

Appendix A: Minister's letter and direction

Letter and direction to the ACCC from the Parliamentary Secretary to the Treasurer establishing the formal monitoring of the prices, costs and profits of unleaded petrol in Australia—2012



The Hon David Bradbury MP
Parliamentary Secretary to the Treasurer

Mr Graeme Samuel AO
Chairman
Australian Competition and Consumer Commission
GPO Box 520J
MELBOURNE VIC 3001

Dear Mr Samuel

Attached is a direction for the Australian Competition and Consumer Commission (ACCC) to monitor the prices, costs and profits relating to the supply of unleaded petroleum products in the petroleum industry in Australia from 17 December 2011 and to provide me with a report on the monitoring no later than 17 December 2012. The direction is pursuant to section 95ZE of the *Competition and Consumer Act 2010*.

This direction is to take effect after the former Minister for Competition Policy and Consumer Affairs, the Hon Dr Craig Emerson MP's, direction to you of 13 May 2010 expires on 16 December 2011.

Thank you for your assistance.

Yours sincerely

A handwritten signature in blue ink, appearing to read 'D. Bradbury', followed by a large, stylized flourish.

DAVID BRADBURY

09 MAY 2011



COMMONWEALTH OF AUSTRALIA

COMPETITION AND CONSUMER ACT 2010

MONITORING OF THE PRICES, COSTS AND PROFITS RELATING TO THE SUPPLY OF UNLEADED PETROLEUM PRODUCTS IN THE PETROLEUM INDUSTRY IN AUSTRALIA

I, David Bradbury, Parliamentary Secretary to the Treasurer, pursuant to section 95ZE of the *Competition and Consumer Act 2010*, hereby direct:

1. the Australian Competition and Consumer Commission (ACCC) to monitor the prices, costs and profits relating to the supply of unleaded petroleum products in the petroleum industry in Australia for one year, effective from 17 December 2011;
2. the ACCC to report to me on its monitoring activities in paragraph (1); and
3. the report of the ACCC to be provided by 17 December 2012.

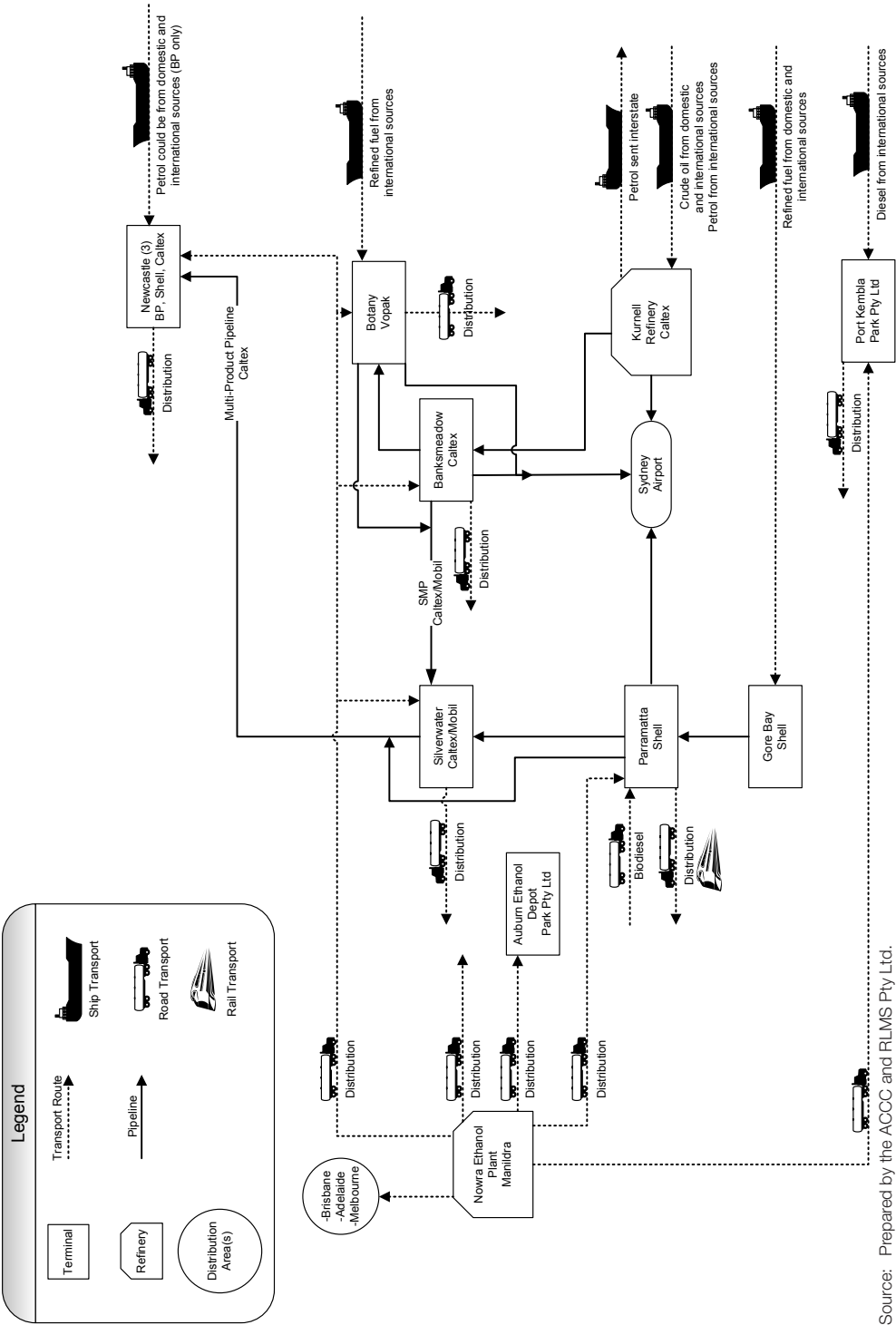
DATED THIS 9th DAY OF May 2011

A handwritten signature in black ink, appearing to read 'David Bradbury', followed by a large, stylized flourish.

David Bradbury
PARLIAMENTARY SECRETARY TO THE TREASURER

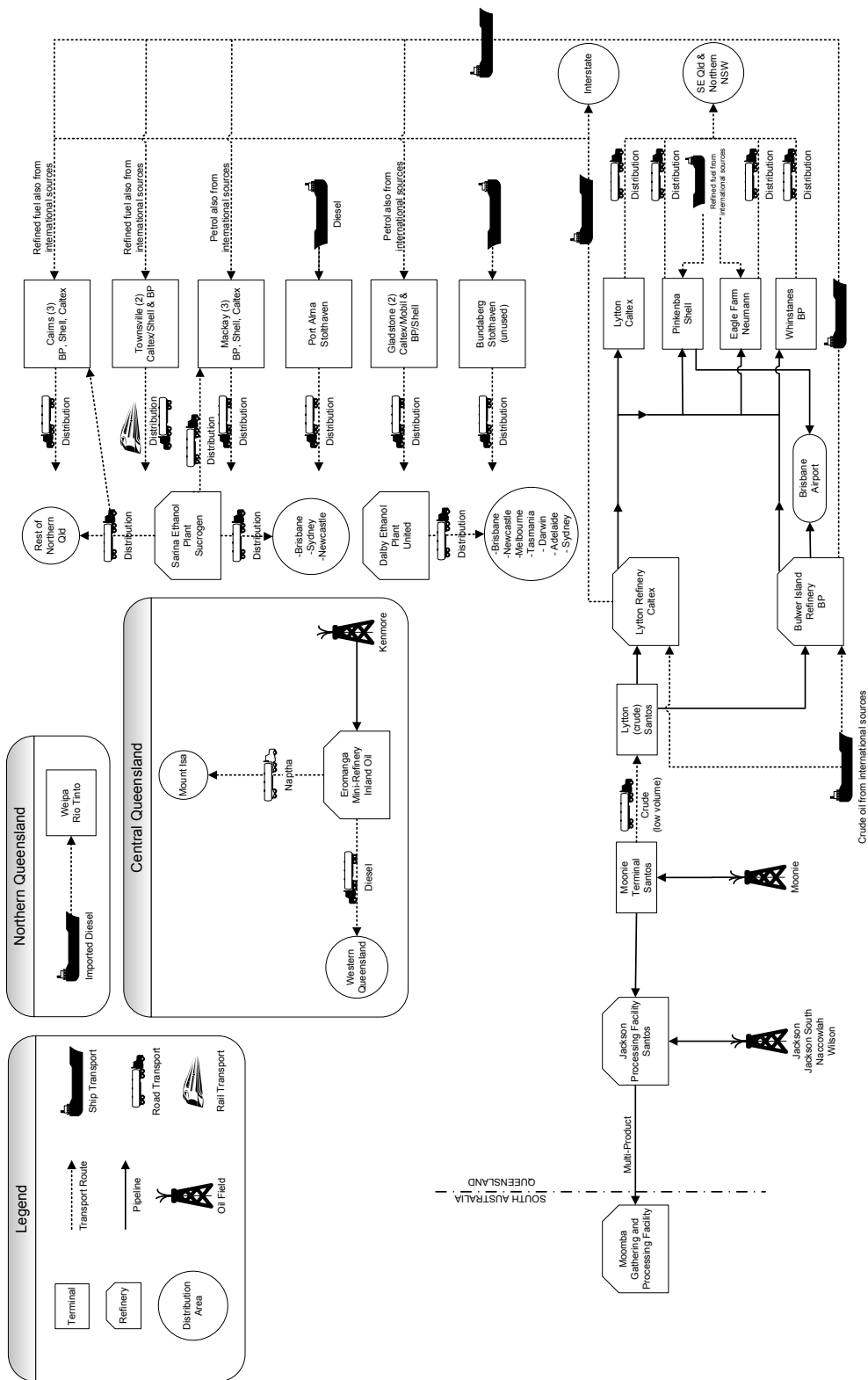
Appendix B: Major infrastructure schematics

Figure B.1 New South Wales oil flow schematic



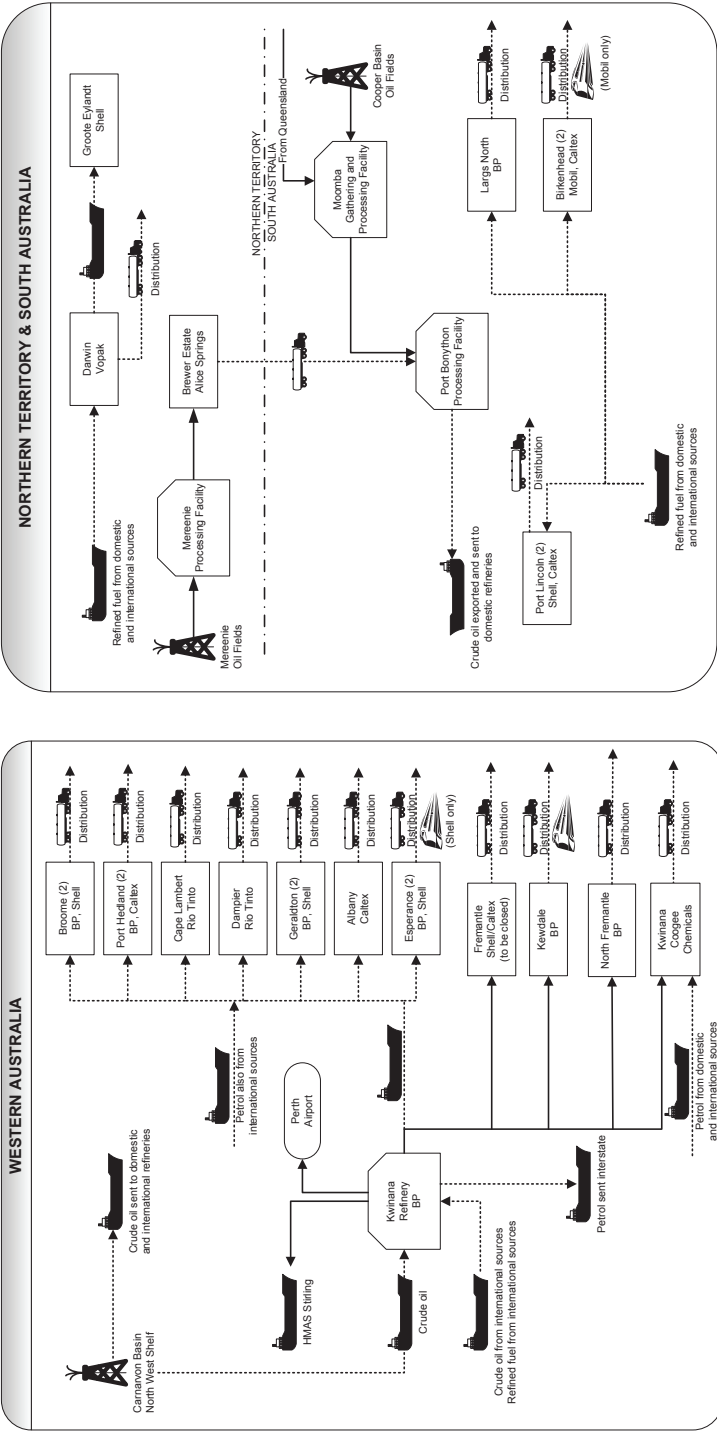
Source: Prepared by the ACCO and RLMS Pty Ltd.

