



# JHX Investor Day 2022

New York, 12-13 September 2022 – Day 1



**JamesHardie™**

# CAUTIONARY NOTE ON FORWARD-LOOKING STATEMENTS

## CAUTIONARY NOTE ON FORWARD-LOOKING STATEMENTS

This Management Presentation contains forward looking statements within the meaning of the Private Securities Litigation Reform Act of 1995. 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 media releases and other written materials and in oral statements made by the Company’s officers, directors or employees to analysts, institutional investors, representatives of the media and others. Words such as “believe,” “anticipate,” “plan,” “expect,” “intend,” “target,” “estimate,” “project,” “predict,” “forecast,” “guideline,” “aim,” “will,” “should,” “likely,” “continue,” “may,” “objective,” “outlook” and similar expressions are intended to identify forward-looking statements but are not the exclusive means of identifying such statements. These forward-looking statements are based upon management's current expectations, estimates, assumptions, beliefs and general good faith evaluation of information available at the time the forward-looking statements were made concerning future events and conditions. Readers are cautioned not to place undue reliance on any forward-looking statements or rely upon them as a guarantee of future performance or results or as an accurate indications of the times at or by which any such performance or results will be achieved

Forward-looking statements are necessarily subject to risks, uncertainties and other factors, many of which are unforeseeable and beyond the Company’s control. Many factors could cause actual results, performance or achievements to be materially different from those expressed or implied in this Management Presentation, including, among others, the risks and uncertainties set forth in Section 3 “Risk Factors” in James Hardie’s Annual Report on Form 20-F for the year ended 31 March 2022, which include, but are not necessarily limited to risks such as changes in general economic, political, governmental and business conditions globally and in the countries in which the Company does business, including the impact of COVID-19; changes in interest rates; changes in inflation rates; changes in exchange rates; the level of construction generally; changes in cement demand and prices; changes in raw material and energy prices; changes in business strategy and various other factors. Should one or more of these risks or uncertainties materialize, or should underlying assumptions prove incorrect, actual results may vary materially from those described herein. James Hardie assumes no obligation to update or correct the information contained in this Management Presentation except as required by law.

## USE OF NON-GAAP FINANCIAL INFORMATION; AUSTRALIAN EQUIVALENT TERMINOLOGY

This Management Presentation includes financial measures that are not considered a measure of financial performance under generally accepted accounting principles in the United States (GAAP). These financial measures are designed to provide investors with an alternative method for assessing our performance from on-going operations, capital efficiency and profit generation. Management uses these financial measures for the same purposes.

These financial measures are or may be non-GAAP financial measures as defined in the rules of the U.S. Securities and Exchange Commission and may exclude or include amounts that are included or excluded, as applicable, in the calculation of the most directly comparable financial measures calculated in accordance with GAAP. These non-GAAP financial measures should not be considered to be more meaningful than the equivalent GAAP measure. Management has included such measures to provide investors with an alternative method for assessing its operating results in a manner that is focused on the performance of its ongoing operations and excludes the impact of certain legacy items, such as asbestos adjustments. Additionally, management uses such non-GAAP financial measures for the same purposes. However, these non-GAAP financial measures are not prepared in accordance with GAAP, may not be reported by all of the Company’s competitors and may not be directly comparable to similarly titled measures of the Company’s competitors due to potential differences in the exact method of calculation. For additional information regarding the non-GAAP financial measures presented in this Management Presentation, including a reconciliation of each non-GAAP financial measure to the equivalent GAAP measure, see the slide titled “Non-GAAP Financial Measures” included in the Appendix to this Management Presentation.

In addition, this Management Presentation includes financial measures and descriptions that are considered to not be in accordance with GAAP, but which are consistent with financial measures reported by Australian companies, such as operating profit, EBIT and EBIT margin. Since the Company prepares its Consolidated Financial Statements in accordance with GAAP, the Company provides investors with definitions and a cross-reference from the non-GAAP financial measure used in this Management Presentation to the equivalent GAAP financial measure used in the Company’s Consolidated Financial Statements. See the section titled “Non-GAAP Financial Measures” included in the Appendix to this Management Presentation.

# FORMALITIES

Zero Harm

Venue Layout

Welcome Bags

WiFi Network: JamesHardie

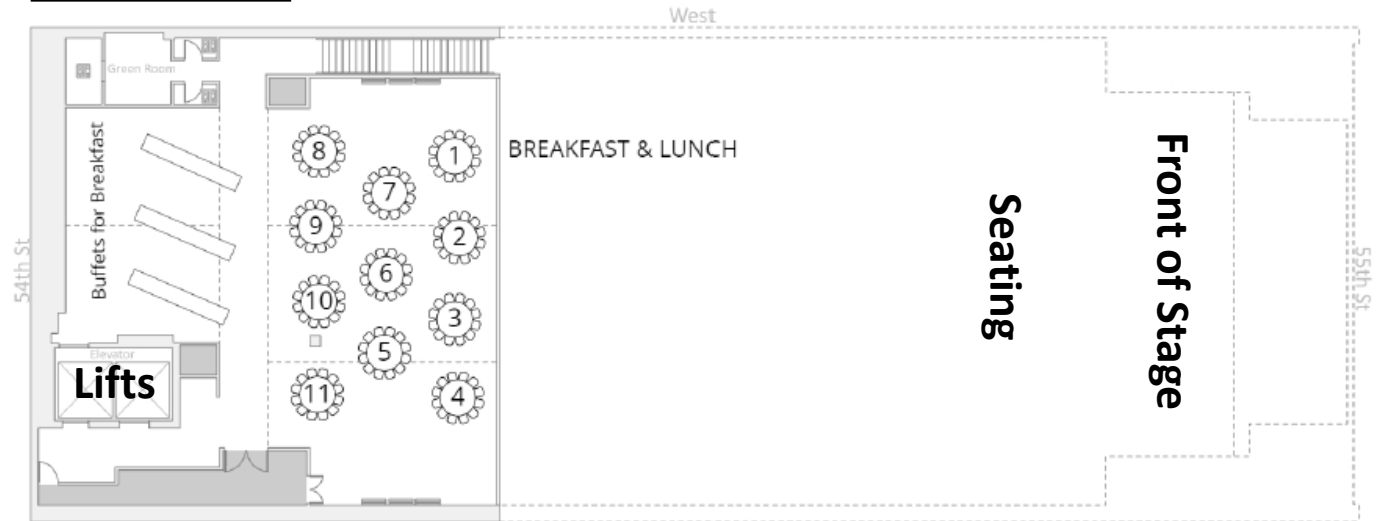
Password: Investor2022

Charging Your Items

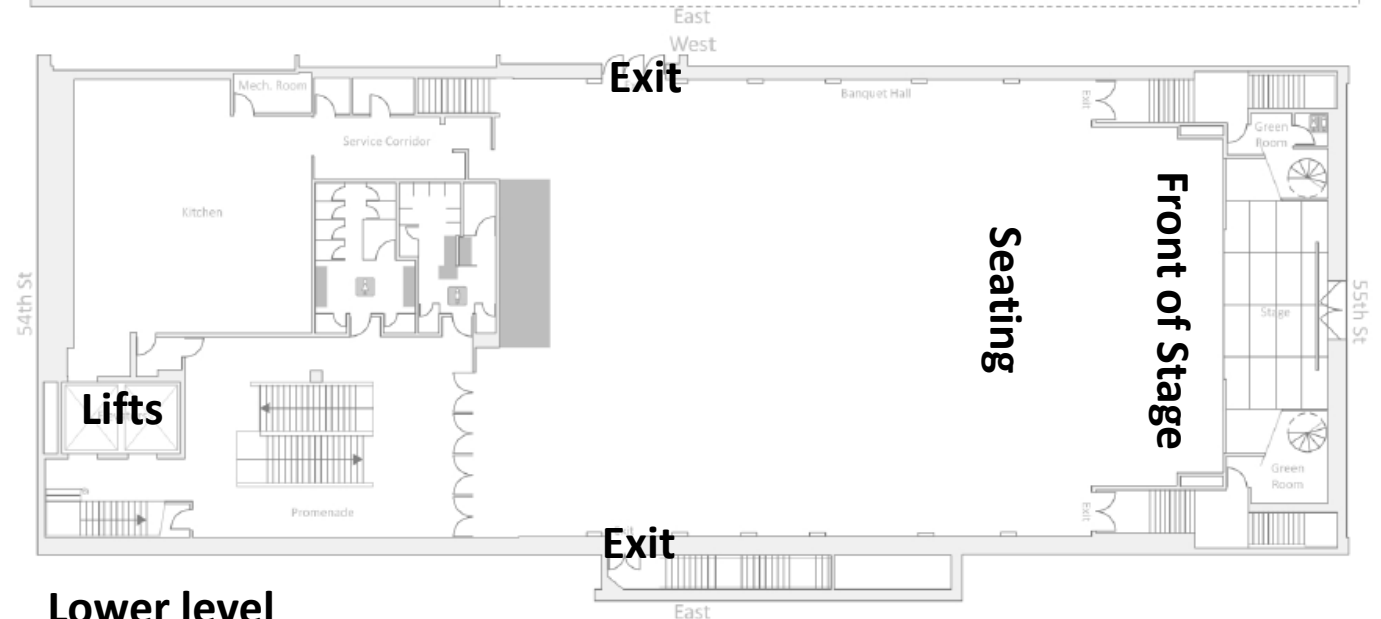
Meals / Experience Groups

Agenda

## Balcony level



## Lower level



# AGENDA – DAY 1 ZIEGFELD BALLROOM

## Day 1 – Monday, September 12<sup>th</sup>

<b>Breakfast</b>	7:45-8:30 AM	All
<b>Logistics Overview</b>	8:30-8:45 AM	James Brennan-Chong
<b>CEO Overview</b>	8:45-9:15 AM	Aaron Erter
<b>Zero Harm and ESG</b>	9:15-9:30 AM	Ryan Kilcullen / Jill Kolling
<b>Q&amp;A</b>	9:30-10:00 AM	All
<b>Break</b>	10:00-10:30 AM	All
<b>North America Overview</b>	10:30-11:30 AM	Sean Gadd
<b>Q&amp;A</b>	11:30-12:00 PM	Sean Gadd
<b>Lunch</b>	12:00-1:30 PM	All
<b>Northeast &amp; Midwest R&amp;R</b>	1:30-2:00 PM	Chad Fredericksen
<b>Customer</b>	2:00-2:20 PM	John Madson
<b>Contractor</b>	2:20-2:40 PM	Chad Fredericksen
<b>Q&amp;A</b>	2:40-3:00 PM	All
<b>Break</b>	3:00-3:30 PM	All
<b>Homeowner</b>	3:30-3:40 PM	Sean Gadd
<b>It's Possible™</b>	3:40-4:00 PM	Atousa Ghoreichi
<b>Magnolia</b>	4:00-4:20 PM	Atousa Ghoreichi
<b>Visualization</b>	4:20-4:35 PM	Chad Fredericksen
<b>North America Closing</b>	4:35-4:45 PM	Sean Gadd
<b>Q&amp;A</b>	4:45-5:00 PM	All
<b>Happy Hour</b>	5:00-6:30 PM	All
<b>Dinner</b>	6:30-9:00 PM	All



# AGENDA – DAY 2 ZIEGFELD BALLROOM

## Day 2 – Tuesday, September 13<sup>th</sup>

<b>Breakfast</b>	7:00-8:00 AM	All
<b>APAC</b>	8:00-9:15 AM	John Arneil & Travis Johnson
<b>Q&amp;A</b>	9:15-9:30 AM	All
<b>Experience Session #1</b>	9:30-10:00 AM	Breakout Groups
<b>Break</b>	10:00-10:15 AM	All
<b>Europe</b>	10:15-11:15 AM	Tobias Bennerscheidt & Henning Risse
<b>Q&amp;A</b>	11:15-11:30AM	All
<b>Experience Session #2</b>	11:30AM-12:00 PM	Breakout Groups
<b>Lunch</b>	12:00-1:15 PM	All
<b>Global Innovation</b>	1:15-2:15 PM	Joe Liu & Alan Miller
<b>Q&amp;A</b>	2:15-2:30 PM	All
<b>Experience Session #3</b>	2:30-3:00 PM	Breakout Groups
<b>Break</b>	3:00-3:15 PM	All
<b>Global Capacity</b>	3:15-4:00 PM	Ryan Kilcullen
<b>Q&amp;A</b>	4:00-4:15 PM	All
<b>Closing with CEO &amp; CFO</b>	4:15-4:45 PM	Aaron Erter & Jason Miele
<b>Q&amp;A</b>	4:45-5:00 PM	All
<b>Happy Hour</b>	5:00-6:30 PM	All
<b>Dinner</b>	6:30-9:00 PM	All





**INVESTOR DAY 2022 – CEO AARON ERTER**



## FULL YEAR FISCAL YEAR 2023 GUIDANCE

Management reaffirms full year FY23 Adjusted Net Income<sup>1</sup> guidance of:

# US\$730 million and US\$780 million

a 22% increase at the mid point relative to FY22

### North America Guidance – Full Year FY23

Net Sales Growth      18+% growth versus FY22

EBIT margin            28-32%

*James Hardie's guidance is based on current estimates and assumptions and is subject to a number of known and unknown uncertainties and risks, including those related to the COVID-19 pandemic and set forth in our Q1 FY23 Media Release in "Forward-Looking Statements."*

<sup>1</sup> Fiscal Year 2022 and 2023 Adjusted Net Income excludes asbestos related expenses and adjustments.

# WHO AM I?



**Wharton**  
UNIVERSITY OF PENNSYLVANIA



UNIVERSITY OF  
**NOTRE DAME**



# WHO AM I?



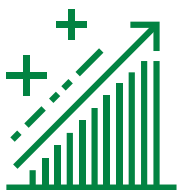
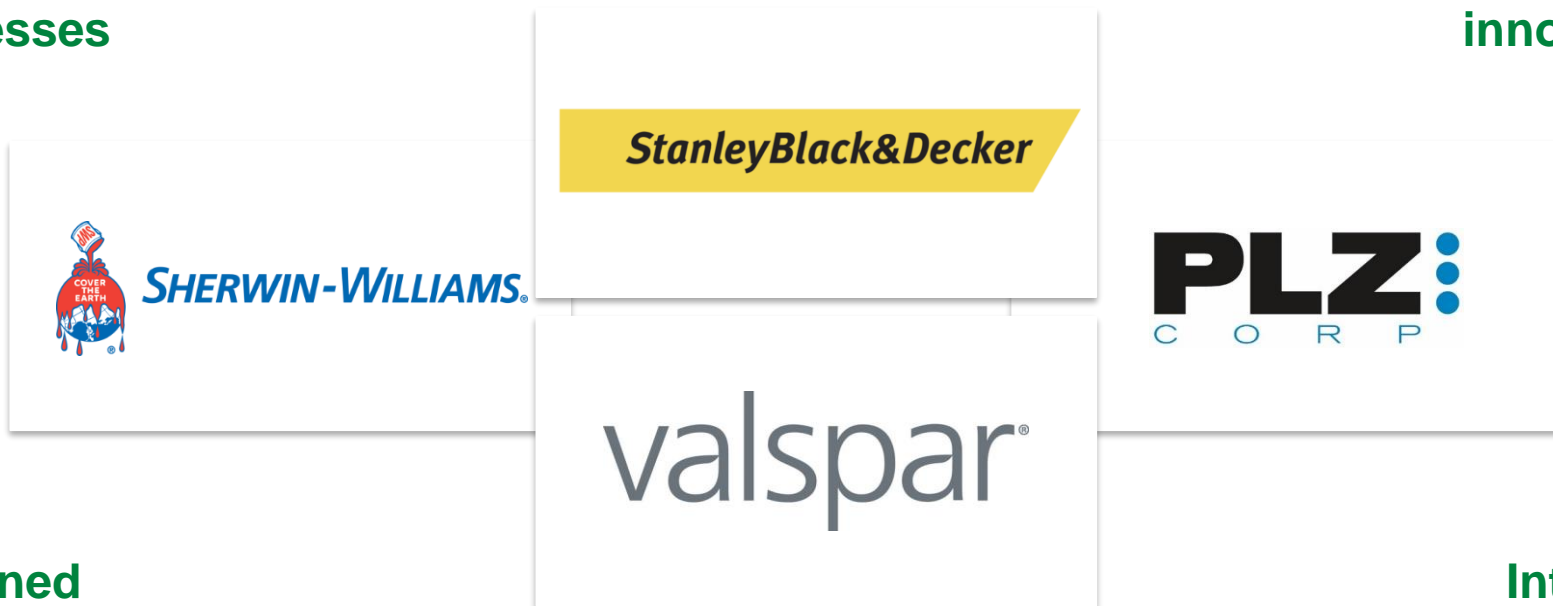
Managed diverse global businesses



Demonstrated passion and experience in building consumer-centric and brand led growth organizations



Developed insight driven innovation organizations



Driven sustained profitable growth



Developed deep experience in new business development and commercialization



Integrated customer focused supply chain organizations

## WHY JAMES HARDIE?

- ✓ Great Reputation Within the Industry
- ✓ Experienced & Talented Team
- ✓ First Class and Committed Board
- ✓ Strong Cash Position
- ✓ Tremendous Growth Opportunities
- ✓ My Experience is Aligned to Accelerate Value



# RIGHT GLOBAL STRATEGY TO DELIVER GROWTH

1

**Market to Homeowners to Create Demand**

2

**Penetrate and Drive Profitable Growth in Existing and New Segments**

3

**Commercialize Global Innovations by Expanding Into New Categories**

**Continued Execution and Expansion of Foundational Initiatives:**

- i) **LEAN Manufacturing**
- ii) **Customer Engagement**
- iii) **Supply Chain Integration**



## Zero Harm & ESG

## MY FOCUS



**Being in the field**  
with our customers  
and team members

Successfully  
**executing on our  
commitments**

Developing a diverse  
**world-class team**  
rooted in respect and  
teamwork

Driving  
**Profitable  
growth**

# WHAT TO EXPECT?

**Consumer Focused**  
Customer & Trade Driven

**RESULTS**  
***DRIVEN***

**SAFETY #1**

**T E A M**  
approach

**OPERATE WITH**  
**RESPECT AND**  
***AUTHENTICITY***







**ZERO HARM AND ESG**



# ZERO HARM UPDATE AND ESG – PRESENTERS



**Ryan Kilcullen**  
EVP Global Operations



**Jill Kolling**  
VP ESG and Chief  
Sustainability Officer





# AGENDA

## Investor Day 2022 – Zero Harm and ESG

Topic

Presenter

Zero Harm Update

Ryan Kilcullen

ESG Update

Jill Kolling





**ZERO HARM UPDATE**  
**Ryan Kilcullen, EVP Operations**





Our **conviction** that **every incident is preventable**



# JH ZERO HARM

## Our culture

Foundational, non-negotiable element of our global culture

A collective belief that we are “our brother’s/sister’s keeper”

A conviction that every incident is preventable

Proactive actions made continually

Embedded in our behavior 24/7

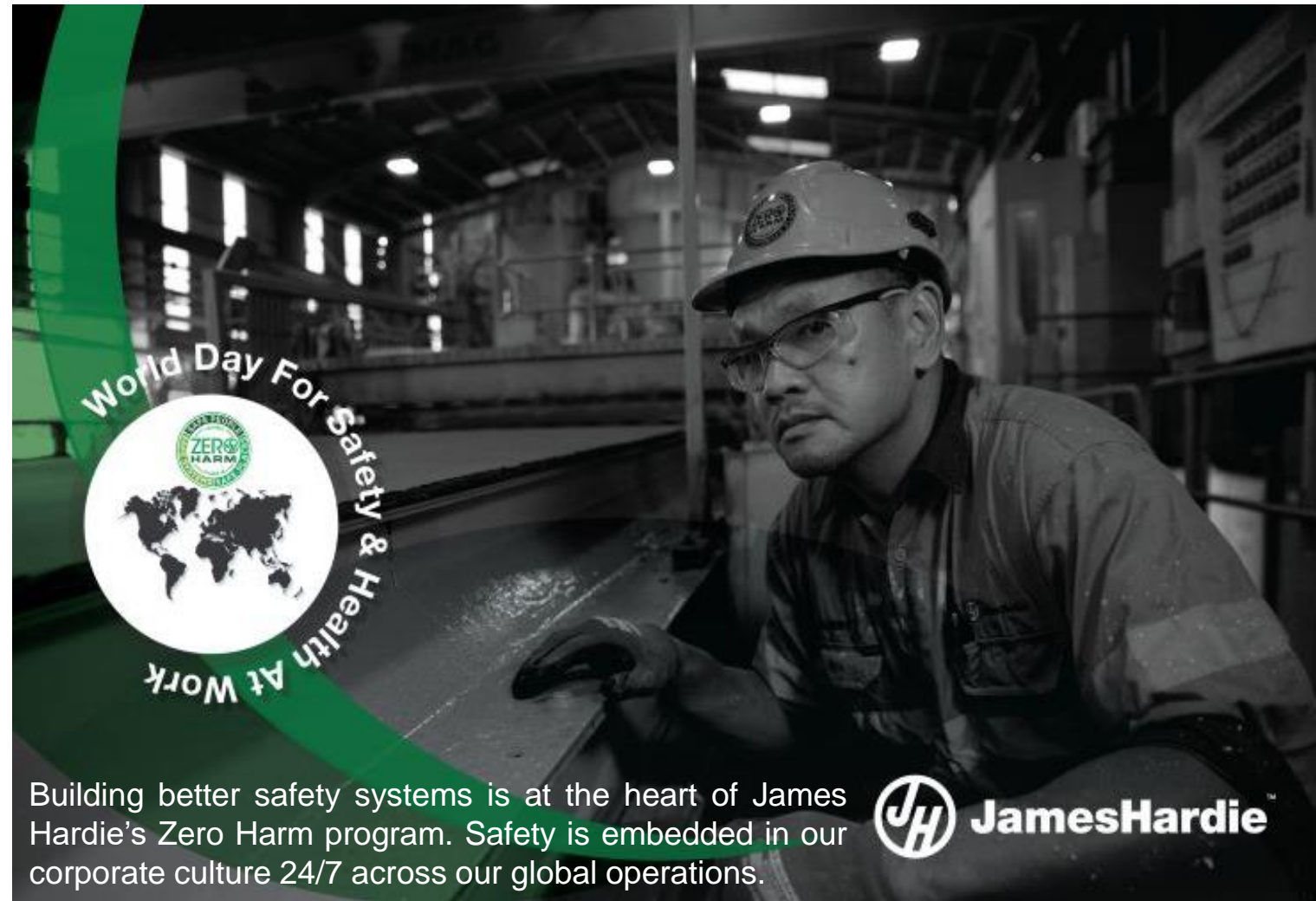
### ZERO HARM

✔ Managing our zero harm safety culture that focuses on safe people, safe places and safe systems



Our total recordable incident rate (TRIR) is below industry average

GOAL → CONTINUOUS IMPROVEMENT



# ZERO HARM IN ACTION

## Leadership Commitment – APAC Safety Day

**James Hardie Asia Pacific Zero Harm Pledge**

I am personally committed to a **ZERO HARM** working environment

Signature \_\_\_\_\_  
**JamesHardie**

**We are all Zero Harm Leaders**

At James Hardie, our families rely on us to come home safely every day. We will do everything to guarantee that happens.

