## UNITED STATES SECURITIES AND EXCHANGE COMMISSION

Washington, D.C. 20549

#### FORM 6-K

Report of Foreign Private Issuer Pursuant to Rule 13a-16 or 15d-16 under the Securities Exchange Act of 1934

For the Month of June 2018

1-15240 (Commission File Number)

#### JAMES HARDIE INDUSTRIES plc

(Translation of registrant's name into English)

Europa House, Second Floor Harcourt Centre Harcourt Street, Dublin 2, Ireland (Address of principal executive offices)

Indicate by check mark whether the registrant files or will file annual reports under cover Form 20-F or Form 40-F.

Form 20-F..X.... Form 40-F.......

Indicate by check mark if the registrant is submitting the Form 6-K in paper as permitted by Regulation S-T Rule 101(b)(1): Not Applicable Indicate by check mark if the registrant is submitting the Form 6-K in paper as permitted by Regulation S-T Rule 101(b)(7): Not Applicable

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#### Forward-Looking Statements

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Examples of forward-looking statements include:

- statements about the Company's future performance;
- projections of the Company's results of operations or financial condition:
- statements regarding the Company's plans, objectives or goals, including those relating to strategies, initiatives, competition, acquisitions, dispositions and/or its products;
- expectations concerning the costs associated with the suspension or closure of operations at any of the Company's plants and future plans with respect to any such plants:
- expectations concerning the costs associated with the significant capital expenditure projects at any of the Company's plants and future plans with respect to any such projects:
- expectations regarding the extension or renewal of the Company's credit facilities including changes to terms, covenants or ratios:
- · expectations concerning dividend payments and share buy-
- statements concerning the Company's corporate and tax domiciles and structures and potential changes to them, including potential tax charges:
- statements regarding tax liabilities and related audits, reviews and proceedings;
- statements regarding the possible consequences and/or potential outcome of legal proceedings brought against us and the potential liabilities, if any, associated with such proceedings:
- expectations about the timing and amount of contributions to Asbestos Injuries Compensation Fund (AICF), a special purpose fund for the compensation of proven Australian asbestos-related personal injury and death claims;
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  and competition law matters) and to resolve any such pending legal and regulatory matters within current estimates and in anticipation of certain third-party
  recoveries; and
- statements about economic conditions, such as changes in the US economic or housing recovery or changes in the market conditions in the Asia Pacific region, the
  levels of new home construction and home renovations, unemployment levels, changes in consumer income, changes or stability in housing values, the availability
  of mortgages and other financing, mortgage and other interest rates, housing affordability and supply, the levels of foreclosures and home resales, currency
  exchange rates, and builder and consumer confidence.

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of the governmental loan facility to AICF; compliance with and changes in tax laws and treatments; competition and product pricing in the markets in which the Company operates; the consequences of product failures or defects; exposure to environmental, asbestos, putative consumer class action or other legal proceedings; general economic and market conditions; the supply and cost of raw materials; possible increases in competition and the potential that competitors could copy the Company's products; reliance on a small number of customers; a customer's inability to pay; compliance with and changes in environmental and health and safety laws; risks of conducting business internationally; compliance with and changes in laws and regulations; currency exchange risks; dependence on customer preference and the concentration of the Company's customer base on large format retail customers, distributors and dealers; dependence on residential and commercial construction markets; the effect of adverse changes in climate or weather patterns; possible inability to renew credit facilities on terms favorable to the Company, or at all; acquisition or sale of

businesses and business segments; changes in the Company's key management personnel; inherent limitations on internal controls; use of accounting estimates; integration of Fermacell into our business; and all other risks identified in the Company's reports filed with Australian, Irish and US securities regulatory agencies and exchanges (as appropriate). The Company cautions you that the foregoing list of factors is not exhaustive and that other risks and uncertainties may cause actual results to differ materially from those referenced in the Company's forward-looking statements. Forward-looking statements speak only as of the date they are made and are statements of the Company's current expectations concerning future results, events and conditions. The Company assumes no obligation to update any forward looking statements or information except as required by law.

### **EXHIBIT INDEX**

Exhibit No.	<u>Description</u>
<u>99.1</u>	2018 APAC Investor Tour Presentation - J. Troung
99.2	2018 APAC Investor Tour Presentation - C. Groenewald
99.3	2018 APAC Investor Tour Presentation - J. Arneil
<u>99.4</u>	2018 APAC Investor Tour Presentation - S. Terzian
<u>99.5</u>	2018 APAC Investor Tour Presentation - A. Bones
99.6	2018 APAC Investor Tour Presentation - J. Cook

#### **SIGNATURES**

26 June 2018

Date:

Pursuant to the requirements of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned, thereunto duly authorized.

James Hardie Industries plc

By: /s/ Natasha Mercer

Natasha Mercer Company Secretary

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## **James Hardie International**

Jack Truong, President – International
Asia Pacific Investor & Analyst Tour
Sunshine Coast, Australia
June 25-26, 2018

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## **AGENDA**

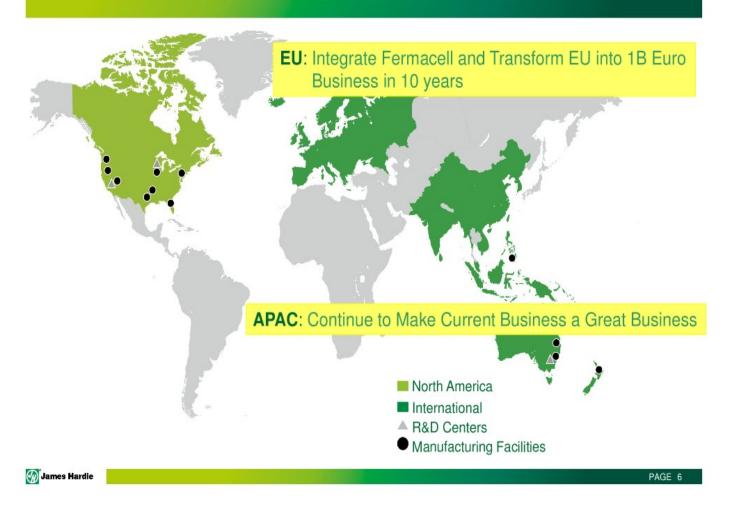
- International Strategy
- James Hardie Europe
- · James Hardie Asia Pacific



## INTERNATIONAL STRATEGY



### **INTERNATIONAL PRIORITIES**



## **AGENDA**

- International Strategy
- James Hardie Europe
- · James Hardie Asia Pacific

James Hardie

### Strategic Rationale of Fermacell Acquisition for JH Europe

### Scale

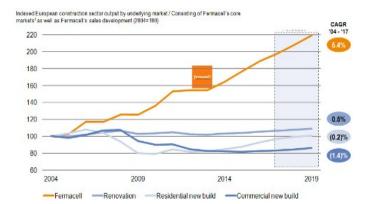
- · Critical mass
- Local R&D capabilities

### Quality Company

- · Quality products
- Strong brand
- · Profitable growth trend



- · Technical pull-through selling
- · High category share
- · From exterior to interior



Source: Euroconstruct (as of Nov-16), B+L Market research, Consultic, BCG
Top 10 markets based on revenue 2016A: DE, FR, DK, NL, CH, AT, UK, CZ, IT, SE



- · Long-term growth above market
- · Route to market
- Fiber gypsum / fiber cement: differentiated technical platforms

James Hardie

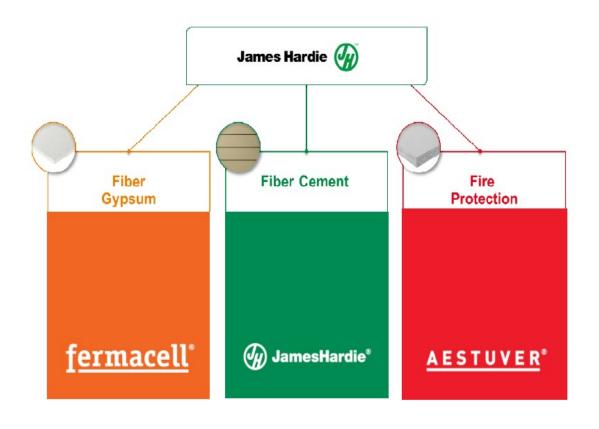
## **James Hardie Europe Transformation**

	Before Acquisition		Post Acquisition	<b>®</b>
Workforce	• 70 employees	<b>4</b>	• 900+ employees	Person I. Standard Million
Presence	• UK, FR, DK, DE	<b>4</b>	• 12+ countries	
Segments	Residential New Construction     Repair and Renovation	<b>4</b>	<ul><li>Residential New Constr</li><li>Repair and Renovation</li><li>Commercial</li></ul>	ruction
Products	Fiber Cement	<b>4</b>	<ul><li>Fiber Cement</li><li>Fiber Gypsum</li><li>Cement Bonded</li></ul>	
Revenue <sup>1</sup>	• € 31 M	<b>4</b>	• ~ € 300 M	

<sup>&</sup>lt;sup>1</sup> 'Before Acquisition' revenue is based on unaudited James Hardie Europe financial records for 12 months ended 31 March 2018. 'Post Acquisition' revenue is a 12 month estimate based on unaudited James Hardie Europe financial records and unaudited Fermacell IFRS financial records for the 12 months ended 31 March 2018.