Figure B.2 Queensland oil flow schematic



Source: Prepared by the ACCC and RLMS Pty Ltd.

Figure B.4 Western Australia, Northern Territory and South Australia oil flow schematics



Source: Prepared by the ACCC and RLMS Pty Ltd.

Appendix C: Major Australian terminals

Table C.1 Major terminals: New South Wales¹⁹⁷

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Banksmeadow (Sydney)	Caltex	Caltex	Caltex Mobil (minor)	Indirectly through Kurnell refinery or Vopak Botany by pipeline.
Parramatta (Sydney)	Shell	Shell	Shell BP (JTA)	Directly via Gore Bay terminal.
Silverwater (Sydney)	Caltex/ Mobil (SMP) ¹⁹⁷	Mobil	Caltex Mobil	Indirectly through Kurnell refinery or Vopak Botany then via pipeline.
Botany (Sydney)	Vopak	Vopak	BP, Mobil, Shell and independent wholesalers (co-mingled leases)	Direct from Port Botany.
Botany (Sydney)	Terminals Pty Ltd	Terminals Pty Ltd	Independent wholesaler (lease)	Direct from Port Botany. No petrol throughput, primarily diesel.
Newcastle	BP	BP	BP Mobil (minor)	Direct from Port of Newcastle. Indirect through Sydney terminals and/or refineries.
Newcastle	Caltex	Caltex	Caltex Mobil (minor)	Indirect through Sydney terminals and/or refineries.
Newcastle	Shell	Shell	Shell Mobil (JTA)	Indirect through Sydney terminals and/or refineries.
Port Kembla	Park Pty Ltd	Park Pty Ltd	Park Pty Ltd Manildra	Direct from Port Kembla.

Table C.2 Major terminals: Northern Territory

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Darwin	Vopak	Vopak	BP, Caltex, Shell and independent wholesaler (co-mingled leases)	Direct from Port Darwin.

¹⁹⁷ The source for tables in this appendix is ACCC analysis based on data obtained from firms monitored through the ACCC's monitoring process.

Major terminals are defined as terminals which have a pipeline connection to a port and/or refinery.

¹⁹⁸ Sydney Metropolitan Pipeline (SMP) is a Caltex/Mobil (60/40) joint venture which also owns the pipeline from Banksmeadow terminal to Silverwater terminal.

Table C.3 Major terminals: Queensland

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Lytton (Brisbane)	Caltex	Caltex	Caltex	Indirect through Lytton refinery.
Pinkenba (Brisbane)	Shell	Shell	Shell	Direct from own port. Indirect through both Brisbane refineries.
Whinstanes (Brisbane)	BP	BP	BP Mobil (JTA)	Indirect through Bulwer Island refinery. Import by Mobil not allowed under current JTA.
Eagle Farm (Brisbane)	Neumann	Neumann	Neumann Independent wholesalers (hosted)	Direct from own port. Indirect through both Brisbane refineries.
Bundaberg	Stolthaven	Stolthaven	Unused	Direct from port.
Cairns	BP	BP	BP Mobil (hosted)	Direct from port.
Cairns	Caltex	Caltex	Caltex	Direct from port.
Cairns	Shell	Shell	Shell	Direct from port.
Gladstone	BP/Shell	BP	BP Shell	Direct from port.
Gladstone	Caltex/ Mobil	Caltex	Caltex Mobil	Direct from port.
Mackay	BP	BP	BP Mobil (hosted) Caltex (minor)	Direct from port.
Mackay	Caltex	Caltex	Caltex	Direct from port.
Mackay	Shell	Shell	Shell Caltex (minor)	Direct from port.
Port Alma	Stolthaven	Stolthaven	None currently	Direct from port.
Townsville	BP	BP	BP Mobil (hosted)	Direct from port.
Townsville	Caltex/ Shell	Shell	Caltex Shell	Direct from port.
Weipa	Rio Tinto	BP	BP	Direct from port. Serves local mines, primarily diesel throughput.

Table C.4 Major terminals: South Australia

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Birkenhead (Adelaide)	Caltex	Caltex	Caltex	Direct from port.
Birkenhead (Adelaide)	Mobil	Mobil	Mobil Shell (JTA) Caltex (minor)	Direct from port.
Largs North (Adelaide)	BP	BP	BP Caltex (minor)	Direct from port.
Port Lincoln	Caltex	Caltex	Caltex	Direct from port.
Port Lincoln	Shell	Shell	Shell Mobil (hosted) BP (minor) (hosted)	Direct from port.

Table C.5 Major terminals: Tasmania

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Hobart	BP	BP	BP Caltex (minor) (hosted) Mobil (minor) (hosted)	Direct from port.
Hobart	Caltex	Caltex	Caltex Shell (hosted)	Direct from port.
Bell Bay	Stolthaven	Stolthaven	Independent wholesaler (leased)	Direct from port.
Burnie	BP	BP	BP Caltex (minor) (hosted)	Direct from port.
Devonport	Shell	Shell	Shell Caltex (JTA)	Direct from port.

Table C.6 Major terminals: Victoria

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Newport (Melbourne)	Caltex	Caltex	Caltex	Direct from Holden Dock.
Newport (Melbourne)	Shell	Shell	Shell	Direct from Holden Dock.
Yarraville (Melbourne)	Mobil	Mobil	Mobil BP (JTA)	Direct from Holden Dock.
Coode Island (Melbourne)	Terminals Pty Ltd	Terminals Pty Ltd	Third party (lease)	Direct from port. No petrol throughput; has ethanol capacity.
Corio (Geelong)	Shell	Shell	Shell Caltex	Indirect through refinery. Terminal is truck gantry at Geelong refinery.
Hastings	United	United	United	Direct from port.

Table C.7 Major terminals: Western Australia

Location	Owner(s)	Operator	User(s) (type of arrangement)	Import access
Fremantle (Perth)	Shell/ Caltex	Shell	Caltex Shell	Indirect through Kwinana refinery. Terminal is being closed down.
Kewdale (Perth)	BP	BP	BP Caltex (hosted)	Indirect through Kwinana refinery.
North Fremantle (Perth)	BP	BP	BP	Indirect through Kwinana refinery. Minimal petrol throughput.
Kwinana (Perth)	Coogee	Coogee	Caltex, Mobil, Shell, and independent wholesalers (hosted)	Direct from port.
Albany	Caltex	Caltex	Caltex	Direct from port.
Broome	BP	BP	BP Caltex (minor) (hosted)	Direct from port.
Broome	Shell	Shell	Shell	Direct from port.
Cape Lambert	Rio Tinto	BP	BP	Direct from port. Serves local mines, primarily diesel throughput.
Dampier	Rio Tinto	BP	BP	Direct from port. Serves local mines, primarily diesel throughput.
Esperance	BP	BP	BP	Direct from port.
Esperance	Shell	Shell	Shell Caltex (hosted)	Direct from port.
Geraldton	BP	BP	BP Caltex (hosted)	Direct from port.
Geraldton	Shell	Shell	Shell Caltex (hosted)	Direct from port.
Port Hedland	BP	BP	BP Caltex	Direct from port.
Port Hedland	Caltex	Caltex	Caltex	Direct from port. No petrol throughput.

Appendix D: E10 price monitoring

This appendix presents information on the ACCC's E10 price monitoring in the period October 2011 to September 2012.¹⁹⁹

E10 is regular unleaded petrol which includes up to 10 per cent ethanol. The prices monitored are those for regular unleaded petrol (RULP) and E10. The monitoring excludes premium unleaded petrol that contains ethanol and E85. E10 prices are collected from various retail sites in a particular location and compared with the RULP prices at those retail sites. To be included in this analysis retail sites must sell both E10 and RULP.

Nine regional locations that were included in last years' report have dropped out of the monitoring program this year. Seven of these locations are in New South Wales and two in Queensland.²⁰⁰ In addition, two regional locations in New South Wales and one in Queensland have not had any price data available for the last 6 months. Three locations (two in Queensland and one in New South Wales) were added to the monitoring program this year.

The decrease in the number of locations in New South Wales included in the E10 monitoring program is a result of the ethanol mandate in that state (as retail sites move to sell E10 and cease selling RULP).²⁰¹

Methodological issues relating to the collection and reporting of this price data are discussed at the end of this appendix.

199 E10 price monitoring quarterly reports for the December 2006 quarter and the March, June and September 2007 quarters are available from the ACCC website. Information from October 2007 to September 2011 was included in past ACCC petrol monitoring reports.

The source for all data in this appendix is ACCC and Informed Sources. Note that some figures in the tables may not add exactly due to rounding. Where data is not available it is identified in the tables as 'na'.

200 These are identified in the methodological section at the end of this appendix.

201 The New South Wales ethanol mandate is described in section 5.2.1 of chapter 5.

Monthly and quarterly aggregates

Table D1 shows monthly and quarterly average differentials between RULP and E10 prices across all of the locations included in the ACCC's E10 price monitoring program for the period October 2011 to September 2012.

**Table D1 Monthly and quarterly average RULP-E10 differentials: October 2011 to September 2012—
all locations monitored**

Month	Differential cpl
October 2011	1.7
November 2011	1.8
December 2011	1.8
Average	1.8
January 2012	1.8
February 2012	1.8
March 2012	1.7
Average	1.8
April 2012	1.8
May 2012	1.8
June 2012	1.9
Average	1.8
July 2012	2.1
August 2012	1.9
September 2012	1.9
Average	2.0

Table D1 shows that the monthly average differential between RULP and E10 prices across all the locations in the ACCC's E10 price monitoring program was broadly stable over most of the period, with a slight increase in the last quarter.

Capital cities and regional locations

Table D2 shows monthly average RULP and E10 prices and the differential for the capital cities and regional locations in aggregate. The table covers the period October 2011 to September 2012.

**Table D2 Monthly and quarterly average RULP and E10 prices and the differential:
October 2011 to September 2012—broad aggregates²⁰²**

Location	Month	RULP cpl	E10 cpl	Differential cpl
Capital cities	October 2011	145.4	143.3	2.1
	November 2011	142.1	140.0	2.1
	December 2011	140.0	137.9	2.1
	Average	142.5	140.4	2.1
	January 2012	142.0	139.9	2.1
	February 2012	143.3	141.3	2.0
	March 2012	146.7	144.6	2.1
	Average	144.0	141.9	2.1
	April 2012	149.6	147.4	2.2
	May 2012	147.2	145.1	2.1
	June 2012	139.4	137.3	2.1
	Average	145.4	143.3	2.1
	July 2012	134.0	131.8	2.2
	August 2012	141.8	139.6	2.2
	September 2012	144.4	142.2	2.2
	Average	140.1	137.9	2.2
Regional locations	October 2011	145.1	143.4	1.7
	November 2011	144.3	142.5	1.8
	December 2011	143.1	141.3	1.8
	Average	144.2	142.4	1.8
	January 2012	143.8	142.1	1.7
	February 2012	144.5	142.8	1.7
	March 2012	148.9	147.2	1.7
	Average	145.7	144.0	1.7
	April 2012	153.2	151.6	1.6
	May 2012	152.5	150.8	1.7
	June 2012	147.7	145.8	1.9
	Average	151.1	149.4	1.7
	July 2012	141.2	139.1	2.1
	August 2012	144.5	142.6	1.9
	September 2012	146.9	145.0	1.9
	Average	144.2	142.2	2.0

²⁰² The average monthly price in the 'capital cities' aggregate is the average of all prices from retail sites selling E10 in the five capital cities (i.e. Sydney, Melbourne, Brisbane, Adelaide and Canberra); and similarly the average monthly price in the 'regional locations' aggregate is the average of all prices from retail sites selling E10 in New South Wales and Queensland regional locations.