**John Arneil**  
General Manager, APAC  
**JamesHardie**

**James Hardie Asia Pacific Zero Harm Pledge**

**ZERO HARM**

**We are all Zero Harm Leaders through:**

- Speaking up, listening and taking action
- Always considering our current state (Planning, Proficiency or Complacency) and the SafeStart observation
- Encouraging and recognising environment, health & safety leadership
- Training and empowering safe decisions
- Looking out for each others physical and mental health and the environment
- Following road regulations at all times

**We will:**

- Take 5 and put Zero Harm ahead of productivity or cost
- Be a brother's and sister's keeper
- Report incidents and only walk away if it's not your responsibility to investigate

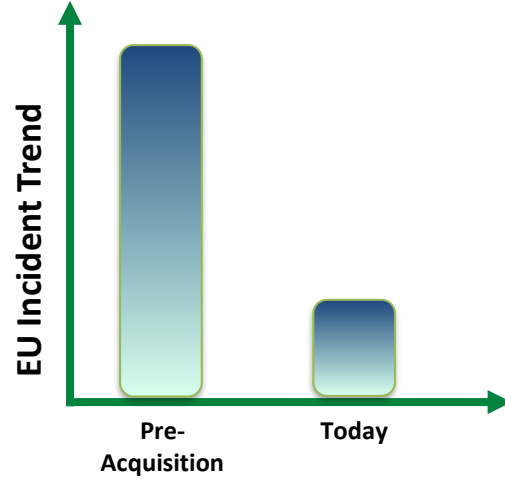
**Changing our behaviours is key for our transformation towards Zero Harm**

## Operator Engagement



# ZERO HARM IN ACTION

## Global Replication of Best Practices



## Total Company Zero Harm



Sales



Fleet



Office



Think of **your safety story** and write a brief summary

- What states were involved?
- Which errors happened as a result of the states?

SAFESTART NOW	STORY CARD
<p>Storyteller: _____</p> <p>Summary (What happened?): _____</p> <p>Elements:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> What activity? What happened?</li> <li><input type="checkbox"/> What state or states?</li> <li><input type="checkbox"/> What critical errors?</li> <li><input type="checkbox"/> How could it have been worse?</li> </ul>	<p>Story Card</p> <p>What were the states and errors?</p> <p>STATES</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Rushing</li> <li><input type="checkbox"/> Frustration</li> <li><input type="checkbox"/> Fatigue</li> <li><input type="checkbox"/> Complacency</li> </ul> <p>ERRORS</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Eyes not on task</li> <li><input type="checkbox"/> Mind not on task</li> <li><input type="checkbox"/> Line of fire</li> <li><input type="checkbox"/> Balance, traction, grip</li> </ul> <p>The four states can cause or contribute to four critical errors, which increase the risk of injury.</p>





**ESG UPDATE**  
**Jill Kolling, VP ESG & Chief Sustainability Officer**



# HISTORY OF ESG AT JAMES HARDIE

2018

No Report

2020

**SUSTAINABILITY OVERVIEW**

**SHAPING A SUSTAINABLE FUTURE**

Embedded in a foundation of Zero Harm, James Hardie's approach to Sustainability puts people first with a focus on safety. Investing in a culture of safety ensures both our employees and our business partners get home safely to their families, every day.

**GLOBAL SUSTAINABILITY HIGHLIGHTS**

\$912M Scope 1 & 2 Carbon Footprint	1.05 Global Water Intensity (liters per square meter)	\$36M Waste Management
--	--	---------------------------

**CREATING A NEW HARDIE**

JamesHardie

2021



Sustainability Report  
Fiscal Year 2021  
Published 28 July 2021



2022



Sustainability Report



**Building Sustainable Communities**

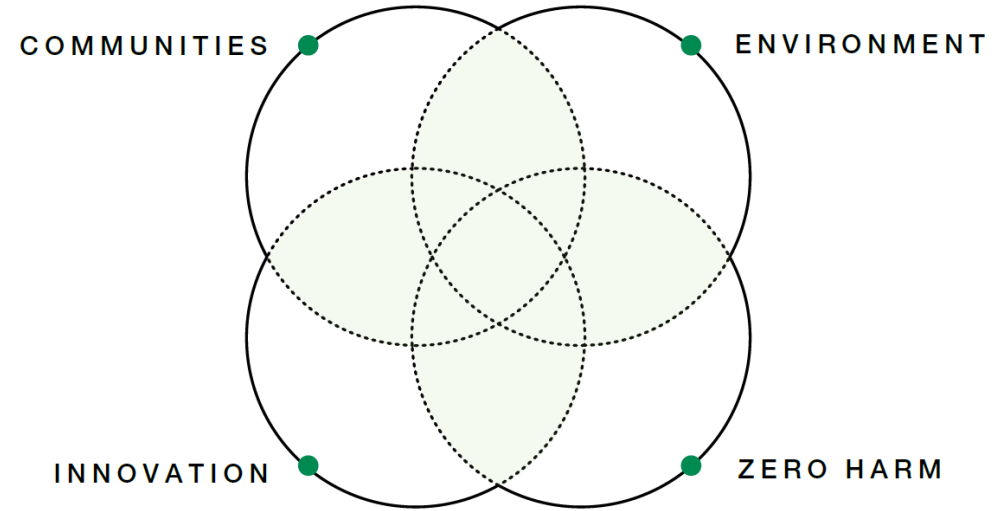
FY 2022





# OUR PILLARS

James Hardie's sustainability strategy integrates our global strategy for value creation and operational performance. It focuses on our four key pillars of Communities, Environment, Innovation and Zero Harm.



## COMMUNITIES

With a global mindset, we carefully manage our business impact by employing, sourcing, delivering and giving locally.



## ENVIRONMENT

We seek to minimize our impact on the environment, and we prioritize the management of water, waste, energy and emissions.



## INNOVATION

We use new technologies to produce high-quality sustainable products, solutions and building practices.



## ZERO HARM

Safety is a non-negotiable value of our company. Our Zero Harm culture empowers all employees to ensure the safety of fellow employees, partners, customers and communities.

# FY22 highlights

## ENVIRONMENT

- ✔ Promoting environmental excellence by reducing waste and our use of water and energy (CY19 baseline)

3.87M additional cubic feet of water recycled in CY21

GOAL → 20M CF BY 2030



21% reduction in scope 1+2 greenhouse gas intensity (MT CO2e/\$ revenue) in CY21

GOAL → 40% BY 2030

47% reduction in landfill waste intensity (MT/\$ revenue) in CY21

GOAL → 50% BY 2030

## COMMUNITIES

- ✔ Adding value to our communities by committing to gender diversity in management positions

19%

gender diversity in all management positions in FY22

GOAL → 20% BY FY24

## ZERO HARM

- ✔ Managing our zero harm safety culture that focuses on safe people, safe places and safe systems



Our total recordable incident rate (TRIR) is below industry average

GOAL → CONTINUOUS IMPROVEMENT

## INNOVATION

- ✔ Embracing innovation by delivering solutions that help improve the lives of homeowners

26%

of revenue from products with Environmental Product Declarations in FY22

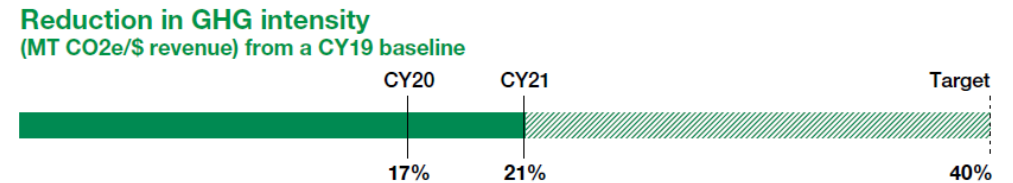
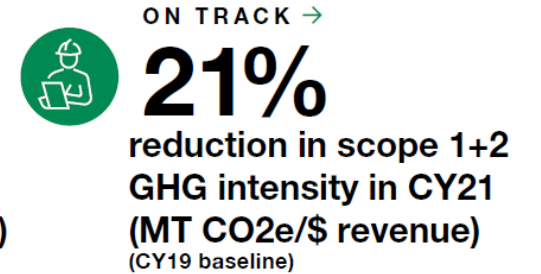
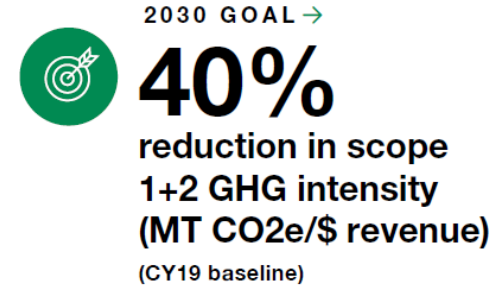
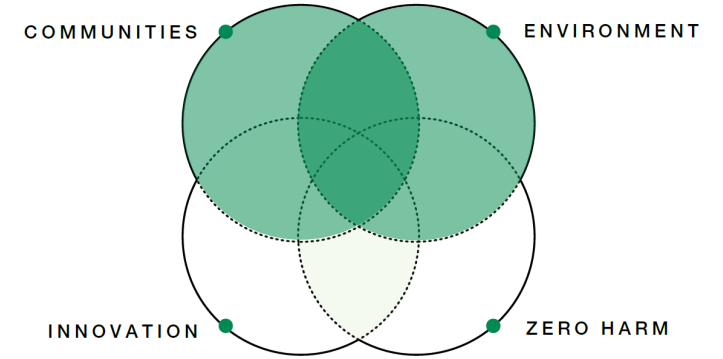
GOAL → 80% BY 2030

# FY22 HIGHLIGHTS – ELIMINATING COAL



After 50 years, the coal boiler at our Carole Park facility in Queensland, Australia was shut down in March. In its place are two new natural gas boilers.

Asia Pacific joins North America as a coal-free region as we continue our commitment to transition away from coal.

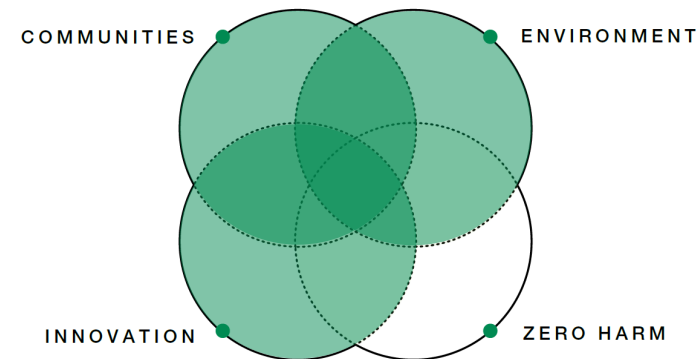


# FY22 HIGHLIGHTS – RECYCLING AND REUSING WASTE



In our waste takeback program in Europe, we salvage trim cuttings from our customers and bring them back to our fiber gypsum plants to recycle into new Fermacell® fiber gypsum boards.

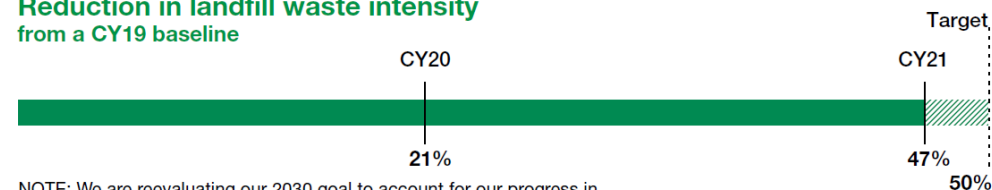
In Texas, we signed a multi-year contract with a local company for a proprietary beneficial reuse of waste from our Cleburne and Waxahachie fiber cement plants.



2030 GOAL →  
**50%**  
reduction in landfill waste intensity (MT/\$ revenue)  
(CY19 baseline)

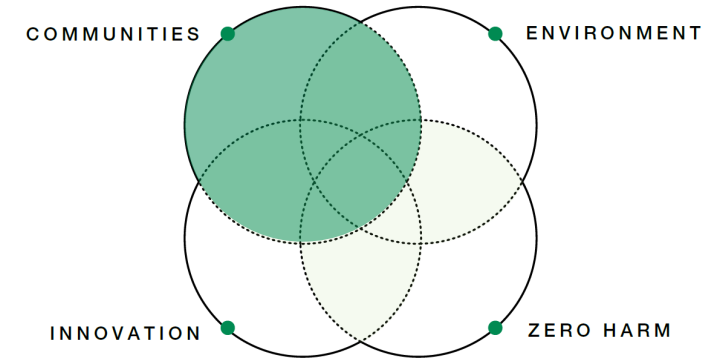
ON TRACK →  
**47%**  
reduction in landfill waste intensity in CY21 (MT/\$ revenue)  
(CY19 baseline)

### Reduction in landfill waste intensity from a CY19 baseline

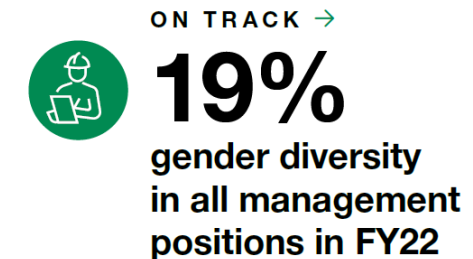


NOTE: We are reevaluating our 2030 goal to account for our progress in reducing landfill waste intensity over the past three calendar years.

# FY22 HIGHLIGHTS – INCLUSION AND DIVERSITY



Our I&D program focuses on culture, employee engagement, employee capabilities, hiring practices, and growing and developing talent in the organization. We prioritize inclusion in the workplace so our employees feel they have a voice and are comfortable doing their best work.



Gender diversity in management positions



# FY22 HIGHLIGHTS – IMPACTING LOCAL ECONOMIES



→ 150 MILES

SOURCED →

**80%**  
of raw materials  
locally

HIRED →

**75%**  
from the local  
communities  
in which we  
operate

→ 500 MILES

CONTRIBUTED →

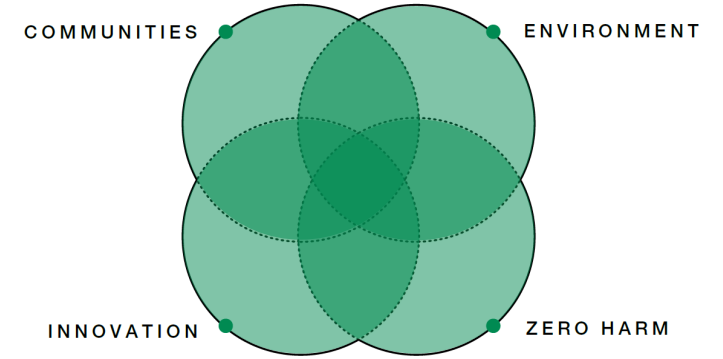
**\$1.42B**  
in economic value  
in communities  
where we operate

DELIVERED →

**65%**  
of our  
products  
locally

DONATED →

**\$800,000**  
locally



James Hardie builds value by contributing to local economies through capital expenditure at our plants and by investing in our employees, in local ecosystems and across our supplier base.