## **Brand Architecture**



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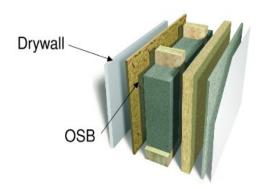
### Value Proposition of Fiber Gypsum

FROM: TWO Layers (OSB + Drywall)

### Fiber Gypsum is the Best All-Around Board



• Over 200 sales professionals throughout Europe with a strong focus on technical sales



TO: ONE Layer of Fiber Gypsum



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## Fiber Gypsum Products & Applications



Fiber Gypsum - Timber Frame



Timber Frame, Germany



Fiber Gypsum - Flooring



Elementary School, Germany



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## **Fiber Cement Products & Applications**



Fiber Cement - HardiePlanks



Fiber Cement - HardiePanel



Fiber Cement - HardieBacker



Timber Frame, UK



Multi Family, France



Wet Room application



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AGE 1

## **Cement Bonded Products & Applications**

<u>AESTUVER</u>°

### Cement Bonded Board - Fire Protection



Elbe Tunnel Hamburg, Germany



NSBP Tunnel Brisbane, Australia



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## **Fermacell Manufacturing Footprint**

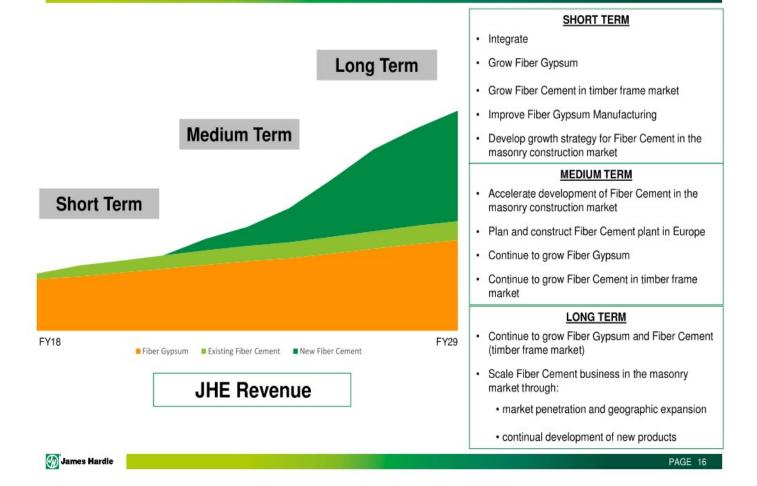
<u>fermacell</u>°

<u>AESTUVER</u>°



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## James Hardie Europe - 10 year objective



## **AGENDA**

- International Strategy
- James Hardie Europe
- · James Hardie Asia Pacific

James Hardie

### **James Hardie Asia Pacific**



## ZERO HARM AT THE CORE OF OUR STRATEGY

#### Australia

 Continue to grow above market with strong focus on demand generation, new product launches, and operational excellence

#### **New Zealand**

Continue to gain share with focus on demand generation and operational excellence

#### **Philippines**

- Accelerated growth through repair & renovation and residential new construction segments
- · Successful start up of new production line in Cabuyao

#### JH Systems

 Focused growth on medium density and high density multifamily new construction

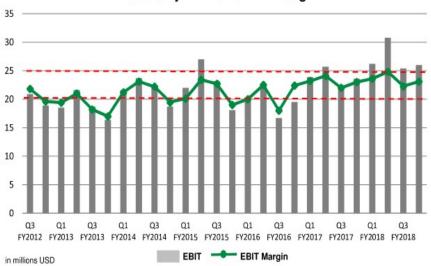




AGE 18

## **International Consistently Delivers Strong Returns**

### **Quarterly EBIT and EBIT Margin**





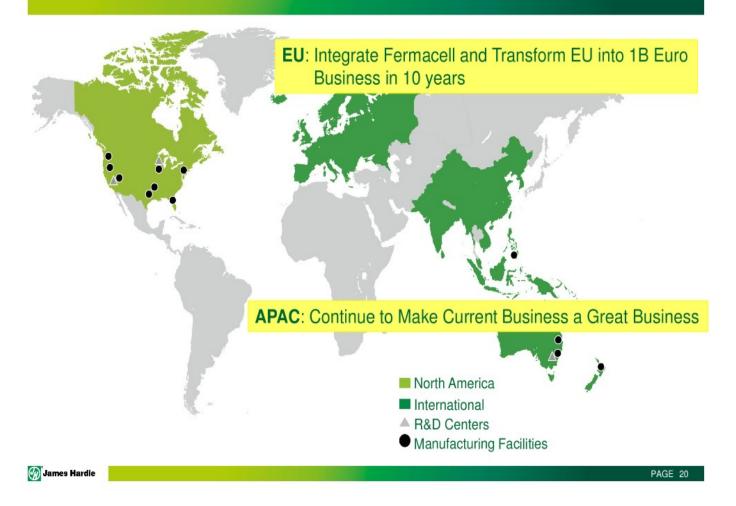






James Hardie

### **INTERNATIONAL PRIORITIES**







## **James Hardie Asia Pacific**

Conrad Groenewald, General Manager – Asia Pacific
Asia Pacific Investor & Analyst Tour
Sunshine Coast, Australia
June 25-26, 2018

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## **AGENDA**



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## **ASIA PACIFIC IN CONTEXT**







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## **APAC SEGMENT COVERAGE**













Renovation

Single Detached

Medium Density

(Townhouses)

Medium Density

(Up to 3 levels) (4-12 Le

High Density

(4-12 Levels)

Ultra High Density (>12 Storey)



James Hardie

## **APAC VISION AND STRATEGIC PILLARS**



James Hardie

### ZERO HARM AT THE CORE OF OUR STRATEGY

### Safe People

- Everyone at JH is a Safety Leader
- Every employee in the business is empowered and authorised to stop unsafe acts
- Every leader in the business takes action on unsafe acts and conditions

### Safe Places

- 5S and housekeepingvisibly demonstrates Zero Harm
- Engineering controls are implemented to minimise exposure to risk
- Continuous Improvement through safety in design

### Safe Systems

- Safety integrated into every function across the business
- Safety systems provide the structure to control critical risks
- Systems are standardised and transferable







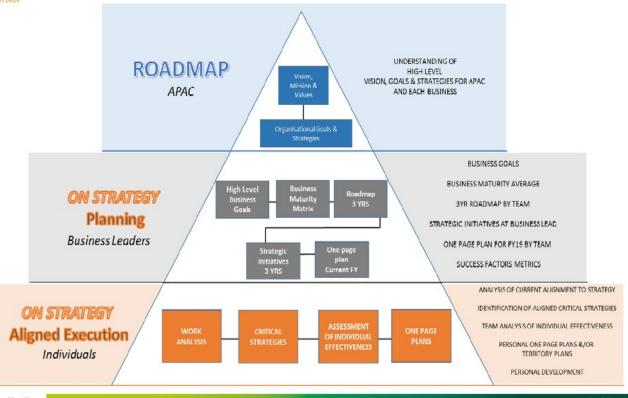
James Hardie





**ON STRATEGY** 

All employees have a connection to our strategy.....



James Hardie



Structured for Sustainable, Profitable Run the Business Growth **Regional Management Team JHAU JHNZ JHPH** JHS **Future** BUs Improve the Business Manufacturing Improvement Lead Finance & IT Zero Harm Coach People & Performance Procurement Support **Supply Chain** Research & Product Grow Development

James Hardie

Legal

AGE 1



Leveraging both internal and external programs across the industry







2016 program – 30 people 2017 program – 35 people

James Hardie



Our Manufacturing Graduate program has been highly successful in creating future technical expertise and leadership within our manufacturing network

Business
Orientation

Manufacturing
Operations

Market
Understanding

Manufacturing
Operations &
Key Project

2016 intake – 4 people 2018 intake – 8 people

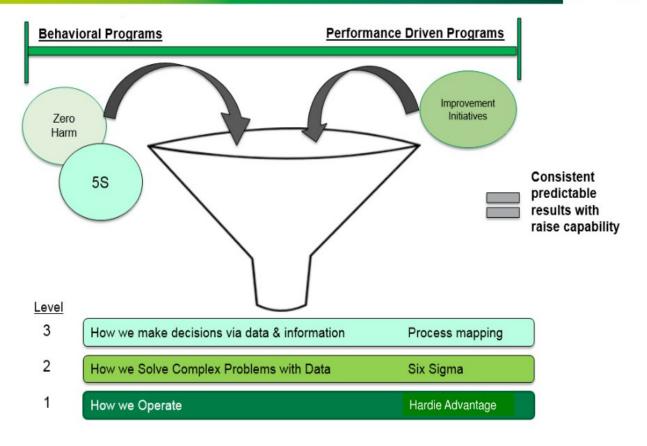


James Hardie



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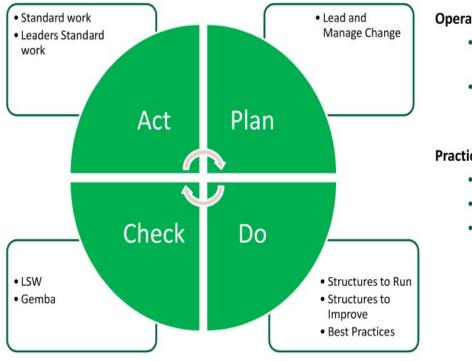




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How we Operate: Hardie Advantage:



