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TA 11.1 Water AMP7 Comparative Industry Performance Assessment Technical Annex

September 2018
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Purpose:

This technical annex captures how we have assessed the current and future performance of other water companies to predict their performance relative to our forecast performance, so that we can target upper quartile performance, where this is supported by our customers and stakeholders. It comprises part of the supporting evidence for chapter 6 - Outcomes, Performance Commitments & Outcome Delivery Incentives and chapter 11 - Wholesale Water.

The table below summarises the Ofwat tests that are addressed by the evidence presented in this Annex.

Table 1- Relevant Ofwat tests

Ref	Ofwat test		Comment
Primary Focus Areas			
Delivering outcomes for customers – OC1	How appropriate, well-evidenced and stretching are the company's proposed performance commitments and service levels?	<p>High-quality plan: Performance commitments set at stretching levels, including for leakage and water efficiency, which should be supported by high-quality evidence that the performance commitments are stretching.</p> <p>Take a robust, stretching approach to developing its bespoke performance commitments and service levels. Approach should be supported by high-quality evidence, including CCG support for the effectiveness of its customer engagement. Propose a robust package of ODIs to incentivise itself to deliver performance commitments to customers. This should use reputational and financial outcome delivery incentives grounded in customer research.</p> <p>Risk and reward package focussing strongly on service delivery.</p> <p>Ambitious and innovative plan: Propose innovative and sector-leading performance commitments with stretching levels and an ODI incentive package supporting outstanding achievement and innovation as well as protecting customers against the risk of delivery failure. Present high-quality evidence on its plans to achieve exceptional service performance.</p>	We have used our assessment of the current and future performance of other water companies to predict their performance relative to our forecast performance, so that we can target upper quartile performance, where this is supported by our customers and stakeholders.

Introduction

This document captures how we have assessed future industry performance. This Technical Annex supports the derivation of ODIs, including medium-term (2018 to 2025) industry performance forecasts that have been used to inform our assessment of industry frontier, upper quartile and average performance. This report provides details of the assessment for the following Common Performance Commitments:

- Compliance Risk Index
- Interruptions to supply
- Leakage
- Per Capita Consumption (PCC)
- Bursts
- Discolouration
- Taste and Odour

Compliance Risk Index

The Compliance Risk Index (CRI) is a new measure from 2016 and hence little historic analysis is possible (the previous MZC measure is not directly comparable). To gauge potential performance of other companies we have assumed behaviours based on information in the public domain and known regulatory issues specific to certain companies.

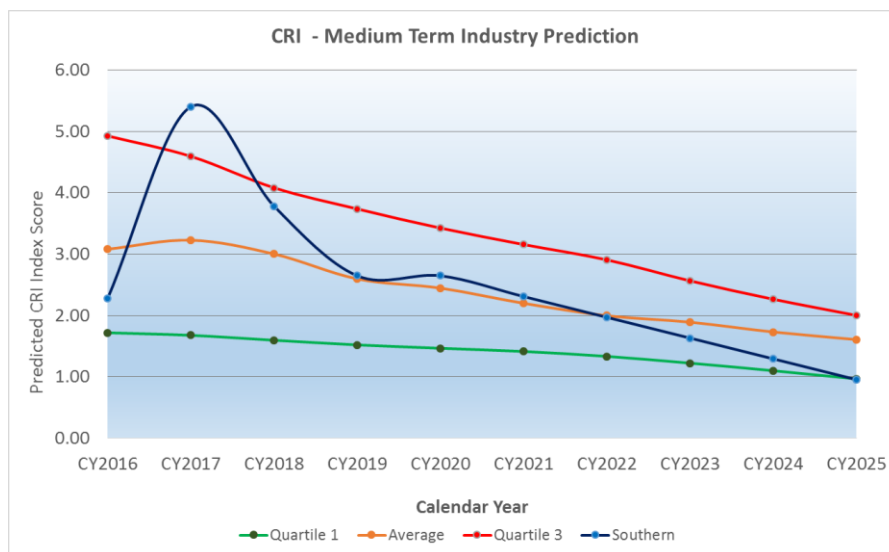


Figure 1 - CRI prediction to 2025¹²

Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

¹ CRI is shown in Calendar Year (CY) as per OFWAT Final Methodology.

² As per the OFWAT Final Methodology, the PR19 Data Table App1 shows a target of 0. Figure 3 shows our anticipated performance projection.

DWI expect that current (CY2016) upper quartile performance will become the average for the industry³. We have used this expectation to scale our assessment of industry performance improvements. We have assumed that the CY2025 industry average is the same as the CY2016 industry upper quartile position. Our assessment was undertaken in the following steps:

1. We first took the CRI numbers from the DWI Chief Inspectors Report 2017⁴.
2. We made specific adjustments to projected company performance improvements where we had market intelligence.
3. Otherwise we made general base assumptions about the rate of improvement:
 - a) We assumed a 1% improvement per annum for companies already in Quartile 1.
 - b) We assumed a 5% improvement per annum for companies already in Quartile 2.
 - c) We assumed a 15% improvement per annum for companies in Quartiles 3 & 4.

