

Welcome to Gas Industry Co's *News Bulletin*, a periodic advisory of new and current consultations, workstream developments, publications and presentations.

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GTAC: Draft SOPs and Metering Requirements for stakeholder comment

First Gas has released revised versions of the following draft standard operating procedures (SOPs):

1. GTAC Pipeline Balancing and Line Pack Management
2. GTAC Curtailments and Operational Flow Orders

The SOPs have been revised following feedback at the workshop on 18 September 2018. Comments on the SOPs are invited as part of the GTAC consultation that closes on **3 October 2018**.

Stakeholder comments can be made [here](#).

GTAC workshop 25 September 2018

As advised in our 18 September 2018 News Bulletin, a GTAC workshop is scheduled for Tuesday 25 September 2018. The workshop is an opportunity for stakeholders to ask First Gas questions regarding the GTAC to inform their submissions. There is no formal agenda or supporting documents for the workshop.

Please note the following workshop details:

GTAC workshop 25 September 2018	
Venue	Maui Room, Gas Industry Co, Level 8, The Todd Building, 95 Customhouse Quay, Wellington
Dates	Tuesday 25 September 2018
Time	10.00am to 1.00pm on Tuesday, 25 September 2018 Tea, coffee and biscuits available RSVP to Alison O'Connor by Monday 24 September 2018
Teleconference	RSVP to Alison O'Connor by Monday 24 September 2018

GIC Report: *Retail competition in the LPG market* published

Gas Industry Co has today published *Retail competition in the LPG market*. The purpose of this paper is to review the retail market arrangements for liquefied petroleum gas (LPG) from a policy perspective. The paper is available [here](#).

Gas Industry Co committed to this review in response to stakeholder concerns about possible barriers to competition in the LPG retail market. Two specific concerns were raised:

Whether arrangements in the retail LPG market favour incumbents over new entrants; and

Whether the lack of third-party access to reticulated LPG networks presents a barrier to competition.

This paper draws on research on the operation of the retail LPG market, academic literature, and interviews with stakeholders in reviewing and analysing the arrangements in place for the retail LPG market. It begins with an overview of what LPG is and how it is used; canvasses the relevant characteristics of the retail LPG market, including market shares and price competition with other fuels; and assesses whether there are barriers to LPG competition.

Gas Industry Co would like to thank the individuals and organisations that participated in interviews with us and those who provided feedback on an earlier draft of this paper.

Note that this paper was being finalised when the agreement by First Gas to purchase Contact's Rockgas LPG business was announced at the end of July 2018. That sale had not been finalised at the time of this paper's publication. As such, the commentary and analysis contained in this paper reflects the retail market prior to the Rockgas transaction. It is, in effect, a snapshot of the LPG market at a particular point in time. Doubtless the LPG market will continue to evolve as the Rockgas transaction and other factors shape its future direction.

If you wish to discuss any aspect of this Bulletin, please contact us at info@gasindustry.co.nz or 04-4721800

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