

Load and demand forecast

Roma to Brisbane Pipeline: 2027–32 Access Arrangement Revision Proposal

1 July 2026



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1. Introduction

The Roma to Brisbane Pipeline (RBP) was commissioned in 1969 and is a bi-directional transmission pipeline that consists of the:

- 438 km mainline pipeline from Wallumbilla (near Roma) to Brisbane and its associated facilities,
- lateral pipeline at Lytton known as the Lytton Lateral and
- 121 km Peat lateral pipeline which connects the Peat and Scotia gas fields to the RBP.

The RBP is owned by APT Petroleum Pipelines Pty Limited (ABN 39 009 737 393) (APTPPL).

The RBP is a scheme pipeline under the access regime of the National Gas Law (NGL) and National Gas Rules (NGR) and is required to submit a revised access arrangement proposal to the Australian Energy Regulator (AER) on 1 July 2026.

To the extent practicable, the access arrangement information for a full access arrangement proposal is to include information on transmission pipeline usage over the earlier access arrangement period including:

- the minimum, maximum and average demand for each receipt or delivery point, and
- user numbers for each receipt or delivery point.

This information is included in the access arrangement information as part of the RBP Access Arrangement revision proposal submitted to the AER on 1 July 2026.

The demand forecast is a critical component of an access arrangement as it:

- highlights whether augmentation of the pipeline is required; and
- is a key input in the calculation of reference tariffs.

No augmentation capital expenditure is currently proposed in the 2027-32 RBP access arrangement revision proposal so the function of the demand forecast is limited to calculation of the reference tariffs.

A summary of the demand forecast is provided in the reference service model, and this confidential document explains in more detail how the demand forecast has been derived and the assumptions underpinning the forecast.

APTPPL only forecasts the total contracted capacity of the RBP pipeline. These contracts allow for RBP users to nominate and schedule gas transportation from injection points to various delivery points along the RBP. The variations in the gas transported by users are only constrained by the maximum daily quantities and imbalance provisions of their gas transportation agreements so the actual gas throughput at delivery and injection points is dependent on the future requirements of the contracted users. Consequently, APA has not provided forecasts of peak and annual demand by receipt and delivery point on the RBP in this document or in the *RBP 2027-32 – Reset RIN – Workbook 1 – Forecast*.