# CONTINUING OUR ESG JOURNEY



- Building out a global ESG team
- Continue to evolve our ESG reporting
- Incorporate customer and consumer insights
- Gain a better understanding of our upstream and downstream carbon footprint
- Develop a more strategic approach to social sustainability
- Revisit our goals



Q&A







**30 MINUTE BREAK**





**INVESTOR DAY 2022 – NORTH AMERICA**



## PRESENTERS



**Sean Gadd**  
President  
North America



**Chad Fredericksen**  
VP North America  
Professional Channel



**John Madson**  
VP North America  
Sales



**Atousa Ghoreichi**  
SVP North America  
Marketing, PR, and Communications

# AGENDA

## Investor Day 2022 – North America

<u>Topic</u>	<u>Presenter</u>
North America Overview	Sean Gadd
Built for Growth	
Why We Win	
Regional Approach	
Q&A	
Lunch	
Northeast & Midwest Repair & Remodel	Chad Fredericksen
Customer	John Madson
Contractor	Chad Fredericksen
Q&A / Break	
Homeowner	Sean Gadd
It's Possible™	Atousa Ghoreichi
Magnolia	Atousa Ghoreichi
Visualization	Chad Fredericksen
North America Closing	Sean Gadd
Q&A	





# **NORTH AMERICA: OVERVIEW**

## **Sean Gadd, President North America**



# NORTH AMERICA – SUMMARY

Proven track record as a growth company

James Hardie fiber cement proven to deliver high value

We want to win in all regions and all segments

Accelerate sustainable profitable growth in Northeast and Midwest Repair & Remodel market

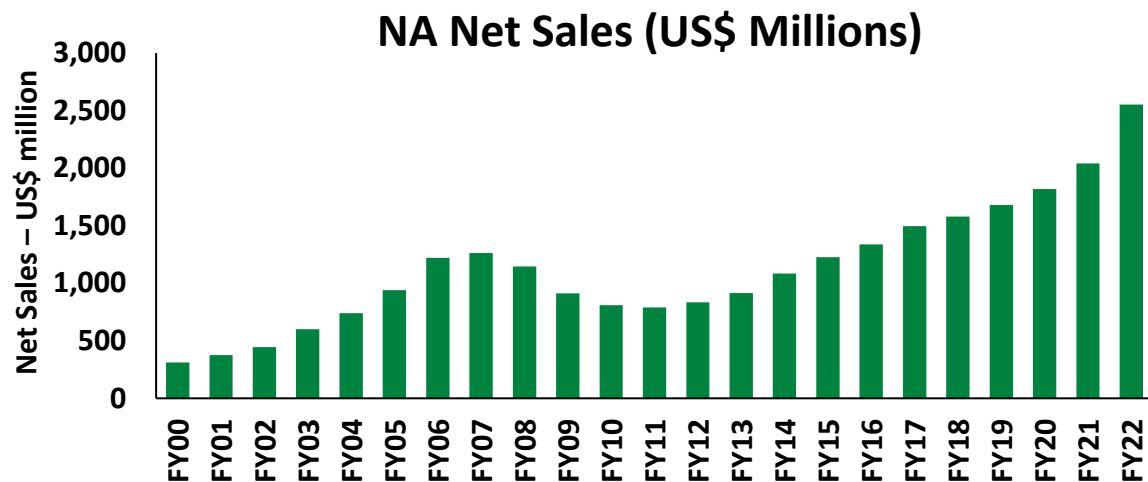
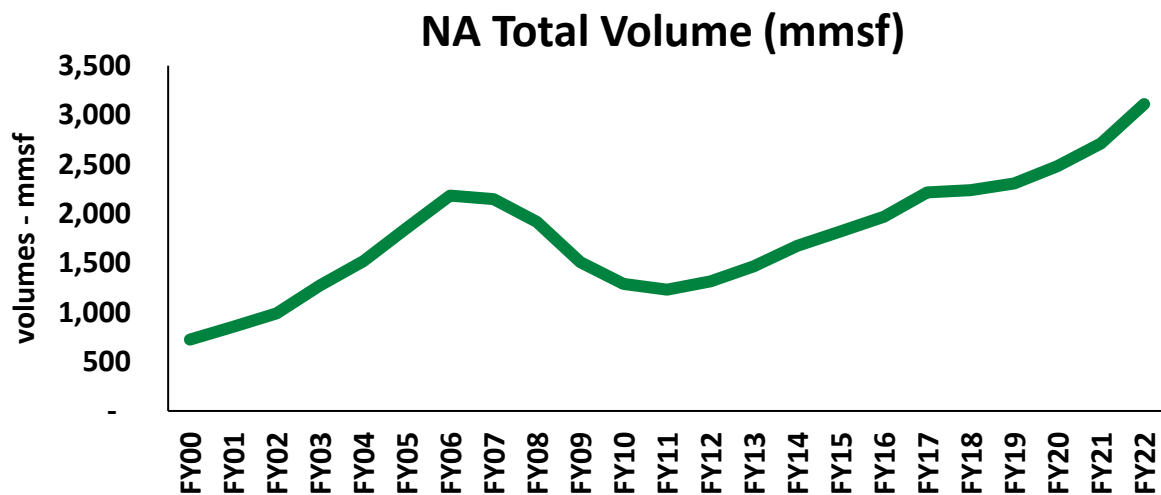




**NORTH AMERICA: BUILT FOR GROWTH**



# VOLUME AND NET SALES GROWTH



## 20 Year Performance

**Volume**      ↑ 3.1x vs 2002  
 6% CAGR

**Net Sales**    ↑ 5.7x vs 2002  
 9% CAGR

## 10 Year Performance

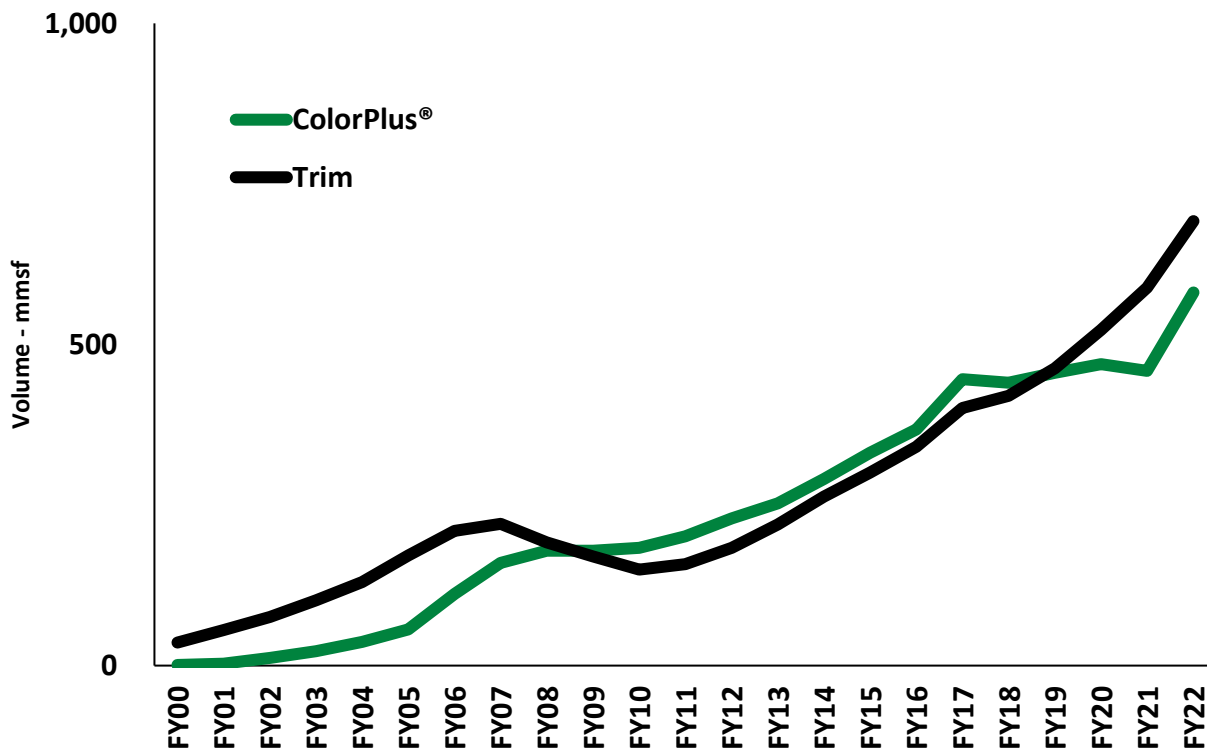
**Volume**      ↑ 2.4x vs 2012  
 9% CAGR

**Net Sales**    ↑ 3.1x vs 2012  
 12% CAGR



# DRIVING PROFITABLE MIX THROUGH FULL WRAP SOLUTIONS & COLORPLUS® TECHNOLOGY

ColorPlus® Technology and Trim Volume (mmsf)



## 20 Year Volume Performance

ColorPlus® 21% CAGR

Trim 12% CAGR

## 10 Year Volume Performance

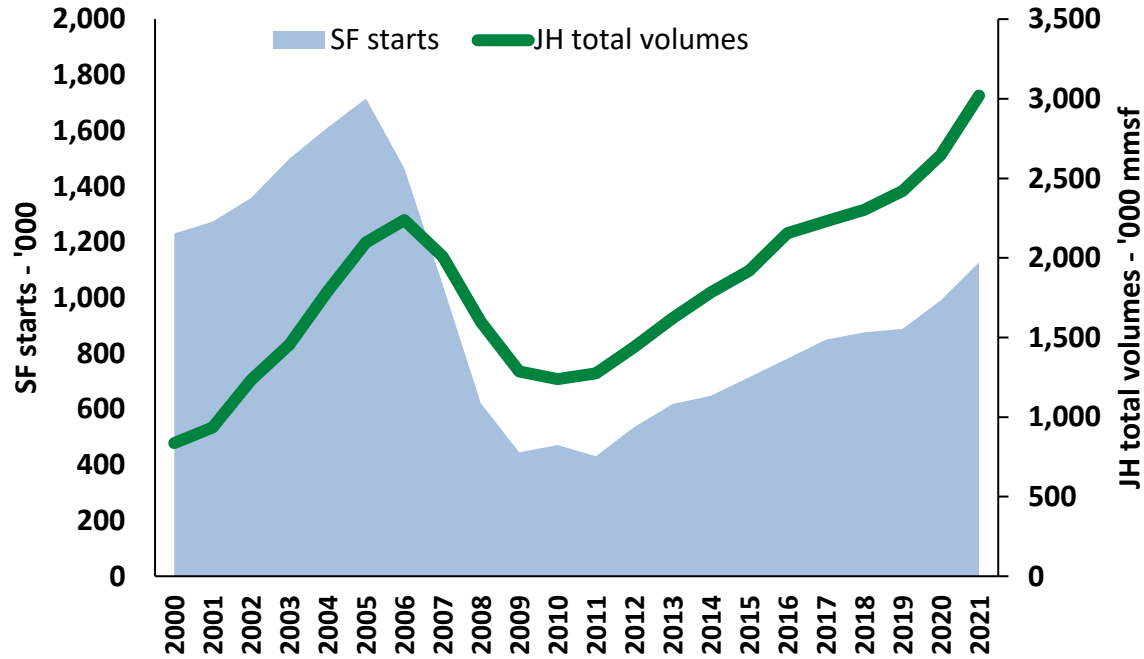
ColorPlus® 10% CAGR

Trim 14% CAGR

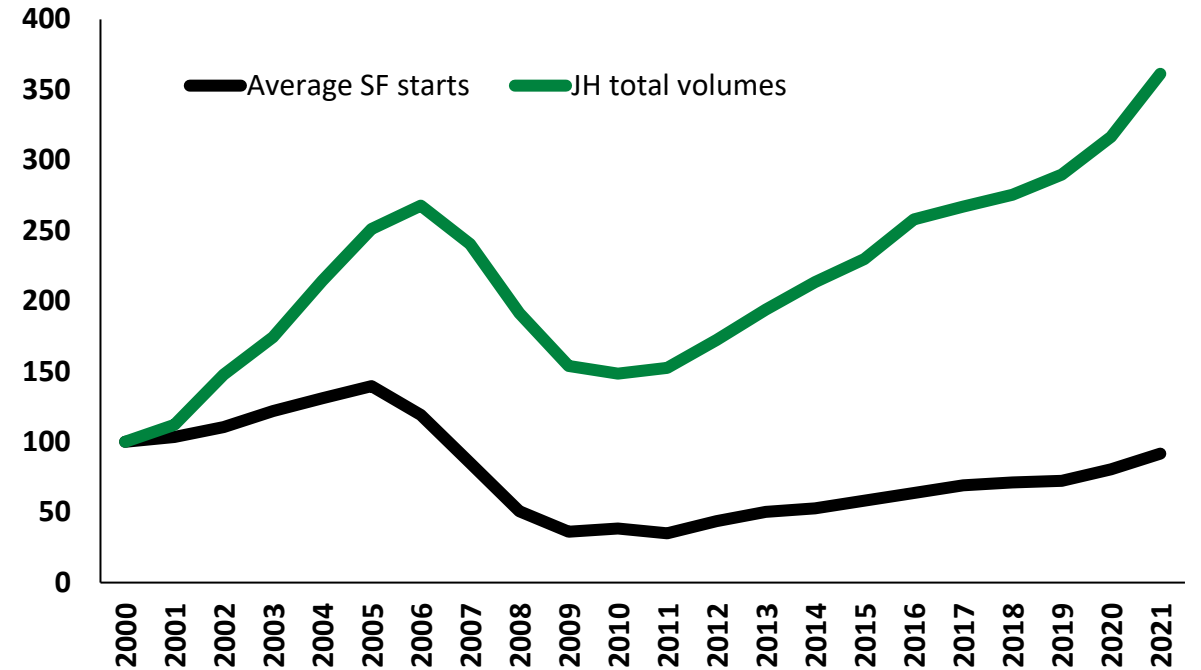
**ColorPlus® and Trim Volume has Grown from 88 mmsf in FY02, to 412 mmsf in FY12 to 1,273 mmsf in FY22**

# PENETRATING REPAIR & REMODEL SEGMENT

### Volume vs SF Housing Starts



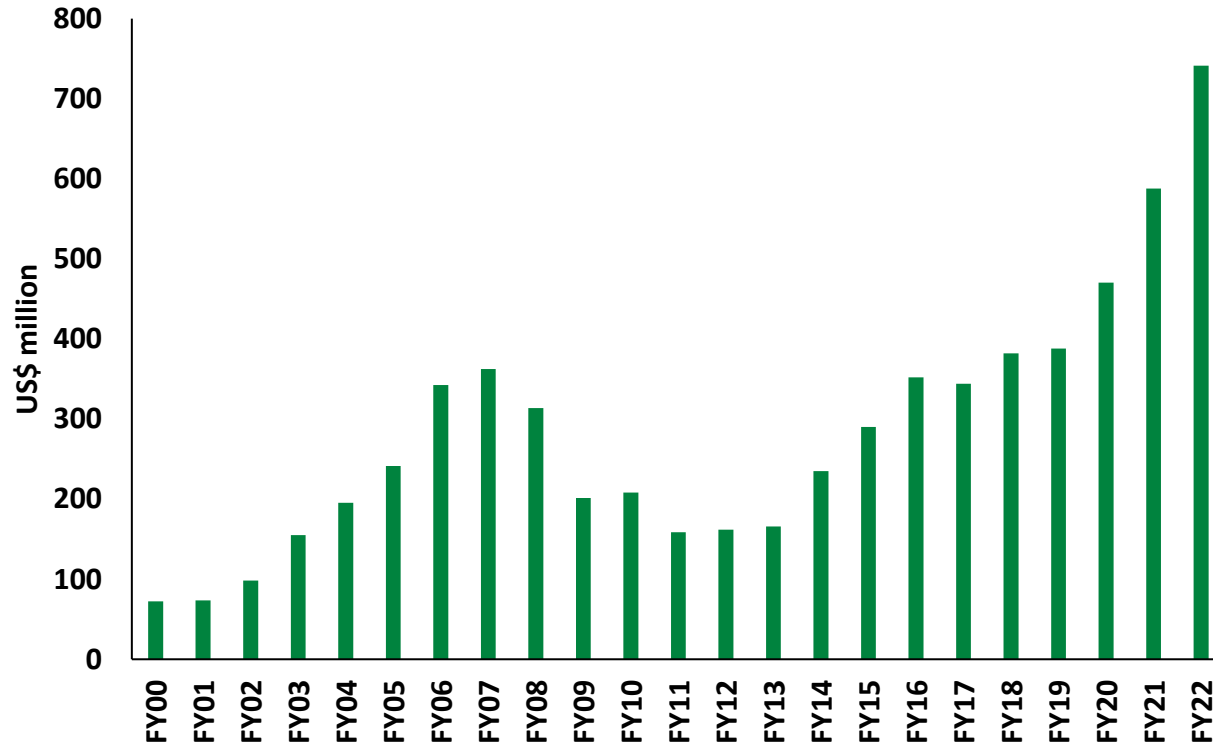
### Indexed Volume vs SF Housing Starts



**Successfully Penetrating Repair & Remodel While Continuing to Win Market Share**

# LONG TERM PROFITABILITY

## Adjusted EBIT



### 20 Year Performance

**Adjusted EBIT** ↑7.6x vs 2002  
11% CAGR

### 10 Year Performance

**Adjusted EBIT** ↑4.6x vs 2012  
16% CAGR

**Sustainable Profitable Growth**

# BUILT FOR GROWTH

10 Year  
Volume CAGR

9%

10 Year  
Net Sales CAGR

12%

10 Year Adjusted  
EBIT CAGR

16%



**NORTH AMERICA: WHY WE WIN**





# James Hardie Value Proposition

## Exterior Design

- ✓ Curb Appeal

## Superior Durability

- ✓ Resistance to Fire & Weather

## Low Maintenance

- ✓ Full Wrap Solution

## Trusted Brand

- ✓ On Over 10 Million Homes

## Unrivaled Business Support

## WHY WE WIN AGAINST THE COMPETITION

### Vinyl

- Exterior Design
- Superior Durability
- Low Maintenance with a refresh solution
- Affordable based on value

### Wood

- Superior Durability
- Low Maintenance
- Design
  - Full range of products
- Superior Support and Tools

### Other FC

- Trusted Brand
- Engineered for Climate™
- Technology
- Representation, Support, and Tools
- Diversified Segments

