



McPherson's Limited Investor Presentation

April 2016



MCP Financial Update (CFO, Paul Witheridge)

- ⌘ **Divestment of remaining 49% of Housewares joint venture has completed**
 - ❄ \$21.3m in funds generated, inclusive of \$2.2m in repaid working capital loans
 - ❄ \$2.0m profit before tax generated on total divestment
 - ❄ \$10.0m applied to buyback bonds
 - ❄ Balance of funds applied to reduce working capital debt
 - ❄ Material reduction in debt and strengthening of balance sheet

- ⌘ **As per 1H 2016 Results Release, improved second half F2016 performance relative to F2015 is expected despite the significant adverse impact of AUD/USD depreciation**



Strategy Update

Paul Maguire

Managing Director



Trading commentary

- ⌘ Retail trading conditions favourable with brands performing well
- ⌘ Commercial building approvals trending upwards
- ⌘ Margins adversely impacted by the weak AUD
- ⌘ Easing commodity prices partially offsetting the weak AUD
- ⌘ Price increases and other performance improvement initiatives helping offset the impact of currency
- ⌘ Note - 2H2015 was adversely impacted by the requirement to supply unprofitable private label products. These contracts were exited June 2015, therefore 2H2016 will benefit from their absence



Corporate Brand Identity

Mission

To be a world-class consumer products company
through
1st choice products for consumers
and by being a
1st choice partner for customers and suppliers
1st choice employer for employees
1st choice investment for shareholders

Vision

Making life easier

for

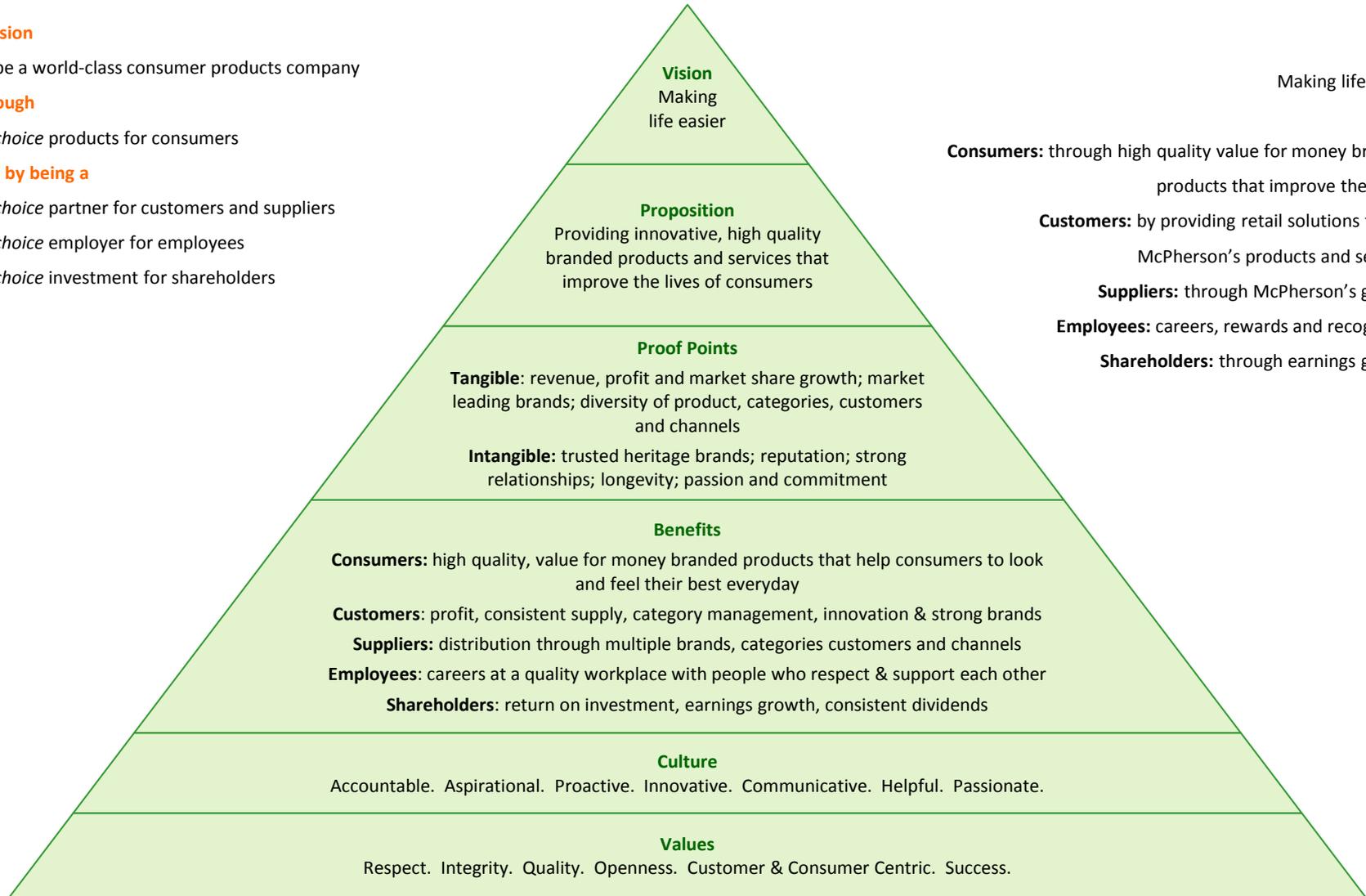
Consumers: through high quality value for money branded products that improve their lives