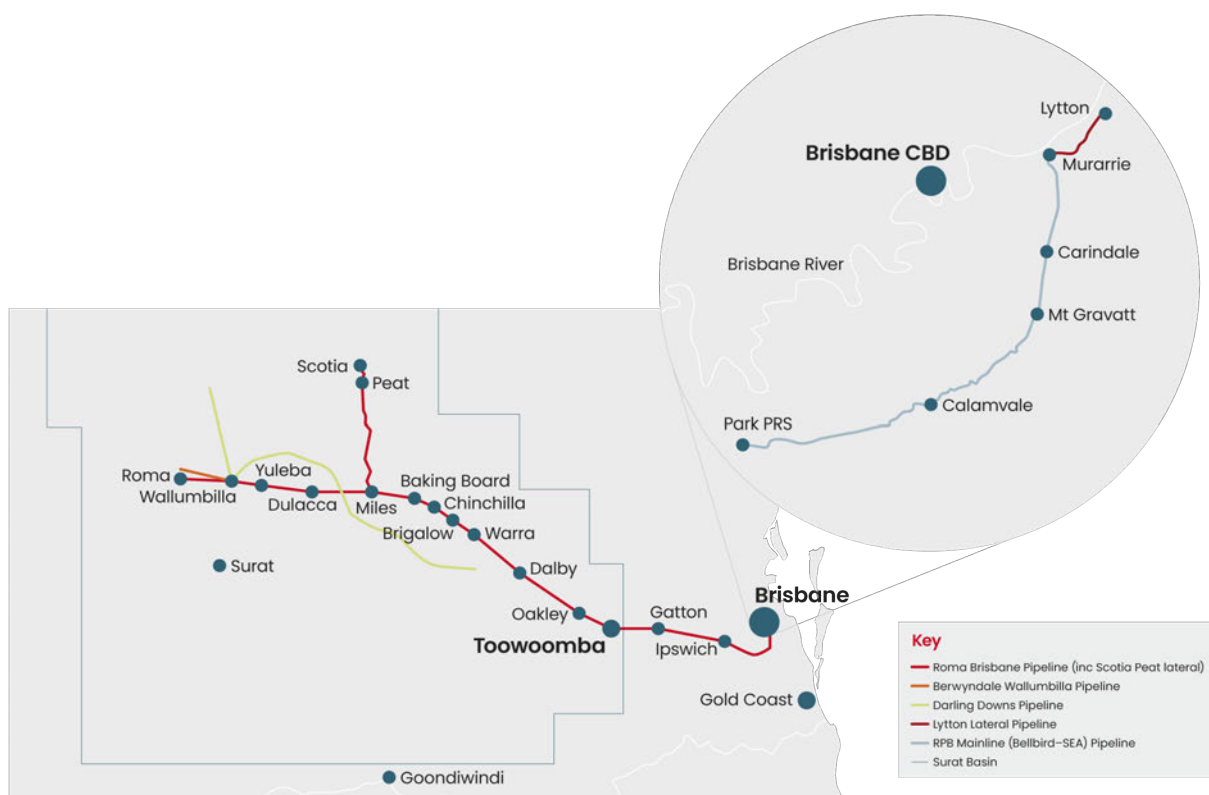
2. Pipeline configuration and capacity

The RBP is a bi-directional pipeline that transports gas between Wallumbilla supply hub (near Roma) to Brisbane and various regional centres along its route. It has a length of 438 km and a maximum allowable operating pressure (MAOP) of 9,650 kPa.

The RBP pipeline system also includes:

- the lateral pipeline at Lytton known as the Lytton Lateral; and
- the 121 km Peat lateral pipeline which connects the Peat and Scotia gas fields to the RBP.

As a bi-directional pipeline, the RBP allows for eastern and western gas flows on the pipeline segment from Roma to the Brisbane city gate whilst the pipeline segment east of the Brisbane gate is single directional and only allows for eastern gas flows.



2.1. Delivery points

The RBP currently transports gas to 20 delivery points on the pipeline.

The Roma to Riverview segment of the pipeline connects to 9 delivery points including industrial loads, Gas Powered Generation (GPG), the distribution networks in Dalby, Oakey and Toowoomba and interconnections with other pipelines.

The additional 11 RBP delivery points are on the eastern side of the Brisbane Gate and are principally for the Allgas and AGN distribution networks within Brisbane. These include some large commercial and industrial end-users as well as the Swanbank Power Station.

APTPL is planning to install a new delivery point at Kogan North in 2027-28 to supply gas to the planned Brigalow Pipeline which will support the Brigalow GPG.

Table 2-1: Current RBP Delivery Points

Roma to Brisbane segment	Brisbane
SWQP Interconnect (Wallumbilla delivery)	Riverview
Condamine	Redbank
Wambo	Swanbank Power Station
Dalby Bio-Refinery	Ellen Grove
Dalby Town Council	Ritchie Road
Oakey Power Station	Runcorn
Oakey APT Allgas	Mt Gravatt
Toowoomba	Tingalpa
Sandy Creek	Lytton Lateral
	Murarrie
	Gibson Island

2.2. Receipt points

The RBP currently has 12 separate receipt or injection points. There are 5 major supply points at Wallumbilla with 7 other injection points along the pipeline between Roma and Brisbane.