# FULL WRAP SOLUTION

Complete Exterior  
by James Hardie™

Hardie®  
Shingle

Hardie®  
Soffit

Hardie®  
Plank

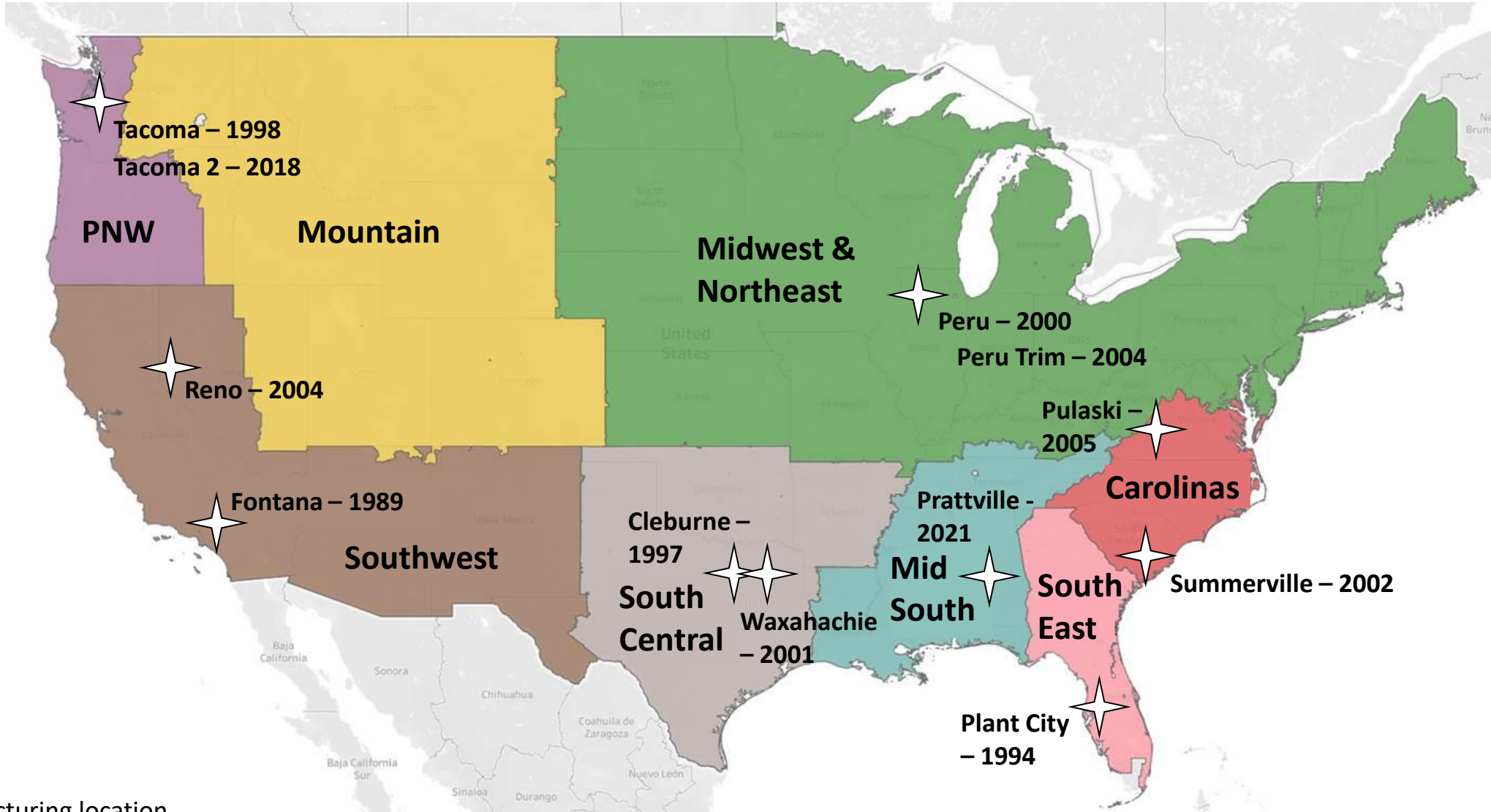
Hardie®  
Panel & Trim  
Batten

Hardie®  
Trim

We Manufacture  
High Performance  
Fiber Cement  
Building Solutions



# GROWTH THROUGH INNOVATION & CAPACITY EXPANSION



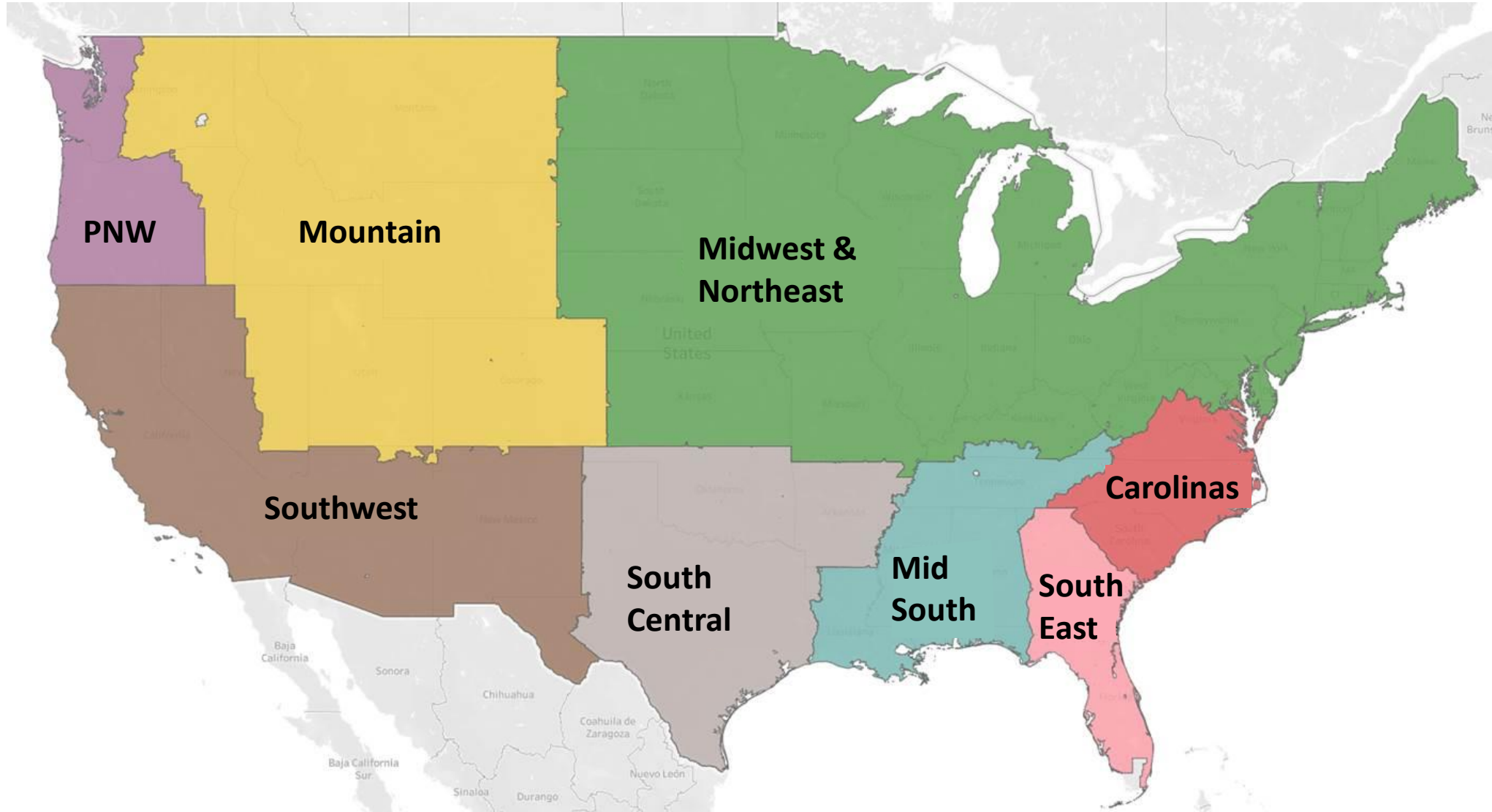
★ Manufacturing location



**NORTH AMERICA: REGIONAL APPROACH**

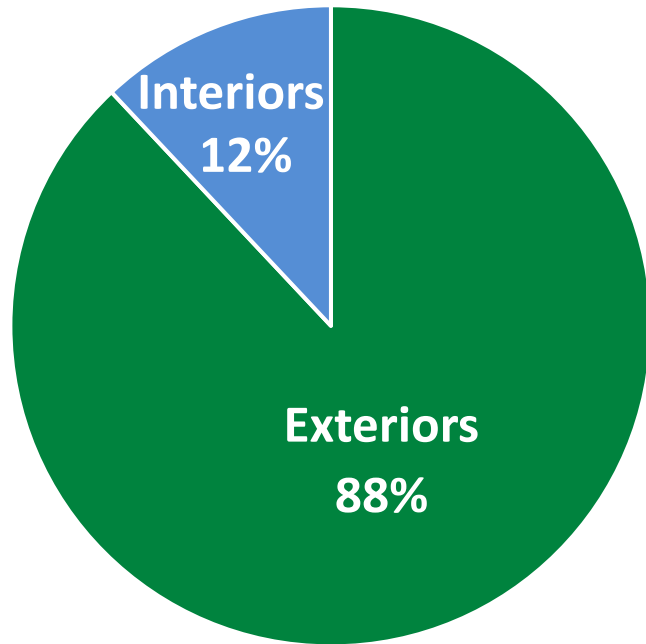


# REGIONAL MAP



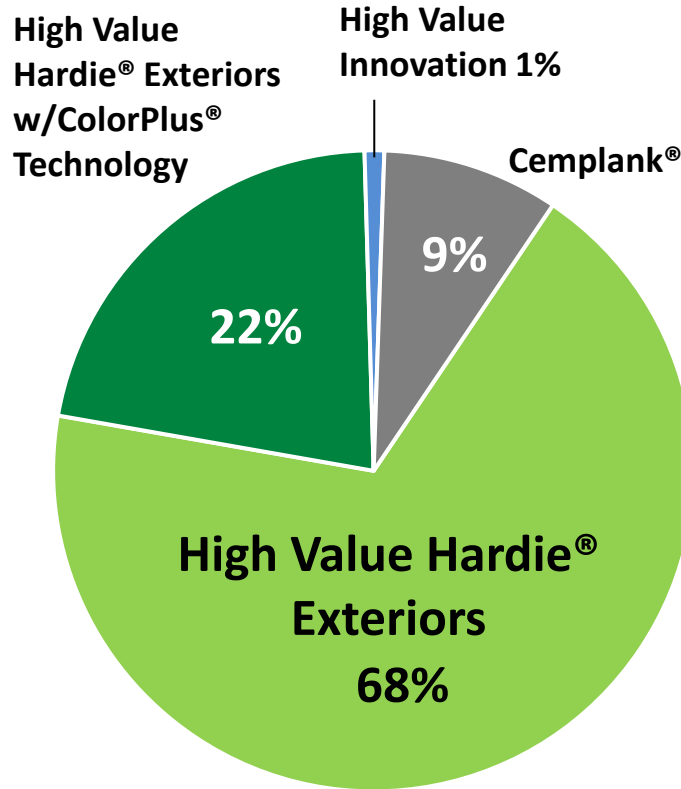
# VOLUME OVERVIEW

## FY22 Exteriors vs Interiors

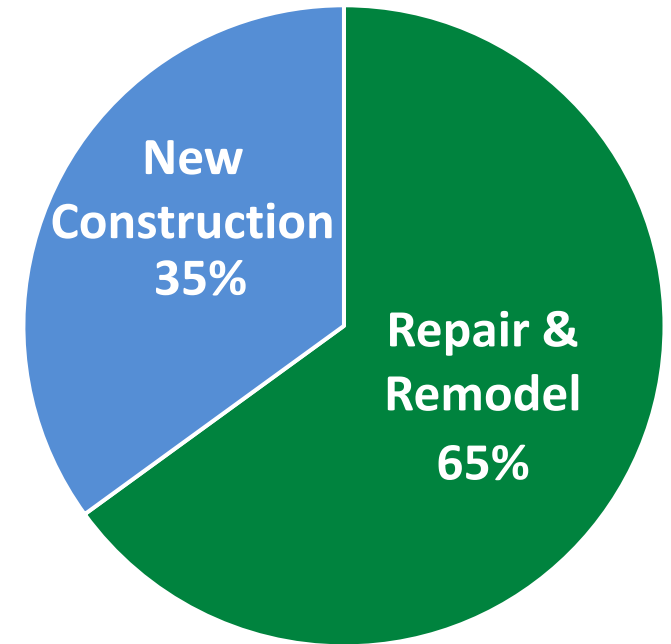


## FY22 Exteriors

### By Product



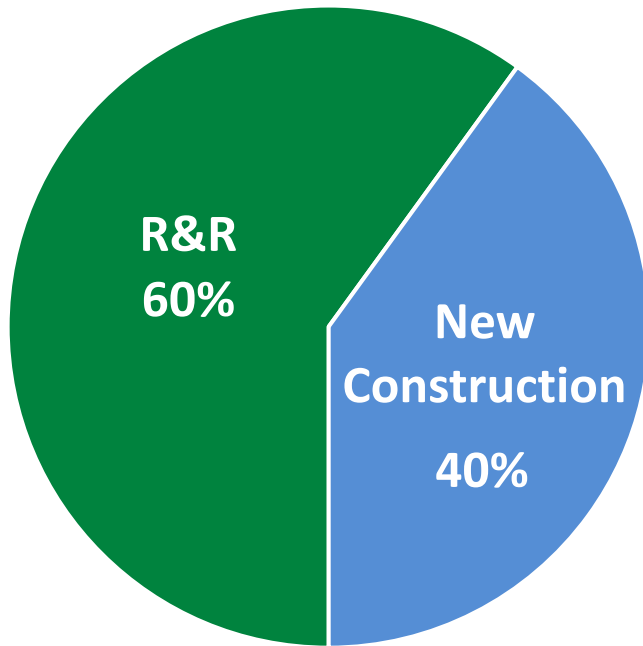
### By End Market<sup>1</sup>



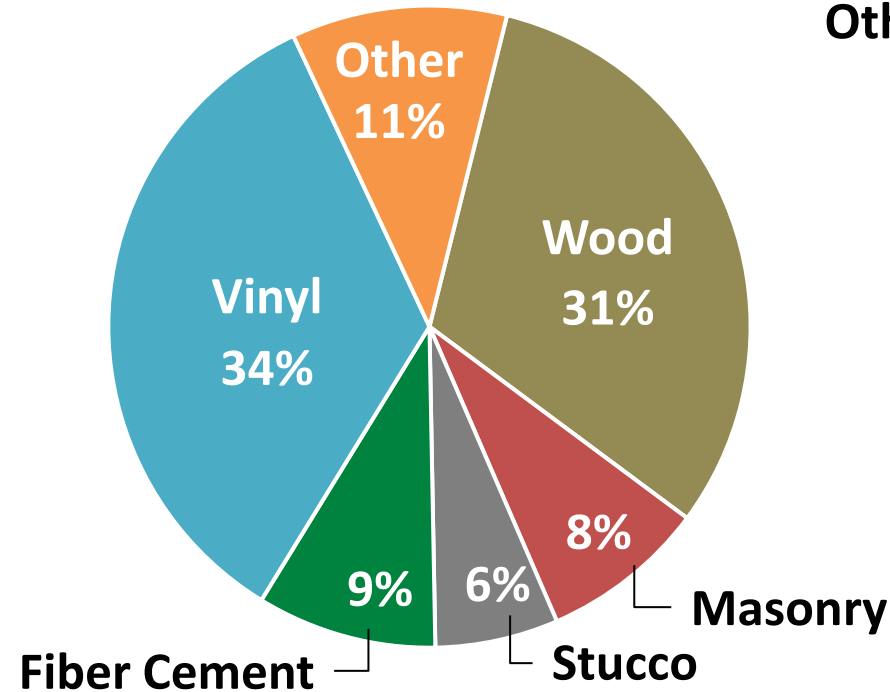
**We Are Now 65% Repair & Remodel**

# NORTH AMERICA 2021 EXTERIOR CLADDING MARKET

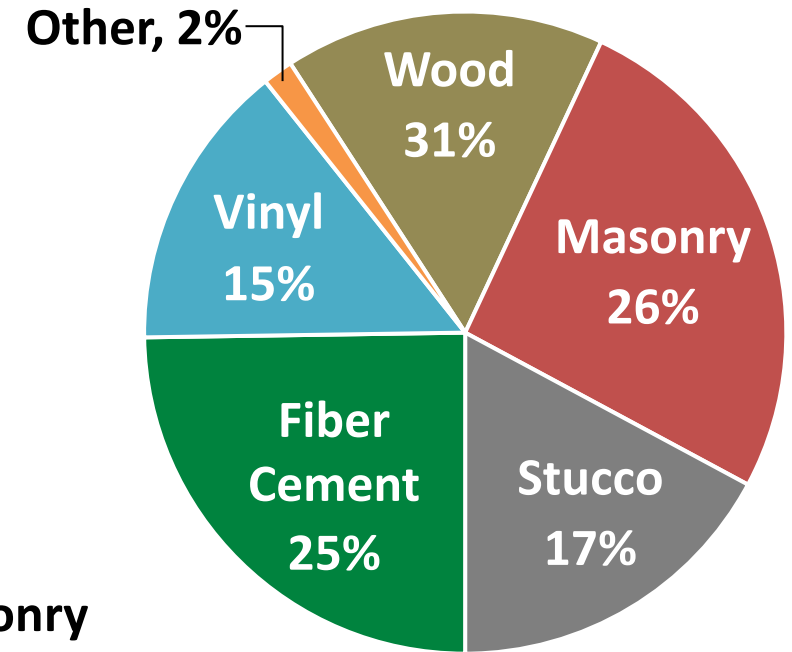
## Total Market



## Repair & Remodel



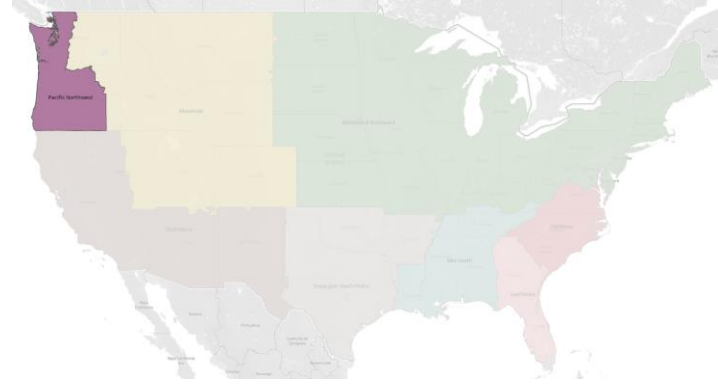
## New Construction



**Significant Opportunity for Sustainable Profitable Growth**

1 Per NAHB Home Innovation survey that measures total square feet volume including waste of all external cladding materials going on the side of homes in calendar year 2021, does not include Trim and Soffit

# PACIFIC NORTHWEST OVERVIEW



**Region:** Pacific Northwest

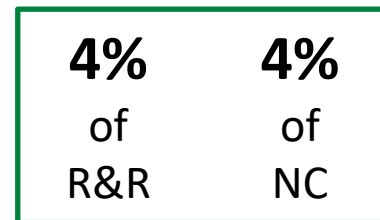
**Standard:** Fiber cement, 56% of New Construction

**Market Background:**

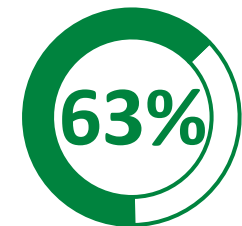
- 4 side Architecture
- Moving to Modern

**Our Approach:** Defend with Primed Full Wrap, penetrate modern with Aspyre® and Hardie® Architectural Collection

**Pacific Northwest Market  
as a % of Total US Market<sup>1</sup>**



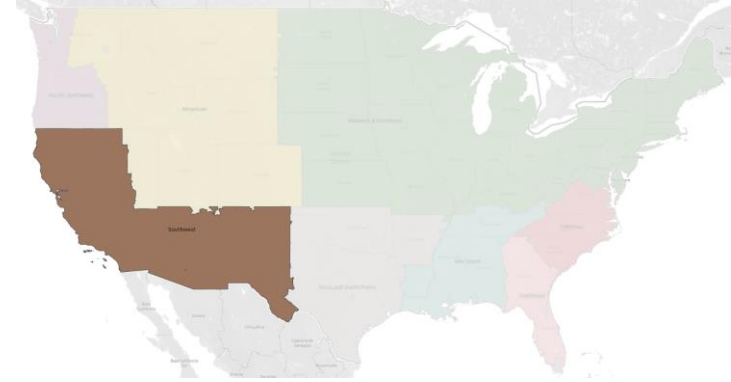
**% of Homes >40  
Years or Older<sup>2</sup>**



<sup>1</sup> Per NAHB Home Innovation survey that measures total square feet volume including waste of all external cladding materials going on the side of homes in calendar year 2021, does not include Trim and Soffit

<sup>2</sup> US Census

# SOUTHWEST OVERVIEW



**Region:** Southwest

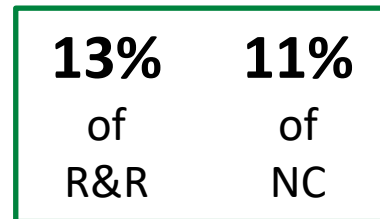
**Standard:** Stucco, 57% of New Construction

**Market Background:**

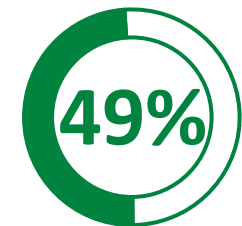
- Mediterranean look

**Our Approach:** Win with Primed full wrap everywhere, with separate focus on Southern California Coast and Northern California with Aspyre. Opportunity to win Modern with Hardie® Architectural Collection

**Southwest Market  
as a % of Total US Market<sup>1</sup>**



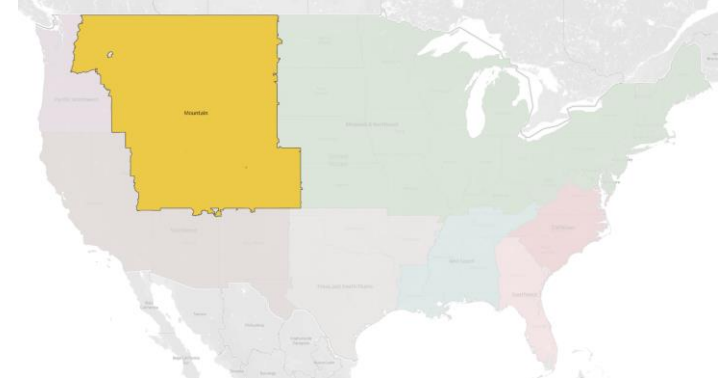
**% of Homes >40  
Years or Older<sup>2</sup>**



<sup>1</sup> Per NAHB Home Innovation survey that measures total square feet volume including waste of all external cladding materials going on the side of homes in calendar year 2021, does not include Trim and Soffit

<sup>2</sup> US Census

# MOUNTAIN OVERVIEW



**Region:** Mountain

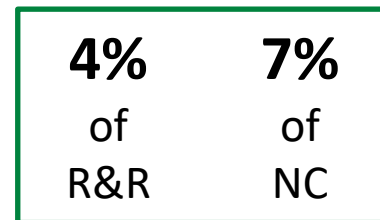
**Standard:** Wood, 37% of New Construction

**Market Background:**

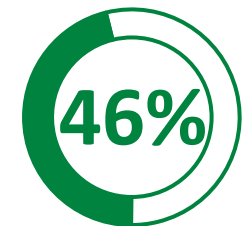
- Denver is largest market
- 4 side Architecture
- Consolidated builder market

**Our Approach:** Win with Primed Full Wrap

**Mountain Market  
as a % of Total US Market<sup>1</sup>**



**% of Homes >40  
Years or Older<sup>2</sup>**

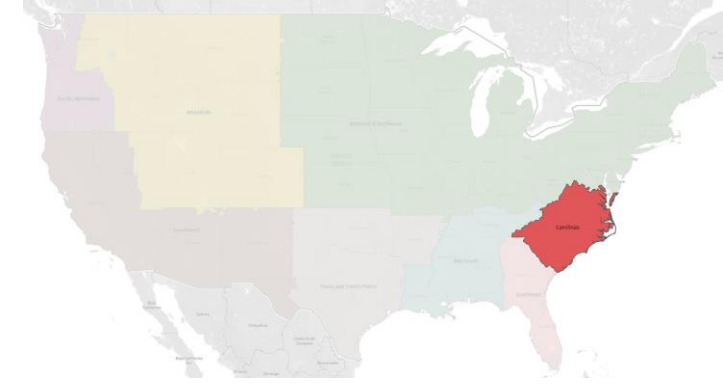


<sup>1</sup> Per NAHB Home Innovation survey that measures total square feet volume including waste of all external cladding materials going on the side of homes in calendar year 2021, does not include Trim and Soffit