### **Operating System:**

- System to "Run" the business
- System to "Improve" the business

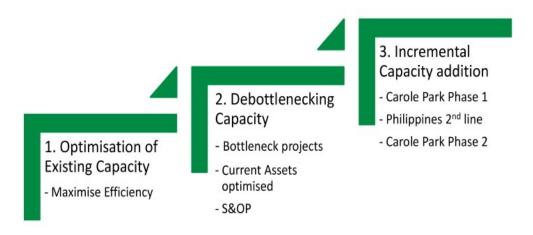
### Practices to LOCK-in results:

- Standard work
- · Leaders standard work
- Gemba Go See Check

James Hardie



### Strategy on Investment - Capacity



# Unlocking APAC Capacity to deliver lowest cost of capacity to meet current and future demand

James Hardie

# MARKET LED



James Hardie

# MARKET LED



# Best in Industry Insights:







	Consumers	Developer / Designers /Architects	Builders & Trades
Australia	2,000	1,000	1,500
New Zealand	500	1,500	500
JHS		100	500
Philippines	400	300	800

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## **MARKET LED**



# Insights into Action: EPIC path to purchase



James Hardie

# **INNOVATIVE SOLUTIONS**



James Hardie

## **INNOVATIVE SOLUTIONS**

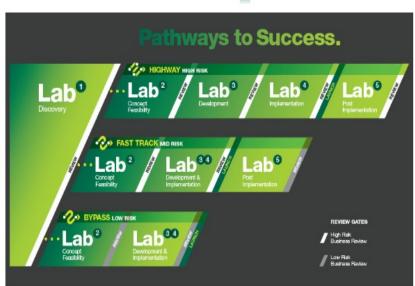


## Innovation Stage Gate Process:



New pathways and stage gates to commercialize new products and systems in market, sooner

- Captures and drives insights through to commercial reality
- · Consistent Global Process
- Drives integration between Business Units
- Pathways are tailored to project risk and speed to commercialization



**James Hardie** 

# **RESPONSIBLE BUSINESS**



James Hardie

## **RESPONSIBLE BUSINESS**





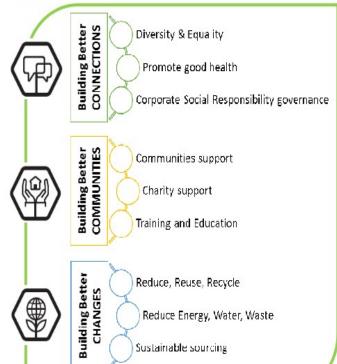
Double the business while achieving sustainable growth and building better futures



### THE ROADMAP



### THE FRAMEWORK



Sustainable sourcing

James Hardie

## **APAC VISION AND STRATEGIC PILLARS**



James Hardie

### WHAT YOU WILL SEE AND HEAR:

### What Will You See:

- Strong alignment and leadership commitment to Zero Harm
- Emphasis on linkages between Innovation, Market Leadership and World Class Manufacturing

### Australia:

- How we will make a good business better

### JHS:

- Recap on the strategic importance of the acquisition, and progress to date

### New Zealand:

- Strong market position, will be enhanced by Innovation

### Philippines:

- Update on Investment, and how we will continue to grow share

James Hardie





# **James Hardie Australia**

John Arneil, Country Manager Asia Pacific Investor and Analyst Tour Sunshine Coast, Australia June 25-26, 2018

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- statements regarding tax liabilities and related audits, reviews and proceedings;
- statements regarding the possible consequences and/or potential outcome of legal proceedings brought against us and the potential liabilities, if any, associated with such proceedings:
- expectations about the timing and amount of contributions to Asbestos Injuries Compensation Fund (AICF), a special purpose fund for the compensation of proven Australian asbestos-related personal injury and death claims;
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  consumer confidence.



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# **AGENDA**



James Hardie

# **AU Strategy**

# VISION: To transform the Australian way to build

## **APPROACH:**

- Zero Harm: Accelerating our safety journey
- Market Led: We are customer and consumer insights led with a unique go to market model
- Innovative Solutions: Delivery of market valued systems and solutions
- World class manufacturing: Serve market with the right quality and lowest cost
- Smart, driven, real people: invest in developing all levels of the organisation



James Hardie

AGE

# Zero Harm at the core of our strategy

### Safe People

- Everyone at JH is a Safety Leader
- Every employee in the business is empowered and authorised to stop unsafe acts
- Every leader in the business takes action on unsafe acts and conditions

### Safe Places

- 5S and housekeeping visibly demonstrates Zero Harm
- Engineering controls are implemented to minimise exposure to risk
- Continuous Improvement through safety in design

### Safe Systems

- Safety integrated into every function across the business
- Safety systems provide the structure to control critical risks
- Systems are standardised and transferable

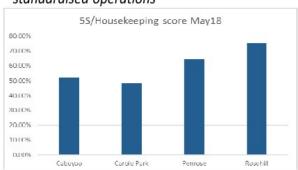


James Hardie

# Zero Harm is our number one priority – 5S example



### 5S providing the platform for SAFE Plant, and standardised operations











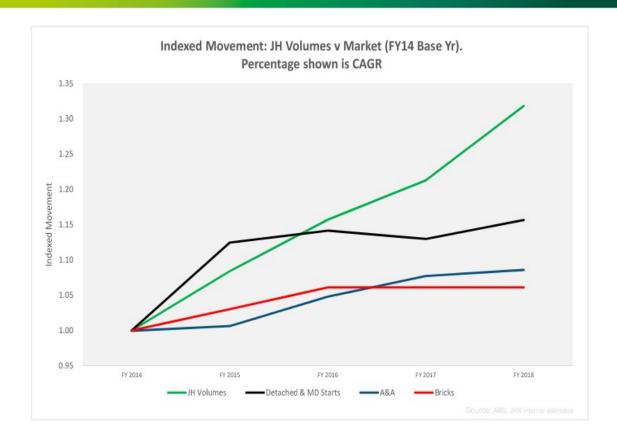






James Hardie

# James Hardie continues to beat the cycle...



James Hardie

# And deliver on financial objectives

### Strong Australian Revenue growth



### Strong Australian EBIT growth



### **Driving International Segment results**

	FY16	FY17	FY18
Net Sales (US\$m)	379	412	462
Sales Volume (mmsf)	481	487	529
EBIT (US\$m)	78	95	108
EBIT Margin %	21	23	24

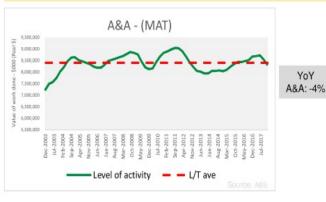
James Hardie

# The housing cycle is starting to turn

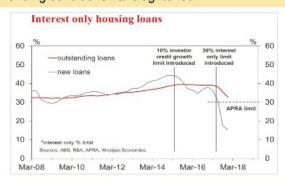
### 1. Residential starts down but above long term average



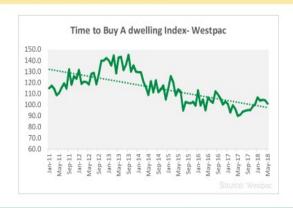
### 2. A&A down YoY but in line with long term average



### 3. Lending conditions have tightened



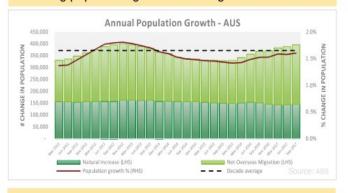
#### 4. Consumer sentiment is down



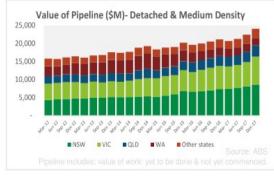


# But population growth, building approvals and pipeline remain strong

### 1. Strong population growth is driving fundamentals



### 3. Pipeline is excellent, particularly in Eastern States



Value of pipeline is ~50% above where it was 6 years ago

### 2. Despite a fall in starts, approvals are rising

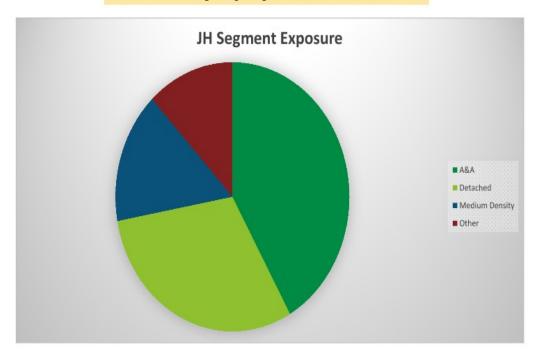


YoY DT: 4.7% MD: 2.7% HR: -3.0% Total: 2.1%

James Hardie

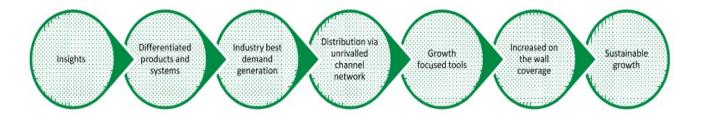
# James Hardie sales come from A&A, detached & medium density segments – less exposed to extreme variability

We have a strong weighting in A&A, detached and MD



James Hardie

# **How James Hardie outperforms the market**























James Hardie

# **Turning insights into action**





# DRIVING DEMAND VIA "LOOK"

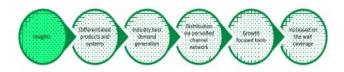
Identified & marketing the two unique FC looks which combined are as big as Brick & Render

# BUILDER SEGMENTATON & JOURNEYS

Expanding our primary demand model to reach and convert the smaller builders and trades