Table 2-2: Current RBP Receipt points

Wallumbilla	Roma to Brisbane segment
Wungoona LPG Plant (Run 1)	Woodroyd
Kincora (Run 2)	Scotia
SWQ Pipeline Interconnect (Run 3)	Condamine
Qld Gas Pipeline (Run 4)	Windibri
Spring Gully (Run 7)	Argyle
	Wambo
	Kogan North

APTPL is planning to remove the Wallumbilla receipt point (Qld Gas Pipeline (Run4)) soon.

2.3. Nameplate capacity

The nameplate rating of the RBP is its maximum daily capacity to provide firm transportation service under the pipeline's normal operating conditions. The nameplate rating of the RBP is currently 167 TJ/day for eastern flows and 125 TJ/day for western flows. This provides a total nameplate capacity of 292 TJ/day.

APA is forecasting the maximum daily capacity of the RBP to provide firm transportation service to remain at 292 TJ/day for the 2027-32 Access Arrangement period.

3. Forecast methodology and key assumptions

APTPPL has forecast contracted demand on the RBP based on historical trends and forecast changes in current and potential customers' contractual requirements.

The demand forecasts are derived directly from contractual data and therefore:

- do not use complex methods or models,
- do not apply require weather normalisation, and
- no explicit model calibration is required.

The key inputs and data sets used in the process are:

- the historical contracted demand for the pipeline, including the remaining term of existing capacity contracts,
- the historical load patterns for existing customers, and
- an analysis of the nature of demand under each contract (e.g. the demand requirements of the user and whether their demand profile is likely to change over the forecast period),
- an assessment of the probability of renewal of expiring contracts including the level of capacity reservation at which they are likely to be renewed, and
- an analysis of the market participants that are likely to use Western-haul services, and the capacity reservation levels those customers are likely to require based on policy considerations, potential gas production volumes and patterns.

The forecasts have been discussed with the RBP Stakeholder Reference Group, but no independent verification has been sought.

3.1. Key assumptions

The key assumptions behind the demand forecasts for the RBP are:

- local demand for gas underlying the current contracts is not expected to change significantly,
- continued use of firm transportation service under pre-existing agreements for the transportation of gas for residential, commercial and industrial use in southeast Queensland region,
- the use of firm transportation service for the transportation of gas for power generation is likely to increase, and
- gas domestic reservation policies may improve the utilisation of westbound services.

3.2. No pipeline expansion

Prospective and current users of the RBP have expressed interest in additional future transportation service however this interest has yet to translate into the long-term commitments for capacity that are necessary to support pipeline expansion.

Consequently, the access arrangement revision proposal does not include any planned expansion of RBP capacity during the period.

The demand forecasts provided in the access arrangement revision proposal are therefore not a driver of the capital and operating expenditure forecasts provided but are a key input into the derivation of reference tariffs.

3.3. Forecast methodology

To develop a demand forecast for the RBP, APTPPL has separated the market into four distinct types of users seeking gas services through the RBP, namely:

— **Retailing loads:**

These are large shippers or aggregators that supply gas to domestic, commercial and small industrial end-users. The demand from these customers is very much dependent on the end use of gas. Existing retail contracts are coming to the end of their term so future retail contracts have been forecast primarily through reviewing the usage of existing contracts and assessing the expected level of renewal of these contracts.

— **Major industrial customers:**

Many major industrial customers contract individually for gas transportation and supply rather than through retailers or brokers. The load forecast for major industrial customers has been undertaken at an individual customer level, based on an assessment of the customer's operations, and the market for the customer's product.

— **Gas-fired Power Generation (GPG):**

The demand for GPG is driven by conditions in the electricity market, including energy policies, rather than by the price of gas or gas transportation. There are existing GPG users on the RBP but also new prospective users. The demand for GPG loads has been forecast primarily through reviewing existing user's contracts and renewals while including the contracts for new users that have reached Final Investment Decision (FID).