<sup>2</sup> US Census



# CAROLINAS OVERVIEW



**Region:** Carolinas

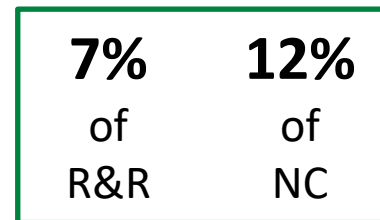
**Standard:** Vinyl, Fiber Cement (both ~30% of New Construction); Vinyl, 36% of R&R

**Market Background:**

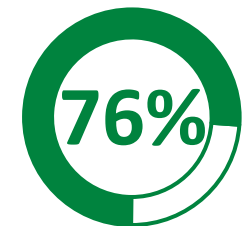
- Largest ColorPlus® market
- Consolidated builder market 4 Sided Architecture

**Our Approach:** ColorPlus® Technology

**Carolinas Market  
as a % of Total US Market<sup>1</sup>**



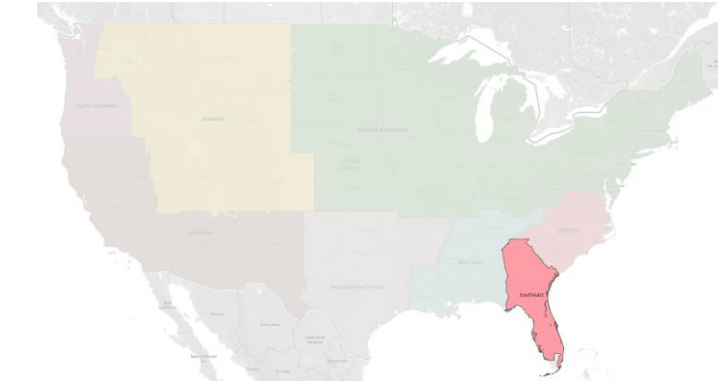
**% of Homes >40  
Years or Older<sup>2</sup>**



<sup>1</sup> Per NAHB Home Innovation survey that measures total square feet volume including waste of all external cladding materials going on the side of homes in calendar year 2021, does not include Trim and Soffit

<sup>2</sup> US Census

# SOUTHEAST OVERVIEW



**Region:** Southeast

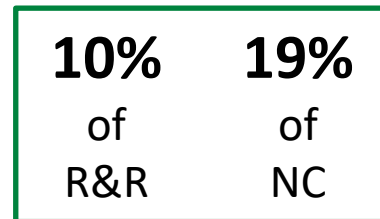
**Standard:** Stucco, 36% of New Construction; Fiber Cement

**Market Background:**

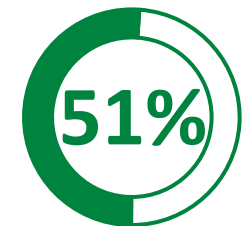
- Atlanta very consolidated 4 Side Architecture
- Florida: Stucco liability

**Our Approach:** Defend with Primed in Atlanta, and grow in Florida with Full Wrap ColorPlus® Technology and Hardie® Architectural Collection

**Southeast Market  
as a % of Total US Market<sup>1</sup>**



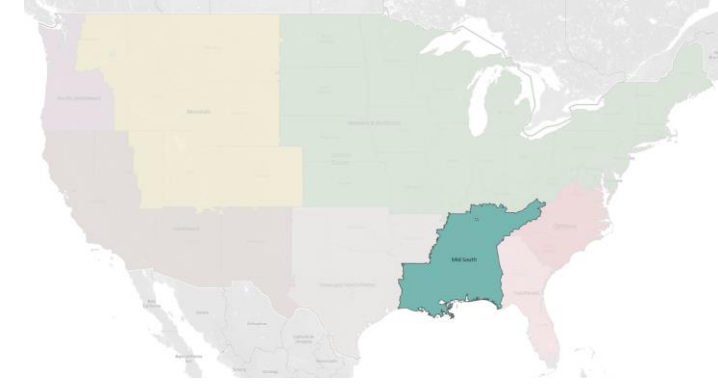
**% of Homes >40  
Years or Older<sup>2</sup>**



<sup>1</sup> Per NAHB Home Innovation survey that measures total square feet volume including waste of all external cladding materials going on the side of homes in calendar year 2021, does not include Trim and Soffit

<sup>2</sup> US Census

# MID SOUTH OVERVIEW



**Region:** Mid South

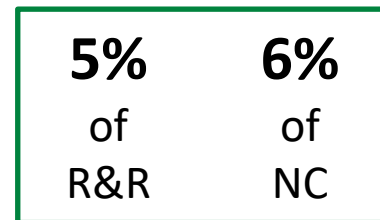
**Standard:** Brick, 33% of New Construction

**Market Background:**

- Fairly fragmented
- High paint costs on the coast

**Our Approach:** Exteriors with ColorPlus® Technology on the coast and Primed Full Wrap everywhere else

**Mid South Market  
as a % of Total US Market<sup>1</sup>**



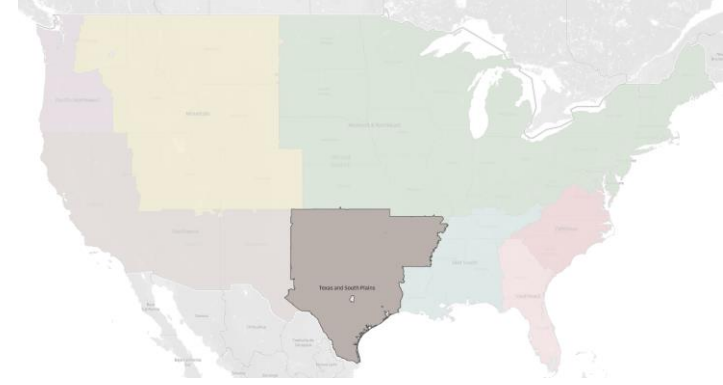
**% of Homes >40  
Years or Older<sup>2</sup>**



<sup>1</sup> Per NAHB Home Innovation survey that measures total square feet volume including waste of all external cladding materials going on the side of homes in calendar year 2021, does not include Trim and Soffit

<sup>2</sup> US Census

# SOUTH CENTRAL OVERVIEW



**Region:** South Central

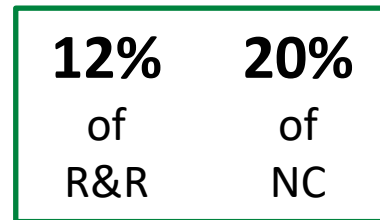
**Standard:** Brick/Masonry, 37% of New Construction

**Market Background:**

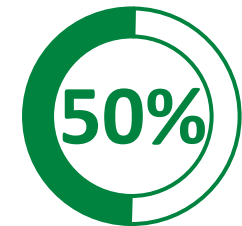
- Historical ordinance for 80% masonry until 2018
- Region moving to 4 Sided Architecture

**Our Approach:** Win with Primed Full Wrap, penetrating new Masonry opportunity in New Construction

**South Central Market  
as a % of Total US Market<sup>1</sup>**



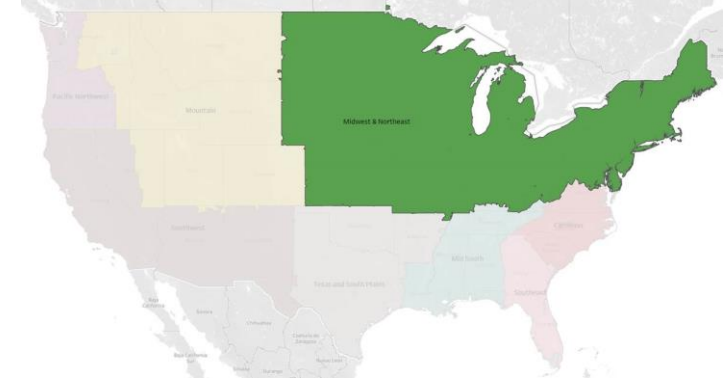
**% of Homes >40  
Years or Older<sup>2</sup>**



<sup>1</sup> Per NAHB Home Innovation survey that measures total square feet volume including waste of all external cladding materials going on the side of homes in calendar year 2021, does not include Trim and Soffit

<sup>2</sup> US Census

# NORTHEAST AND MIDWEST OVERVIEW



**Region:** Northeast & Midwest

**Standard:** Vinyl, 39% of R&R (Fiber Cement 7% of R&R)

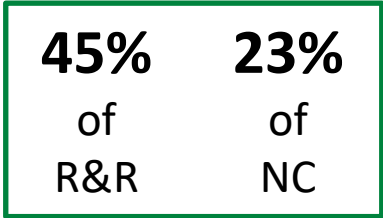
**Market Background:**

- Old Housing Stock primarily with Vinyl and Wood siding
- Northeast is 4 side Architecture
- Predominantly wood look

**Our Approach:** Exteriors with ColorPlus® Technology Full Wrap market development

**Sustainable Profitable Growth Opportunity  
in Repair & Remodel for  
James Hardie Fiber Cement**

**Northeast & Midwest Markets  
as a % of Total US Market<sup>1</sup>**



**% of Homes >40  
Years or Older<sup>2</sup>**



<sup>1</sup> Per NAHB Home Innovation survey that measures total square feet volume including waste of all external cladding materials going on the side of homes in calendar year 2021, does not include Trim and Soffit

<sup>2</sup> US Census



**Q&A**





**90 MINUTE LUNCH**





**NORTH AMERICA: NORTHEAST AND MIDWEST R&R**  
**Chad Fredericksen, VP North America Pro Channel**



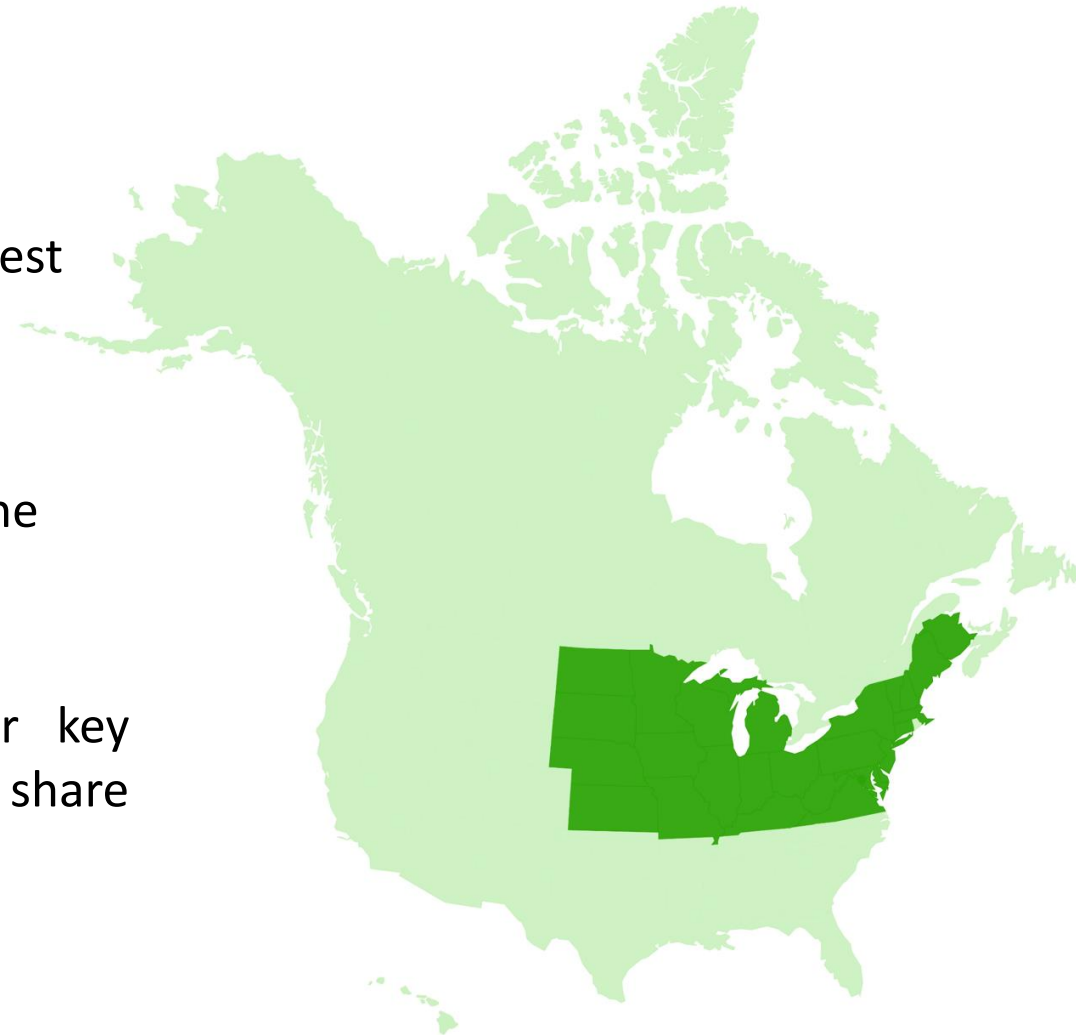


## NORTHEAST AND MIDWEST REPAIR & REMODEL – SUMMARY

The Repair & Remodel market in the Northeast and Midwest is a Sustainable Profitable Growth Opportunity

James Hardie has industry leading capabilities across the entire Repair & Remodel value chain

Our integrated and aligned value chain enables our key customers and contractors to capture a disproportionate share of demand helping them and us make more money



# WHAT IT TAKES TO TURN A DREAM INTO A REALITY



**COMPLETED RE-SIDE**

**CUSTOMER**



---

**Supply**  
**Service**  
**Education**

**CONTRACTOR**



---

**Expertise**  
**Material**  
**Labor**

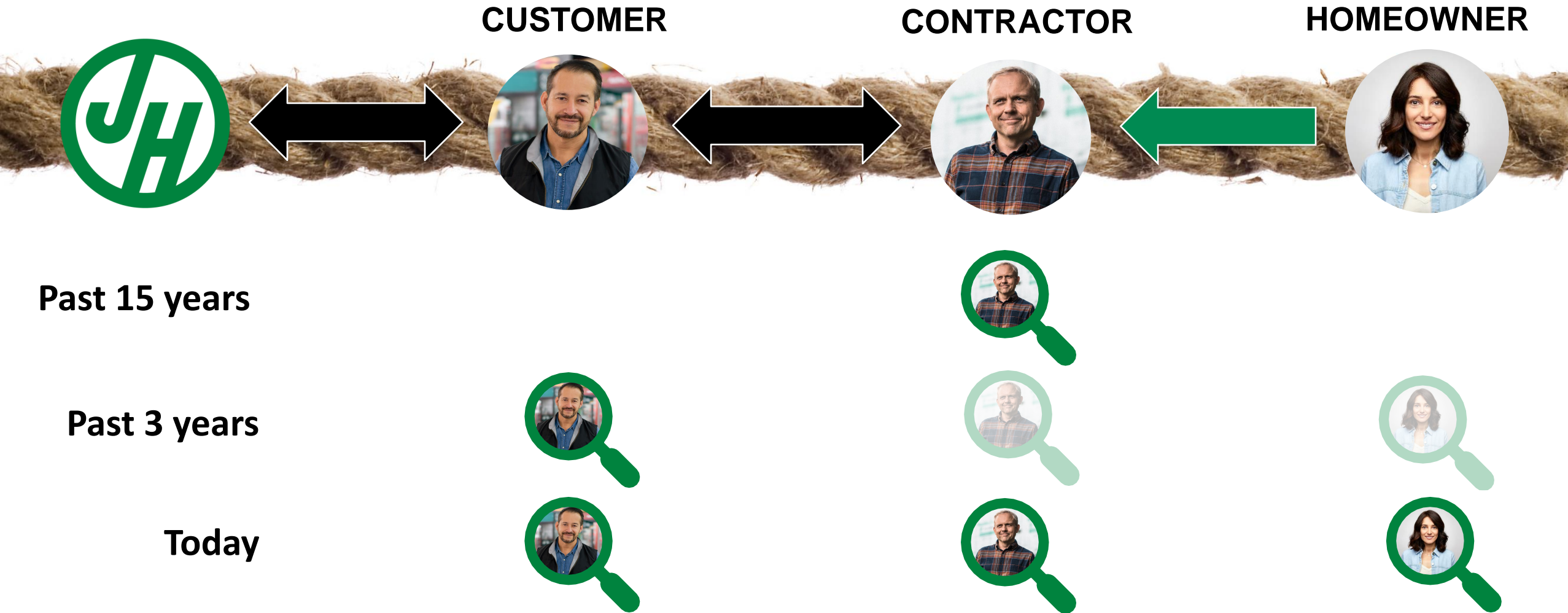
**HOMEOWNER**



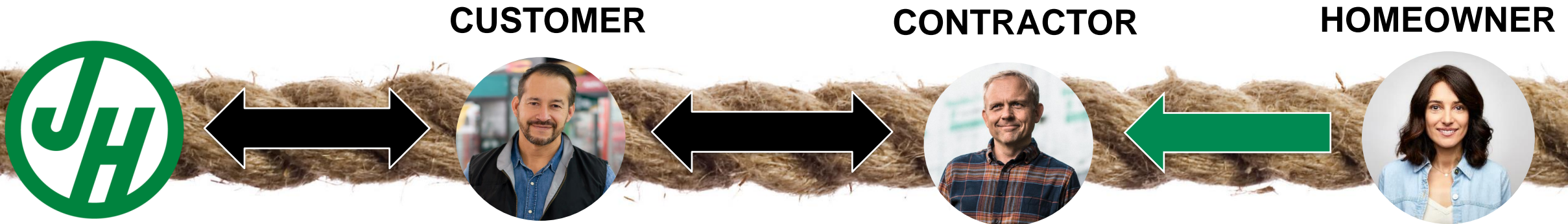
---

**Home**  
**Inspiration**  
**Investment**

# INDUSTRY LEADING CAPABILITIES ACROSS THE ENTIRE VALUE CHAIN



# CONNECTING THE VALUE CHAIN TO DRIVE GROWTH



**Ensuring our Customers capture a disproportionate amount of the demand created and become the force multiplier**



**NORTH AMERICA: CUSTOMER**  
**John Madson, VP North America Sales**



## CUSTOMER – KEY TAKEAWAYS

We are better aligned with our customers today than ever before

Our customers are motivated to support us as they make more money per transaction selling James Hardie than competitive products

The customer interacts with every contractor and can communicate the James Hardie value proposition to them at scale



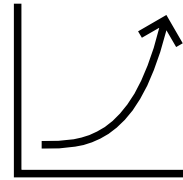
# HOW JAMES HARDIE DELIVERS WHAT THE CUSTOMER VALUES

## CUSTOMER

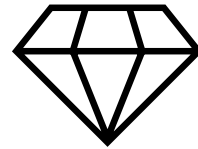


Defined as any building materials supplier. Their customers include; R&R contractors, siding installers, and residential builders.

## THE CUSTOMER CARES ABOUT



**Organic growth**



**Higher value products**

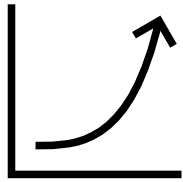


**Efficient working capital utilization**

# HOW JAMES HARDIE DELIVERS WHAT THE CUSTOMER VALUES

Customer Need

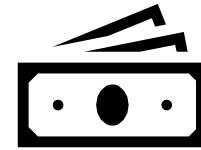
## ORGANIC GROWTH



## HIGHER VALUE PRODUCTS



## EFFICIENT WORKING CAPITAL



JH Value Creation

Superior demand  
creation

Broad product  
portfolio

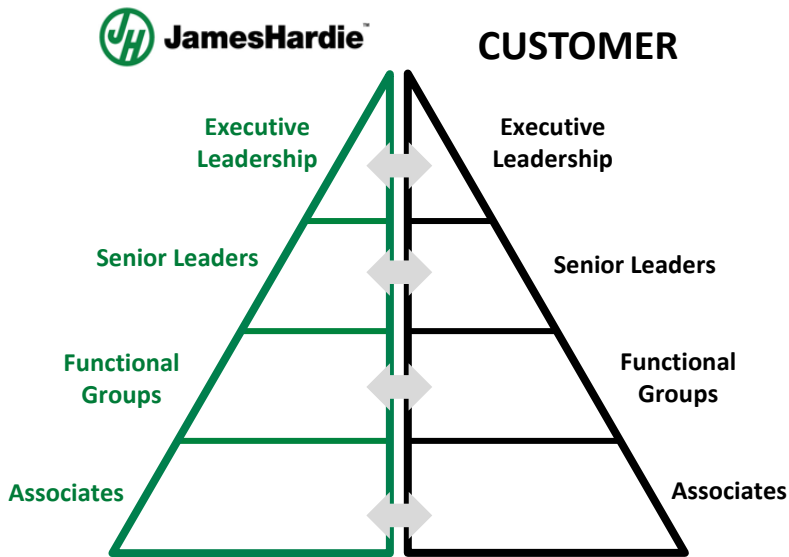
Innovation

LEAN inventory  
management



# HOW JAMES HARDIE DELIVERS WHAT THE CUSTOMER VALUES

## INTEGRATED APPROACH




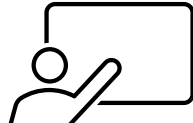
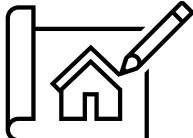
Guarantee alignment at every level of each organization.