Customers: by providing retail solutions through McPherson's products and services

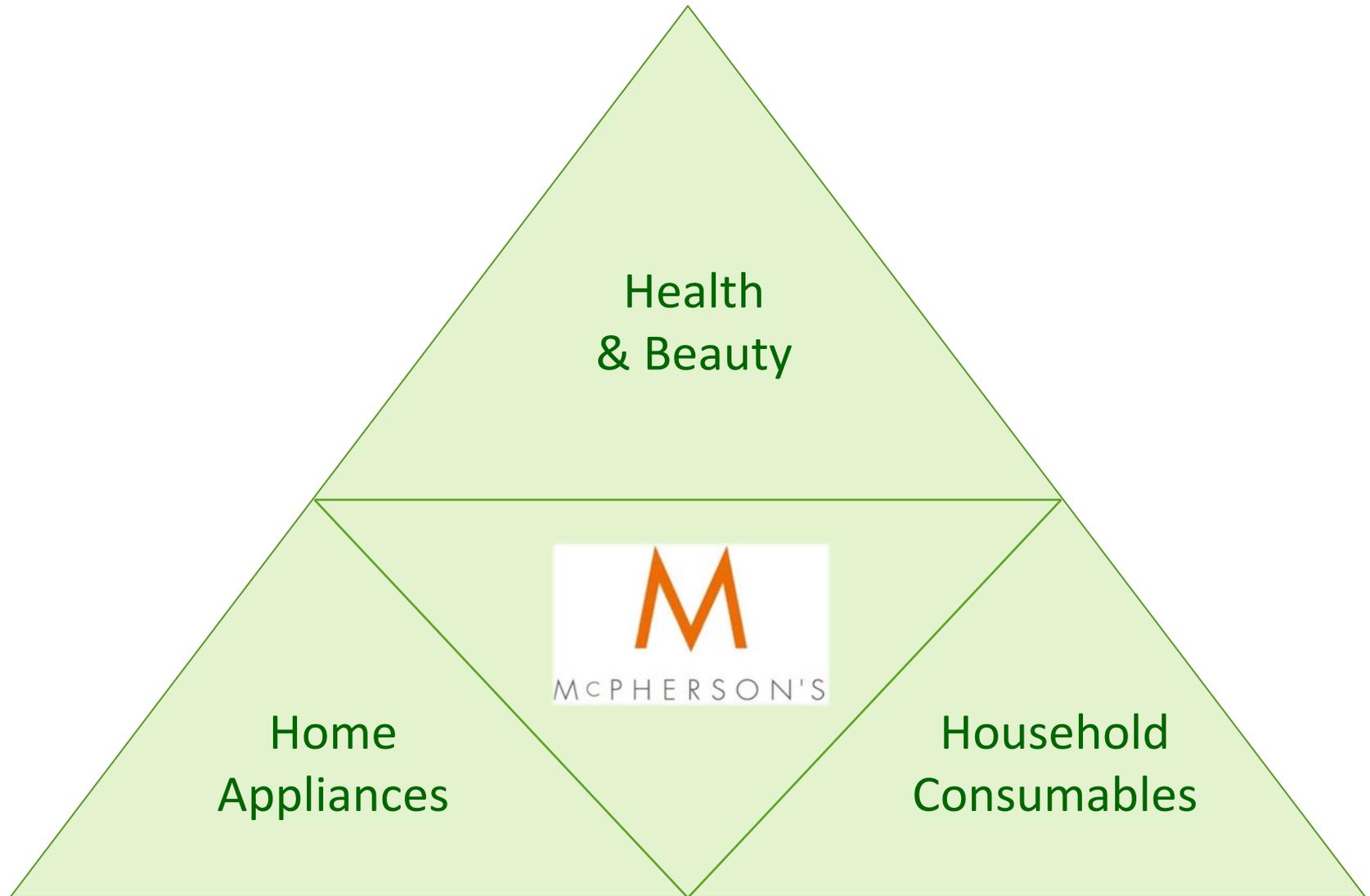
Suppliers: through McPherson's growth

Employees: careers, rewards and recognition

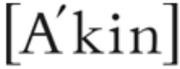
Shareholders: through earnings growth



Company divisions



Divisional revenue summary (Aus & NZ)*

		SHARE OF REVENUE 1H2016	REVENUE GROWTH 1H16 vs 1H15	REASONS	OUTLOOK
HEALTH & BEAUTY	  	48%	11%	New products and new ranging	Growth in revenue and profit
HOME APPLIANCES	 	23%	18%	New products and new ranging	Growth in revenue and profit
HOUSEHOLD CONSUMABLES	 <small>Inspiring Professional Results</small>	25%	(10%)	Multix sales up 1%, market leadership maintained, some private label exited	Consistent performance