— **Westernhaul services:**

Gas exiting the RBP at Wallumbilla may be shipped to Gladstone for LNG export, or it may be shipped to markets in SA, NSW or Victoria for direct consumption or for GPG. The demand for RBP westernhaul services is therefore driven by gas trading opportunities when short-term price differentials allow shippers to do so. Demand for the westernhaul service is therefore highly variable depending on customers short-term requirements. The demand forecast for the next regulatory period has been based on known customers that contract longer term for the service with assumptions made on potential short-term contracting by other customers based on their historical behaviour.

4. Historical information

Table 4.1 highlights capacity reservation and utilisation information as reported to the AER in the annual regulatory information notices (RIN) for the RBP.

The contracted capacity amounts reflect:

- all contracted capacity contracted, not only under the reference services, and
- a weighted average as some capacity may be contracted for the entire year but other capacity may be contracted for just a few days.

The change in contracted capacity over the current regulatory period reflect the dynamic nature of the SE Queensland market and the variance in the nature of the demands for RBP services. Generally, contracted capacity has declined with the RBP heavily contracted in earlier years but seeing less capacity being booked through long term contracts as shippers increasingly value short term flexibility.

Table 4-1: Pipeline capacity, contracted capacity and utilisation

		2021–22	2022–23	2023–24	2024–25	2025–26e
RBP Eastbound:						
Capacity	TJ/day	167	167	167	167	167
Contracted capacity	(%)	101	73	62	54	52
Contracted capacity	TJ/day	168.7	122.1	103.1	89.8	86
Pipeline Utilisation	(%)	58	55	41	38	38
RBP Westbound:						
Capacity	TJ/day	125	125	125	125	125
Contracted capacity	(%)	82	90	70	50	46
Contracted capacity	TJ/day	102.5	112.1	87.8	62.6	58
Pipeline Utilisation	(%)	65	55	36	35	33
Total RBP						
Capacity	TJ/day	292	292	292	292	292
Contracted capacity	(%)	93	80	65	52	49
Contracted capacity	TJ/day	271	234	191	152	144
Pipeline Utilisation	(%)	61	55	39	37	36

The use of capacity trading platforms has also increased, particularly the Day Ahead Auction (DAA) market, and has resulted in less firm capacity being booked on the RBP with shippers acquiring more short-term capacity using these markets. For example, higher levels of capacity have been booked on monthly contracts, or day ahead and within-day contracts.

The reported pipeline utilisation rates also reflect this behaviour with volumes falling and eastbound and westbound utilisation down to 38% and 33% respectively.

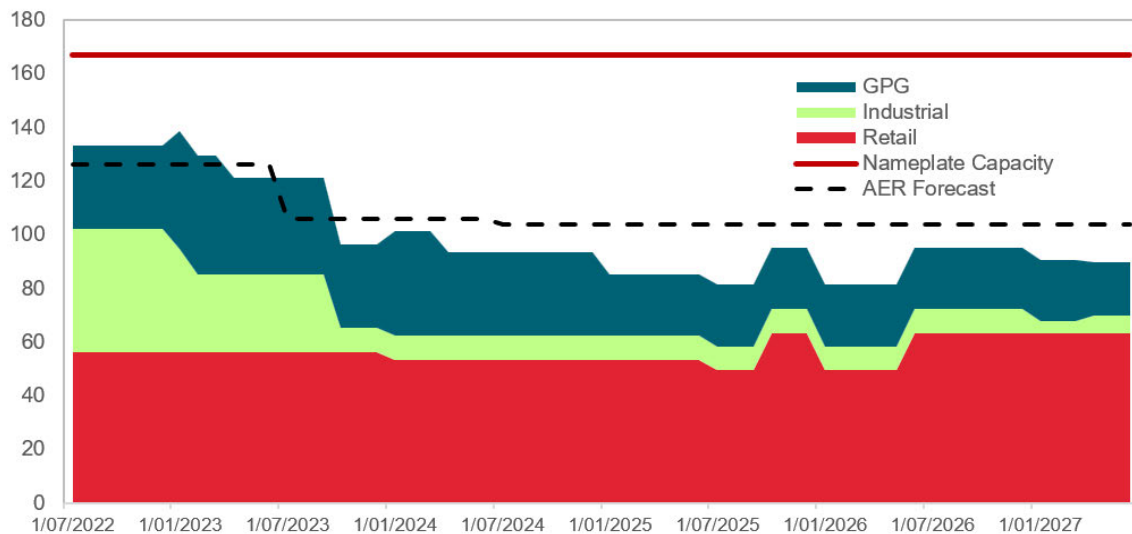
We are seeing more shippers taking advantage of shorter-term firm service offerings to sculpt their pipeline capacity to their loads, and thus better use their reserved capacity. A review of pipeline contracts further indicates that some contracts are under-utilised and as they come to the end of their term, it would be reasonable to expect that they may be renewed at a lower capacity reservation level.