With regards to point (2) above, we have made the following company specific adjustments based on market intelligence (above the base assumption given above):

- Anglian Water plan to deploy transient monitoring/acoustic logging, this is anticipated to reduce bursts by 10%. This will have a corresponding impact on CRI (distribution component is approximately 30% of CRI) = 3% improvement.
- Sutton and East Surrey Water are deploying smart networks in the form of additional flow/pressure sensors with predictive analysis with an expected 5% reduction in bursts. This will have a corresponding impact on CRI (distribution component is approximately 30% of CRI) = 1.5% improvement to CRI.
- Affinity Water have deployed extensive hydro-acoustic logging which has the potential to reduce bursts (through predictive/lead indicators) by 10%. This will have a corresponding impact on CRI (distribution component is approximately 30% of CRI) = 3% improvement to CRI.

With regards to point (3) above, the quartile improvements are based on historical improvements in the current Mean Zonal Compliance metric (by company rank) scaled to the expected improved industry average⁵.

This is with the exception of Thames Water, United Utilities (UU) and Severn Trent (including Dee Valley Water) all of whom are currently subject to DWI scrutiny and delivering transformative programmes under notice. For these companies a 15% per annum improvement has been assumed regardless of starting quartile.

Based on this we predict we will be 4th in the industry by 2024 and in the upper quartile. Based on this forecast, we will be in close competition with Bournemouth Water and Bristol Water on the Q1/Q2 boundary (all separated by 0.03 index points) as shown in Figure 2.

³ Presentation from the ATi Network Monitoring Conference 22nd June 2017

⁴ DWI Chief Inspectors Report 2017

⁵ This was done as part an SME review.

COMPANY	Current ⁶ Ranking	CY2025	2025 Ranking	Change
SES	1	0.02	1	0
Wessex	2	0.70	2	0
Portsmouth	3	0.82	3	0
Southern	6	0.95	4	2
Bournemouth	4	0.96	5	-1
Bristol	5	0.99	6	-1
UU	12	1.25	7	5
Thames	15	1.47	8	7
South West	9	1.56	9	0
South Staffs	10	1.65	10	0

Figure 2 - Predicted Industry Top 10 CRI Rankings (2025)

Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Interruptions to Supply

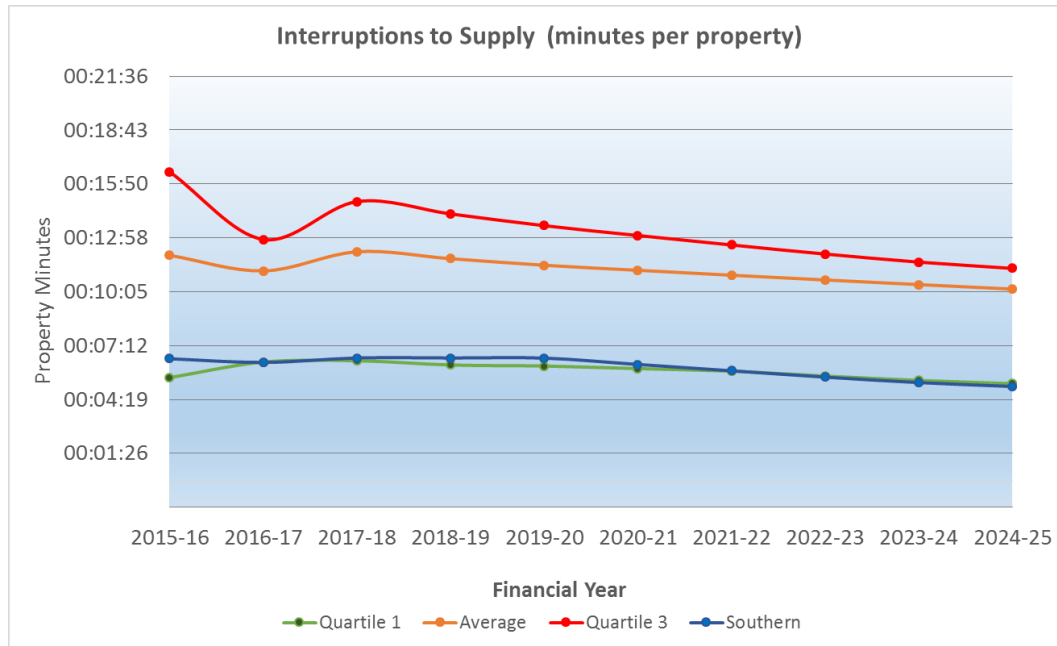
The interruptions to supply metric has a number of limitations which limit historical analysis, this is mainly due to the high susceptibility of this metric to weather conditions (volatility) and changes in the interruptions to supply measure (both the change to property minutes in 15/16 and then to shadow reporting⁷ for 16/17).