Specific locations

Tables D3 and D4 show the same data as in table D2 for each of the 35 locations across Australia included in the monitoring program in the period October 2011 to September 2012. Table D3 includes five capital cities and table D4 includes 30 regional locations (14 in New South Wales and 16 in Queensland).

Table D3 Monthly and quarterly average RULP and E10 prices and the differential: October 2011 to September 2012—capital cities

Location	Month	RULP cpl	E10 cpl	Differential cpl
Sydney	October 2011	143.4	141.2	2.2
	November 2011	139.9	137.6	2.3
	December 2011	138.4	136.1	2.3
	Average	140.6	138.3	2.3
	January 2012	140.3	138.1	2.2
	February 2012	143.0	140.9	2.1
	March 2012	145.6	143.4	2.2
	Average	143.0	140.8	2.2
	April 2012	148.9	146.7	2.2
	May 2012	143.8	141.6	2.2
	June 2012	136.3	134.0	2.3
	Average	143.0	140.8	2.2
	July 2012	130.8	128.3	2.5
	August 2012	140.4	137.9	2.5
	September 2012	142.4	140.0	2.4
	Average	137.9	135.4	2.5
Melbourne	October 2011	142.9	140.7	2.2
	November 2011	138.9	136.7	2.2
	December 2011	136.9	134.7	2.2
	Average	139.6	137.4	2.2
	January 2012	139.2	137.1	2.1
	February 2012	138.5	136.4	2.1
	March 2012	144.9	142.6	2.3
	Average	140.9	138.7	2.2
	April 2012	151.5	148.7	2.8
	May 2012	145.2	142.8	2.4
	June 2012	130.6	128.4	2.2
	Average	142.4	140.0	2.5
	July 2012	131.2	129.0	2.2
	August 2012	138.3	136.0	2.3
	September 2012	141.8	139.3	2.5
	Average	137.1	134.8	2.3

Location	Month	RULP cpl	E10 cpl	Differential cpl
Brisbane	October 2011	148.0	146.1	1.9
	November 2011	143.3	141.4	1.9
	December 2011	141.5	139.6	1.9
	Average	144.3	142.4	1.9
	January 2012	144.3	142.4	1.9
	February 2012	145.4	143.5	1.9
	March 2012	149.6	147.6	2.0
	Average	146.4	144.5	1.9
	April 2012	151.8	149.7	2.1
	May 2012	147.4	145.5	1.9
	June 2012	141.9	140.0	1.9
	Average	147.0	145.1	2.0
	July 2012	136.4	134.5	1.9
	August 2012	144.5	142.5	2.0
	September 2012	146.3	144.2	2.1
	Average	142.4	140.4	2.0
Adelaide	October 2011	143.7	141.5	2.2
	November 2011	139.1	136.8	2.3
	December 2011	137.0	134.7	2.3
	Average	139.9	137.7	2.3
	January 2012	140.2	137.9	2.3
	February 2012	141.0	138.8	2.2
	March 2012	145.7	143.6	2.1
	Average	142.3	140.1	2.2
	April 2012	148.3	146.0	2.3
	May 2012	145.9	143.6	2.3
	June 2012	139.0	136.7	2.3
	Average	144.4	142.1	2.3
	July 2012	132.4	130.0	2.4
	August 2012	140.7	138.4	2.3
	September 2012	142.2	139.8	2.4
	Average	138.4	136.1	2.4
Canberra	October 2011	148.8	147.1	1.7
	November 2011	149.4	147.7	1.7
	December 2011	146.1	144.4	1.7
	Average	148.1	146.4	1.7
	January 2012	145.8	144.0	1.8
	February 2012	148.8	147.0	1.8
	March 2012	147.6	145.9	1.7
	Average	147.4	145.6	1.8
	April 2012	147.6	145.9	1.7
	May 2012	153.8	152.1	1.7
	June 2012	149.3	147.6	1.7
	Average	150.2	148.5	1.7
	July 2012	139.1	137.3	1.8
	August 2012	144.9	143.1	1.8
	September 2012	149.5	147.8	1.7
	Average	144.5	142.7	1.8

**Table D4 Monthly and quarterly average RULP and E10 prices and the differential:
October 2011 to September 2012—regional locations**

Location	Month	RULP cpl	E10 cpl	Differential cpl
New South Wales regional locations				
Albury	October 2011	135.5	134.0	1.5
	November 2011	135.5	134.0	1.5
	December 2011	135.5	134.0	1.5
	Average	135.5	134.0	1.5
	January 2012	135.5	134.0	1.5
	February 2012	138.9	137.4	1.5
	March 2012	142.9	141.4	1.5
	Average	139.1	137.6	1.5
	April 2012	149.9	148.4	1.5
	May 2012	149.9	148.4	1.5
	June 2012	145.9	144.4	1.5
	Average	148.6	147.1	1.5
	July 2012	137.8	136.3	1.5
	August 2012	140.2	138.7	1.5
	September 2012	142.9	141.4	1.5
	Average	140.3	138.8	1.5
Bathurst	October 2011	142.6	141.0	1.6
	November 2011	145.9	144.4	1.5
	December 2011	145.9	144.4	1.5
	Average	144.8	143.3	1.5
	January 2012	145.9	144.4	1.5
	February 2012	146.3	144.8	1.5
	March 2012	151.2	149.7	1.5
	Average	147.8	146.3	1.5
	April 2012	na	na	na
	May 2012	na	na	na
	June 2012	na	na	na
	Average	na	na	na
	July 2012	na	na	na
	August 2012	na	na	na
	September 2012	na	na	na
	Average	na	na	na
Bulahdelah	October 2011	141.2	139.4	1.8
	November 2011	140.6	138.9	1.7
	December 2011	138.5	136.8	1.7
	Average	140.1	138.4	1.7
	January 2012	na	na	na
	February 2012	na	na	na
	March 2012	na	na	na
	Average	na	na	na
	April 2012	na	na	na
	May 2012	na	na	na
	June 2012	na	na	na
	Average	na	na	na
	July 2012	na	na	na
	August 2012	na	na	na
	September 2012	na	na	na
	Average	na	na	na

Location	Month	RULP cpl	E10 cpl	Differential cpl
Central Coast	October 2011	144.8	143.0	1.8
	November 2011	146.0	144.2	1.8
	December 2011	142.7	140.9	1.8
	Average	144.5	142.7	1.8
	January 2012	140.9	139.1	1.8
	February 2012	143.6	141.7	1.9
	March 2012	146.8	145.0	1.8
	Average	143.8	141.9	1.8
	April 2012	151.8	149.3	2.5
	May 2012	151.2	148.5	2.7
	June 2012	143.9	139.5	4.4
	Average	149.0	145.8	3.2
	July 2012	132.7	127.1	5.6
	August 2012	142.6	139.1	3.5
	September 2012	144.0	140.6	3.4
	Average	139.8	135.6	4.2
Dubbo	October 2011	142.7	141.2	1.5
	November 2011	142.7	141.2	1.5
	December 2011	142.7	141.2	1.5
	Average	142.7	141.2	1.5
	January 2012	142.7	141.2	1.5
	February 2012	142.7	141.2	1.5
	March 2012	147.5	146.0	1.5
	Average	144.3	142.8	1.5
	April 2012	154.2	152.7	1.5
	May 2012	154.3	152.8	1.5
	June 2012	152.2	150.7	1.5
	Average	153.6	152.1	1.5
	July 2012	144.8	143.3	1.5
	August 2012	145.1	143.6	1.5
	September 2012	146.9	145.4	1.5
	Average	145.6	144.1	1.5
Inverell	October 2011	na	na	na
	November 2011	na	na	na
	December 2011	na	na	na
	Average	na	na	na
	January 2012	na	na	na
	February 2012	na	na	na
	March 2012	150.0	148.5	1.5
	Average	150.0	148.5	1.5
	April 2012	153.0	152.0	1.0
	May 2012	152.0	151.0	1.0
	June 2012	147.4	146.4	1.0
	Average	150.8	149.8	1.0
	July 2012	140.1	139.1	1.0
	August 2012	144.0	143.0	1.0
	September 2012	148.8	147.8	1.0
	Average	144.3	143.3	1.0

Location	Month	RULP cpl	E10 cpl	Differential cpl
Kempsey	October 2011	147.2	145.7	1.5
	November 2011	146.1	144.4	1.7
	December 2011	145.9	144.3	1.6
	Average	146.4	144.8	1.6
	January 2012	146.7	145.2	1.5
	February 2012	147.0	145.5	1.5
	March 2012	150.1	148.5	1.6
	Average	147.9	146.4	1.5
	April 2012	na	na	na
	May 2012	na	na	na
	June 2012	148.8	147.1	1.7
	Average	148.8	147.1	1.7
	July 2012	143.0	141.5	1.5
	August 2012	141.5	140.0	1.5
	September 2012	138.2	136.5	1.7
	Average	140.9	139.3	1.6
Moruya	October 2011	151.7	149.7	2.0
	November 2011	150.7	149.0	1.7
	December 2011	147.7	146.3	1.4
	Average	150.0	148.3	1.7
	January 2012	149.0	147.6	1.4
	February 2012	150.0	148.4	1.6
	March 2012	155.2	153.8	1.4
	Average	151.4	149.9	1.5
	April 2012	na	na	na
	May 2012	156.1	154.5	1.6
	June 2012	149.0	147.6	1.4
	Average	152.6	151.1	1.5
	July 2012	141.6	140.0	1.6
	August 2012	149.0	147.8	1.2
	September 2012	na	na	na
	Average	145.3	143.9	1.4
Moss Vale	October 2011	146.2	144.8	1.4
	November 2011	144.0	142.5	1.5
	December 2011	139.9	138.4	1.5
	Average	143.4	141.9	1.5
	January 2012	146.6	145.1	1.5
	February 2012	147.9	146.4	1.5
	March 2012	150.7	149.2	1.5
	Average	148.4	146.9	1.5
	April 2012	151.1	149.6	1.5
	May 2012	152.0	150.5	1.5
	June 2012	141.7	140.2	1.5
	Average	148.3	146.8	1.5
	July 2012	137.0	135.5	1.5
	August 2012	146.2	144.8	1.4
	September 2012	152.6	151.1	1.5
	Average	145.3	143.8	1.5

Location	Month	RULP cpl	E10 cpl	Differential cpl
Newcastle	October 2011	146.2	143.8	2.4
	November 2011	145.5	143.0	2.5
	December 2011	142.5	140.0	2.5
	Average	144.7	142.3	2.5
	January 2012	143.4	140.8	2.6
	February 2012	144.1	141.6	2.5
	March 2012	149.2	146.7	2.5
	Average	145.6	143.0	2.5
	April 2012	154.0	151.7	2.3
	May 2012	151.2	148.7	2.5
	June 2012	140.8	138.3	2.5
	Average	148.7	146.2	2.4
	July 2012	133.0	129.8	3.2
	August 2012	142.8	140.6	2.2
	September 2012	146.6	144.5	2.1
	Average	140.8	138.3	2.5
Taree	October 2011	147.6	145.4	2.2
	November 2011	146.4	144.2	2.2
	December 2011	144.8	143.3	1.5
	Average	146.3	144.3	2.0
	January 2012	146.5	144.9	1.6
	February 2012	147.1	145.6	1.5
	March 2012	151.8	150.3	1.5
	Average	148.5	146.9	1.5
	April 2012	155.9	154.4	1.5
	May 2012	153.7	152.2	1.5
	June 2012	145.9	144.3	1.6
	Average	151.8	150.3	1.5
	July 2012	141.9	140.4	1.5
	August 2012	na	na	na
	September 2012	na	na	na
	Average	141.9	140.4	1.5
Tweed Heads	October 2011	148.6	147.4	1.2
	November 2011	143.8	142.6	1.2
	December 2011	141.5	140.4	1.1
	Average	144.6	143.5	1.2
	January 2012	144.8	143.7	1.1
	February 2012	147.5	146.3	1.2
	March 2012	149.1	148.1	1.0
	Average	147.1	146.0	1.1
	April 2012	152.0	150.9	1.1
	May 2012	na	na	na
	June 2012	na	na	na
	Average	152.0	150.9	1.1
	July 2012	na	na	na
	August 2012	na	na	na
	September 2012	na	na	na
	Average	na	na	na

