

**COOKE Lydia**

**From:** Roger D Simpson & Associates [mailto:roger@panpac.biz]  
**Sent:** Friday, 10 February 2012 4:41 PM  
**To:** COOKE Lydia  
**Cc:** BRACIC John; 'Elsbury Drew'  
**Subject:** Quicklime - USSP non-alumina sector

**NON-CONFIDENTIAL**

Hi Lydia,

Hereunder a non-confidential version of my earlier email:

Further to our meeting on Wednesday (8/2) and email earlier today, please see the attached (confidential) spreadsheet providing actual net selling prices for quicklime and CPI movements from 2004.

From 2004 to 2009, the most recent period unaffected by dumping, the annual growth rate of non-alumina sector net selling prices was XXX % compared with CIP average annual growth rate of XXX % during that period.

We submit that in the absence of dumped imports from Thailand, Cockburn's selling prices since 2009 would have grown by XXX % annually, meaning that the 2011 unsuppressed selling price for the non-alumina sector is \$ XXX /tonne.

Regards,  
Roger

13/02/2012

**COOKE Lydia**

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**From:** Roger D Simpson & Associates [roger@panpac.biz]  
**Sent:** Friday, 10 February 2012 5:01 PM  
**To:** COOKE Lydia  
**Cc:** BRACIC John; 'Elsbury Drew'  
**Subject:** Quicklime - USSP alumina sector

**NON-CONFIDENTIAL**

Hi Lydia,

We submit that the USSP for Cockburn's sales of quicklime into the alumina sector is that amount included in my earlier email, this being the amount Cockburn could achieve in the absence of dumped imports from Thailand. The basis for this amount cannot be publicly disclosed as to do so would adversely affect Cockburn's commercial interests.

Regards,  
Roger

13/02/2012