Therefore, for this assessment only 2015/16⁸ and 2016/17 data has been used as a baseline with these averaged to give a 2017-18 baseline figure.

⁶ Final 2017 CRI Rankings not available at time of writing.

⁷ Methodology as per UKWIR Guidelines 2018

⁸ AMP6 base data from Water UK (Discover Water 15/16 and 16/17 Data)



Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Figure 3 - Interruptions prediction to 2025

For end AMP6 performance it is assumed that companies projected to meet their ODI target with 12 out of the 18 companies achieving the Industry standard (12 property minutes) target by the end of 2019-20 (those that are not projected to meet the ODI target are projected to improve by 5% per annum to minimise financial impact of the ODI penalties).

Our AMP7 assessment was undertaken in the following steps:

1. We first took the predicted 2019-20 baseline position.
2. We made specific adjustments to projected company performance improvements where we had market intelligence.
3. Otherwise, we made general base assumptions about the rate of improvement:
 - a) We assumed a 1% improvement for companies already in Quartile 1.
 - b) We assumed a 5% improvement for companies already in Quartile 2.
 - c) We assumed a 10% improvement for companies in the lower two quartiles.

With regards to point (2) above, we have made the following company specific adjustments based on market intelligence (above the base assumption given above):

- Thames Water (deployment of Trunkminder S) - it is assumed a 15% reduction in transient driven bursts is achieved by 2025.⁹
- United Utilities (deployment of ONet pressure management system¹⁰) - In a trial DMA [UU] claimed a reduction of 38% in bursts¹¹. We have assumed that 50% effective

⁹ Thames Water Press Release – 17th March 2018

¹⁰ Smart Water Networks and Smart Metering Technology Review and Investment Appraisal (May 2018)

¹¹ Note we have already extensively leveraged pressure management

deployment can be achieved in AMP7 (due to scale of asset base) at an effectiveness of 75% this equates to a burst and interruption reduction of 14% by the end of AMP7.¹²

- Anglian Water (deployment of ONet pressure management system) - In a trial DMA UU¹³ claimed a reduction of 38% in bursts. We have assumed that 75% effective deployment can be achieved in the AMP7 (due to scale of asset base) at an effectiveness of 75% this equates to a burst and interruption reduction of 21% by the end of AMP7¹⁴
- Sutton & East Surrey Water are deploying smart networks in the form of additional flow/pressure sensors with predictive analysis with an expected 5% reduction in bursts and interruptions.¹⁵
- Affinity Water have deployed extensive hydro-acoustic logging which has the potential to reduce bursts (through predictive/lead indicators) by 10% in bursts and interruptions¹⁶
- Welsh Water (deployment of optiMiser) = 10-12% reduction in bursts and interruption (12% reduction to the end of AMP7 is assumed)¹⁷
- Wessex Water (deployment of optiMiser) = 10-12% reduction in bursts and interruption (12% reduction to the end of AMP7 is assumed)¹⁸

With regards to point (3) above the quartile improvements are based on historical improvements in the current interruptions performance (by company rank).

Based on this analysis we are predicted to be 5th in the industry by 2022/23 and in Q1, see Figure 4.

COMPANY	Current Ranking	2024-25	2025 Ranking	Change
Northumbrian	2	00:02:00	1	1
Bournemouth	1	00:02:07	2	-1
Portsmouth	3	00:03:39	3	0
South Staffs	5	00:04:30	4	1
Southern	6	00:05:30	5	1
SSE	4	00:05:37	6	-2
Anglian	10	00:07:39	7	3
Severn Trent	8	00:09:49	8	0
Thames	9	00:10:00	9	0
United utilities	16	00:11:07	10	6

Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Figure 4 - Predicted Industry Top 10 Rankings for Interruptions to Supply (2025)

¹² Smart Water Networks and Smart Metering Technology Review and Investment Appraisal (May 2018)

¹³ We assumed the same reduction potential as United Utilities

¹⁴ Smart Water Networks and Smart Metering Technology Review and Investment Appraisal (May 2018)

¹⁵ Global Leakage Summit 2018 (Proceedings and Presentations) (2018)