Location	Month	RULP cpl	E10 cpl	Differential cpl
Tweed Heads South	October 2011	148.2	146.6	1.6
	November 2011	143.2	141.4	1.8
	December 2011	141.3	139.5	1.8
	Average	144.2	142.5	1.7
	January 2012	143.7	142.0	1.7
	February 2012	146.8	145.1	1.7
	March 2012	148.0	146.3	1.7
	Average	146.2	144.5	1.7
	April 2012	150.8	149.1	1.7
	May 2012	148.2	146.4	1.8
	June 2012	141.7	140.0	1.7
	Average	146.9	145.2	1.7
	July 2012	136.0	134.3	1.7
	August 2012	146.9	145.1	1.8
	September 2012	149.7	147.9	1.8
	Average	144.2	142.4	1.8
Wollongong	October 2011	146.9	144.1	2.8
	November 2011	146.1	142.6	3.5
	December 2011	144.3	140.6	3.7
	Average	145.8	142.4	3.3
	January 2012	146.1	143.2	2.9
	February 2012	147.4	144.3	3.1
	March 2012	150.2	148.1	2.1
	Average	147.9	145.2	2.7
	April 2012	153.2	151.4	1.8
	May 2012	151.2	149.2	2.0
	June 2012	143.6	140.2	3.4
	Average	149.3	146.9	2.4
	July 2012	138.7	134.0	4.7
	August 2012	145.3	142.8	2.5
	September 2012	146.3	143.7	2.6
	Average	143.4	140.2	3.3
Queensland regional locations				
Bowen	October 2011	145.9	143.9	2.0
	November 2011	145.9	143.9	2.0
	December 2011	145.9	143.9	2.0
	Average	145.9	143.9	2.0
	January 2012	145.9	143.9	2.0
	February 2012	145.9	143.9	2.0
	March 2012	150.0	148.0	2.0
	Average	147.3	145.3	2.0
	April 2012	154.3	152.3	2.0
	May 2012	154.9	152.9	2.0
	June 2012	152.5	150.5	2.0
	Average	153.9	151.9	2.0
	July 2012	146.9	144.4	2.5
	August 2012	147.5	145.0	2.5
	September 2012	149.9	147.4	2.5
	Average	148.1	145.6	2.5

Location	Month	RULP cpl	E10 cpl	Differential cpl
Bundaberg	October 2011	na	na	na
	November 2011	na	na	na
	December 2011	na	na	na
	Average	na	na	na
	January 2012	na	na	na
	February 2012	143.9	141.9	2.0
	March 2012	148.0	146.0	2.0
	Average	146.0	144.0	2.0
	April 2012	151.7	149.7	2.0
	May 2012	152.0	149.7	2.3
	June 2012	147.4	145.1	2.3
	Average	150.4	148.2	2.2
	July 2012	141.6	139.6	2.0
	August 2012	143.8	141.8	2.0
	September 2012	144.9	142.9	2.0
	Average	143.4	141.4	2.0
Cairns	October 2011	146.4	144.7	1.7
	November 2011	145.9	144.3	1.6
	December 2011	145.9	144.3	1.6
	Average	146.1	144.4	1.6
	January 2012	145.9	144.3	1.6
	February 2012	146.0	144.5	1.5
	March 2012	150.3	148.7	1.6
	Average	147.4	145.8	1.6
	April 2012	154.9	153.3	1.6
	May 2012	155.3	153.7	1.6
	June 2012	152.7	151.1	1.6
	Average	154.3	152.7	1.6
	July 2012	147.1	145.5	1.6
	August 2012	147.2	145.5	1.7
	September 2012	148.8	147.1	1.7
	Average	147.7	146.0	1.7
Childers	October 2011	146.1	144.6	1.5
	November 2011	144.1	142.6	1.5
	December 2011	143.2	141.6	1.6
	Average	144.5	142.9	1.5
	January 2012	144.4	142.8	1.6
	February 2012	144.9	143.4	1.5
	March 2012	150.0	148.4	1.6
	Average	146.4	144.9	1.6
	April 2012	154.7	153.1	1.6
	May 2012	153.6	152.1	1.5
	June 2012	148.1	146.6	1.5
	Average	152.1	150.6	1.5
	July 2012	140.3	138.6	1.7
	August 2012	144.6	143.1	1.5
	September 2012	148.1	146.5	1.6
	Average	144.3	142.7	1.6

Location	Month	RULP cpl	E10 cpl	Differential cpl
Dalby	October 2011	143.8	142.3	1.5
	November 2011	142.7	141.2	1.5
	December 2011	142.3	140.8	1.5
	Average	142.9	141.4	1.5
	January 2012	142.4	140.9	1.5
	February 2012	142.4	140.8	1.6
	March 2012	148.4	146.9	1.5
	Average	144.4	142.9	1.5
	April 2012	154.5	152.9	1.6
	May 2012	154.1	152.6	1.5
	June 2012	152.1	150.6	1.5
	Average	153.6	152.0	1.5
	July 2012	145.1	143.6	1.5
	August 2012	145.6	144.1	1.5
	September 2012	148.0	146.5	1.5
	Average	146.2	144.7	1.5
Gladstone	October 2011	145.2	143.2	2.0
	November 2011	143.0	141.0	2.0
	December 2011	141.9	139.9	2.0
	Average	143.4	141.4	2.0
	January 2012	141.6	139.6	2.0
	February 2012	142.6	140.6	2.0
	March 2012	148.9	146.8	2.1
	Average	144.4	142.3	2.0
	April 2012	na	na	na
	May 2012	na	na	na
	June 2012	na	na	na
	Average	na	na	na
	July 2012	na	na	na
	August 2012	na	na	na
	September 2012	na	na	na
	Average	na	na	na
Gympie	October 2011	na	na	na
	November 2011	145.4	143.3	2.1
	December 2011	143.7	141.7	2.0
	Average	144.6	142.5	2.1
	January 2012	143.8	141.8	2.0
	February 2012	143.7	141.7	2.0
	March 2012	150.4	148.4	2.0
	Average	146.0	144.0	2.0
	April 2012	155.3	153.3	2.0
	May 2012	154.3	152.3	2.0
	June 2012	145.7	143.7	2.0
	Average	151.8	149.8	2.0
	July 2012	139.0	137.0	2.0
	August 2012	144.2	142.2	2.0
	September 2012	148.4	146.4	2.0
	Average	143.9	141.9	2.0

Location	Month	RULP cpl	E10 cpl	Differential cpl
Hervey Bay	October 2011	145.5	144.2	1.3
	November 2011	144.5	143.1	1.4
	December 2011	143.3	141.9	1.4
	Average	144.4	143.1	1.4
	January 2012	143.1	141.6	1.5
	February 2012	143.1	141.7	1.4
	March 2012	147.9	146.5	1.4
	Average	144.7	143.3	1.4
	April 2012	151.4	150.0	1.4
	May 2012	151.6	150.1	1.5
	June 2012	146.8	145.3	1.5
	Average	149.9	148.5	1.5
	July 2012	140.9	138.6	2.3
	August 2012	143.3	141.4	1.9
	September 2012	146.9	145.5	1.4
	Average	143.7	141.8	1.9
Ingham	October 2011	143.5	141.4	2.1
	November 2011	143.0	141.0	2.0
	December 2011	142.9	140.9	2.0
	Average	143.1	141.1	2.0
	January 2012	143.2	141.2	2.0
	February 2012	143.4	141.4	2.0
	March 2012	149.1	147.1	2.0
	Average	145.2	143.2	2.0
	April 2012	154.3	152.3	2.0
	May 2012	154.9	152.9	2.0
	June 2012	152.9	150.9	2.0
	Average	154.0	152.0	2.0
	July 2012	146.9	144.9	2.0
	August 2012	146.8	144.8	2.0
	September 2012	148.8	146.8	2.0
	Average	147.5	145.5	2.0
Mackay	October 2011	144.2	142.8	1.4
	November 2011	142.9	141.6	1.3
	December 2011	142.9	141.6	1.3
	Average	143.3	142.0	1.3
	January 2012	142.9	141.7	1.2
	February 2012	143.0	141.5	1.5
	March 2012	147.4	145.8	1.6
	Average	144.4	143.0	1.4
	April 2012	152.9	151.3	1.6
	May 2012	153.1	151.5	1.6
	June 2012	150.0	148.4	1.6
	Average	152.0	150.4	1.6
	July 2012	142.7	140.9	1.8
	August 2012	142.9	140.9	2.0
	September 2012	145.8	143.8	2.0
	Average	143.8	141.9	1.9

Location	Month	RULP cpl	E10 cpl	Differential cpl
Maryborough	October 2011	145.7	144.7	1.0
	November 2011	144.3	143.3	1.0
	December 2011	142.9	141.9	1.0
	Average	144.3	143.3	1.0
	January 2012	143.4	142.4	1.0
	February 2012	143.3	142.4	0.9
	March 2012	148.2	147.2	1.0
	Average	145.0	144.0	1.0
	April 2012	na	na	na
	May 2012	151.5	150.5	1.0
	June 2012	na	na	na
	Average	151.5	150.5	1.0
	July 2012	na	na	na
	August 2012	na	na	na
	September 2012	na	na	na
	Average	na	na	na
Rockhampton	October 2011	149.1	147.4	1.7
	November 2011	149.6	147.9	1.7
	December 2011	149.9	148.3	1.6
	Average	149.5	147.9	1.7
	January 2012	148.5	146.5	2.0
	February 2012	148.5	146.5	2.0
	March 2012	151.0	149.0	2.0
	Average	149.3	147.3	2.0
	April 2012	153.9	151.9	2.0
	May 2012	153.4	151.4	2.0
	June 2012	149.9	148.2	1.7
	Average	152.4	150.5	1.9
	July 2012	144.6	143.2	1.4
	August 2012	146.0	144.3	1.7
	September 2012	151.0	149.3	1.7
	Average	147.2	145.6	1.6
Toowoomba	October 2011	141.2	139.6	1.6
	November 2011	141.1	139.4	1.7
	December 2011	139.4	137.7	1.7
	Average	140.6	138.9	1.7
	January 2012	138.8	137.1	1.7
	February 2012	139.0	137.3	1.7
	March 2012	143.9	142.2	1.7
	Average	140.6	138.9	1.7
	April 2012	151.2	149.5	1.7
	May 2012	151.7	150.0	1.7
	June 2012	147.3	145.6	1.7
	Average	150.1	148.4	1.7
	July 2012	140.3	138.6	1.7
	August 2012	139.6	137.9	1.7
	September 2012	145.4	143.7	1.7
	Average	141.8	140.1	1.7