IMPULSE MERCHANDISING (IMD) / OTHER		4%	(7%)	IMD grew but pet products exited	Planned exit

* Revenue summary excludes Housewares due to the divestment of 51% of Housewares, which has been 'equity accounted' since Nov 2014



Company transformation

McPherson's is substantially **transforming** through acquisition & divestment and the establishment of new agency partnerships; increasing participation in more profitable categories, channels and markets

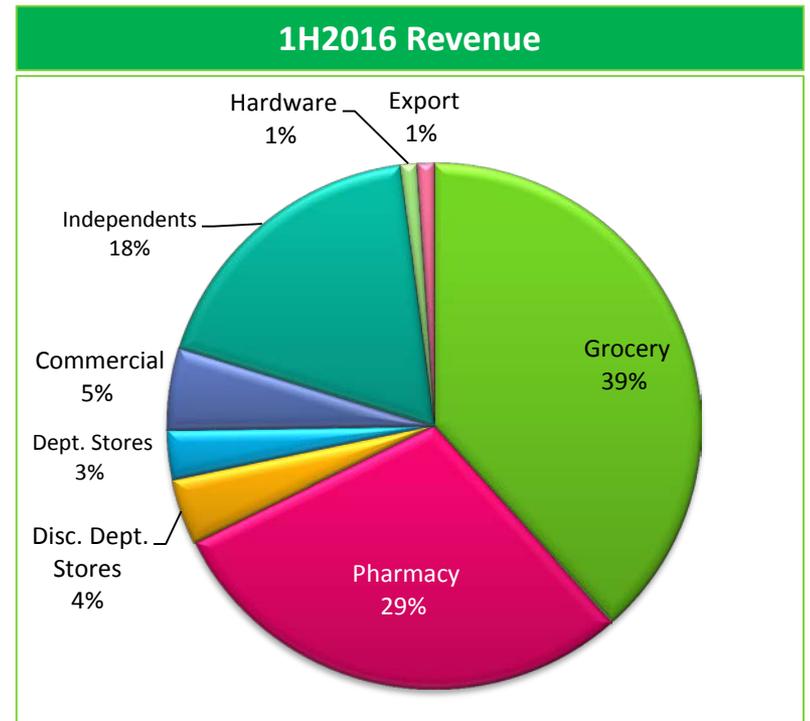
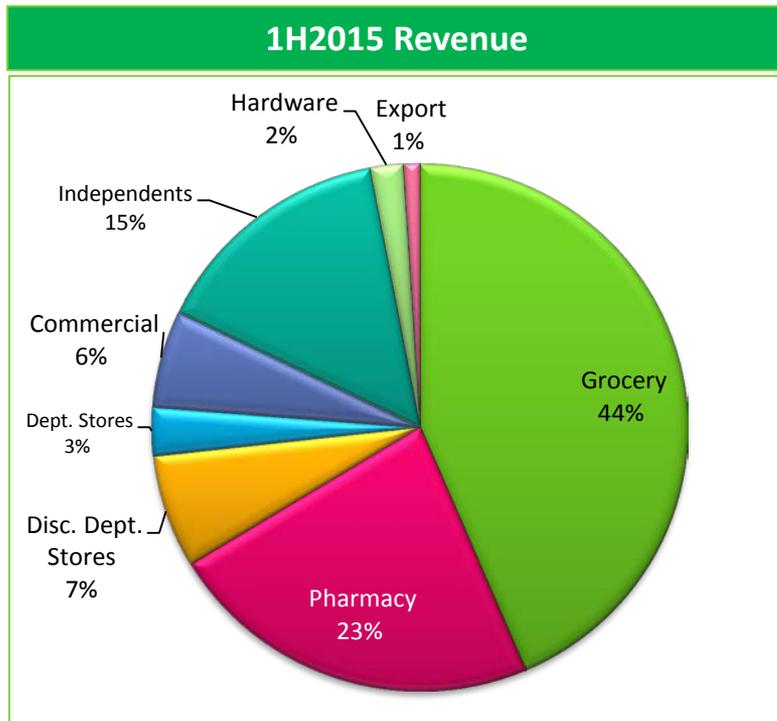
McPherson's is a **consumer centric** organisation committed to providing consumers with **innovative, high quality** branded products that **improve** their lives