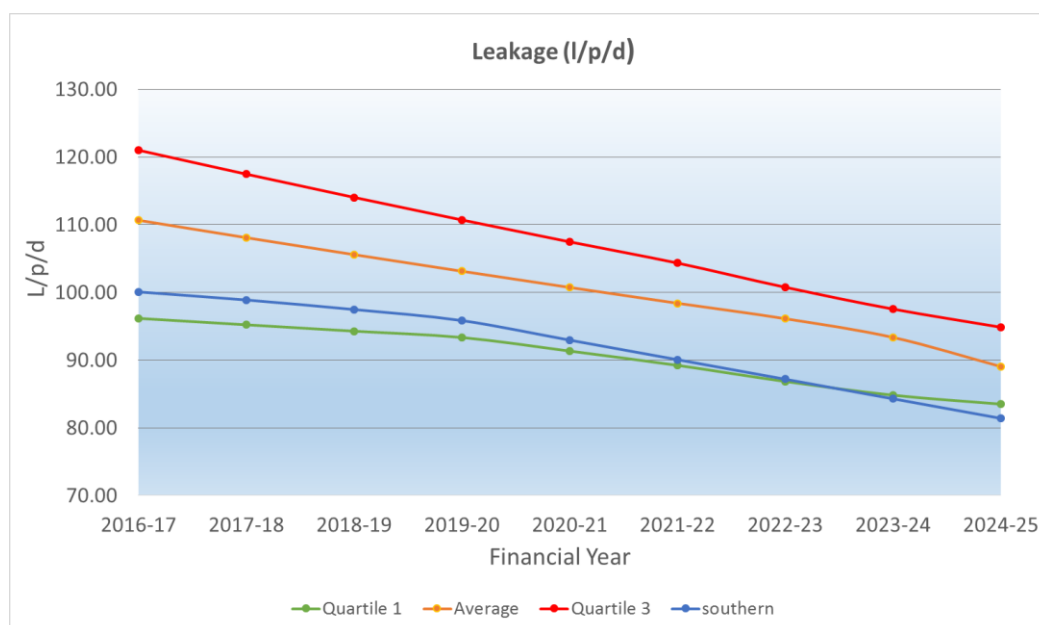
¹⁶ Global Leakage Summit 2018 (Proceedings and Presentations) (2018)

¹⁷ Smart Water Networks and Smart Metering Technology Review and Investment Appraisal (May 2018)

¹⁸ Global Leakage Summit 2018 (Proceedings and Presentations) (2018)

Leakage

The leakage metric has a number of limitations which limit historical analysis, this is mainly due to the change to reporting methodology (as a consequence of which, only 2016/17 data is available). Ofwat have stated that they expect companies to achieve a 15% reduction as a minimum by 2025. Ofwat also informed the Global Leakage Summit (March-2018) that they expected two thirds of companies to meet the 15% target¹⁹. We have therefore assumed that the average performance improvement in the industry will be 15%.



Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Figure 5 - Leakage prediction to 2025

Our AMP7 assessment was undertaken in the following steps:

1. We first took the predicted 2016-17 baseline position.
2. We made specific adjustments to projected company performance improvements where we had market intelligence.
3. Otherwise we made general base assumptions about the rate of improvement:
 - a) We assumed a 5% improvement for companies already in Quartile 1.
 - b) We assumed a 10% improvement for companies already in Quartile 2.
 - c) We assumed a 15% improvement for companies in Quartile 3.
 - d) We assumed a 20% improvement for companies in Quartile 4.

With regards to point (2) above, we have made the following company specific adjustments based on market intelligence:

¹⁹ Global Leakage Summit 2018 (Proceedings and Presentations) (2018)

- Thames Water (deployment of AMI meter network over AMP7 and AMP8), assumes this can reduce Customer Side Leakage (CSL) by 25%. CSL accounts for approximately 28% of total leakage. Therefore, this equates to an additional 7% of leakage reduction in AMP7 above the base 15% (this is assumed to be recovered by convention ALC and mains replacement).²⁰
- Anglian Water (impact of ONet deployment). Asset base wide pressure optimisation – information available in the public domain suggests that an average 5m pressure drop across all DMA's (this has been equated to 4% reduction in total leakage²¹). In addition to this Anglian Water also plan to deploy remote sensing (drones/satellite imaging) and acoustic logging. Anglian Water have stated publicly that their AMP7 leakage reduction target will be 24%.²²
- United Utilities (impact of ONet deployment). Asset base wide pressure optimisation – there is little information in the public domain, we have therefore assumed this is the same as Anglian Water (4%).²³
- Bristol Water have publicly announced that they have a target of 15% reduction for AMP7.²⁴
- Affinity Water (deployment of an AMI meter network over AMP7), assumes this can reduce CSL by 25%. CSL accounts for approximately 28% of total leakage. Therefore, this equates to an additional 7% of leakage reduction and in combination with acoustic logging this will equal a 14% reduction which is a publicly declared target.²⁵
- Sutton & East Surrey (deployment of an AMI meter network over AMP7), assumes this can reduce CSL by 25%. CSL accounts for approximately 28% of total leakage. Therefore, this equates to an additional 7% of leakage reduction in AMP7 above the base 5%.²⁶
- Yorkshire Water announced that they were targeting a 40% reduction, we believe this may be optimistic and have forecast 30% based on likely practicality.²⁷

With regards to point (3) above, the quartile improvements were scaled based on the median company delivering the 15% reduction.

Based on this analysis we predict we will be 4th in the industry by 2024/25 and in Q1, as shown in Figure 6.