Location	Month	RULP cpl	E10 cpl	Differential cpl
Townsville	October 2011	142.8	140.7	2.1
	November 2011	142.3	140.2	2.1
	December 2011	141.6	139.5	2.1
	Average	142.2	140.1	2.1
	January 2012	141.9	139.8	2.1
	February 2012	142.1	140.0	2.1
	March 2012	148.0	145.8	2.2
	Average	144.0	141.9	2.1
	April 2012	151.8	149.7	2.1
	May 2012	151.2	149.1	2.1
	June 2012	148.8	146.7	2.1
	Average	150.6	148.5	2.1
	July 2012	143.7	141.2	2.5
	August 2012	144.7	142.0	2.7
	September 2012	146.0	143.4	2.6
	Average	144.8	142.2	2.6
Warwick	October 2011	143.8	142.3	1.5
	November 2011	143.7	142.2	1.5
	December 2011	143.7	142.2	1.5
	Average	143.7	142.2	1.5
	January 2012	143.7	142.2	1.5
	February 2012	143.3	141.8	1.5
	March 2012	147.8	146.3	1.5
	Average	144.9	143.4	1.5
	April 2012	151.3	149.8	1.5
	May 2012	151.3	149.8	1.5
	June 2012	148.0	146.5	1.5
	Average	150.2	148.7	1.5
	July 2012	138.4	136.9	1.5
	August 2012	142.2	140.7	1.5
	September 2012	145.1	143.4	1.7
	Average	141.9	140.3	1.6
Whitsunday	October 2011	na	na	na
	November 2011	na	na	na
	December 2011	na	na	na
	Average	na	na	na
	January 2012	142.2	140.6	1.6
	February 2012	142.6	141.1	1.5
	March 2012	146.8	145.2	1.6
	Average	143.9	142.3	1.6
	April 2012	151.4	149.9	1.5
	May 2012	150.1	148.5	1.6
	June 2012	149.3	147.8	1.5
	Average	150.3	148.7	1.5
	July 2012	145.2	143.6	1.6
	August 2012	145.8	144.3	1.5
	September 2012	147.7	146.2	1.5
	Average	146.2	144.7	1.5

Methodology

Coverage

The ACCC obtains petrol price data from Informed Sources. Informed Sources price monitoring involves sampling. Informed Sources currently monitors fuel prices at around 4200 retail sites in Australia. There are currently around 6300 retail sites in Australia. Therefore, the Informed Sources monitoring covers two thirds of the total number of retail sites. All of the capital cities and most of the major regional centres are included in the Informed Sources price monitoring, as are a representative sample of other regional locations.

Informed Sources collects E10 price data from all states and territories, except Western Australia where E10 is not commercially available.

As at early October 2012 Informed Sources collected E10 prices from around 1220 retail sites across Australia. Of this total, around 35 per cent of these retail sites are included in the locations covered in this appendix.²⁰³

The number of locations included in the E10 monitoring program in 2012 has decreased from last year (from 41 to 35 locations) primarily because retail sites in New South Wales are increasingly selling E10 and not selling RULP.

Locations that were included in last year's report but which have since dropped out of the E10 monitoring program are Armidale, Coffs Harbour, Goulburn, Gunnedah, Lismore, Muswellbrook and Tamworth in New South Wales; and Ayr and Roma in Queensland. Three locations—Bulahdelah and Bathurst in New South Wales and Gladstone in Queensland—have not had any price data available for the last six months.

Locations that have been added to the E10 monitoring program this year are Inverell in New South Wales; and Bundaberg and Whitsunday in Queensland.

Data collection

Informed Sources obtains daily average E10 and RULP prices for the locations included in this appendix. The monthly averages are derived from the daily average prices. E10 prices collected are for regular E10. They do not include premium unleaded petrol that contains ethanol or E85.

The daily E10 price for these locations is the average price at retail sites selling E10 that are monitored by Informed Sources. The daily RULP price is the average price at those retail sites. Therefore, the average RULP price for a particular location included in this report may be different from the overall average RULP price in that location.

Locations are only included in the tables where Informed Sources obtains daily E10 prices from two or more retail sites in that location. This is to ensure the robustness of the price data.

Daily price data is only included in the monthly average where both E10 and RULP prices for that day are available. To derive a monthly average price, daily average prices need to be available for at least 14 days in that month.

²⁰³ To be included in this appendix, locations needed to have price data for at least three months over the period October 2011 to September 2012.

Informed Sources may exclude data from some retail sites which sell E10 in these locations where it has concerns about the robustness and accuracy of the E10 or RULP price data.

In some locations there are significant variations in the monthly price differential between RULP and E10. These variations are influenced by factors such as the specific retail sites included in the monitoring each month and changes to the pricing policies at retail sites.

Appendix E: Gross indicative retail differences

This appendix provides data on gross indicative retail differences (subsequently referred to as ‘differences’) for petrol.²⁰⁴ These differences are calculated by subtracting average terminal gate prices (TGPs) from average retail prices.

Differences for the five largest cities in aggregate were discussed in chapter 8. This appendix provides differences for each of the cities individually.²⁰⁵ These are shown annually for the period 2007–08 to 2011–12 in both nominal and real terms, and monthly for 2011–12.²⁰⁶

It is important to remember that these differences are a useful benchmark only and they should not be confused with actual profits.

²⁰⁴ All references to petrol in this appendix are to RULP.

²⁰⁵ Sources for the data in this appendix are: ACCC, Informed Sources, BP, Caltex, Mobil, Shell, WA FuelWatch, and Australian Bureau of Statistics.

²⁰⁶ The ABS All Groups Consumer Price Index for Sydney, Melbourne, Brisbane, Adelaide and Perth was used to deflate the respective retail differences. Source: Australian Bureau of Statistics, *6401.0 Consumer Price Index, Australia*, Tables 1 and 2. CPI: All Groups, Index Numbers and Percentage Changes, at: <http://www.abs.gov.au/AUSSTATS>, accessed 8 October 2012.

Sydney

Average annual petrol retail prices, TGPs and differences in Sydney for 2007–08 to 2011–12 are presented in table E.1. The differences are also calculated in real terms relative to 2007–08 prices. The information is presented on a monthly basis for 2011–12 in table E.2.

Table E.1 Average annual petrol retail prices, TGPs and differences, Sydney: 2007–08 to 2011–12

	Average retail price cpl	Average TGP cpl	Difference cpl	Difference (real) cpl
2007–08	136.3	131.3	5.0	5.0
2008–09	128.2	122.1	6.1	5.9
2009–10	123.4	117.0	6.4	6.1
2010–11	131.7	124.1	7.6	7.0
2011–12	141.9	135.2	6.7	6.0
Average difference			6.4	6.0

The average annual difference over the five years was 6.4 cpl. It ranged from a low of 5.0 cpl in 2007–08 to a high of 7.6 cpl in 2010–11.

Table E.2 Average monthly petrol retail prices, TGPs and differences, Sydney: July 2011 to June 2012

	Average retail price cpl	Average TGP cpl	Difference cpl
July 11	139.3	132.2	7.1
August 11	139.3	132.8	6.5
September 11	142.0	136.2	5.8
October 11	143.4	137.3	6.1
November 11	139.9	130.8	9.1
December 11	138.5	130.5	8.0
January 12	140.5	134.7	5.8
February 12	143.2	135.8	7.4
March 12	145.9	141.1	4.8
April 12	149.3	143.4	5.9
May 12	144.4	138.8	5.6
June 12	136.7	128.9	7.8
Average annual difference			6.7

The monthly difference over the year ranged from a low of 5.6 cpl in May 2012 to a high of 9.1 cpl in November 2011.

Melbourne

Average annual petrol retail prices, TGPs and differences in Melbourne for 2007–08 to 2011–12 are presented in table E.3. The differences are also calculated in real terms relative to 2007–08 prices. The information is presented on a monthly basis for 2011–12 in table E.4.

Table E.3 Average annual petrol retail prices, TGPs and differences, Melbourne: 2007–08 to 2011–12

	Average retail price cpl	Average TGP cpl	Difference cpl	Difference (real) cpl
2007–08	136.3	130.7	5.6	5.6
2008–09	129.9	121.8	8.1	7.9
2009–10	125.3	116.7	8.6	8.2
2010–11	131.6	123.6	8.0	7.4
2011–12	141.1	134.7	6.4	5.8
Average difference			7.3	7.0

The average annual difference over the five years was 7.3 cpl. It ranged from a low of 5.6 cpl in 2007–08 to a high of 8.6 cpl in 2009–10.

Table E.4 Average monthly petrol retail prices, TGPs and differences, Melbourne: July 2011 to June 2012

	Average retail price cpl	Average TGP cpl	Difference cpl
July 11	139.3	131.6	7.7
August 11	138.9	132.3	6.6
September 11	142.2	135.6	6.6
October 11	143.1	136.7	6.4
November 11	139.2	130.2	9.0
December 11	137.4	130.0	7.4
January 12	139.8	134.1	5.7
February 12	139.1	135.2	3.9
March 12	145.5	140.7	4.8
April 12	151.8	142.9	8.9
May 12	145.5	138.2	7.3
June 12	130.6	128.3	2.3
Average annual difference			6.4

The monthly difference over the year ranged from a low of 2.3 cpl in June 2012 to a high of 8.9 cpl in November 2011 and April 2012.

Brisbane

Average annual petrol retail prices, TGPs and differences in Brisbane for 2007–08 to 2011–12 are presented in table E.5. The differences are also calculated in real terms relative to 2007–08 prices. The information is presented on a monthly basis for 2011–12 in table E.6.

Table E.5 Average annual petrol retail prices, TGPs and differences, Brisbane: 2007–08 to 2011–12

	Average retail price cpl	Average TGP cpl	Difference cpl	Difference (real) cpl
2007–08	128.4	122.0	6.4	6.4
2008–09	122.5	112.8	9.7	9.3
2009–10	126.3	116.9	9.4	8.8
2010–11	133.7	123.8	9.9	9.0
2011–12	145.4	134.8	10.6	9.4
Average difference			9.2	8.6

Note: TGPs were adjusted downwards before 2009–10 to reflect the Queensland Government retail fuel subsidy of around 9.2 cpl (including GST).

The average annual difference over the five years was 9.2 cpl. It ranged from a low of 6.4 cpl in 2007–08 to a high of 10.6 cpl in 2011–12.

Table E.6 Average monthly petrol retail prices, TGPs and differences, Brisbane: July 2011 to June 2012

	Average retail price cpl	Average TGP cpl	Difference cpl
July 11	141.2	131.9	9.3
August 11	141.7	132.5	9.2
September 11	145.0	135.9	9.1
October 11	148.2	137.0	11.2
November 11	143.7	130.2	13.5
December 11	141.9	129.9	12.0
January 12	144.7	134.2	10.5
February 12	145.8	135.2	10.6
March 12	150.1	140.7	9.4
April 12	152.6	143.1	9.5
May 12	148.2	138.6	9.6
June 12	142.3	128.6	13.7
Average annual difference			10.6

The monthly difference over the year ranged from a low of 9.1 cpl in September 2011 to a high of 13.7 cpl in June 2012.

Adelaide

Average annual petrol retail prices, TGPs and differences in Adelaide for 2007–08 to 2011–12 are presented in table E.7. The differences are also calculated in real terms relative to 2007–08 prices. The information is presented on a monthly basis for 2011–12 in table E.8.

Table E.7 Average annual petrol retail prices, TGPs and differences, Adelaide: 2007–08 to 2011–12

	Average retail price cpl	Average TGP cpl	Difference cpl	Difference (real) cpl
2007–08	135.6	131.4	4.2	4.2
2008–09	128.7	122.6	6.1	5.9
2009–10	123.6	117.4	6.2	5.9
2010–11	130.0	124.1	5.9	5.4
2011–12	142.1	135.1	7.0	6.3
Average difference			5.9	5.5

The average annual difference over the five years was 5.9 cpl. It ranged from a low of 4.2 cpl in 2007–08 to a high of 7.0 cpl in 2011–12.

Table E.8 Average monthly petrol retail prices, TGPs and differences, Adelaide: July 2011 to June 2012

	Average retail price cpl	Average TGP cpl	Difference cpl
July 11	139.7	132.1	7.6
August 11	137.5	132.8	4.7
September 11	142.5	136.2	6.3
October 11	144.2	137.3	6.9
November 11	140.1	130.5	9.6
December 11	138.5	130.3	8.2
January 12	140.4	134.5	5.9
February 12	142.0	135.6	6.4
March 12	146.0	141.0	5.0
April 12	148.6	143.5	5.1
May 12	146.5	138.9	7.6
June 12	139.8	129.0	10.8
Average annual difference			7.0

The monthly difference over the year ranged from a low of 4.7 cpl in August 2011 to a high of 10.8 cpl in June 2012.

