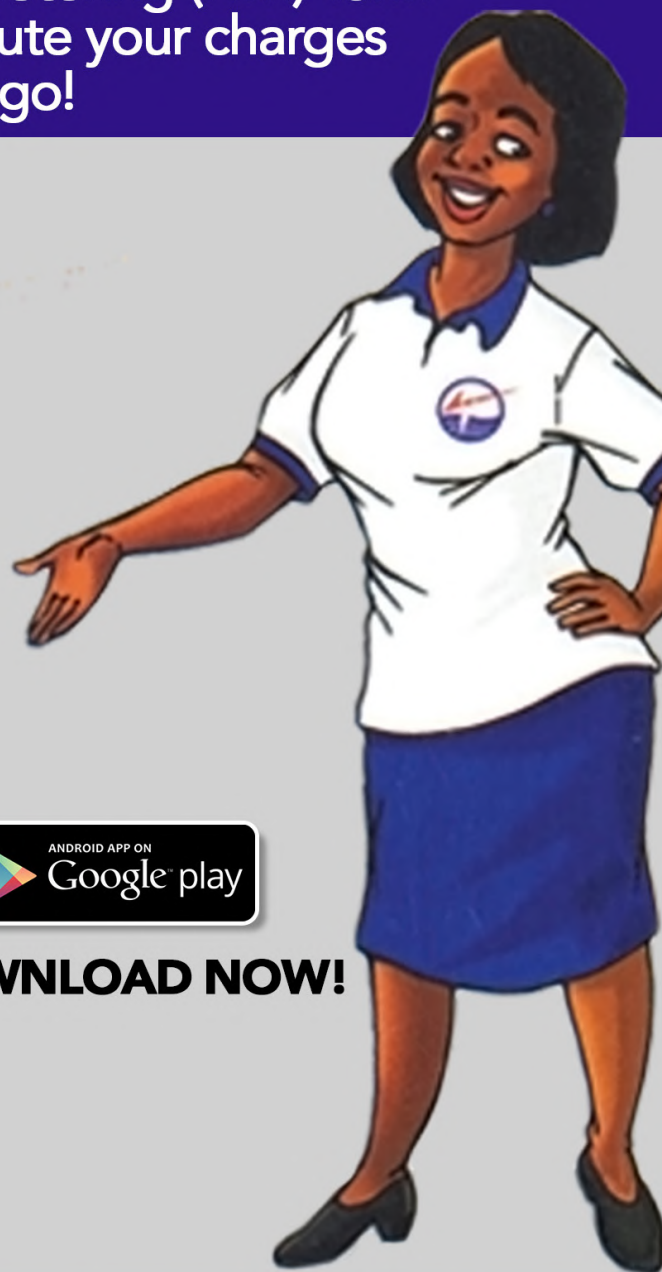
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