²⁰ Smart Water Networks and Smart Metering Technology Review and Investment Appraisal (May 2018)

²¹ ONet Internet Publication – March 2018

²² Global Leakage Summit 2018 (Proceedings and Presentations) (2018)

²³ Smart Water Networks and Smart Metering Technology Review and Investment Appraisal (May 2018)

²⁴ Global Leakage Summit 2018 (Proceedings and Presentations) (2018)

²⁵ Smart Water Networks and Smart Metering Technology Review and Investment Appraisal (May 2018)

²⁶ Smart Water Networks and Smart Metering Technology Review and Investment Appraisal (May 2018)

²⁷ Global Leakage Summit 2018 (Proceedings and Presentations) (2018)

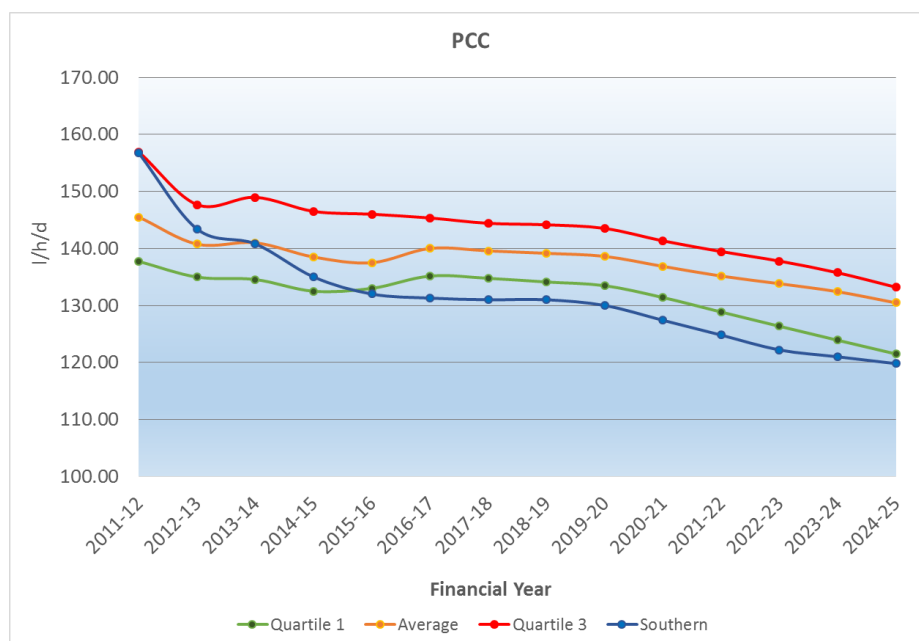
COMPANY	Current Ranking	2024-25	2025 Ranking	Change
Anglian	1	63.61	1	0
SES	3	76.51	2	1
Bristol Water	5	76.57	3	2
Southern	7	81.41	4	3
South East	2	81.52	5	-3
Essex & Suffolk	4	84.17	6	-2
Dee Valley	6	85.55	7	-1
Cambridge	8	86.97	8	0
Yorkshire	17	87.98	9	8
Bournemouth	9	88.01	10	-1

Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Figure 6: Predicted Industry Rankings for Leakage (2025)²⁸

Per Capita Consumption (PCC)

The PCC metric has a substantial amount of historical data with trends being fairly linear for each company since the start of the decade²⁹. Therefore to assess potential performance a simple linear average rate of change has been applied from the 16-17 baseline³⁰.



Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Figure 7 - PCC prediction to 2025

This is with the exception of the following:

²⁸ Leakage expressed at l/p/d for comparison purposes and excluding growth (81.41 = 89.6 MI/d as per App1)

²⁹ Quartile level assumptions are not required for well understood metrics with sufficient historical data

³⁰ Water UK: Discover Water (2015/16 and 2016/17 data)

- Affinity Water (because the company now plans to deploy an AMI universal meter network over AMP7).
- Sutton & East Surrey Water (SES) (deployment of AMI universal meter network over AMP7).
- Thames Water (deployment of AMI universal meter network over AMP7 and AMP8).

For the above companies a ~20 l/p/d reduction is assumed based on the improved PCC achieved through our Universal Metering Programme.^{31 32}

A number of companies have also communicated PCC targets for the end of AMP7³³:

- Bristol Water have stated a target of 130 l/h/d by 2025, which would imply a reduction of 10%.
- Yorkshire Water have stated a target of a 20% reduction by 2025.
- Anglian Water have stated a target of 120 l/h/d by 2025, which would imply a reduction of 10%.

Based on this analysis we predict we will be 2nd in the industry by 2024/25 and in Q1, as shown in Figure 8.