The implications for the demand forecast are that the amount of long-term capacity reservation for many customers is expected to fall.

5. Forecast Easternhaul demand

The following figure shows the contracting position for easternhaul load on the RBP over the current access arrangement period. It also highlights the nameplate capacity and the demand forecast approved by the AER in its determination for 2022-27. The contracted capacity data can be derived from the Gas Bulletin Board (GBB) but has been separated by sector for the purposes of forecasting.

Figure 5-1: Contracted Easternhaul Capacity, nameplate and AER Allowance (TJ/day)



The figure shows:

- a step-down in contracting during 2024 with the closure of a major industrial customer as expected and reflected in the demand forecast approved by AER,
- that retail contracts were largely unchanged with annual variations as shippers utilised reallocation of MDQ as allowed within their contracts,
- a reduction in a major GPG contract in 2025, and
- that contracted load has remained below the AER demand forecast for most of the regulatory period.

As contract expire, the basis for making this demand forecast is to assess the probability that expiring contracts will be renewed, and what the level of capacity is likely to be reserved on contract renewal.

5.1. Retail load

The retail load segment is included in the Easternhaul and is used by retailers to supply end-users through connected gas distribution systems in Brisbane and other regional centres.

On the RBP, these loads are served through meters at Dalby, Ellengrove, Mt Gravatt, Murarrie, Oakey, Redbank, Ritchie Road, Riverview, Runcorn, Sandy Creek, Tingalpa, Toowoomba and Wambo.

This contracted retail load includes commercial and industrial loads which are served by the retailers. The following table highlights the major shippers for retail loads, their current contract position and forecast contracts over the next access arrangement period.

In previous contracts, retailers generally reserved capacity sufficient to ensure they met their retail customers' peak demands, and they also tended to maintain some headroom to accommodate customer growth and churn.

However, with the introduction of capacity trading platforms such as the DAA, shippers are less likely allow for annual peaks or provide headroom when contracting for long-term firm capacity on the RBP. The large retail contracts on the RBP are expiring during 2027 and to forecast the level of capacity in future retail contracts, APTPPL has:

- reviewed the usage of the existing retail contracts over the last 24 months,
- taken note of reallocations of MDQ utilised by the shippers under their current contracts, and
- assessed the expected level of renewal of these contracts.

The resulting demand forecast shown in the following table reflects these expectations. APTPPL forecasts contracted demand for the largest shippers to reduce during contract renewal to reflect their recent utilisation. Retailer contract capacity is then forecast to be maintained at this level over the term of the 2027-32 access arrangement period.

Table 5-2: Retail gas forecast for Easternhaul contracts, (TJ/day)

[REDACTED]						
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Total	64.0	54.8	48.6	48.6	48.6	48.6
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5.2. Major industrials

There are currently 4 major industrial customers connected to the RBP that self-contract for capacity rather than utilising a retailer.

Several of these contracts expire [REDACTED] but APTPPL has forecast these to be renewed at, or above current contracted capacities based on:

- Utilisation of their contracts in recent years, and
- Initial discussions with these industrial customers on their future requirements.

