

s22

From: s22
Sent: Tuesday, 8 October 2024 11:52 AM
To: s22 @bhp.com
Cc: s22
Subject: Coal insights call with DISR [SEC=OFFICIAL]

OFFICIAL

Hi s22 ,

Nice to meet you the other week at Minerals Week.

I'm following up as to whether s22 and myself would be able to organise a call with any experts on coal and iron ore to further build our understanding of our respective commodities.

Writing the Resources and Energy Quarterly, we deal with 2-5 year volumes and price forecasting so are interested in anything to do with production and market insights on the demand, supply and pricing.

Let me know if this is a possibility and keen to discuss further.

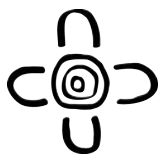
Best,

s22

Economist
Resource Economics Team | Resource and Energy Insights Branch | Analysis and Insights Division

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From: s22
Sent: Tuesday, 14 May 2024 11:08 AM
To: s22 @bhp.com.au
Subject: Hello [SEC=OFFICIAL]

s22

I'm currently working in the Office of the Chief Economist in DISR – the team that does the Resources and Energy Quarterly. I've come full circle!

Our bosses are keen for us to develop more industry contacts to help us better understand the sector and outlook and hence write more useful reports.

We are keen to try and catchup with someone from BHP periodically, perhaps a couple of times a year, to get a BHP perspective on the outlook for resources such as iron ore, copper nickel etc as well as broader issues relating to prices, and longer term outlook/ issues over the horizon.

Obviously we don't expect someone as senior as s22, but we were hoping there was someone from BHP who understands the resources sector and would be willing to share insights/thoughts on the industry.

There's no specific urgency – we're currently drafting the June REQ – and I assume u are super busy given it's Budget week. But keen to discuss when u have time.

Regards

s22

Assistant Manager

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From: s22 s22 @bhpbilliton.com>
Sent: Saturday, 21 September 2024 2:07 PM
To: s22
Subject: RE: Electric smelting furnace [SEC=OFFICIAL]

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BHP Internal

BHP Internal

Mate – sorry for delay s22 On Iron Ore...I'm sure you caught our results preso...we noted there is ~170Mtpa of iron ore supply with production costs in the US\$80-100/t range, and at least 90% of that or ~150Mtpa has a cost base in the US\$90-100/t range. So some decent price support at current levels. We're involved in plenty of partnerships on the ESF front – we see potential in it. Looking forward to catching up soon.

From: s22 s22 @industry.gov.au>
Sent: Wednesday, September 18, 2024 10:31 PM
To: s22 @bhpbilliton.com>
Subject: Electric smelting furnace [SEC=OFFICIAL]

OFFICIAL

s22

I am meeting with IMF on Monday in Canberra. s33(a)(iii)

Can you help with any information on the potential for electric smelting furnace technology (impact / timing) and also BHP strategy for targeting non-Chinese growth in demand. For example, Southern Asia, India and Sub Saharan Africa?

If cannot help no worries. Just trying to fly industry flag.

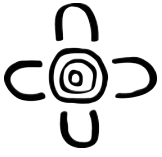
Cheers

s22

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s22



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