Perth

Average annual petrol retail prices, TGPs and differences in Perth for 2007–08 to 2011–12 are presented in table E.9. The differences are also calculated in real terms relative to 2007–08 prices. The information is presented on a monthly basis for 2011–12 in table E.10.

Table E.9 Average annual petrol retail prices, TGPs and differences, Perth: 2007–08 to 2011–12

	Average retail price cpl	Average TGP cpl	Difference cpl	Difference (real) cpl
2007–08	135.8	131.6	4.2	4.2
2008–09	126.2	122.7	3.5	3.4
2009–10	122.3	118.2	4.1	3.9
2010–11	131.5	124.8	6.7	6.2
2011–12	143.3	135.4	7.9	7.1
Average difference			5.3	5.0

The average annual difference over the five years was 5.3 cpl. It ranged from a low of 3.5 cpl in 2008–09 to a high of 7.9 cpl in 2011–12.

Table E.10 Average monthly petrol retail prices, TGPs and differences, Perth: July 2011 to June 2012

	Average retail price cpl	Average TGP cpl	Difference cpl
July 11	139.9	132.7	7.2
August 11	139.9	133.2	6.7
September 11	143.6	136.5	7.1
October 11	145.6	137.6	8.0
November 11	140.5	131.0	9.5
December 11	139.1	130.5	8.6
January 12	141.4	134.6	6.8
February 12	142.9	135.8	7.1
March 12	148.4	141.2	7.2
April 12	151.3	143.7	7.6
May 12	147.7	139.0	8.7
June 12	139.4	129.2	10.2
Average annual difference			7.9

The monthly difference over the year ranged from a low of 6.7 cpl in August 2011 and January 2012 to a high of 10.2 cpl in June 2012.

Appendix F: Retail fuel prices in regional locations

The ACCC monitors fuel prices in around 180 regional locations across Australia. Average annual regular unleaded petrol, diesel and automotive LPG retail prices in these locations in 2011–12 are shown in table F.1.²⁰⁷

207 For a price to be included in the table it had to meet a number of quality thresholds. In general, there had to be a price observation on at least 75 per cent of days over the year, with no break in price data of more than 30 consecutive days. In cases where this threshold was not met, a price has still been included in the table if there was an even spread of missing data observations which would mean that a broadly reliable average price could be estimated. Prices in the latter category have been identified with an asterisk (*) and a degree of caution is required in using the prices of these locations.

For comparison purposes, the average annual RULP retail prices in the capital cities in 2011–12 were: Sydney 141.9 cpl, Melbourne 141.1 cpl, Brisbane 145.4 cpl, Adelaide 142.1 cpl, Perth 143.3 cpl, Canberra 146.8 cpl, Hobart 149.8 cpl and Darwin 153.8 cpl.

The sources for all prices in this appendix are ACCC and Informed Sources.

Table F.1 Average regular unleaded petrol, diesel and automotive LPG retail prices in regional locations in cents per litre: 2011–12

Location	RULP	Diesel	LPG		RULP	Diesel	LPG
New South Wales							
Albury	140.8	148.7	70.4	Lithgow	143.3	150.0	68.8
Armidale	n/a	155.9	80.6	Merimbula	150.0	152.8	84.6
Ballina	n/a	151.2	79.5	Mittagong	n/a	154.2	74.5
Batemans Bay	n/a	156.2	89.9	Moama	147.2	149.4	74.1
Bathurst	146.7	152.1	79.9	Moree	151.1	152.5	87.8
Bega	153.3	156.6	94.0	Moruya	150.7	154.6	84.7
Broken Hill	148.5	153.6	80.3	Moss Vale	148.1	152.2	70.3
Bulahdelah	142.9	151.9	79.7	Mudgee	153.1	156.2	83.2
Buronga	146.8	149.7	75.8	Murwillumbah	147.1	151.9	77.1
Casino	145.5	151.4	79.6	Muswellbrook	149.3	152.6	75.4
Central Coast	144.8	151.0	70.1	Narrabri	151.9	155.3	90.0
Coffs Harbour	148.6	151.4	78.5	Newcastle	145.7	149.7	72.4
Cooma	153.4	159.7	91.8	Nowra	147.4	150.2	76.7
Cootamundra	151.7	156.3	85.0	Nyngan	n/a	157.1	94.0
Cowra	n/a	151.2	n/a	Orange	147.7	153.9	83.2
Deniliquin	150.5	152.3	84.0	Parkes	147.9	151.4	85.3
Dubbo	146.7	150.0	81.5	Port Macquarie	149.2	155.0	82.2
Forbes	148.6	151.8	86.7	Queanbeyan	147.7	148.9	75.0
Forster	149.7	153.1	78.1	Singleton	146.2	151.4	79.1
Gilgandra	148.5	151.8	92.6	Tamworth	148.9	153.9	79.6
Glen Innes	n/a	149.9	78.3	Taree	146.3	149.2	65.8
Goulburn	n/a	148.9	73.8	Temora	150.7	153.6	85.3
Grafton	148.1	151.3	80.0	Tumut	149.8	155.4	82.1
Griffith	147.7	152.3	80.7	Tweed Heads South	145.2	147.6	68.9
Gundagai	146.2	148.6	81.2	Ulladulla	n/a	150.1	78.3
Gunnedah	147.7	151.0	82.6	Wagga Wagga	147.8	151.7	78.1
Hay	150.2	152.0*	82.0	Wauchope	146.7	152.3	83.3
Inverell	148.2	151.0	n/a	Wellington	151.7*	155.0	79.3
Jerilderie	149.9	149.3	81.9	West Wyalong	151.4	156.1	87.6
Kempsey	148.1	153.5	77.3	Wollongong	146.7	150.4	72.6
Leeton	147.4	151.4	81.0	Woolgoolga	148.3	151.2	n/a
Lismore	145.9	150.4	76.7	Yass	150.6	153.0	78.4
Northern Territory							
Alice Springs	165.5	168.5	97.9	Tennant Creek	166.1	173.3	n/a
Katherine	148.8	156.2	98.3				

Location	RULP	Diesel	LPG		RULP	Diesel	LPG
Queensland							
Atherton	147.6	153.7	n/a	Innisfail	147.5	154.5	n/a
Ayr	145.4	150.2	81.7	Kingaroy	146.9	151.4	73.6
Biloela	149.2	152.9	n/a	Longreach	156.2	159.0	n/a
Blackall	157.1	158.7	100.5	Mackay	143.4	150.3	84.4
Blackwater	149.2	151.7	n/a	Mareeba	148.1	154.7	91.4
Bowen	148.5	149.7	87.4	Maryborough	146.0	149.4	85.0
Bundaberg	145.8	150.0	81.3	Miles	156.2	155.5	85.3
Cairns	148.4	155.5	89.1	Moranbah	152.9	155.3	n/a
Charters Towers	150.7	152.5	89.4	Mt Isa	152.9	155.6	84.3
Childers	146.3	149.9	81.5	Rockhampton	149.0	152.7	88.5
Dalby	145.5	149.1	82.2	Roma	149.6	151.7	90.2
Emerald	148.0	151.3	84.9	Toowoomba	141.8	149.4	71.8
Gladstone	146.1	151.1	80.2	Townsville	145.0	147.6	84.2
Goondiwindi	149.2	150.4	80.6	Tully	149.0	153.4	n/a
Gympie	147.4	148.7	82.1	Warwick	145.3	147.9	78.9
Hervey Bay	145.6	149.4	84.1	Whitsunday	140.0	148.3	83.4
Ingham	145.7	147.8	88.6	Yeppoon	148.3	151.4	n/a
South Australia							
Bordertown	149.1	152.4	81.3	Murray Bridge	143.8	150.1	72.9
Ceduna	153.4	154.1	81.9	Naracoorte	146.2	150.2	74.5
Clare	144.9	147.9	77.2	Port Augusta	142.9	149.4	72.2
Cooper Pedy	163.2	n/a	99.9	Port Lincoln	147.8	153.3	69.2
Gawler	142.4	149.3	68.4	Port Pirie	145.3	148.4	77.8
Kadina	145.5	148.5	77.7	Renmark	143.1	150.4	76.4
Keith	151.4	153.2	82.7	Tailem Bend	147.3	150.5	83.4
Loxton	148.2	151.1	79.5	Victor Harbour	145.2	149.8	68.7
Mt Gambier	145.8	151.8	75.8	Whyalla	146.3	151.7	73.3
Tasmania							
Burnie	150.1	153.2	83.4	Queenstown	156.0	157.6	n/a
Devonport	149.4	154.0	82.0	Smithton	151.4	154.2	85.8
Huonville	150.3	155.1	84.2	Sorell	147.2	152.4	82.8
Launceston	149.4	152.2	79.2	Ulverstone	149.9	153.4	83.1
New Norfolk	150.1	154.4	84.6	Wynyard	152.7	154.9	83.8

Location	RULP	Diesel	LPG		RULP	Diesel	LPG
Victoria							
Ararat	143.6	147.1	63.3	Leongatha	148.2	150.8	73.4
Bairnsdale	141.7	146.0	68.6	Mildura	147.7	148.5	77.0
Ballarat	142.3	148.3	67.5	Moe	142.6	147.6	67.7
Benalla	147.4	151.0	74.8	Morwell	143.6	145.8	70.7
Bendigo	143.9	149.5	70.3	Portland	147.7	148.3	77.0
Cobram	146.7	148.8	74.6	Sale	144.0	147.8	72.0
Colac	146.7	149.6	66.7	Seymour	142.2	149.7	64.3
Corryong	152.1	156.0	n/a	Shepparton	145.5	149.1	71.1
Echuca	147.2	149.5	73.9	Swan Hill	147.8	150.3	77.4
Euroa	145.9	147.4	71.6	Traralgon	143.3	148.0	69.8
Geelong	140.8	147.4	63.6	Wallan	142.4	148.2	64.7
Hamilton	147.9	150.6	72.8	Wangaratta	146.5	150.3	71.5
Horsham	146.9	150.3	73.7	Warrnambool	144.9	149.1	73.8
Koo Wee Rup	141.5	145.5	65.1	Wodonga	142.7	149.7	72.7
Kyabram	145.6	149.2	71.3	Yarrawonga	147.2	148.8	73.8
Lakes Entrance	146.3	151.0	72.3				
Western Australia							
Albany	148.8	153.2	100.2	Esperance	150.7	156.3	103.2
Boulder	153.1	156.8	96.3	Geraldton	153.1	155.3	88.5
Bridgetown	149.2	153.4	91.3	Kalgoorlie	152.0	155.9	93.3
Broome	167.4	167.2	111.6	Karratha	161.5	163.1	102.3
Bunbury	141.5	150.1	76.3	Majimup	149.5	153.4	93.4
Busselton	146.2	151.3	83.9	Mount Barker	150.2	154.9	102.5
Carnarvon	158.6	165.3	104.2	Port Hedland	160.1	160.2	103.4
Collie	147.7	153.0	90.9	Waroona	148.0	150.9	89.3
Dongara	158.2	158.8	100.3				

