


**JHPI Journey**  
James Hardie Philippines

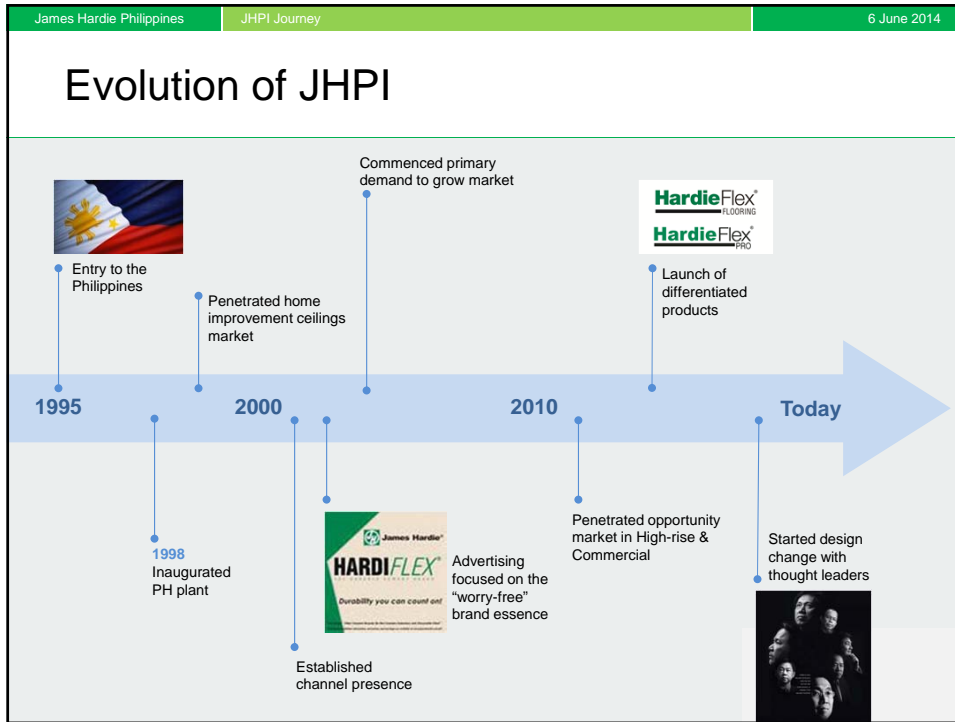


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## Outline

- Evolution of JHPI (James Hardie Philippines Inc)
- FY14 Business Highlights
- Philippine Overview
- Market Overview
- JHPI Current Position
- JHPI 5-Year Strategies





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## Market Overview

- Smaller cut sizes of lots and proliferation for second storey in mass housing an increasing trend
- Urban living continuing to increase in highly urbanized areas concentrated around BPO (Business Process Outsourcing) locations
- Increase in custom built homes and leisure homes
- Design shift from Mediterranean, American designs to more contemporary look
- 3.6M housing backlog

Home Improvement

Commercial & High-rise

Mass housing

Living without compromise

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## Current Position

Home Improvement	✓✓✓✓
Mass Housing	✓✓
Commercial	✓
High-rise Residential	✓

James Hardie Sales

FY11 FY12 FY13 FY14

JHPI sales steady growth

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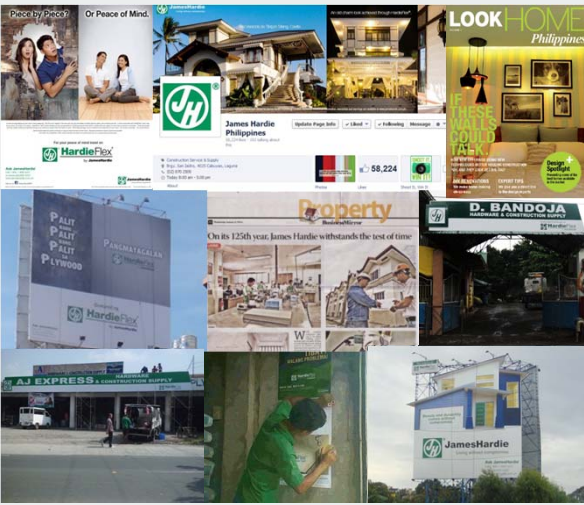
## Key Strategies

- Drive brand to grow home improvement market.
- Aggressively grow primary demand for our products in targeted market segments.
- Grow our overall market position while defending our share in existing market segments.
- Introduce differentiated products to deliver a sustainable competitive advantage.
- Work with architects, developers and builders to create buildings that offer superior livability to that of masonry – “HardieAdvantage”!


