



Future of gas infrastructure – scope and process for engagement

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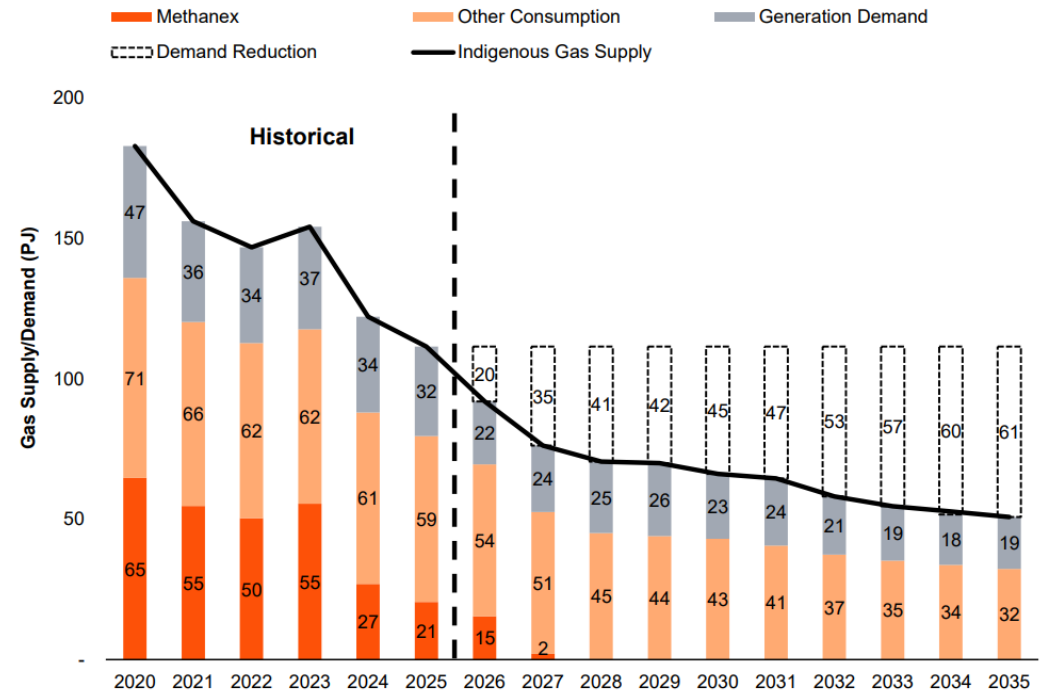
May 2026



Industry context

- Gas Industry Co Supply and Demand Study forecasts declining gas supply and demand (but the rate of decline is uncertain).
- The future of gas infrastructure is impacted by gas supply constraints as well as declining demand due to other factors.
- Some consumers will switch energy sources, some will close and some will remain.
- Gas infrastructure costs will be recovered from a smaller number of consumers and lower volumes.
- Gas infrastructure owners face uncertainty around unrecoverable costs.

Gas supply and demand forecast - Indigenous Gas Only (PJ)



2026 Gas Supply and Demand Study commissioned by Gas Industry Company and sourced from Enerlytica (January 2026), MBIE, and PwC.

Future of gas infrastructure

Existing infrastructure costs

What are the issues?

What are the economic and social outcomes?

What are the alternative options?

Future infrastructure expenditure

What are the issues?

What are the economic and social outcomes?

What are the alternative options?

Disconnection and decommissioning

What are the issues?

What are the economic and social outcomes?

What are the alternative options?

Deliverables and process for engagement

- We are providing an independent perspective that:
 - hears from wide group of consumers.
 - hears from industry participants and leverages work completed to date.
- Regional consumer workshops for commercial and industrial consumers to be held mid-2026, as well as ongoing targeted stakeholder engagement.
- Key deliverable is a report to be delivered in Q4 this year.

Forward work programme