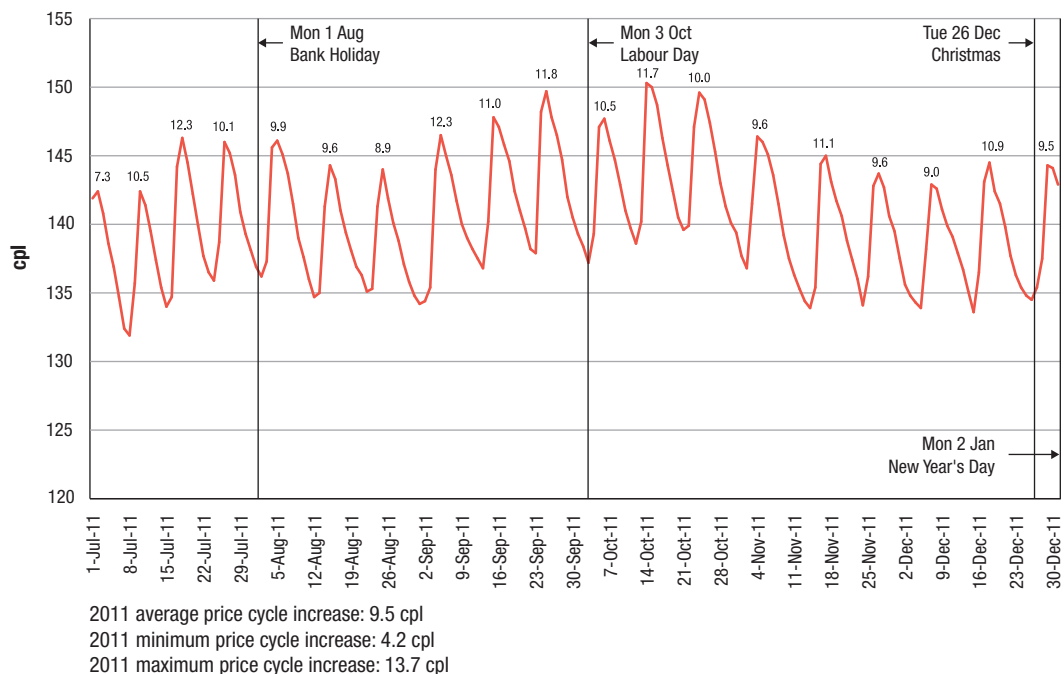
Appendix G: Petrol price cycles and public holidays in the five largest cities

Charts G.1 to G.10 show daily average retail prices for regular unleaded petrol for the second half of 2011 and the first half of 2012 in each of the five largest cities.²⁰⁸ They also identify the price increase of each price cycle during the period and the dates of public holidays. The charts also provide information on the average, minimum and maximum price cycle increases in 2011 and the first half of 2012.²⁰⁹

²⁰⁸ Source for all charts: ACCC calculations based on Informed Sources data.

²⁰⁹ Similar charts for the period January 2007 to June 2011 are available in past ACCC petrol monitoring reports.

**Chart G.1 Sydney, daily average retail prices—price cycles and public holidays:
1 July to 31 December 2011**



**Chart G.2 Sydney, daily average retail prices—price cycles and public holidays:
1 January to 30 June 2012**

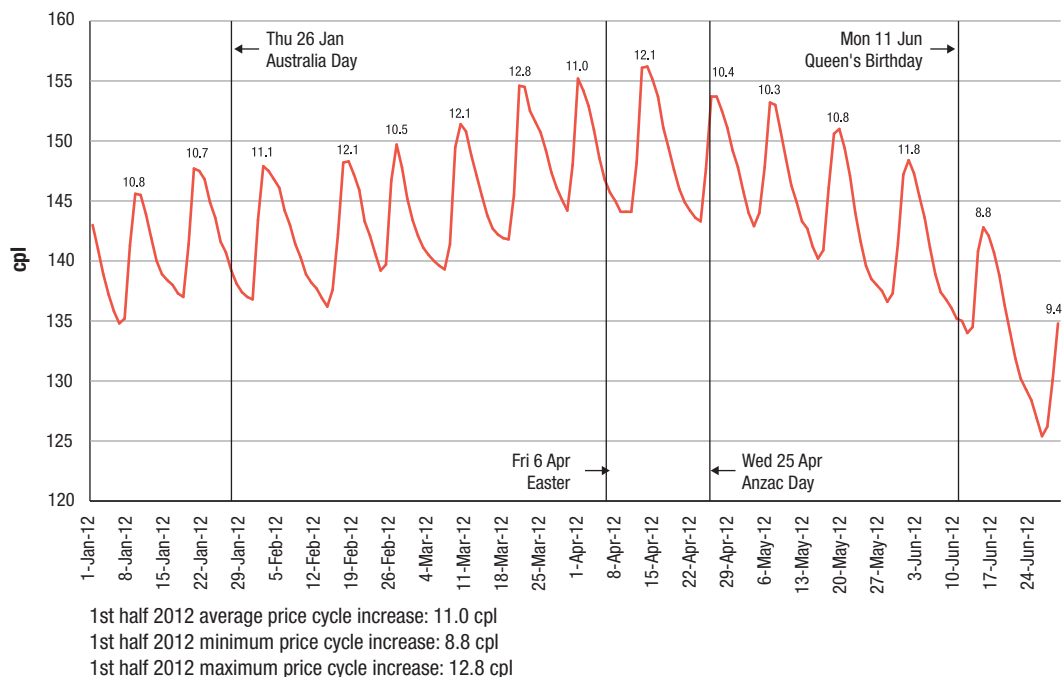


Chart G.3 Melbourne, daily average retail prices—price cycles and public holidays:
1 July to 31 December 2011

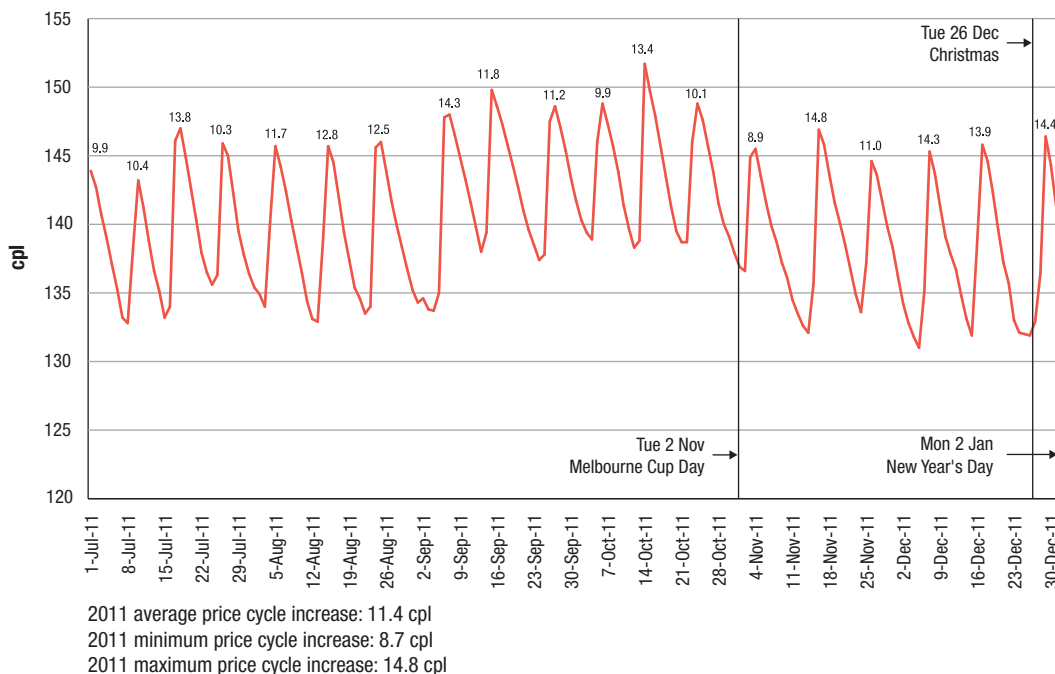
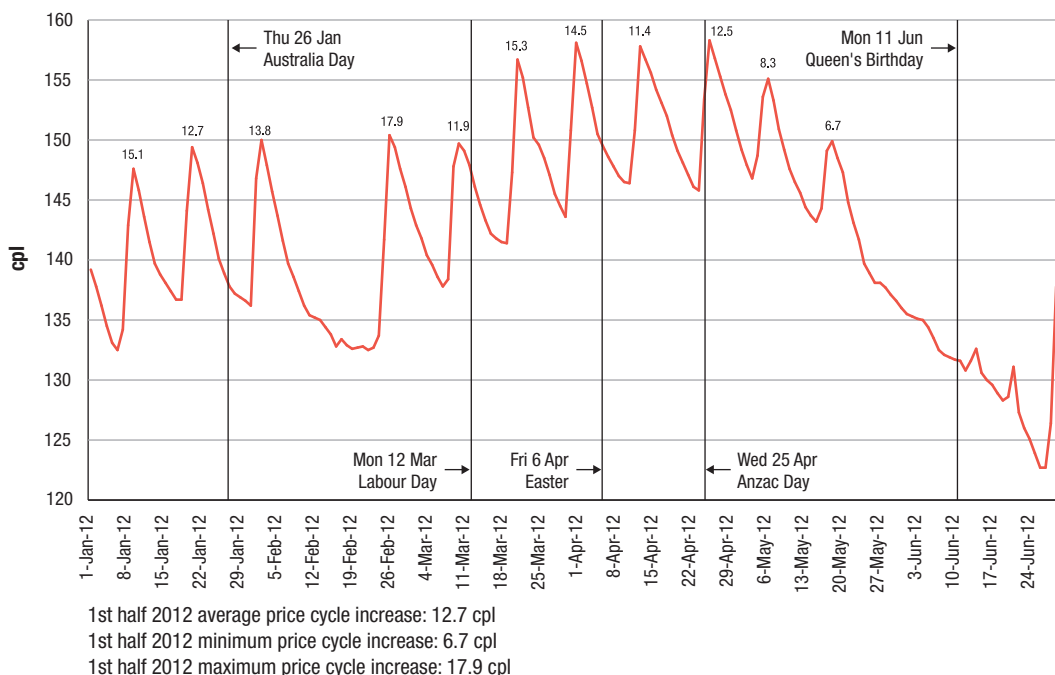
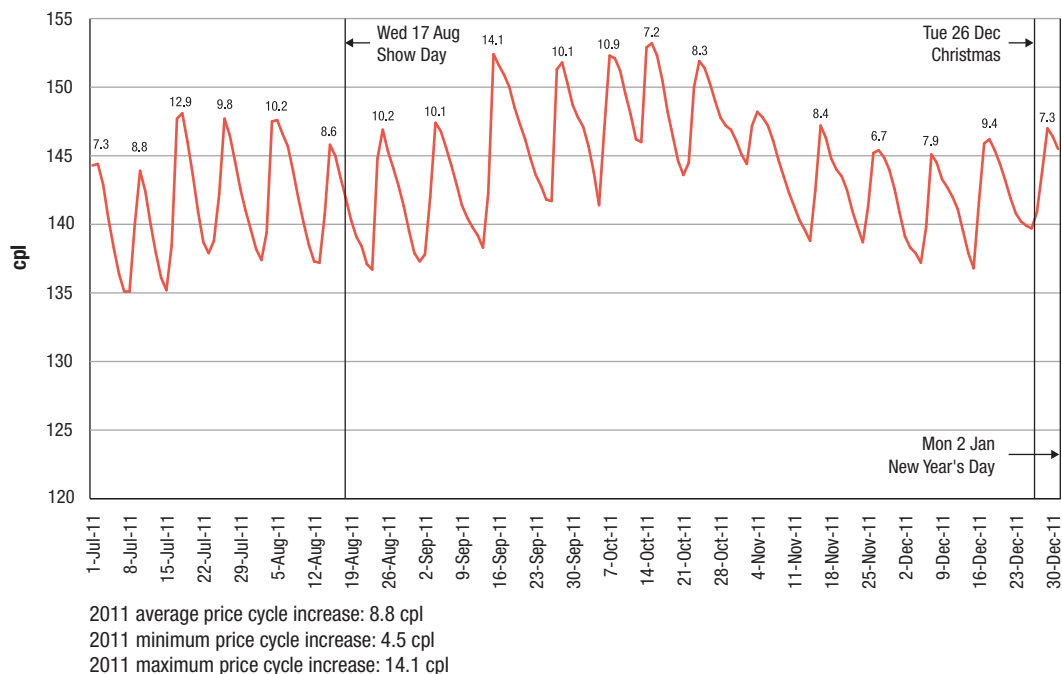


Chart G.4 Melbourne, daily average retail prices—price cycles and public holidays:
1 January to 30 June 2012