COMPANY	Current Ranking	2024-25	2025 Ranking	Change
South Staffs	1	118	1	-1
Southern	2	120	2	-1
United Utilities	9	120	3	5
Anglian	6	121	4	1
Yorkshire	4	122	5	-2
Severn Trent	3	123	6	2
Dee Valley	5	127	7	-2
Portsmouth	14	128	8	6
South West	7	129	9	-2
Cambridge	8	130	10	-2

Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Figure 8 - Predicted Industry Top 10 Rankings for PCC (2025)

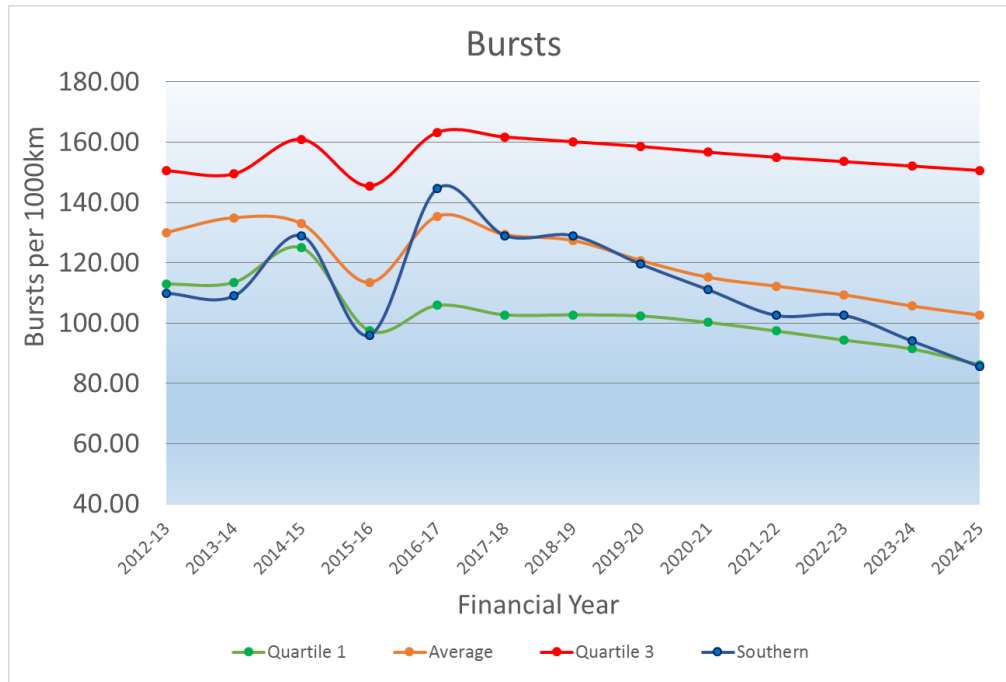
³¹ Please see previous sections for references for AMI deployment

³² Based on 2011-12 to 2016-17 reduction achieved by SWS.

³³ Global Leakage Summit 2018 (Proceedings and Presentations) (2018)

Bursts

The burst metric has a substantial amount of historical data with trends being fairly linear for each company since 2012/13.



Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Figure 9 - Bursts prediction to 2025

Therefore to assess potential performance a simple linear average rate of change has been applied with a minimum improvement of 5% assumed per company³⁴ from the 16/17 baseline³⁵. This is with the exception of the following (also see Section 3. Interruptions commentary):

- Thames Water (deployment of Trunkminder S) = it is assumed that a 15% reduction in transient related bursts is achieved by 2025.
- United Utilities (deployment of ONet pressure management system) = 38% of bursts reduced in trial DMA (claimed by UU). We have assumed that 50% effective deployment can be achieved in AMP7 (due to scale of asset base) at an effectiveness of 75% equating to a burst and interruption reduction of 14% by the end of AMP7.
- Anglian Water (deployment of ONet pressure management system) = 38% of bursts reduced in trial DMA (claimed by UU). We have assumed that 75% effective deployment can be achieved in AMP7 (due to scale of asset base) at an

³⁴ Quartile level assumptions are not required for well understood metrics with sufficient historical data

³⁵ Water UK: Discover Water (2017)

effectiveness of 75% equating to a burst and interruption reduction of 21% by the end of AMP7.

- SES Water are deploying smart networks in the form of additional flow/pressure sensors with predictive analysis with an expected 5% reduction in bursts and interruptions.³⁶
- Affinity Water have deployed extensive hydro-acoustic logging which has the potential to reduce bursts (through predictive/lead indicators) by 10%.³⁷
- Welsh Water (deployment of an optiMiser network management system) = 10-12% reduction in bursts and interruption (12% reduction to the end of AMP7 is assumed).³⁸
- Wessex Water (deployment of an optiMiser network management system) = 10-12% reduction in bursts and interruption (12% reduction to the end of AMP7 is assumed).³⁹

COMPANY	Current Ranking	2024-25	2025 Ranking
Sutton & East Surrey	1	60	1
Dee Valley	5	68	2
Portsmouth	2	69	3
Bournemouth	3	80	4
Southern	11	86	5
United Utilities	6	88	6
Severn Trent	7	90	7
Anglian	10	100	8
South West	4	102	9
Welsh Water	9	103	10

Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Figure 10: Predicted Industry Top 10 Rankings for Bursts (2025)⁴⁰

Based on this analysis we predict we will be 5th in the industry by 2024/25 and in Q1 (see figure 10).