## SHARED GOALS



Establish and drive mutually beneficial goals from CEO to associates.

## ENABLEMENT

-  **Consistent Communication**
-  **Associate Trainings**
-  **Tools for Enablement**

Training, enablement tools, and consistent communication to drive execution and success relative to shared goals.

## CUSTOMER – SUMMARY

We are better aligned with our customers today than ever before

Our customers are motivated to support us as they make more money per transaction selling James Hardie than competitive products

The customer has a broad reach to contractors and can communicate the JH value prop to them at scale





**NORTH AMERICA: CONTRACTOR**  
**Chad Fredericksen, VP North America Pro Channel**



# THE R&R CONTRACTOR – SUMMARY

Expand the number of contractors that sell James Hardie through our customer partnerships

Empower contractors to make more revenue and profit selling James Hardie over competitors

Retain the contractors by continually adding value to them through our Contractor Alliance Program



# JAMES HARDIE CAPABILITY – UNDERSTANDING THE CONTRACTOR

## R&R CONTRACTOR



Defined as any residential contractor who sells and produces an exterior cladding replacement project. The contractor's customer is the homeowner.

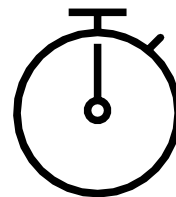
## THERE ARE THREE WAYS A CONTRACTOR CAN MAKE MORE MONEY



**Sell more projects**



**Increase the price of projects**



**Increase efficiency**

# JAMES HARDIE VALUE PROPOSITION TO CONTRACTORS

Contractor Need

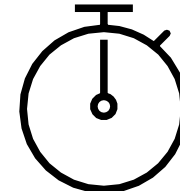
**SELL MORE PROJECTS**



**INCREASE THE PRICE**



**INSTALL MORE EFFICIENTLY**



JH Value Creation

**High quality  
consumer leads**

**Higher value product  
portfolio**

**Proprietary install  
efficiency training**

**Marketing support**

**Sales training and in  
home sales tools**

**Installation aids  
and support**

**CONTRACTOR ALLIANCE PROGRAM**

# CONTRACTOR PROFITABILITY | MOST VALUABLE ASSET IS TIME

R&R Contractor's  
Siding Installation  
Crew



$$40 \times 50 \times 3 = 6,000$$

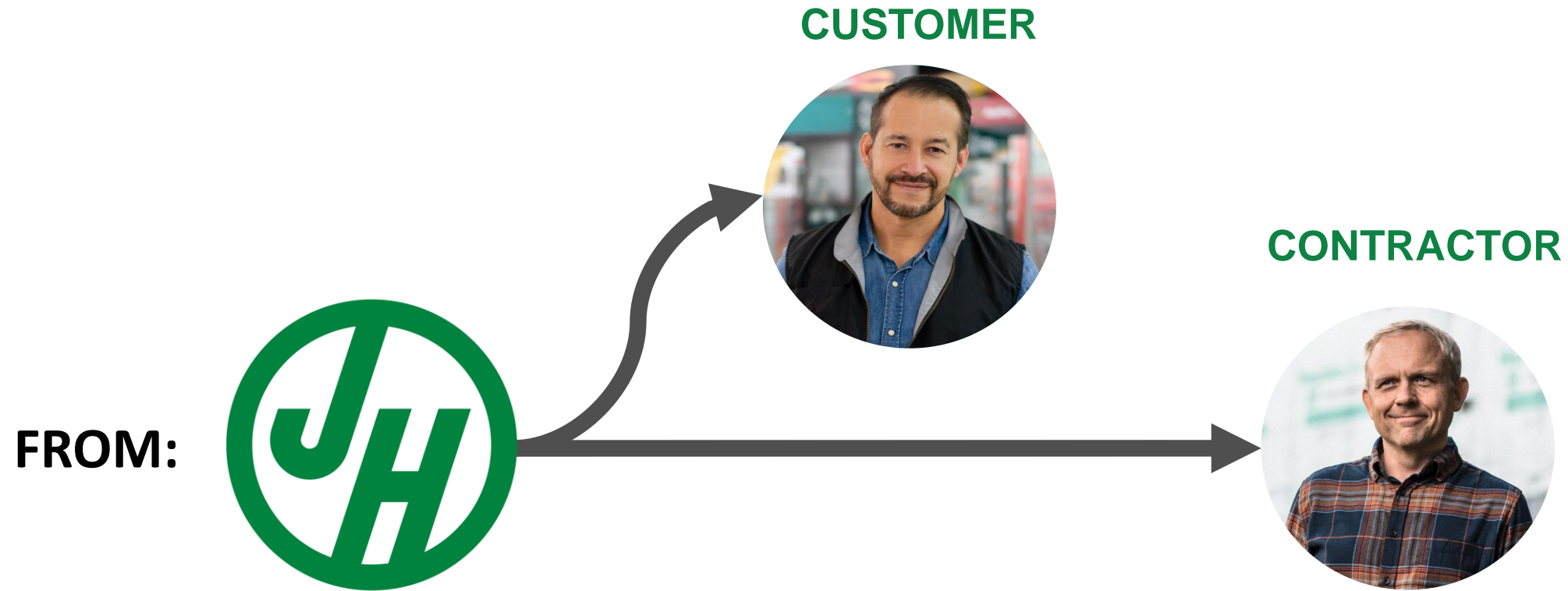
Hours Per Week      Working Weeks a Year      Installers Per Crew      Man-hours Per Year

It is better for a contractor to deploy their finite labor resources to a James Hardie project than a market standard project

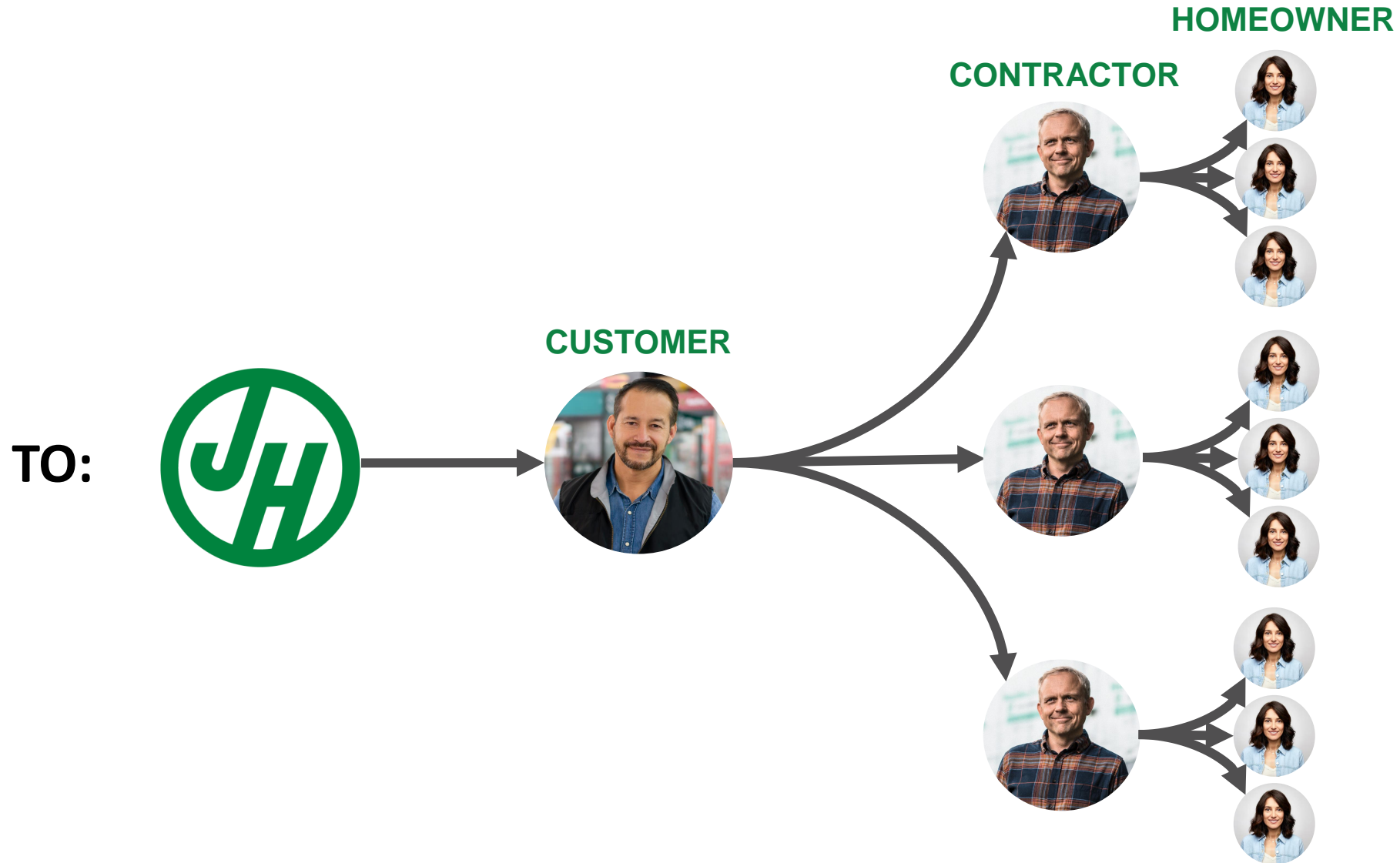




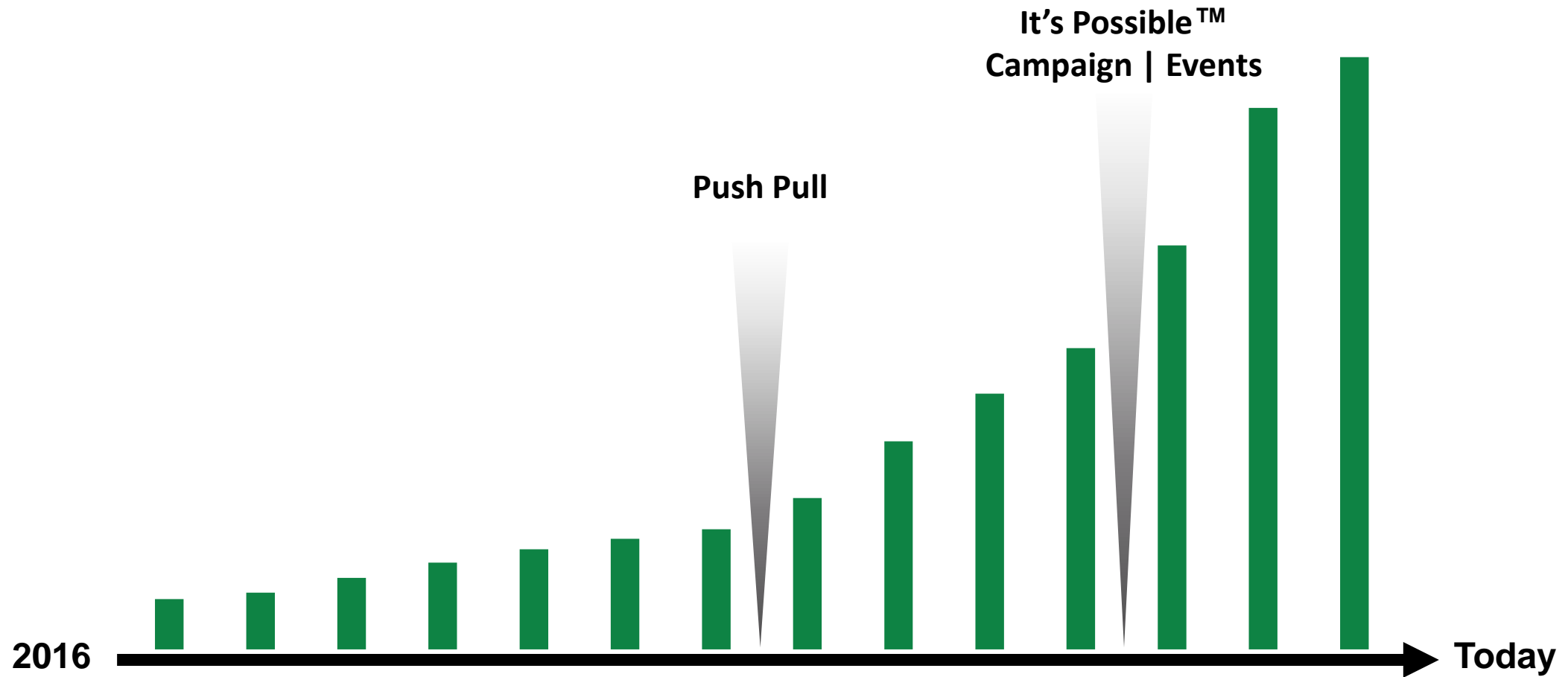
# ALIGNING CUSTOMERS AND CONTRACTORS | FROM – TO



# ALIGNING CUSTOMERS AND CONTRACTORS | FROM – TO



# EXPANDING CONTRACTOR ALLIANCE PROGRAM MEMBERSHIP



Growth of Contractor Alliance Program membership in the Northeastern United States over time.

# THE R&R CONTRACTOR – SUMMARY

Expand the number of contractors that sell James Hardie through our customer partnerships

Empower contractors to make more revenue and profit selling James Hardie over competitors

Retain the contractors by continually adding value to them through our Contractor Alliance Program





**Q&A**





**30 MINUTE BREAK**





**NORTH AMERICA: HOMEOWNER**  
**Sean Gadd, President North America**

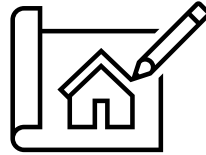


# HOW JAMES HARDIE DELIVERS WHAT THE HOMEOWNER VALUES

## HOMEOWNER



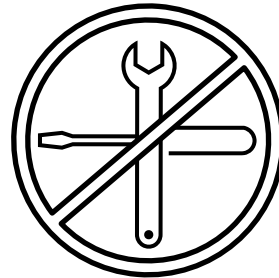
## THE HOMEOWNER CARES ABOUT



**Exterior appeal and design**



**Superior durability**



**Low maintenance**



# THE HOMEOWNER – SUMMARY

Our 360 degree Marketing Strategy to the Homeowner is working

We have researched and drawn insights into the pain points of the Homeowner's path to purchase

We have specific programs and tools to alleviate the homeowner pain points and improve their path to purchase



# 360 DEGREE MARKETING PROGRAM DELIVERED SIGNIFICANT RESULTS IN FY22

1.4 M

New Web Sessions  
+505% YoY

33K

Marketing Leads  
+209% YoY

6K

Sales Leads  
+102% YoY

Equals Increased Demand in FY22

+11%<sup>2</sup>  
Volume

- Targeted 3 Key Metros in the Northeast in FY22
- 360 Degree Marketing Campaign<sup>1</sup> Driving Homeowners to Engage with James Hardie and our Customers

- Demand in 3 Target Regions Outpaced our Other ColorPlus<sup>®</sup> Technology Markets

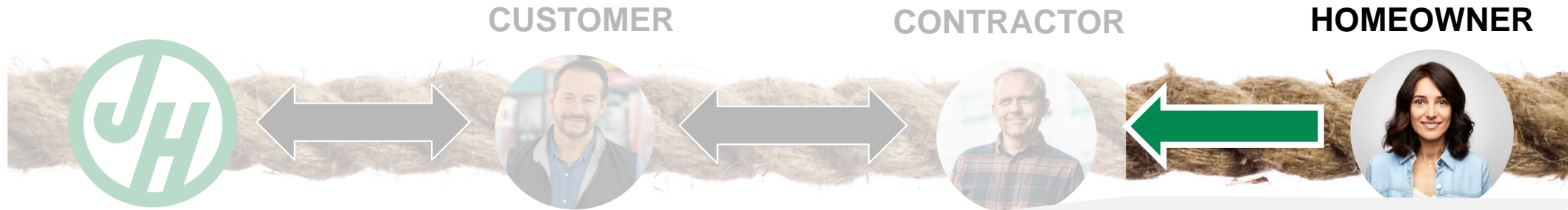
<sup>1</sup> Statistics are for the period of May 2021 – March 2022 compared to pcp and are for the three targeted metro areas. Marketing campaign began in May 2021.

<sup>2</sup> Management calculation based on comparative growth of ColorPlus<sup>®</sup> customer sales volume for single family segment between July 2021 and February 2022, compared to pcp, in targeted campaign markets, as compared to non-targeted markets.

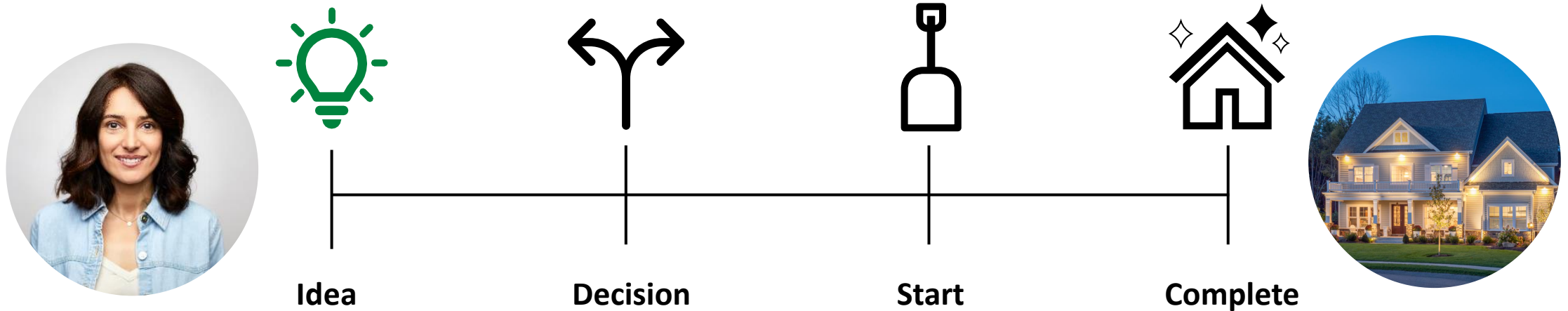


# IMPROVING THE HOMEOWNER'S PATH TO PURCHASE

## Value Chain



## Typical Path to Purchase



# WE ARE ENHANCING HOW WE CONNECT TO THE HOMEOWNER

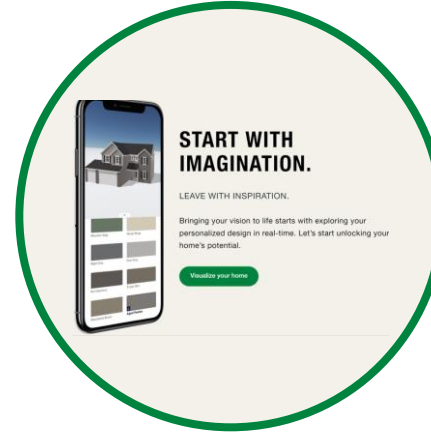
## Improving & Expanding Marketing Program



## Building Trust Via Magnolia Collaboration



## Developing Visualization Tool



## Augmenting Retail Presence





**NORTH AMERICA: HOMEOWNER – IT'S POSSIBLE™**  
**Atousa Ghoreichi, SVP North America Marketing**



## THE HOMEOWNER: IT'S POSSIBLE™ – SUMMARY

Building a consumer brand is a journey and results of the year one launch are promising