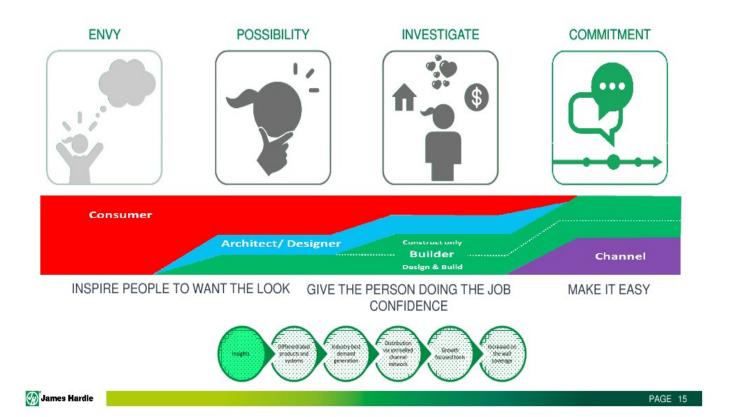
### PARTNERING WITH CHANNEL

Industry leading understanding of how builders chose where to shop, converted into joint action plans with Channel





# **EPIC** path to purchase



### **Holistic marketing**

# Leveraging all direct and co-marketing funds via builders and channel to drive holistic support



James Hardie

# We continue to deliver aggressive New Product Development (NPD) growth through our leading Innovation Lab model

We are led by market and customer insights to deliver differentiated products and services

We continue to

innovation

develop the best tools

to deliver meaningful



We deliver excellence in execution through our Lab process our unique and adaptable Product Development Process (PDP)

We continue to drive a

culture of innovation

via world-leading

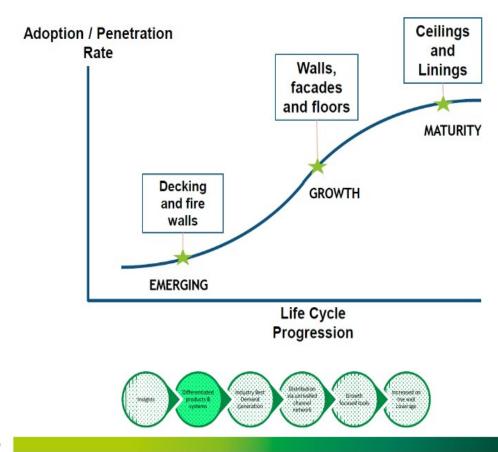
innovation

programmes



James Hardie

#### We drive growth throughout the product lifecycle curve



James Hardie

## We have differentiated products & systems: walls





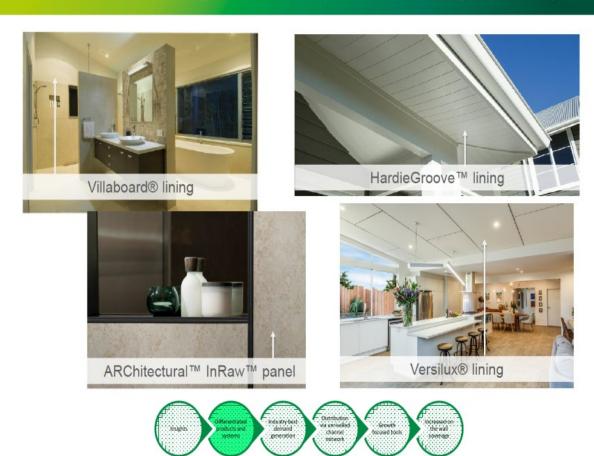






James Hardie

## We have differentiated products & systems: ceilings & linings



James Hardie

## We have differentiated products & systems: floors



Scyon™ Secura™ interior flooring

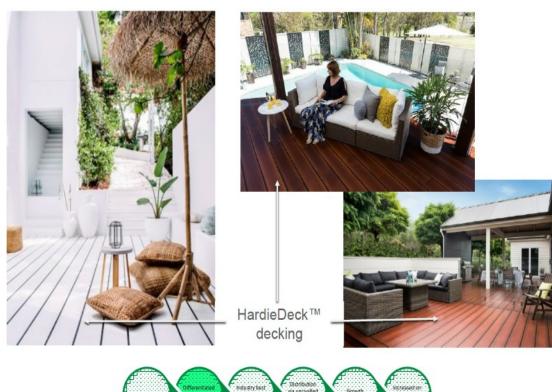
Scyon™ Secura™ exterior flooring





James Hardie

## We have differentiated products & systems: decking





James Hardie

## We have differentiated products & systems: Hardie Smart





James Hardie

#### We have smart, driven and real people driving demand



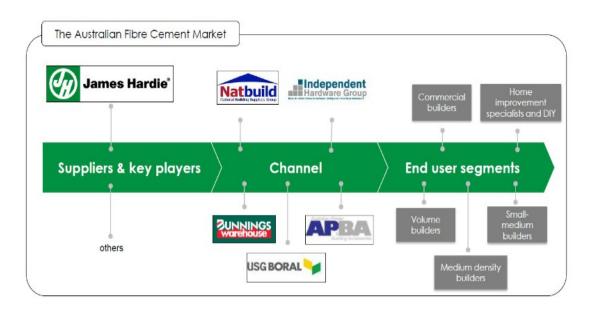
#### Sales Force Enablement:

A strategic, collaborative discipline designed to increase sales results by leveraging intellectual property to provide consistent, scalable enablement services that allow customer-facing professionals and their managers to differentiate and add value in every customer interaction.



James Hardie

# We have wide channel distribution enabling us to serve all end user segments

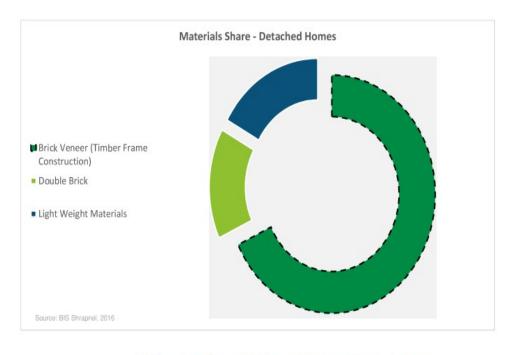


#### Unequalled distribution across all channels



James Hardie

# There is opportunity to continue growing FC in the detached segment



FC has a strong value proposition relative to brick, in particular brick veneer. The data shows there is still a big opportunity to continue growing the size of the FC category.



James Hardie

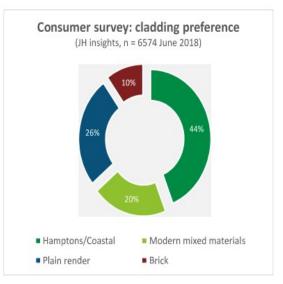
1. 64% of consumers are demanding an FC look, as per our survey results



Bricks



Render







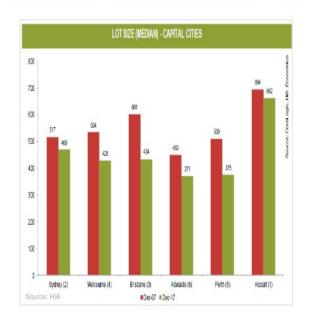
Hamptons/Coastal



Mixed materials

James Hardie

2. Fibre cement provides the consumer with greater space - at a time where lot sizes are decreasing

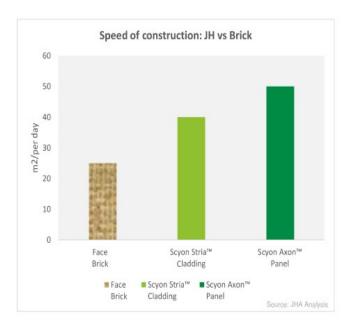


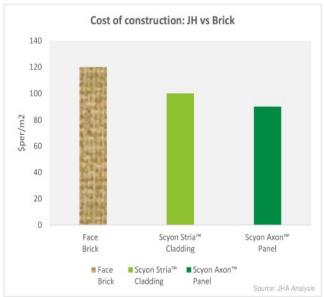




James Hardie

#### 3. Fibre cement is QUICKER and CHEAPER to build with







James Hardie

4. There is a large pool of labour to construct with fibre cement relative to brick related trades





James Hardie

# The Australian landscape used to look like this...











James Hardie

# But we are shaping it to look like this...





James Hardie

# But we are shaping it to look like this...





James Hardie

# But we are shaping it to look like this...





James Hardie

# Our manufacturing strategy aligns with our organisational objectives

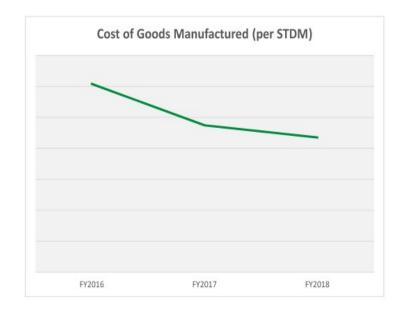


James Hardie

#### Manufacturing costs coming down

#### Manufacturing costs are being driven down by:

- Carole Park facility continuing to come up the curve in conjunction with consistent Rosehill performance
- Hardie Advantage operating system implementation leading to increased standardization across the region
- Opex investment to de-bottleneck and drive further efficiencies across both sites



James Hardie

### Carole Park phase 2: increasing capacity for the longer term

#### Four Strategic Concepts:

- Capacity to service local market growth and penetration
- Support and expand product leadership strategy and capability
- · Minimizes business risk
- · Drive low cost manufacturing



James Hardie

#### **Summary**

James Hardie is committed to "transforming the Australian way to build" using the below approach:

Zero Harm: Accelerating our safety journey

Market Led: We are customer and consumer insights led with a unique go to market model

Innovative Solutions: Delivery of market valued systems and solutions

World class manufacturing: Serve market with the right quality and lowest cost

**Smart**, **driven**, **real people**: invest in developing all levels of the organisation









# **James Hardie Systems**

Steven Terzian, General Manager JHS
Asia Pacific Investor and Analyst Tour
Sunshine Coast, Australia
June 25-26, 2018

#### **CAUTIONARY NOTE ON FORWARD-LOOKING STATEMENTS**

This Management Presentation contains forward-looking statements. James Hardie Industries plc (the "Company") may from time to time make forward-looking statements in its periodic reports filed with or furnished to the Securities and Exchange Commission, on Forms 20-F and 6-K, in its annual reports to shareholders, in offering circulars, invitation memoranda and prospectuses, in media releases and other written materials and in oral statements made by the Company's officers, directors or employees to analysts, institutional investors, existing and potential lenders, representatives of the media and others. Statements that are not historical facts are forward-looking statements and such forward-looking statements made pursuant to the Safe Harbor Provisions of the Private Securities Litigation Reform Act of 1995.