Appearance

The appearance metric has a substantial amount of historical data with trends being fairly linear for each company since 2013/14. Therefore to assess potential performance a simple linear average rate of change has been applied.

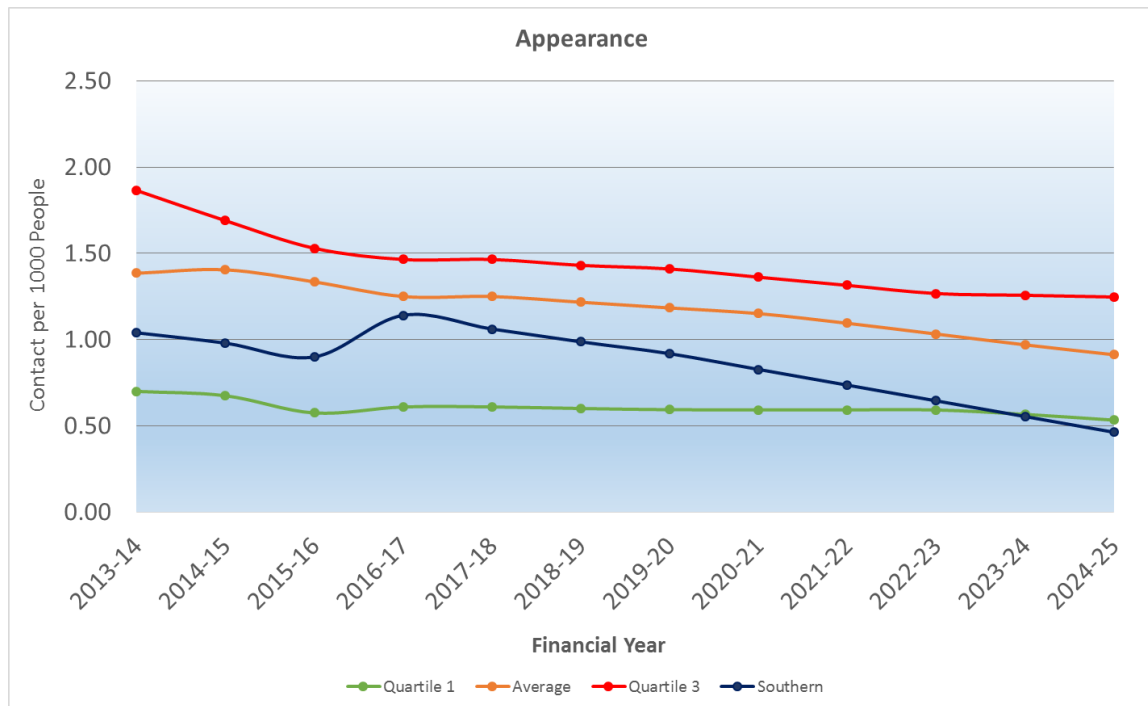
³⁶ Global Leakage Summit 2018 (Proceedings and Presentations) (2018)

³⁷ Global Leakage Summit 2018 (Proceedings and Presentations) (2018)

³⁸ Smart Water Networks and Smart Metering Technology Review and Investment Appraisal (May 2018)

³⁹ Smart Water Networks and Smart Metering Technology Review and Investment Appraisal (May 2018)

⁴⁰ Bursts per 10,000km per annum



Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Figure 11 - Appearance performance prediction to 2025

This is with the exception of the following:

- Thames Water (deployment of Trunkminder S) = it is assumed that a 15% reduction in transient related bursts is achieved by 2025⁴¹. Approximately 20%⁴² of discolouration is from incidents and hence a reduction of 3% by the end of the AMP7 is assumed in addition to the base improvement of 13%.
- United Utilities (deployment of ONet pressure management system) = 38% of bursts reduced in trial DMA (claimed). We have assumed that 50% effective deployment can be achieved in AMP7 (due to scale of asset base) We have assumed that 20% of discolouration incidents are caused by interruptions/bursts this equates to a 3.8% reduction by the end of AMP7 (in addition to the 3% base improvement).
- Anglian Water (deployment of ONet pressure management system) = 38% of bursts reduced in trial DMA (claimed). We have assumed that 75% effective deployment can be achieved in AMP7 (due to scale of asset base) We have assumed that 20% of discolouration incidents are caused by interruptions/bursts this equates to a 5.7% reduction by the end of AMP7 (in addition to the 5% base improvement).
- Welsh Water (deployment of optiMiser) = 10-12% reduction in bursts and interruption (12% reduction to the end of AMP7 is assumed). Scaling this to the 20% of discolouration incidents caused by interruptions/bursts equates to a 2.4% reduction is anticipated by the end of AMP7 (in addition to the 2% base improvement).
- Wessex Water (deployment of optiMiser) = 10-12% reduction in bursts and interruption (12% reduction to the end of AMP7 is assumed). Scaling this to the 20%

⁴¹ See Section 3 for technology commentary

⁴² SWS Mains Flushing Report (2017) – 20% of discolouration contacts can be directly attributed to incidents.

of discolouration incidents caused by interruptions/bursts equates to a 2.4% reduction by the end of AMP7 (in addition to the 13% base improvement).