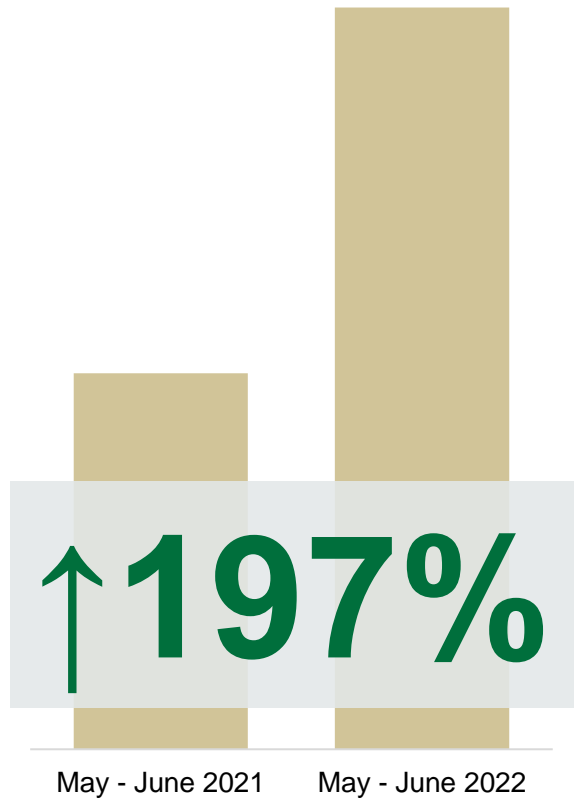
We have taken learnings from this first year to inform and enhance the program moving forward

Given the positive results to date, we are expanding our focus to 3 new key target metros in the Northeast and Midwest

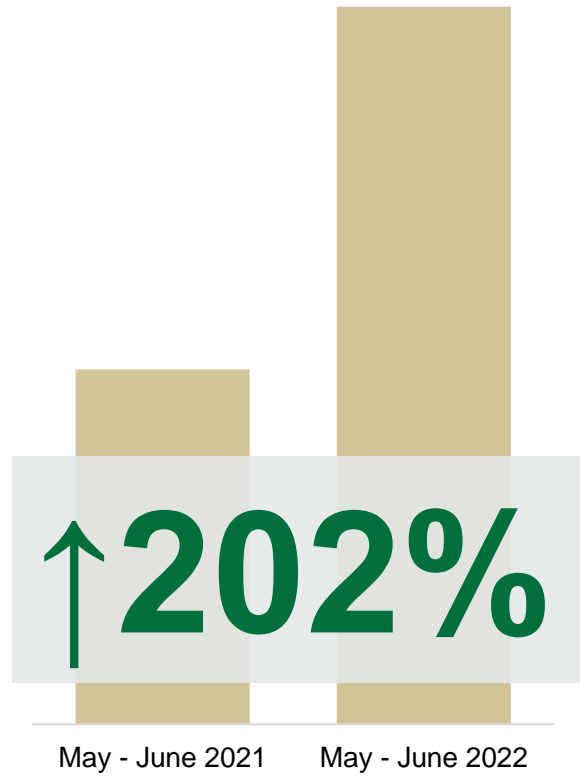


# THIS IS WHAT SUCCESS LOOKS LIKE

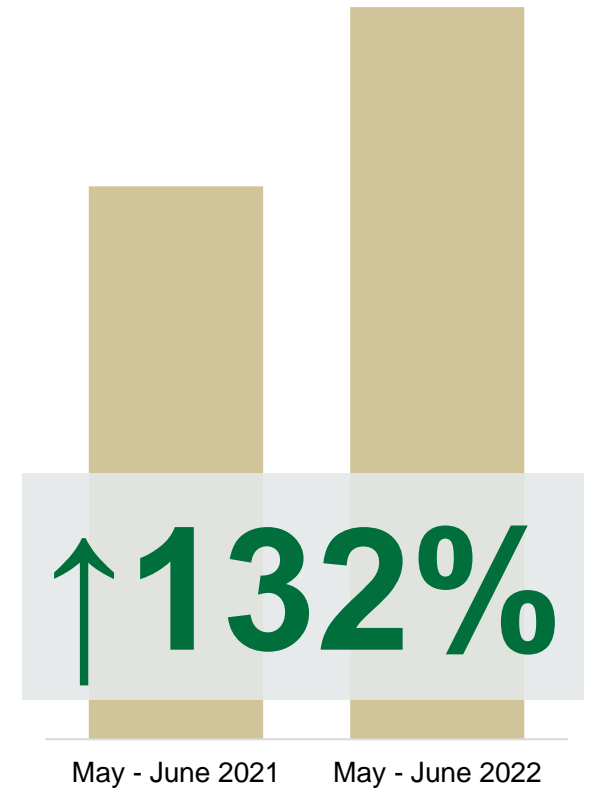
## Sessions



## New Users








## Leads







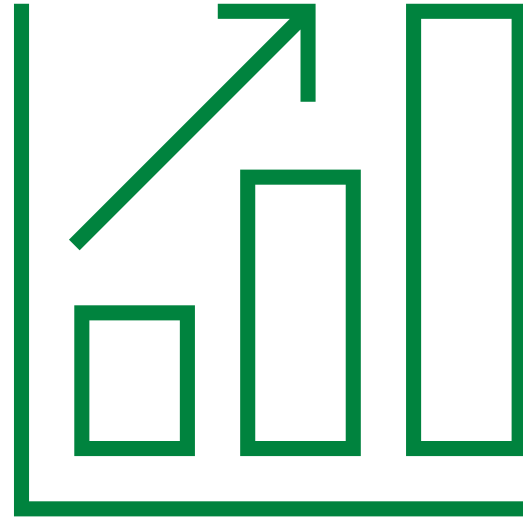
# IT'S POSSIBLE™ 1.0 EVOLVES TO 2.0

May 2021	May 2022	June 2022	July 2022	August 2022
<h3>It's Possible™ 1.0 Launched</h3> <ul style="list-style-type: none"><li>• Boston</li><li>• Philadelphia</li><li>• NY Tri-State</li></ul> 	<h3>Added New Data and Creative Formats</h3> <ul style="list-style-type: none"><li>• Added New Data partners</li><li>• Launched new formats on Meta, Pinterest, Nextdoor, and Houzz</li></ul> 	<h3>Expanded Audience</h3> <ul style="list-style-type: none"><li>• Christine</li><li>• The Power Couple</li><li>• The Project Home Buyer</li><li>• The Empty Nester</li></ul> 	<h3>Added New Markets</h3> <ul style="list-style-type: none"><li>• Washington DC</li><li>• Chicago</li><li>• Minneapolis</li></ul> <h3>Added New Creative</h3> <p>Optimized based on data and analytics</p> 	<h3>Magnolia Launch</h3> <ul style="list-style-type: none"><li>• Biggest product launch ever</li><li>• Visualization Tool</li></ul> 

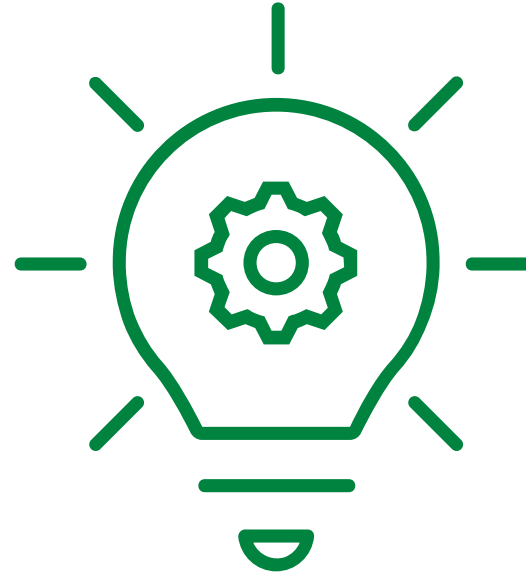
# STRATEGIC MEDIA PILLARS IN FY23



**CHRISTINE(S) ARE  
READY TO BUY**



**BUILD UPON  
EARLIER  
SUCCESS**



**LEVERAGE  
MEDIA & DATA  
INNOVATION**



**AUDIENCE  
SEGMENTATION &  
PERSONALIZATION**

# BUILDING UPON OUR WINNING FORMULA

Homeowner at Center of Attention

360 Marketing Communications

Drive to Website

Capture the Lead



Expanded Audience

Optimize Ad Campaigns

Initiate Path To Purchase

Lead Capture & Nurture

# GROWING OUR AUDIENCE



**CHRISTINE**

**THE POWER COUPLE**  
*The Dreamer, the Doer*

**THE PROJECT HOME BUYER**  
*Taking on the next project*

**THE EMPTY NESTER**  
*The Retired, Downsizer*

# REFRESHED CREATIVE TO DRIVE FURTHER ENGAGEMENT



# INSPIRING WITH DESIGN, REASSURING WITH DURABILITY

It's Possible™ to fall in love with shades of gray.

It's Possible™ to fall in love with shades of gray.

It's Possible™ to fall in love with shades of gray.

Siding | Trim | Soffit

**JH JamesHardie™**

FIND YOUR COLOR



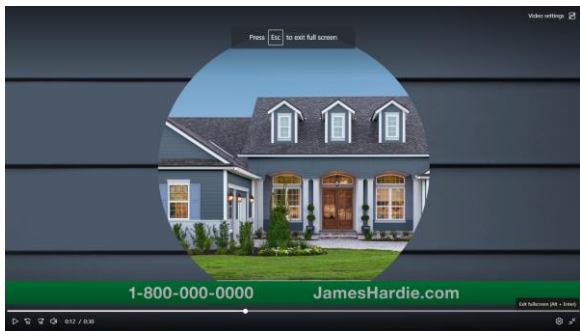
# INSPIRING WITH DESIGN, REASSURING WITH DURABILITY



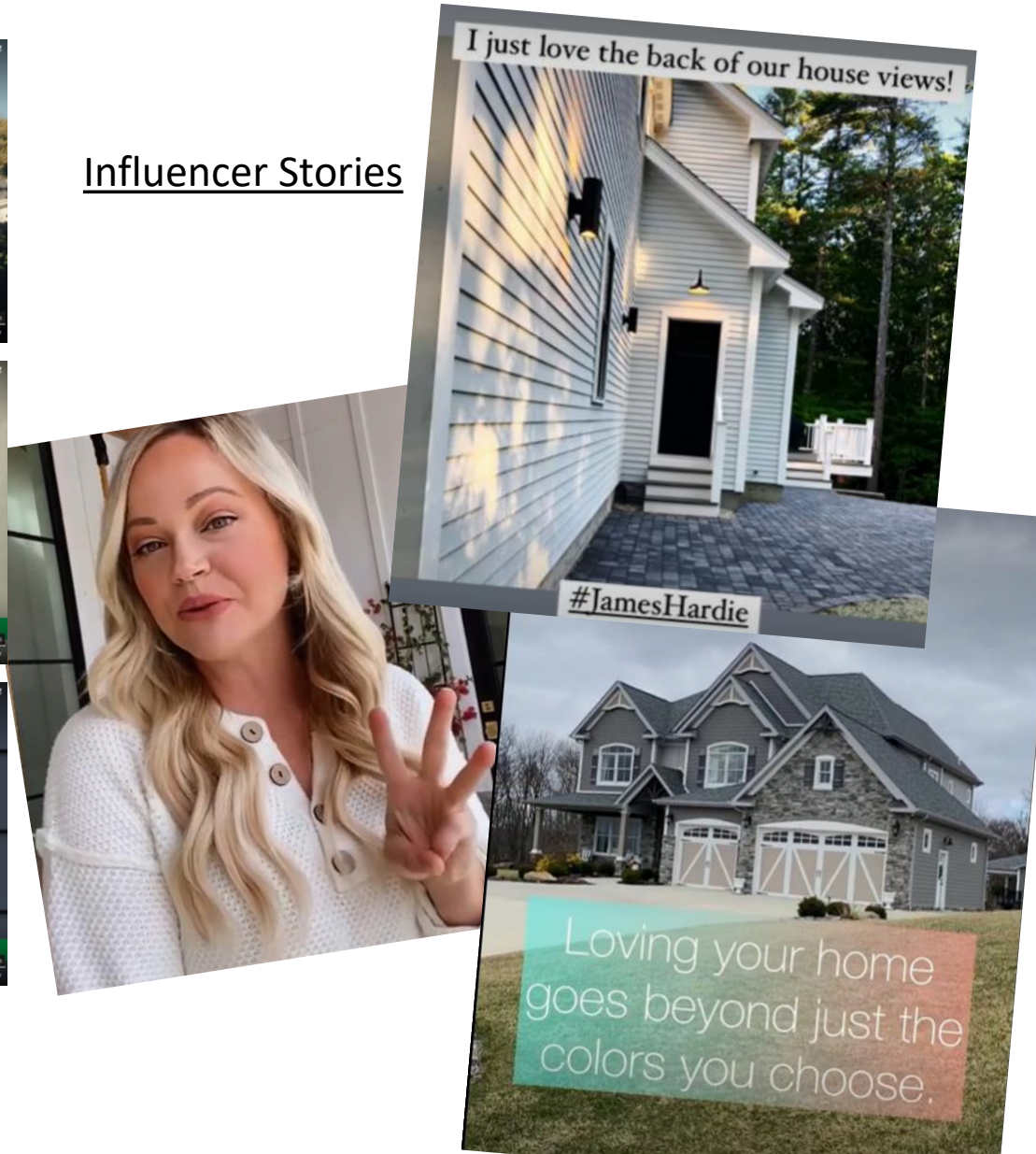
# MAXIMIZING VIDEO ACROSS TV, INFLUENCERS & ORGANIC CHANNELS



Influencer Stories



Lead Gen TV Spot



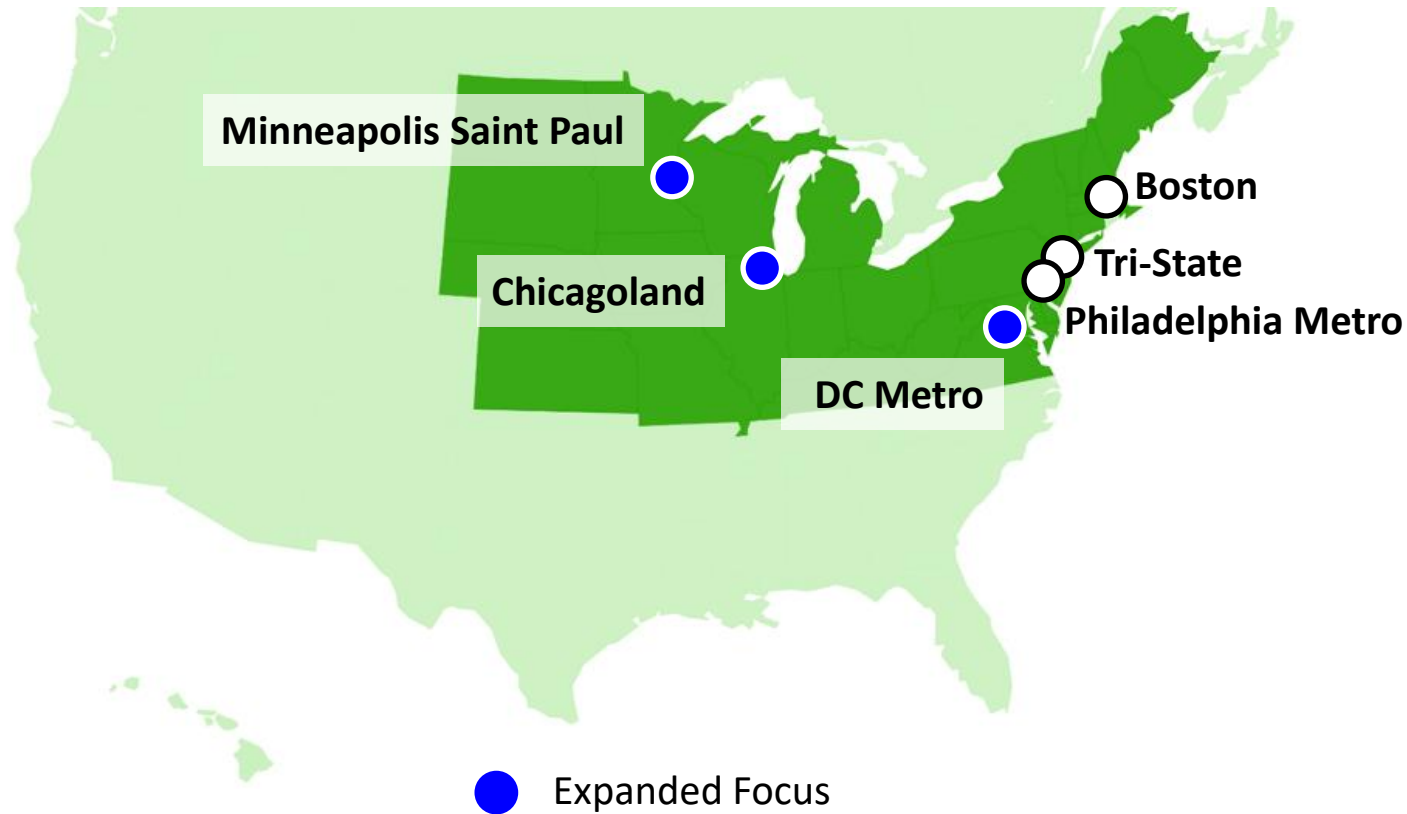
Exterior Design Week





# EXPANSION OF MARKETING PROGRAM COVERING MAJORITY OF NE/MW MARKET

## Expanding 360 Marketing Program



## Expanding to 3 New Metro Areas

Covers the 6 Largest Metro Areas In Northeast and Midwest

Source: 2022 Nielsen Data

## Q1 PERFORMANCE SUMMARY



Year over year, overall **lead volume** was up around **33%** in Q1 for Epicenter FY23.



**Paid Search (search)** has grown 4x YoY and made up 78% of total Q1 leads.



**Display (ad banners)** exceeded Q1 forecasted leads at 105%





**NORTH AMERICA: HOMEOWNER – MAGNOLIA**  
**Atousa Ghoreichi, SVP North America Marketing**



## THE HOMEOWNER: MAGNOLIA – SUMMARY

Chip and Joanna Gaines, and the significant reach of Magnolia will help drive awareness of James Hardie and allow us to sell more full-wrap ColorPlus® Technology finished products

Joanna Gaines helps build credibility with homeowners around design, while Chip builds credibility around contractor choice

Together they provide trust and credibility about James Hardie fiber cement



MAGNOLIA HOME



## *Objective*

Drive awareness of James Hardie  
and sell more full-wrap homes  
with ColorPlus® Technology  
finished products





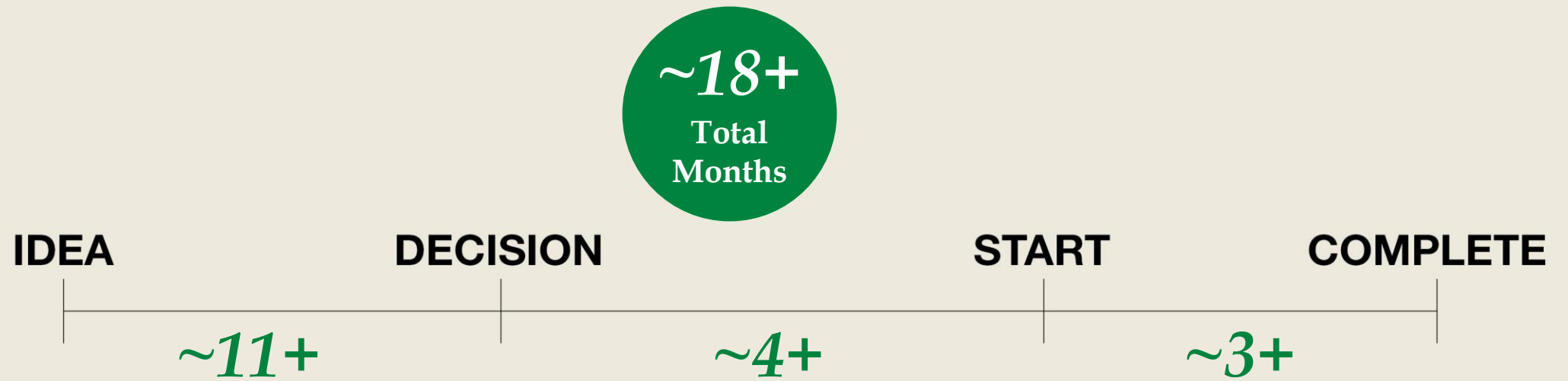
**C**reate awareness  
**O**ptimize demand  
**L**everage credibility  
**O**wn the category  
**R**each the homeowner





# The Path to Purchase is ~18+ Months

Average Number of Months



Source: IPSOS 2019 Project Decision Study



M A G N O L I A   H O M E



### *Why Collaborate?*

- Fixer Upper: #1 Show on HGTV
- Led to their own TV Network, Magnolia, launched in January
- National partnership with Target
- 30,000 weekly visitors to The Silos (Magnolia Land in Waco, TX)
- More than 35 million followers across social channels