**Chart G.5 Brisbane, daily average retail prices—price cycles and public holidays:
1 July to 31 December 2011**



**Chart G.6 Brisbane, daily average retail prices—price cycles and public holidays:
1 January to 30 June 2012**

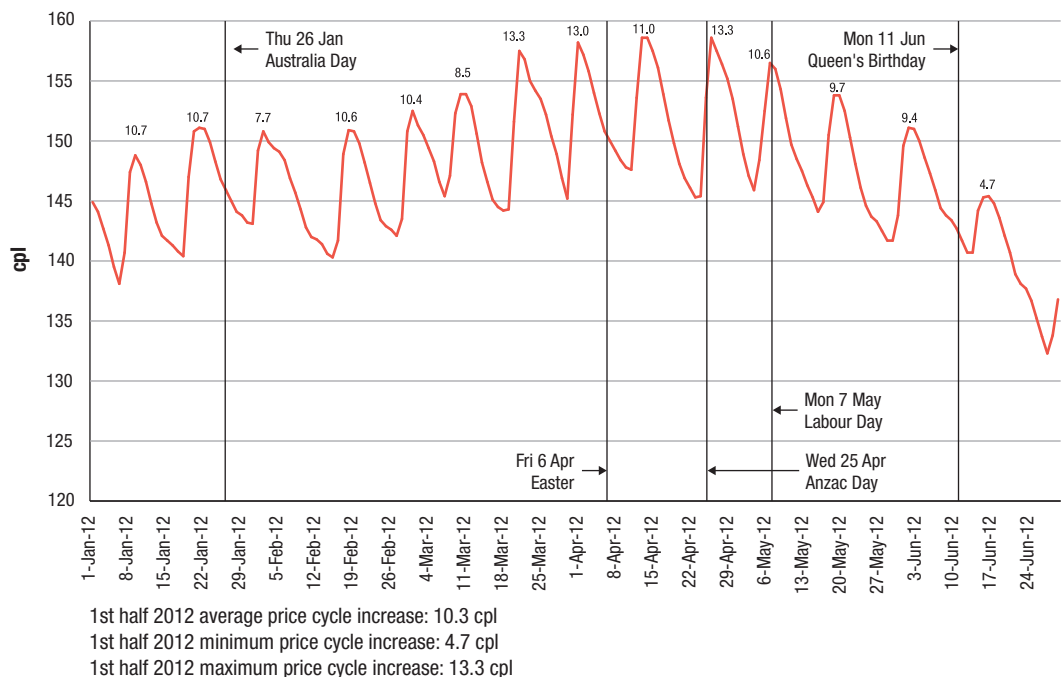


Chart G.7 Adelaide, daily average retail prices—price cycles and public holidays:
1 July to 31 December 2011

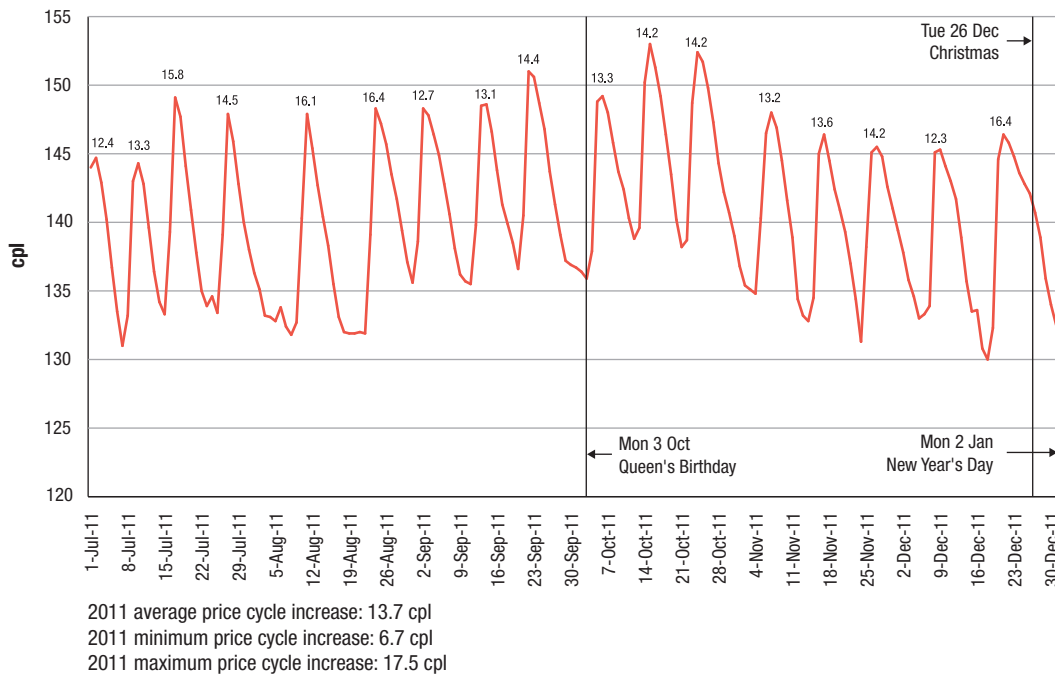


Chart G.8 Adelaide, daily average retail prices—price cycles and public holidays:
1 January to 30 June 2012

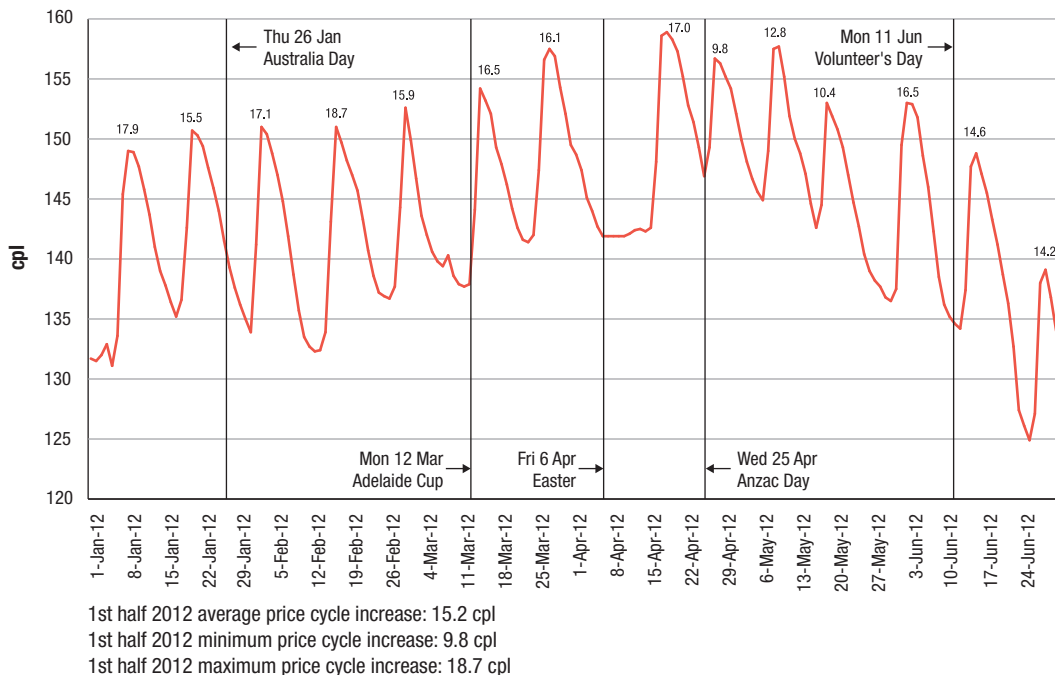


Chart G.9 Perth, daily average retail prices—price cycles and public holidays:
1 July to 31 December 2011

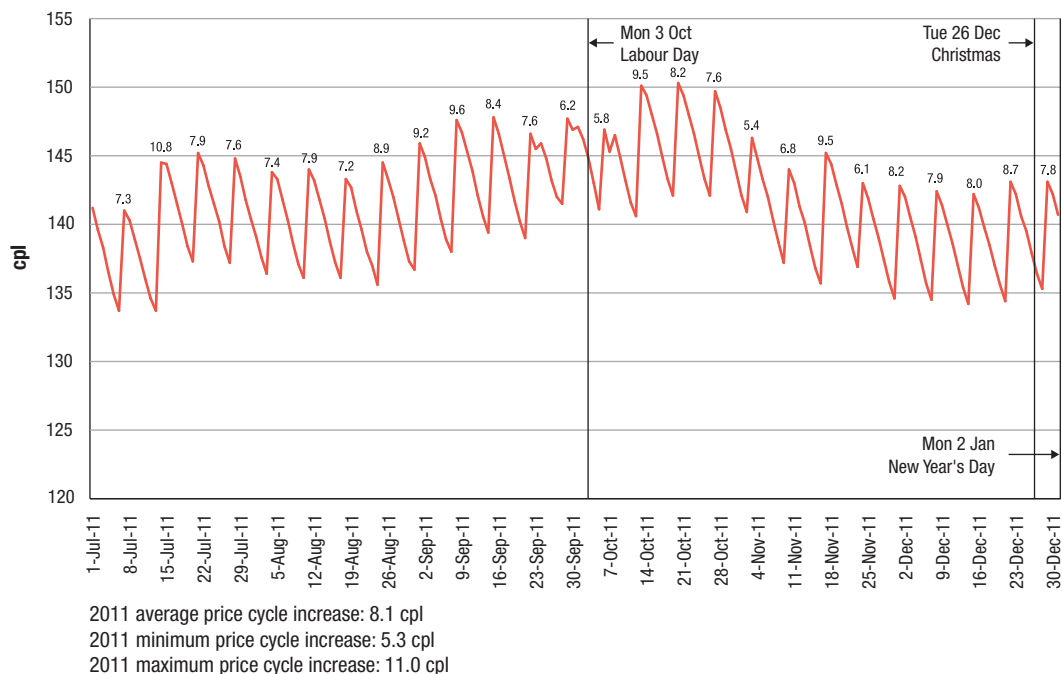
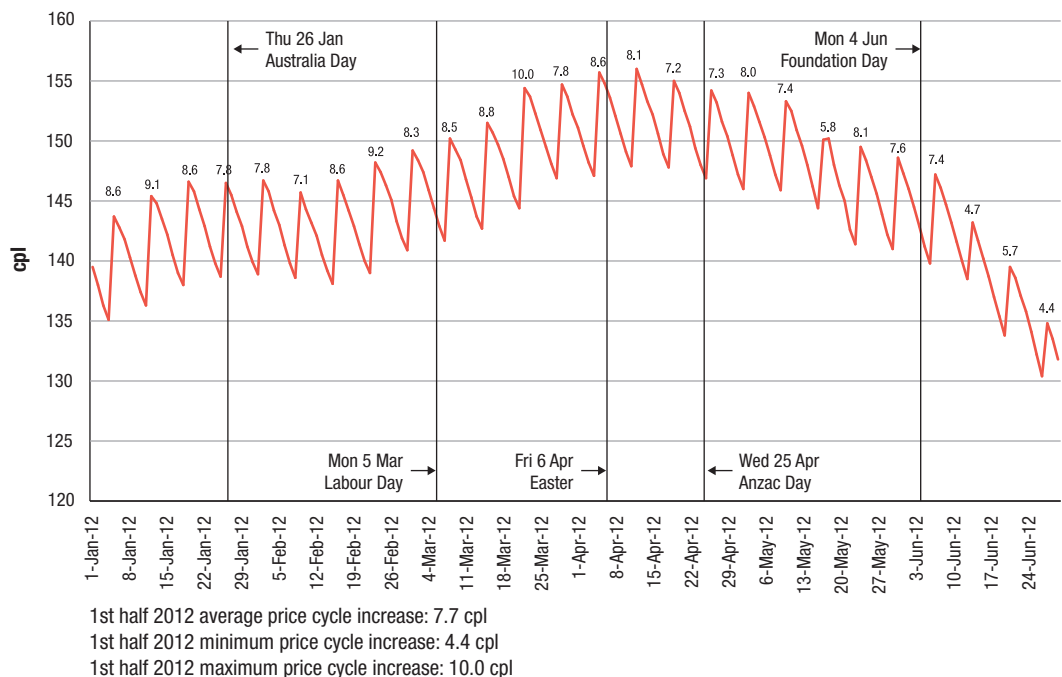


Chart G.10 Perth, daily average retail prices—price cycles and public holidays:
1 January to 30 June 2012



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