[REDACTED]						
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Table 5-3: Major Industrial customers forecast Easternhaul contracts

	Current	2027–28	2028–29	2029–30	2030–31	2031–32
Customers (no.)	4	3	3	3	3	3
Load (TJ/day)	9.0	7.9	7.9	7.9	7.9	7.9

Note, where has been a change in the level of capacity reserved in a year then a weighted average of the capacity reserved over the course of the year is used.

5.3. Gas-fired Power Generation

The demand for gas and gas transportation to supply GPG loads is largely dependent on circumstances in the electricity market.

GPG units tend to operate as peak supply units relative to existing coal-fired plants and often service to “firm up” supply of intermittent renewable generations such as wind or solar.

For the current regulatory period only one GPG, Swanbank E, has been reliant on the RBP for its gas supply. The two Braemar power stations, connected to the RBP at Condamine, have direct access to other sources of gas supply and only draw some gas from the RBP on occasion.

For the next regulatory period, the Brigalow Power Plant is the only new GPG to have finalised its investment and contracted for firm capacity on the RBP.

5.3.1. Swanbank E Power Station

The Swanbank E Power Station is a 385 MW combined cycle gas turbine. (CCGT) owned by state-controlled utility company CleanCo. Swanbank E receives gas from multiple sources in the Surat Basin which is transported via the RBP.

Swanbank E was returned to service after the three-year mothballed period in early 2018 and since returning, has been generating at a capacity factor of between 20 to 30 per cent. Swanbank E is projected to extend its contracted capacity for the next regulatory period.

5.3.2. Braemar 1 and 2

The Braemar power stations are situated at the western end of the RBP and are owned by Alinta (Braemar 1) and Arrow Energy (Braemar 2).

Braemar 1 is 502 MW open cycle gas turbine (OCGT) located 35 kilometres southwest of Dalby and is supplied from coal seam gas fields through a 150-kilometre pipeline between Condamine and Braemar, that is used exclusively to supply the power station.

Braemar 2 is a 450 MW OCGT adjacent to the Braemar 1 power station and gas for this power station is primarily sourced from nearby Arrow Energy gas tenements.

Both stations have alternative contracts for gas supply in place and are only reliant on the RBP for a small percentage of their total gas supply and transport. This contracted capacity is also forecast to continue.

5.3.3. Brigalow Power Plant

The new Brigalow Peaking Power Plant will be located next to CS Energy’s Kogan Creek Power Station and will provide fast start capability in high demand periods, reinforcing the power system reliability and complementing renewable energy development.

This 400 MW gas peaking plant is an OCGT and a 23km pipeline is being built to connect the power plant to the RBP with gas supplies provided by Senex Energy in the Queensland’s Surat Basin.

The early works for this new development commence in December 2026 and the power plant is forecast to be operational in 2028.



5.3.4. Total GPG

The total forecast for contracted capacity in the GPG sector is shown below.

Table 5-4: GPG contract forecasts, (TJ/day)