*introducing the*  
**MAGNOLIA HOME | JAMES HARDIE**  
**COLLECTION**



**BIRCH TREE**



**WEATHERED CLIFFS**



**RUSTIC ROAD**



**RUGGED PATH**



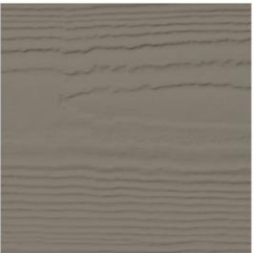
**IT'S ABOUT THYME**



**STONE BEACH**



**STONE PAVER**



**WARM CLAY**



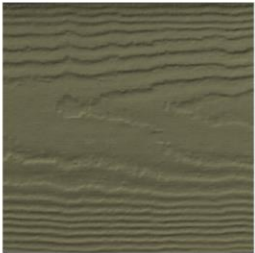
**DRIED EUCALYPTUS**



**CHISELED GREEN**



**WANDERING GREEN**



**MUDFLATS**



**SLATE STEPS**



**PEPPERY ASH**



**LAST EMBERS**



**MIDNIGHT SOOT**



**HARDIE® PANEL  
& HARDIE® TRIM BATTEN**



**HARDIE® SHINGLE**



**HARDIE® PLANK**



**HARDIE® TRIM**



**HARDIE® SOFFIT**

# MAGNOLIA 360 MEDIA CHANNEL OVERVIEW

Meta  
f  
i  
p  
Social



Nextdoor  
houzz  
Partners

YouTube  
Display & Video 360  
Display/Video

People  
Print

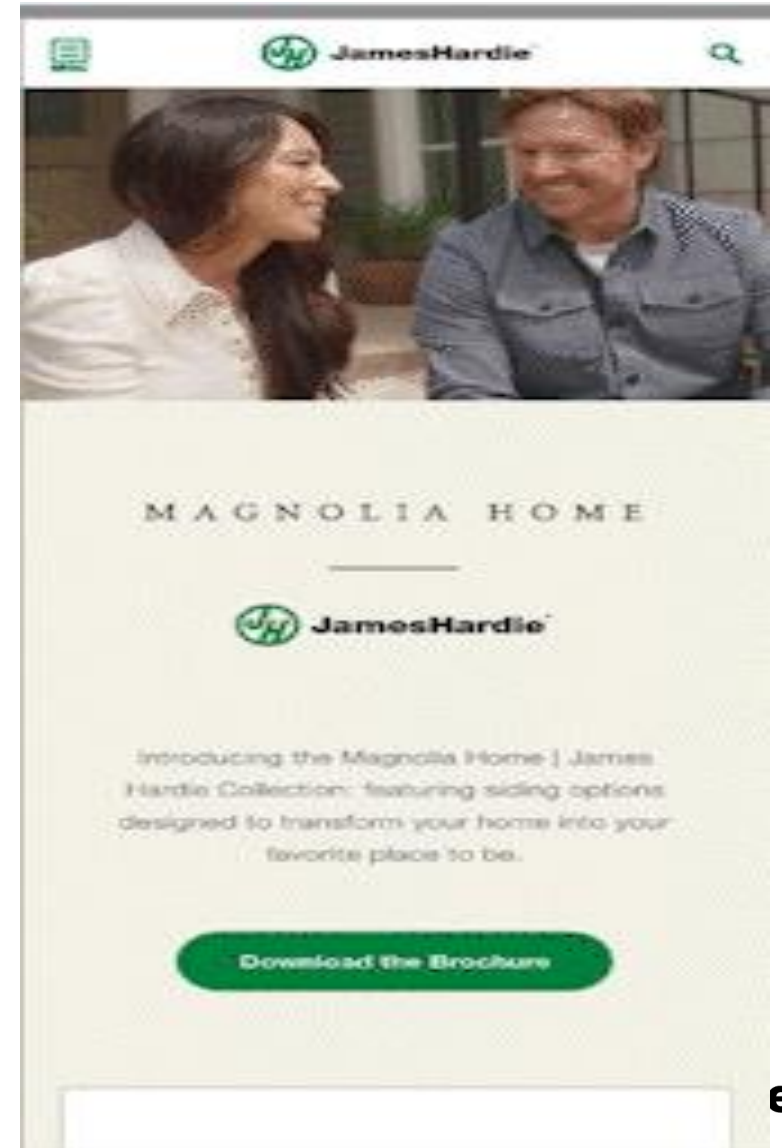
G  
b  
Search

# LANDING PAGE: JAMESHARDIE.COM/MAGNOLIA

Desktop




Mobile



# MAGNOLIA BUZZ: EXAMPLES

**Joanna Gaines And Magnolia Home Have Done It Again With This New Exteriors Collection**

Theresa Gonzalez | Aug 24, 2022



**Trending Stories**

- What's Next To Eat These Summer Shakes? Here's What's Right Out Of The Kitchen
- 7 Genius Tips To Save You Major Money This Fall
- Meet the Inspiring Founder Behind a New Great Collection
- 10 Cool Tech Accessories That are Truly Useful
- 21 of the Coolest Ways to Reduce Single-use Plastic
- 23 Adorable Nurseries Both Mom and Dad Will Love
- 24 Trends You Unknowingly Fall For (Ideas To Try This Season)
- 10 of The Best Things You Can Do To Clean Up Your Home


**GO BEHIND THE SCENES WITH BRIT**

Fast forward, get smarter, and LOL a little... and so much more.

E-MAIL

**Chip and Joanna Gaines Partner with James Hardie for New Collection in Campaign by Ogilvy**

Collaboration with James Hardie marks Chip and Joanna Gaines' entrance into exteriors, the next frontier in home design.



Chip and Joanna Gaines and James Hardie, a world leader in home siding, will launch The Magnolia Home | James Hardie Collection, curated by Joanna Gaines.

This collaboration with James Hardie marks Chip and Joanna Gaines' entrance into exteriors, the next frontier in home design. Accompanying the launch of the Collection is a new video content series featuring Chip and Joanna Gaines, and a multi-channel advertising campaign running across a mix of websites and targeted social and digital channels led by James Hardie's agency of record, Ogilvy.

**Builder**

DATA & ANALYSIS DESIGN MONITORING

Your Smart Home Partner  
Free Products with Our HomeBuilder Program

**Products**

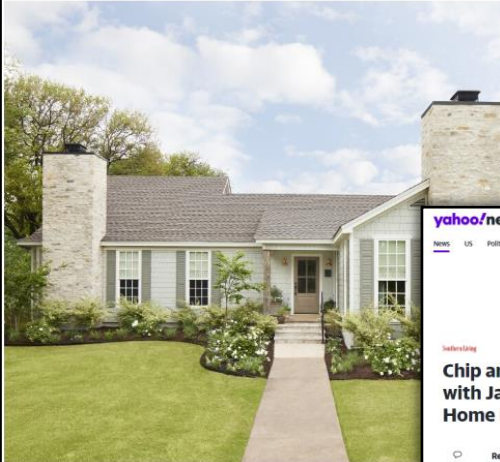
HOME - PRODUCTS - JAMES HARDIE ANNOUNCES THE MAGNOLIA HOME | JAMES HARDIE COLLECTION

Posted on: August 24, 2022

**JAMES HARDIE ANNOUNCES THE MAGNOLIA HOME | JAMES HARDIE COLLECTION**

The collaboration with the fiber cement siding manufacturer marks Chip and Joanna Gaines' entrance into exteriors.

By Symone Strong




NEWS | NEWS

TRENDS + Follow this topic

**Joanna Gaines Shares One of Her Biggest Color Mistakes, and How Her New Collab Is Helping Others Avoid the Same Fate**

by LILLIAN BROWN

published 2 DAYS AGO



SAVE COMMENTS

EXPLORE **Southern Living**

SOUTHERN LIVING • NEWS

**Chip and Joanna Gaines Announce Partnership with James Hardie for an Exclusive Collection of Home Exteriors**

Boost your curb appeal with a touch of Waco inspired magic.

By Rebecca Angel Baer | Updated August 24, 2022




CREDIT: JAMES HARDIE

For years we've all tuned in to watch Chip and Joanna Gaines transform fixer upper homes into dream homes for their clients in **Waco, Texas**. We've watched their stars rise and their empire grow. They've made a tourist destination out of their home base of Waco and created a brand of products that help bring a special touch of modern farmhouse to your own home. Now their line, Magnolia Home,


**Everything to Know About Chip and Joanna Gaines' Newest Magnolia Home Collection**

The 'Fixer Upper' couple dishes on the inspiration behind the collaboration and shares all the details of their latest project.

BY JAMIE KRAVITZ | PUBLISHED: AUG 24, 2022



But many people don't know how the couple's love



Shop Fresh Foam X 860v12

Chip and Joanna Gaines have big news: Magnolia Home is expanding into exteriors. The *Fixer Upper* stars chatted with *Woman's Day* ahead of the release of **The Magnolia Home | James Hardie Collection** of siding — here's everything to know, including how the designs came together, and where you can shop the full product line nationwide.

"It's a beautiful collaboration, with construction and design," Joanna says of the partnership with James Hardie, a leader in fiber cement home siding and exterior design solutions.

James Hardie and Chip and Joanna Gaines, founders of Magnolia, launched an exclusive accessories—The Magnolia Home | James Hardie Collection.

Curated by Joanna, the collection features a palette of natural, earthy tones, including of classic siding products, styles, and textures.

"One of the most important things for any home is exterior curb appeal," she says. "We

**yahoo!news**


News US Politics World COVID-19 Climate Change Health Science Originals Contacts

**TLX** **CERTIFIED**

**Chip and Joanna Gaines Announce Partnership with James Hardie for an Exclusive Collection of Home Exteriors**

Rebecca Angel Baer

Wed, August 24, 2022 at 9:31 AM 3 min read




**TRENDING**

- White House shares Republicans who sit student debt cancel
- FBI agents search Trump's closet during raid, which includes
- Barn, Trump using control GDP
- Jared Kushner says trying to keep his
- Four dead after sus fire on officer new

**HOUSTON CHRONICLE**

LIFESTYLE HOME DESIGN

**Texas' favorite HGTV stars Chip and Joanna Gaines launch siding collection with James Hardie**



MARIE CONIK, STAFF WRITER | Aug 24, 2022 | Updated: Aug 24, 2022 2:57 p.m.

After 20 years of using Hardie siding in home renovation projects, Chip and Joanna Gaines have their own, 16-color collection with the company that pioneered the technology behind James Hardie's fiber cement building products.

# MAGNOLIA BUZZ: PEOPLE MAGAZINE



“In an interview with PEOPLE, Joanna explains the reason why she loves partnering with James Hardie. ‘We drive by the homes we did 20 years ago down by Baylor University, and those were all Hardie-sided homes. This is truly a product that we've believed in for 20 years,’ she says. She adds that working with James Hardie was ‘a match made in heaven,’ and that she and Chip felt ‘honored’ to be collaborating with the company.” – *People*

People NEWS ENTERTAINMENT ROYALS LIFESTYLE PEOPLETV SHOPPING PODCASTS

## Chip and Joanna Gaines Launch 'Timeless' Siding Collection with Home Manufacturing Company James Hardie

The Magnolia power couple have been using James Hardie products for over 20 years

By [Natalia Senanayake](#) | Published on August 29, 2022 05:10 PM

f t p e



**Exclusive**

### Chip and Joanna Gaines Launch 'Timeless' Siding Collection with Home Manufacturing Company James Hardie

EXPLORE People

## LIVING

Your inspirational and entertaining escape for travel, wellness, food, pets and more

- 1
- 2
- 3

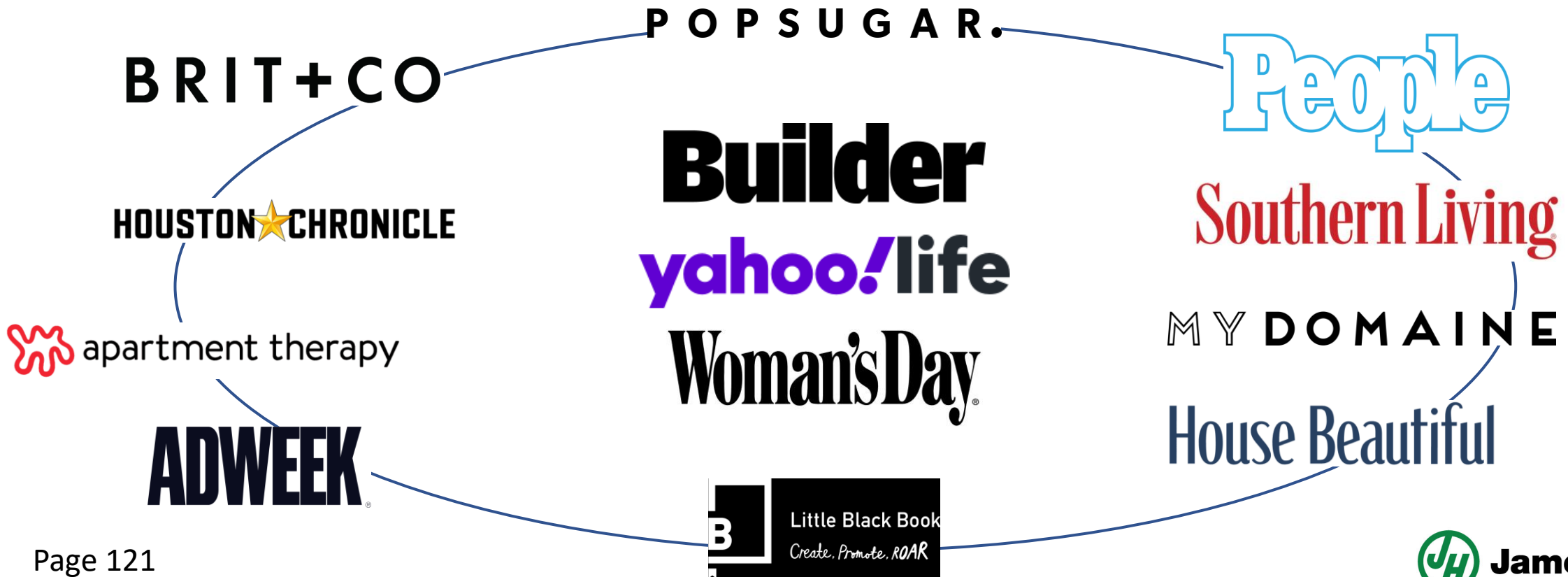
**Exclusive**

### Chip and Joanna Gaines Launch 'Timeless' Siding Collection with Home Manufacturing Company James Hardie



42 Media Placements

1.5 B+ Potential Audience





**NORTH AMERICA: HOMEOWNER – VISUALIZATION**  
**Chad Fredericksen, VP North America Pro Channel**



## THE HOMEOWNER: VISUALIZATION – SUMMARY

Visualization is an invaluable tool to help inspire homeowners to reach their vision and better communicate that vision to contractors

The visualization tool is a simple 3 step process that allows homeowners to experiment with different designs and connect them directly with a contractor

We are currently collaborating with an industry leading visualization provider to bring homeowner visions to life



# THE IMPORTANCE OF VISUALIZATION



**Most consumers will re-side their home once to twice in a lifetime. Visualization is an invaluable tool that can help inspire them to reach their vision and better communicate that vision to a contractor who will bring it to life.**

# THE PROCESS



**Consumer  
takes photos  
of their home.**

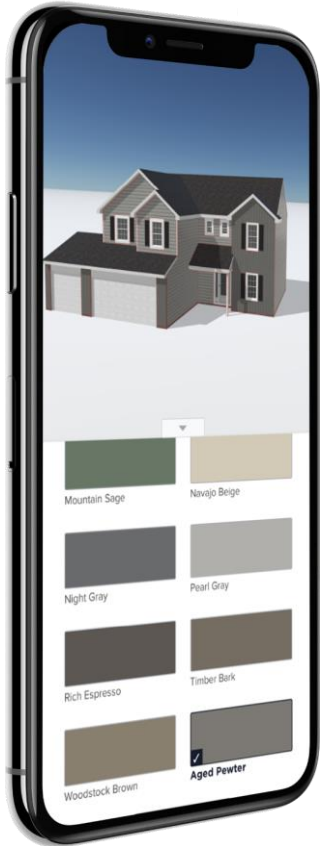


**Experiments with  
different product  
profiles and colors  
on their home.**



**Can connect to an  
aligned James Hardie  
contractor.**

# REPLICATE THE EXPERIENCE AT SCALE THROUGH TECHNOLOGY



## START WITH IMAGINATION.

LEAVE WITH INSPIRATION.

Bringing your vision to life starts with exploring your personalized design in real-time. Let's start unlocking your home's potential.

Visualize your home

Currently collaborating with an industry leading visualization provider.

Actively testing the effect visualization can have on inspiring the consumer and empowering them to communicate their vision to the contractor, resulting in a better experience for both.

Live on [JamesHardie.com](https://www.jameshardie.com)

## THE HOMEOWNER: VISUALIZATION – SUMMARY

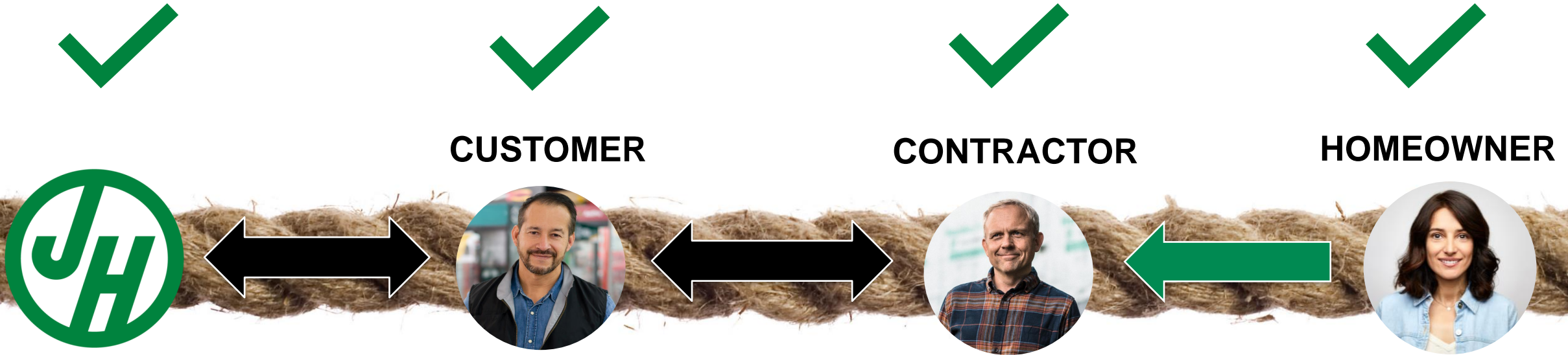
Visualization is an invaluable tool to help inspire homeowners to reach their vision and better communicate that vision to contractors

The visualization tool is a simple 3 step process that allows homeowners to experiment with different designs and connect them directly with a contractor

We are currently collaborating with an industry leading visualization provider to bring homeowner visions to life



# CONNECTING THE VALUE CHAIN TO DRIVE PROFITABLE GROWTH



**James Hardie – Maximizing value & profit across the entire Repair & Remodel value chain**





**NORTH AMERICA: CLOSING**  
**Sean Gadd, President North America**



# NORTH AMERICA – SUMMARY

Proven track record as a growth company

10 Year  
Volume CAGR



10 Year  
Net Sales CAGR

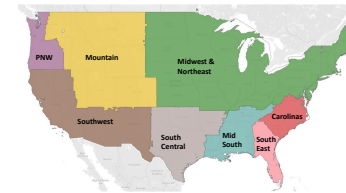


10 Year  
Adj. EBIT CAGR

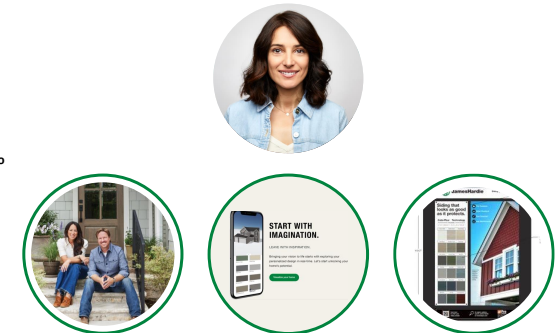


James Hardie fiber cement proven to deliver high value

Ability to win in all regions and all segments



Accelerate sustainable profitable growth in Northeast and Midwest Repair & Remodel market





**Q&A**





**END OF DAY 1**





# JHX Investor Day 2022

New York, 12-13 September 2022 – Day 1



**JamesHardie™**