- SES are deploying smart networks in the form of additional flow/pressure sensors with predictive analysis with an expected 5% reduction in bursts and interruptions (Scaling this to the 20% of discolouration incidents caused by interruptions/bursts equates to a 1% reduction by the end AMP7).
- Affinity Water have deployed extensive hydro-acoustic logging which has the potential to reduce bursts (through predictive/lead indicators) by 10% in bursts and interruptions (Scaling this to the 20% of discolouration incidents caused by interruptions/bursts equates to a 2% reduction by the end AMP7).

COMPANY	Current Ranking	2024-25	2025 Ranking	Change
Portsmouth	1	0.25	1	0
Sutton & East Surrey	3	0.29	2	1
Thames	2	0.30	3	-1
Southern	9	0.46	4	5
Affinity	5	0.49	5	0
Essex & Suffolk	4	0.58	6	-2
Bournemouth	6	0.60	7	-1
Anglian	7	0.80	8	-1
Bristol	11	0.83	9	2
Wessex	8	0.84	10	-2

Source: PR19 Data Table App1 and AMP7 Industry Performance Assessment

Figure 12 - Predicted Industry Top 10 for Appearance (2025)

Based on this analysis we predict we will be 4th in the industry by 2024/25 and in Q1 (see Figure 12).

Taste and Odour

The taste and odour metric has a substantial amount of historical data with trends being fairly linear for each company since 2013/14. Therefore, to assess potential performance a simple linear average rate of change has been applied with no minimum levels of improvement prescribed (all are above 5%).⁴³

⁴³ Analysis undertaken as a simple regression analysis in wholesale benefits workbook.

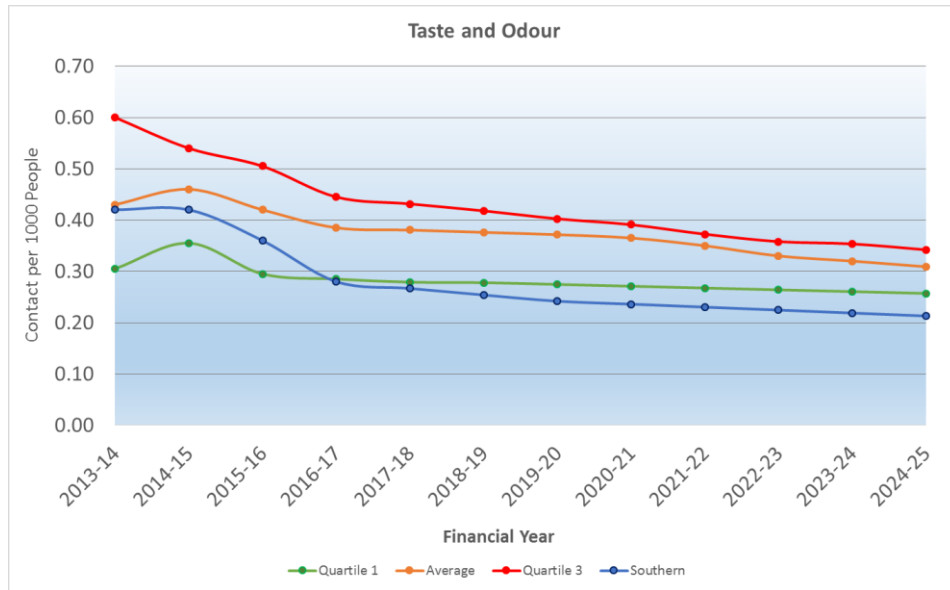


Figure 13 - Taste and Odour prediction to 2025.

COMPANY	Current Ranking	2024-25	2025 Ranking	Change
Sutton & East Surrey	1	0.10	1	0
Essex & Suffolk	2	0.11	2	0
Thames	3	0.17	3	0
Southern	5	0.21	4	1
Affinity	7	0.25	5	2
Portsmouth	4	0.26	6	-2
South West	17	0.27	7	10
Bournemouth	6	0.28	8	-2
United Utilities	9	0.30	9	0
Yorkshire	14	0.30	10	4

Figure 14: Predicted Industry Rankings for Taste & Odour (2025).

Based on this analysis we predict we will be 4th in the industry by 2024/25 and in Q1 (see figure 14).