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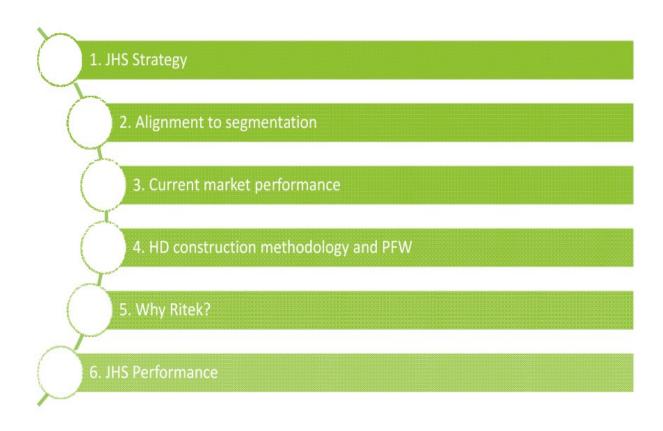
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#### **AGENDA**



James Hardie

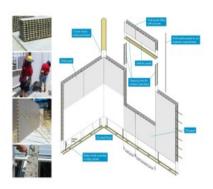
#### **Recap on the Acquisition**

 Ritek Wall Systems was acquired in February 2017, forming a new business unit within the JH group

#### Alignment to the JH business model

- Expansion into a growing residential High Density (HD) segment
- Technically superior walling system
- Opportunity to pull through fibre cement into the HD segment







PAGE :

#### **JHS Strategy**

## Vision: Transform the Australian way to build

#### **APPROACH**

- 1. Zero Harm: Build on momentum.
- Market Led: Continue to build insight into the segment and its stakeholder requirements
- Innovative Solutions: Expand on system offer and incorporation of FC cladding options
- World class manufacturing: Delivery of quality and service offer
- Smart, driven, real people: Recruit, develop and retention focus



James Hardie

AGE

#### ZERO HARM AT THE CORE OF OUR STRATEGY

#### Safe People

- Everyone at JH is a Safety Leader
- Every employee in the business is empowered and authorised to stop unsafe acts
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#### Safe Places

- 5S and housekeepingvisibly demonstrates Zero Harm
- Engineering controls are implemented to minimise exposure to risk
- Continuous Improvement through safety in design

#### Safe Systems

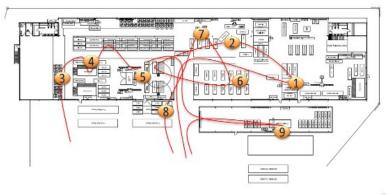
- Safety integrated into every function across the business
- Safety systems provide the structure to control critical risks
- Systems are standardised and transferable



James Hardie

## Aligning with the organisations Zero Harm culture

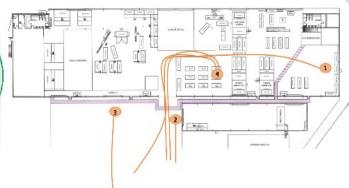
• Example of improvements within mobile plant interaction













#### **Residential Construction Market**













Renovation

Single Detached

Medium Density (Townhouses)

Medium Density (Up to 3 levels)

High Density (4-12 Levels)

Ultra High Density (>12 Storey)

**Densification** 

James Hardie

### **Densification and Growth Corridors aligned with Transport Hubs**

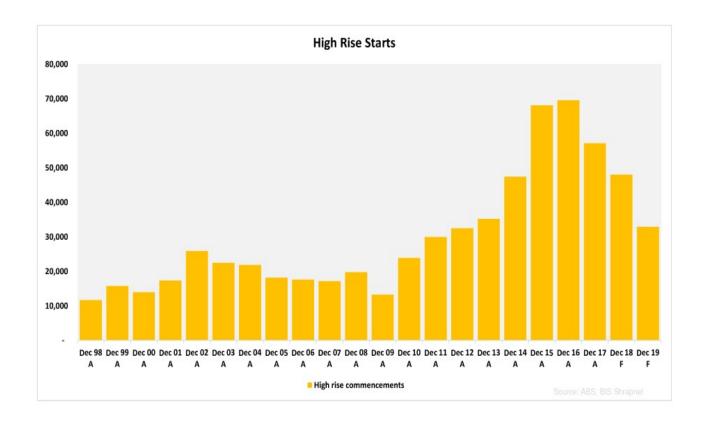
Social and economic factors driving densification into our suburban hubs





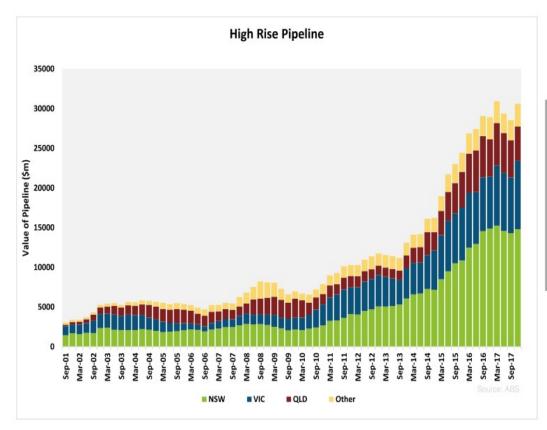
James Hardie

# Although high rise starts are predicted to fall – they are still above the historical average



James Hardie

## Moreover the pipeline of work remaining is large



The pipeline consists of both:

- Value of work yet to be done
- 2. Value of work yet to be commenced

James Hardie

## JH achieves access across all segments



James Hardie

## **Methods of Construction within the HD Segment**

#### Traditional

------



**Pre Cast** 



**Permanent Form Work** 



Temporary Formwork



**Double Brick** 



James Hardie

## **Permanent Formwork (PFW)**

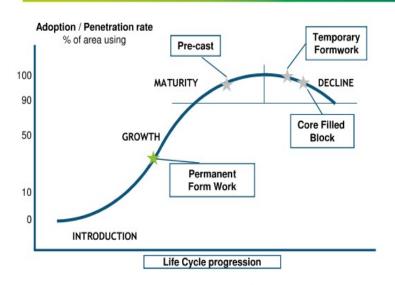
## What is PFW?

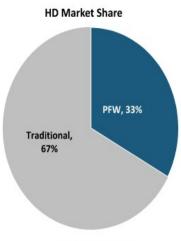
 PFW is a structural walling system that consists of braces or moulds, put in place to contain concrete as it sets, however not removed after





## **Product Maturity within the HD Segment**





Source: JHA Analysis

Issues faced within traditional methods of construction include:

- Availability of trades
- Cost
  - Program i.e. Time
  - Cost of crane
  - Waste
- Site access

James Hardie

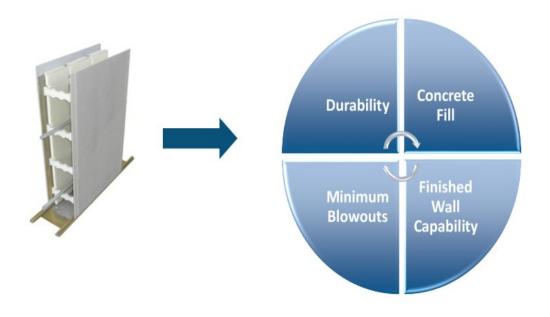
## **PFW Construction Benefits**

- Offering strong benefits against traditional methods
  - Speed of construction
  - Smaller crane
    - Reduces cost
  - Improved logistics
    - Customization promotes better managing of materials and waste
  - Resolves site access challenges
    - Building within tight sites
  - Minimizing traffic management requirements



James Hardie

## Why Ritek?

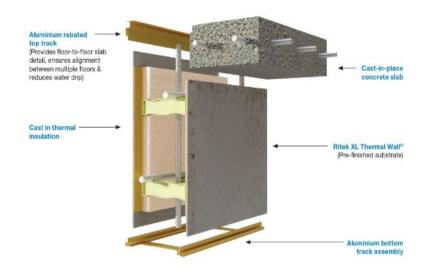


In our view Ritek delivers the most advanced PFW solution

James Hardie

## JHS System Offering – XL and XLT

#### Patented solution

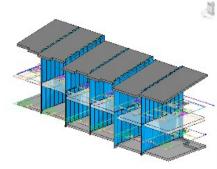


#### System Details and Benefits

- Accessories delivering on water management and aesthetic benefits
- Internal core structure providing durability and concrete management
- In-situ thermal capabilities R1.5 4.8
- Reduce wall thickness and increase floor areas
- Superior FC ready for finishing