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## Drive brand to grow home improvement market

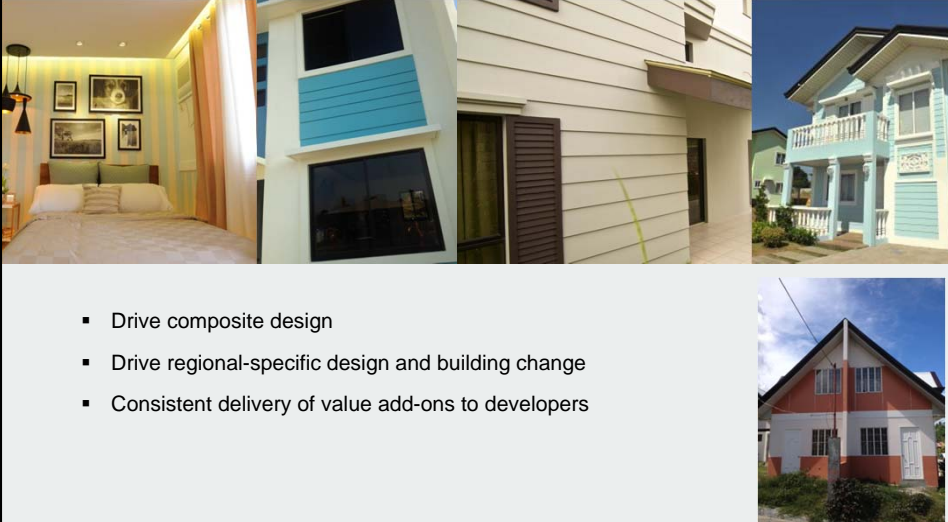


- Focus on in-market activities
- Brand footprint expansion
- Increase brand affinity

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## Aggressively grow primary demand for our products in targeted market segments




- Drive composite design
- Drive regional-specific design and building change
- Consistent delivery of value add-ons to developers

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## Grow our overall market position while defending our share in existing market segments

- Detailed field management
- Building supply chain capability to provide competitive advantage
- Effective category management



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## Introduce differentiated products to deliver a sustainable competitive advantage




- Entering new market segments
- Proactive response to shifts in the market
- Standardized solutions from design challenges


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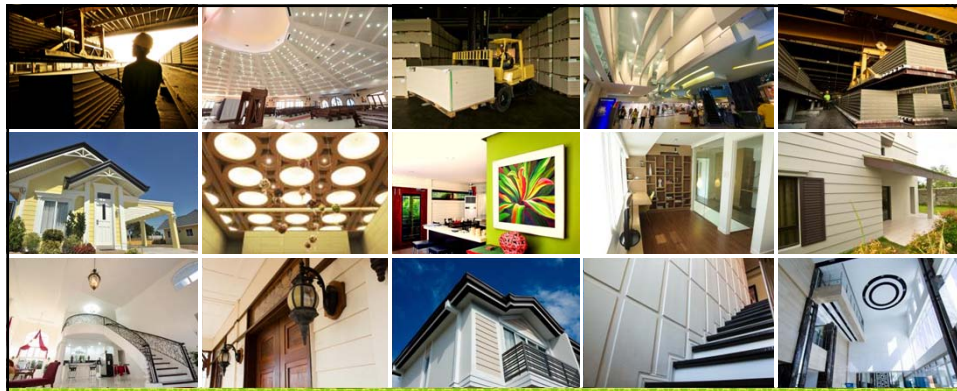
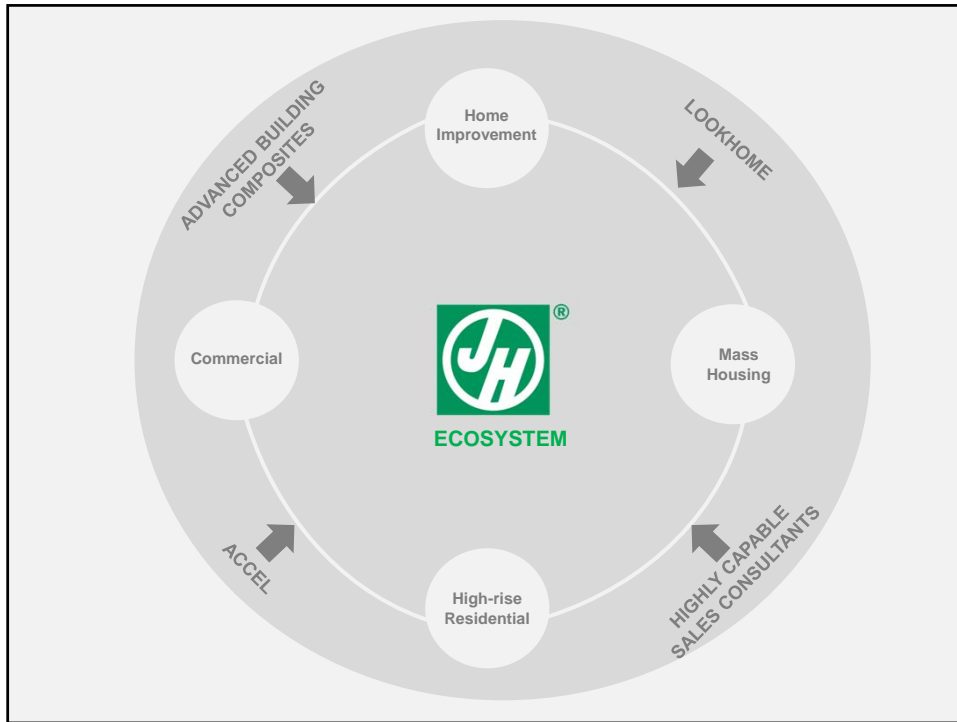
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## Work with architects, developers & builders to create buildings that offer superior livability to that of masonry – “HardieAdvantage”!



- Accelerate design change with thought leaders
- Drive to framed construction
- Develop JH ecosystem to gain competitive advantage

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**END.**