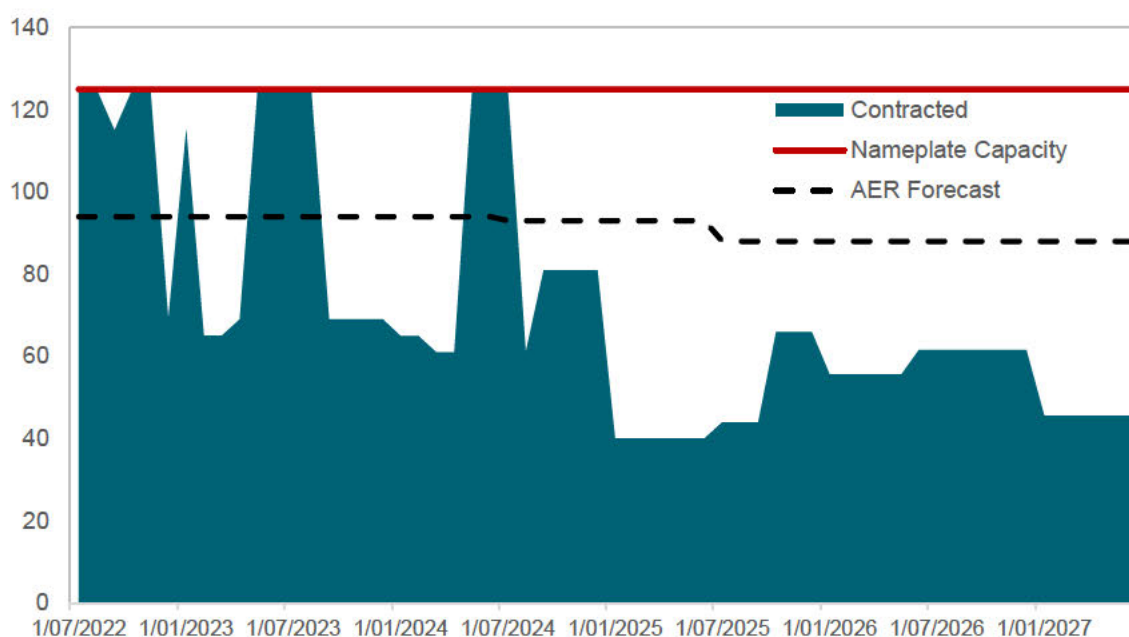
	Current	2027–28	2028–29	2029–30	2030–31	2031–32
Total	45.0	61.0	61.0	61.0	61.0	61.0

6. Forecast Westernhaul demand

The RBP is bidirectional so gas from midstream injection points like the Peat, Argyle and Windibri can travel west to Wallumbilla for delivery to other gas markets in Australia.

Demand for the westernhaul service is highly variable, with few customers contracting longer term for the service. Utilisation of the service in the current regulator period is shown below. The average contracted demand for westernhaul services over the period was approximately 55 TJ/day, but early in the period, maximum contracted demand was 125 TJ/day in some months, equivalent to nameplate capacity.

Figure 6-1: Contracted Westernhaul Capacity, nameplate and AER Allowance (TJ/day)



The market for westbound services is linked to the broader east coast gas market. Gas flowing west to Wallumbilla can be redirected into one of the Gladstone LNG plants, into underground storage, or transferred into the Southwest Queensland Pipeline or the Queensland Gas Pipeline for onward transport to west and central Queensland or southern States.

The main driving force for westbound demand from shippers on the RBP is:

- how much gas is needed in southern markets from Queensland,
- the supply that is available to be distributed from Wallumbilla in the next access arrangement period, and
- any short-term trading opportunities that allow shippers to capitalise on price differentials between northern and southern markets in eastern Australia.

Pipeline competition from nearby pipelines is another sensitivity for westernhaul with potential shippers using several alternate pipelines in the area and only using RBP westernhaul for operational reasons.

Table 6-2: Forecast firm Westernhaul gas contracts

	Current	2027–28	2028–29	2029–30	2030–31	2031–32
Customers (no.)	6	6	6	6	6	6
Load (TJ/day)	61.6	54.6	53.6	53.6	53.6	53.6

7. Total Forecast demand

Table 7-1: Forecast average annual gas flows, TJ/day

	2027-28	2028-29	2029-30	2030-31	2031-32
Retail Loads	54.8	48.6	48.6	48.6	48.6
Major Industrial	7.9	7.9	7.9	7.9	7.9
GPG	61.0	61.0	61.0	61.0	61.0
Total Eastbound	123.7	117.5	117.5	117.5	117.5
Westbound	54.6	53.6	53.6	53.6	53.6
Total	178.3	171.1	171.1	171.1	171.1

Figure 7-2: Forecast average annual gas flows, TJ/day