James Hardie

## JHS - Business Model













# JHS System Applications

Exterior





Lift Shafts

## Interior





Blade Walls



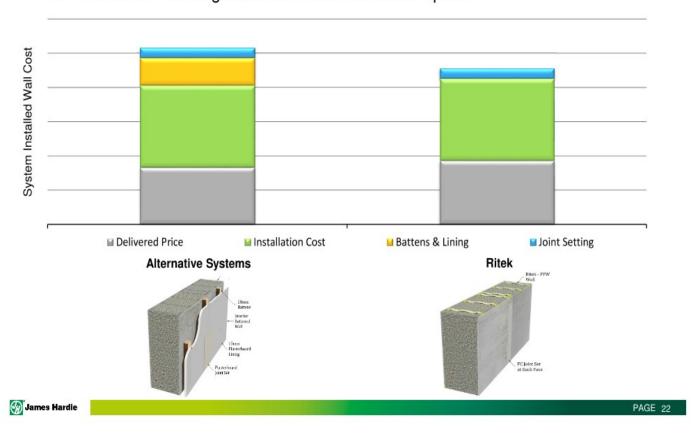


Columns

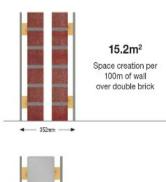
James Hardie

## **Creating Value via the Finished Wall Capability**

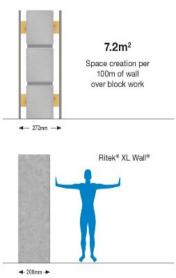
 JHS patented stud configuration with JH's superior fibre cement provides value in the reduction of building cost and creates additional space

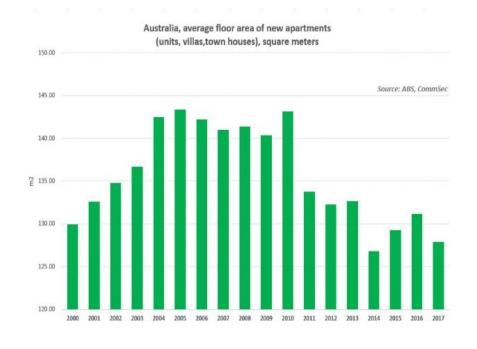


## JHS PFW has a compelling value proposition relative to traditional methods



While apartment sizes are decreasing, JHS provides the opportunity for more space





James Hardie

## Increasing the Value of Fibre Cement into each HD build



James Hardie

## Increasing fibre cement penetration into the HD segment

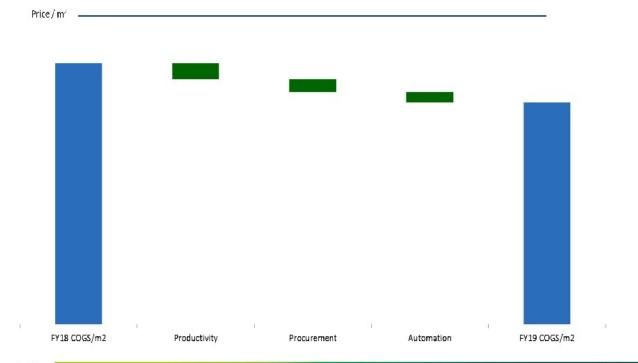
 Enabling a fibre cement bundle within the HD segment while providing the opportunity to differentiate the look



James Hardie

## Leveraging off operational excellence within the JH business

- Phase 1: Focusing on key areas to reduce cost and increase profitability
- Phase 2: Introduce Hardie Advantage to continue to drive improvement



James Hardie

#### **JHS Business Performance**

- Since the acquisition the following has been achieved:
  - "One Organisation" has been formed
    - Key staff retained
  - Immediate focus on safety with positive shift in culture
  - Strategy is playing out with growth achieved
    - Successful entry into the HD segment
    - Conversion of traditional methodology based on value proposition
    - State based approach rather than national
  - Operational benefits achieved via JH alignment
  - Continue to promote and drive the pull through of JH products into the HD segment



## **JHS Strategy**

## Vision: Transform the Australian way to build

## **APPROACH**

- 1. Zero Harm: Build on momentum.
- Market Led: Continue to build insight of the segment and its stakeholder requirements
- Innovative Solutions: Expand on system offer and incorporation of FC cladding options
- World class manufacturing: Delivery of quality and service offer
- Smart, driven, real people: Recruit, develop and retention focus





AGE 28





## **James Hardie New Zealand**

Alan Bones, Country Manager Asia Pacific Investor and Analyst Tour Sunshine Coast, Australia June 25-26, 2018

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- expectations concerning dividend payments and share buy-backs;
- · statements concerning the Company's corporate and tax domiciles and structures and potential changes to them, including potential tax charges;
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- statements regarding the possible consequences and/or potential outcome of legal proceedings brought against us and the potential liabilities, if any, associated with such proceedings;
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- · expectations concerning the adequacy of the Company's warranty provisions and estimates for future warranty-related costs;
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  recoveries; and
- statements about economic conditions, such as changes in the US economic or housing recovery or changes in the market conditions in the Asia Pacific region, the
  levels of new home construction and home renovations, unemployment levels, changes in consumer income, changes or stability in housing values, the availability of
  mortgages and other financing, mortgage and other interest rates, housing affordability and supply, the levels of foreclosures and home resales, currency exchange
  rates, and builder and consumer confidence.



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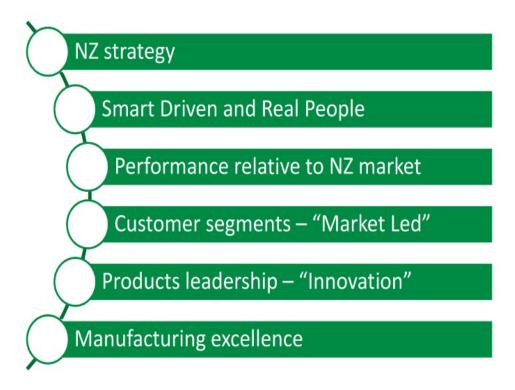


#### **NZ OVERVIEW**

- Zero Harm: Is at the core of our strategy with investment in people, places and systems.
- People: Continual focus on Smart, Driven and Real people to deliver a sustainable competitive advantage.
- Market Performance: The New Zealand construction market is expected to remain strong in the medium term. Growth is flattening, but underlying demand drivers remain healthy.
- Innovation: We remain focused on the innovation and development of new products and building solutions to further support growth.
- Manufacturing Excellence: Invest in capability to deliver on local and regional capacity requirements.

James Hardie

## Agenda – James Hardie New Zealand



James Hardie

## **NZ Strategy**

## VISION: To transform the way Kiwi's build

## **APPROACH**

- 1. Zero Harm: Accelerating our safety journey.
- Market Led: Through insights and primary stakeholder engagement we defend and expand our category leading position.
- Innovative Solutions: Delivery of differentiated solutions that our customers demand and value.
- Manufacturing Excellence: Optimize local output and leverage regional scale to meet market demand
- Smart, driven, real people: Build and retain organisational capability to deliver a competitive advantage





TAGE

### ZERO HARM AT THE CORE OF OUR STRATEGY

#### Safe People

- Everyone at JH is a Safety Leader
- Every employee in the business is empowered and authorised to stop unsafe acts
- Every leader in the business takes action on unsafe acts and conditions

#### Safe Places

- 5S and housekeepingvisibly demonstrates Zero Harm
- Engineering controls are implemented to minimise exposure to risk
- Continuous Improvement through safety in design

#### Safe Systems

- Safety integrated into every function across the business
- Safety systems provide the structure to control critical risks
- Systems are standardised and transferable





## We have Smart, Driven, and Real People

# Attract, Build, and Retain top talent that embodies the James Hardie culture for sustainable competitive advantage

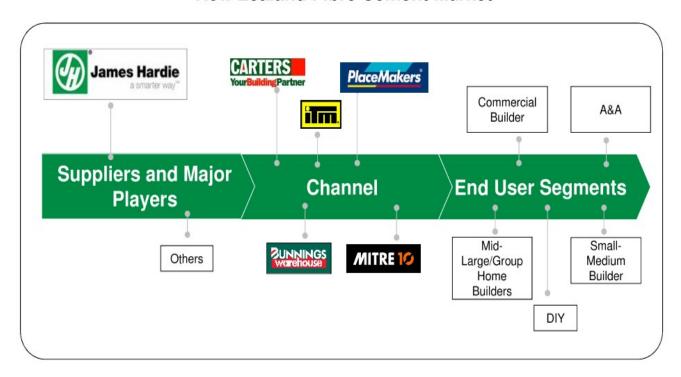


- New NZ Leadership team in place, focusing on improving the business in each function, and as a whole
- Leverage regional functional capability to unlock the potential of people and teams
- Investment in operational resource for effective transition to 24/7 manufacturing
- Develop highly capable people to leadership thinking and capability

James Hardie

## End user focus drives sales through a wide network of distributors

#### **New Zealand Fibre Cement Market**



James Hardie

PAGE

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## We provide differentiated solutions across all major building segments







Detached



Semi-Detached



Medium Density -Townhouses



**High Density -**Apartments

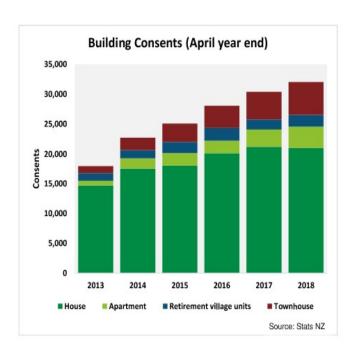


**Mix Commercial** 



## Market Performance: NZ market performance has been strong

1. Building consents (lead indicator of future activity) are up by 5.4% in 2018 vs. 2017



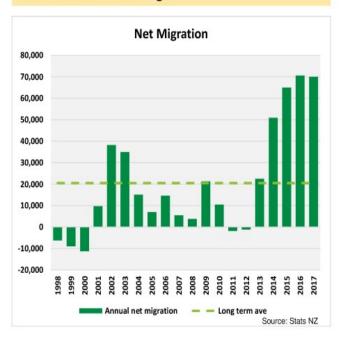
2. A&A is expected to come down as quake rebuild finishes – but activity is still well above long term average



James Hardie

## Market Performance: NZ market indicators are solid

3. Annual net migration is at its peak – driving population growth and future demand for housing



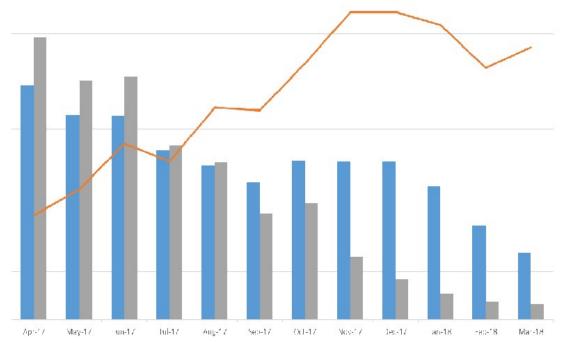
4. Government policy driving more social housing: Kiwi-Build programme will build 100,000 affordable homes over 10 years



James Hardie

## JHNZ maintaining strong growth in a flattening market





#### Source:

JH Sales / Stats NZ residential consent numbers

Quarter lag applied between sales and building consent issued



PAGE

\_\_1

## Targeted demand generation is pivotal to our success...

#### **Defend & Grow**

Defend Category Share Position Value to Channel	<b>Grow</b> Share of Addressable  Detached Homes / A&A
Innovate Differentiated solutions Fire, Acoustics and Pre Cladding	Emerging Markets  Medium Density / New Audiences

#### **New Products & Markets**

James Hardie

PAGE

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## ... however our strength and opportunity lies in residential



James Hardie

## And our value drivers in residential cladding are strong

79% of NZ consumers looking for modern or contemporary designs and performance is a key value driver in the cladding space

Design Versatility







Modern - 60%

Contemporary - 19%

Traditional - 21%

Superior Performance



James Hardie fibre cement offers a unique, low density formulation with heavy duty performance







Source: JHNZ consumer insights survey 2017



PAGE

- 1

# Cladding: Leveraging vertical look trends in residential









James Hardie

'AGE

## ...and transforming the built form in Residential Cladding





LINEA™ WEATHERBOARD







James Hardie

PAGE

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## ...and transforming the built form in Residential Cladding



STRIA™ CLADDING



AXON™ / TITAN™ PANEL

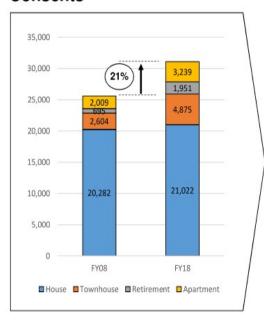




James Hardie

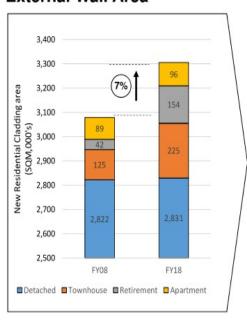
## Density typologies are changing the addressable landscape...

#### **Change in Construction** Consents



Source: NZ Stats

#### Impacts Addressable **External Wall Area**



## ...creates an opportunity for our differentiated systems

James Hardie Fire and Acoustic rated floor Lightweight intertenancy solution



F&A floor achieves above code:

STC = 60 | IIC = 57-65

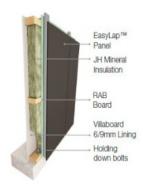


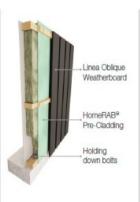
STC: Sound Transmission Class IIC: Impact Insulation Class

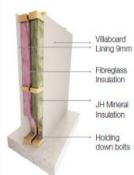


## ...creates an opportunity for our differentiated systems

James Hardie Fire rated Walls Lightweight Exterior wall solutions







Fire Rated Boundary Wall FRR = 30/30/30 FRR = 60/60/60

Fire Rated Boundary Wall FRR = 60/60/60 Inter-Tenancy Fire Rated Wall FRR = 60/60/60 | STC = 57

FRR: Fire Resistance Rating





PAGE

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### Growth above market is bolstered by investment in the Customer

- · Customer Insights leverage insights capability in, as well as through the organization
- · Customer Excellence go beyond product leadership to create value for all stakeholders
- · Sales Effectiveness new systems and framework to position trusted advisory status
- · Marketing Effectiveness focus to include end consumers to influence path to purchase

#### Be Market Led. Know our audience

Consumer

Builder

Specifier

Channel









James Hardie

## Insight led Innovation to strengthen and secure our position

SQM volume



2014 HomeRAB® Pre-Cladding



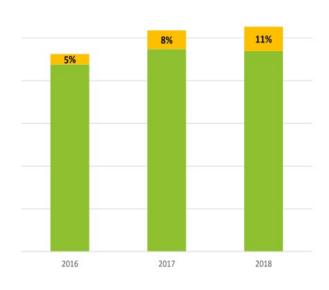
2015 Linea® Oblique Weatherboard



2018 Secura™ F&A Flooring System



2019 RAB™ Board 9mm



New Product contribution under 5 years



## Pre-Cladding: Accelerate growth in all segments

- · Rigid alternative to building paper
- HomeRAB™ Pre-Cladding launched in FY14
- HomeRAB™ Thermal Break launched in FY16

**Volume Growth** 

Coming soon: New RAB™ Board 9mm

2013





**Medium Density** 



2016 Launch HomeRAB® Thermal Break (Steel Framing application)



Commercial

2017

2018



2019 RAB™ Board 9mm

**James Hardie** 

2010

## Transforming the way we build with Residential Pre-Cladding



HOMERAB™ Pre-Cladding





James Hardie

## ...and transforming the way we build with Commercial Pre-Cladding



RAB™ Board





James Hardie

### PENROSE: Manufacturing Excellence to meet growing demand

**Investment in people, process and systems** to create capacity and deliver on organisational objectives in response to significant growth above market both locally and regionally



- 80 years manufacturing in New Zealand, for New Zealanders
- May 2018: JHNZ Moved to a 24/7 operational model
- Deployment of Hardie Advantage operating system

James Hardie

### **NZ Strategy**

## VISION: To transform the way Kiwi's build

## **APPROACH**

- 1. Zero Harm: Accelerating our safety journey.
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- Manufacturing Excellence: Optimize local output and leverage regional scale to meet market demand
- Smart, driven, real people: Build and retain organisational capability to deliver a competitive advantage









# **James Hardie Philippines**

Jon Cook, Finance Director - APAC
Asia Pacific Investor & Analyst Tour
Sunshine Coast, Australia
June 25-26, 2018

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## Agenda



James Hardie

## Zero Harm at the Core of our Strategy

#### Safe People

- Authority to stop work program
- Leadership safety conversation program
- Safety trainings to increase level of safety awareness

#### Safe Places

- 5S and housekeepingvisibly demonstrates Zero Harm
- Engineering controls are implemented to minimise exposure to risk
- Continuous Improvement through safety in design

#### Safe Systems

- Integration of safety in every part of the business
- Hazard and Risk management
- Near miss and Incident management



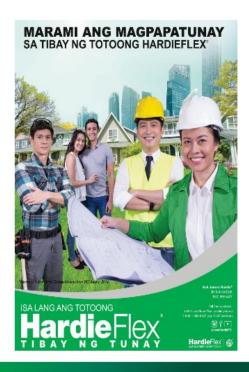


### **Philippines Strategy**

# **VISION:** Transforming the way the Philippines builds

#### **APPROACH**

- Zero Harm: Leadership accountability and risk education.
- Market Led: Distinguish the Hardieflex brand from generic. Focus on channel and projects.
- Innovative Solutions: Product upgrade of Hardieflex.
- World class manufacturing: Safe, cost effective line 2 start up in FY19.
- Smart, driven, real people: Review structure for future strength. Retention and development of hi-potential employees





AGE

## Country Overview: PH has a large and urbanizing population

1. PH is the 12<sup>th</sup> highest populated country in the world



- · Population:107million
- · 2nd in ASEAN bloc, behind Indonesia

2. Urban population expected to double by 2050 to 102m (World Bank)



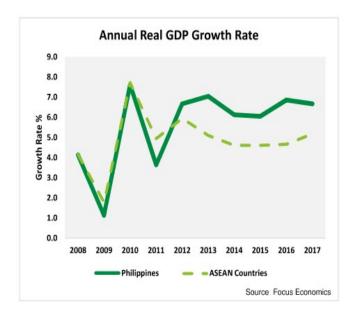
An urbanized population presents greater opportunity for housing construction that is compatible with JH products

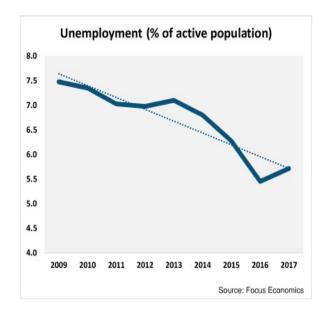
James Hardie

AGE 7

# Economic Overview: PH has enviable economic growth and unemployment

- 3. PH's economic growth rate is outpacing that of other ASEAN countries
- with rate is
  4. PH's unemployment is trending down and is now 5.7%

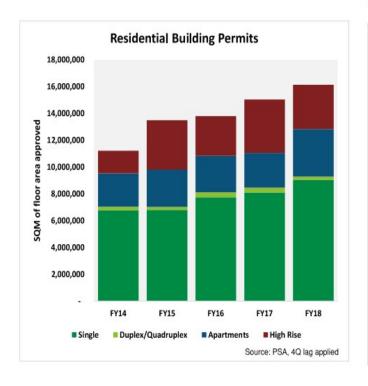


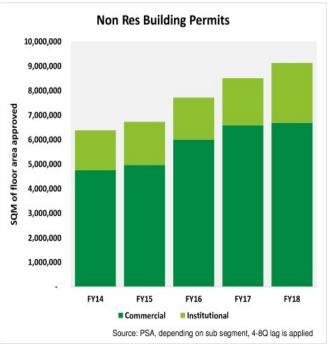


James Hardie

# Market Performance: both residential and non residential segments are growing

- 1. Residential permits are up 7% for FY18
- 2. Non residential permits are also up 7% for FY18

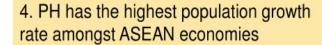


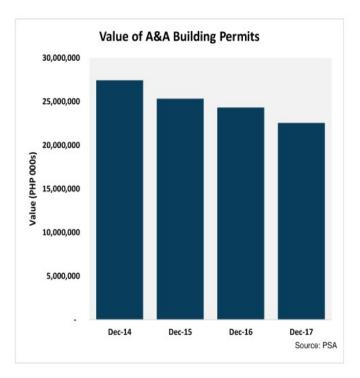


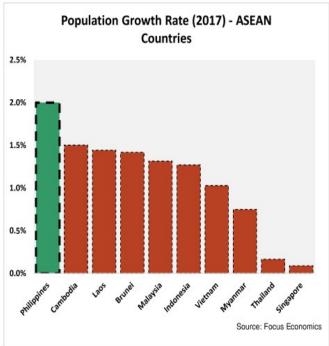
James Hardie

# Market Performance: A&A down but population growth will continue to drive fundamentals

3. A&A is down by 7% for CY18







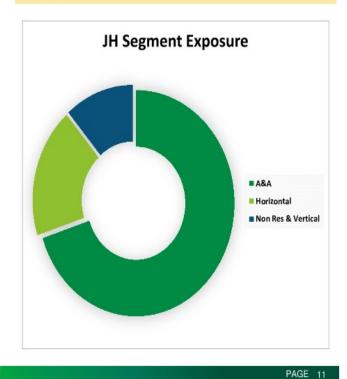
James Hardie

## JH exposure: exposure across all segments

What are the various segments of the market?

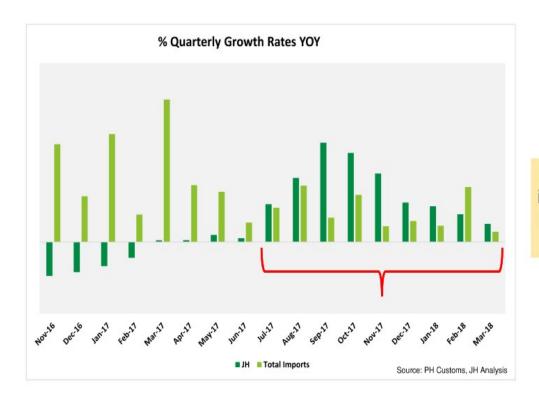
SEGMENT	SUB SEGMENT	DETAILS
Horizontal	Single	bungalow, 2-storey house, nipa hut
	Duplex	single structure divided into two dwelling units by a wall extending from the floor to the ceiling
	Apartments	usually of two storeys, made up of independent living quarters, with independent entrances from internal walls and courts
Vertical	High Rise/Condo	usually of several storeys, consisting of multiple dwelling units
Non Res	Commercial	banks, hotels, offices, stores/malls and restaurants
	Institutional	educational instructions and hospital/health care; ports, airports and other government buildings
A&A	A&A	Repairs & renovations

JH has a strong exposure in A&A, but maintains good positions across other segments



James Hardie

## JH Performance: JH is winning back category share from imports



JH volume growth is now consistently exceeding imports volume growth.

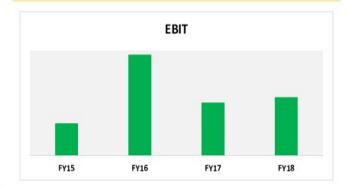
James Hardie

## JH Performance: Growth trajectory restored in FY18

Volume: 4 year positive CAGR



EBIT: 4 year positive CAGR



Revenue: 4 year positive CAGR



James Hardie

## What are the strategies & actions that drive our success?

1. Insights
2. Quality Products
3. Demand Generation
4. Channel Distribution Network
F. Would Class Manufacturing
5. World Class Manufacturing
6. Driven People

James Hardie

## Through a variety of surveys we develop insights



Homeowners 400



Carpenters 300



Contractors 500



Developers 300





Independent market surveys performed during calendar year 2017. Numbers represent survey

respondents.

#### Using our insights and strong brand value

#### HardieFlex value proposition:

- The word "HardieFlex" is synonymous with fiber cement products.
- Recognised value and quality.
- Assurance and service from a trusted and proven brand.





James Hardie

AGE 1

## We develop differentiated products across multiple applications











James Hardie

## We foster a best in class sales team. We do this by:

#### 1. Offering 'quantum' up skilling

FY19		FY20		FY21	
Q1	Q2	Q1	Q3	Q1	Q3
SALES TEAM					
SALES PROCESS & STIMULATING INTEREST	DIAGNOSE & GETTING TO YES	ACCOUNT PLANNING	TERRITORY PLANNING & NEGOTIATION 1	DEMONSTRATING VALUE	ADVANCED NEGOTIATION SKILLS
SALES LEADERS					
GROW COACHING	MONITOR & REINFORCE	MANAGE BY EXCEPTION	MONITOR & REINFORCE	ADVANCED SALES LEADERSHIP	MONITOR & REINFORCE

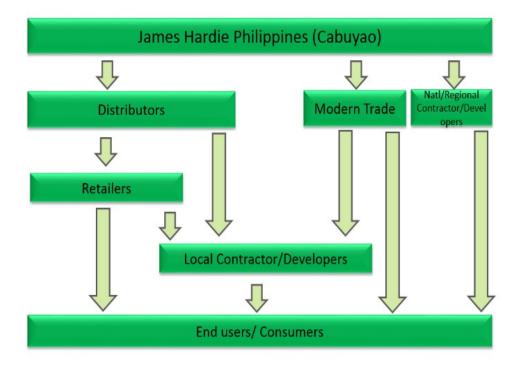


- 2. We hire only the best experienced professionals who can win in a Primary Demand setting
- 3. Our senior leaders are encouraged to work/train across borders



James Hardie

# We have wide channel distribution enabling us to serve all end user segments

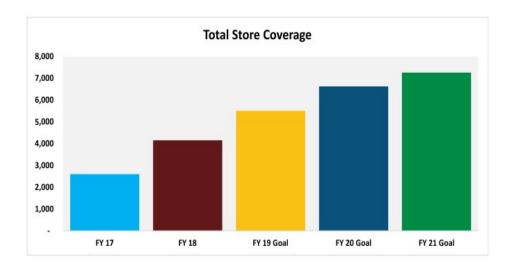




James Hardie

# We have the largest channel coverage positions but we still have ambitions to grow our distributor coverage further

Currently 4,500 stores are covered, but we plan to jump to more than 7,000 by FY21





**James Hardie** 

PAGE :

# Line 2 investment: increasing capacity to serve the growing construction market in the Philippines





James Hardie

#### We have smart, driven & real people. We invest to develop and retain them

# GOAL: develop a highly engaged diverse team that creates sustainable value for the business now and into the future

- "Day-to-Day Management Training Program" for Managers and Supervisors
- Team development for manufacturing team
- · Employee engagement programs
- Building better futures medical mission, blood letting program,
   family outing, school clean-up drive











**James Hardie** 

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### **Philippines Strategy**

# **VISION:** Transforming the way the Philippines builds

#### **APPROACH**

- Zero Harm: Leadership accountability and risk education.
- 2. Market Led: Distinguish the Hardieflex brand from generic. Focus on channel and projects.
- 3. Innovative Solutions: Product upgrade of Hardieflex.
- 4. World class manufacturing: Safe, cost effective line 2 start up in FY19.
- 5. Smart, driven, real people: Review structure for future strength. Retention and development of hi-potential employees.