Our **transformation** is designed to ensure that we can **continue to deliver on this promise** and in doing so **create value** for shareholders



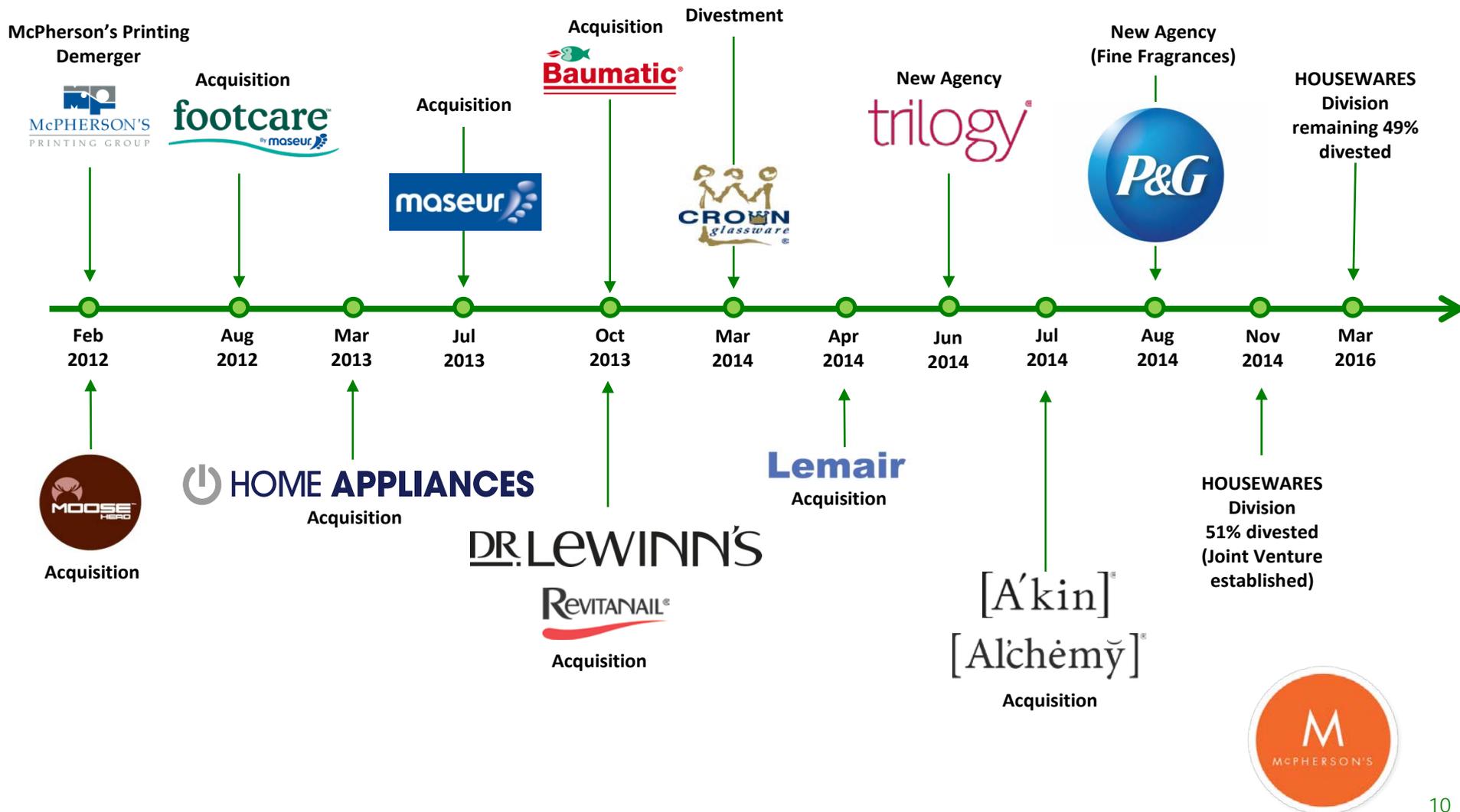
Transformation benefits

- ⌘ Lessened exposure to foreign exchange
- ⌘ A more profitable channel and customer mix



Company transformation timeline

Diversification achieved through acquisitions, divestments and new agencies



Transformation progress



Acquisitions



Partnerships



Divestment



New Products



Performance Improvement



Home Appliances

- ⌘ 'Home Appliances' business acquired, inclusive of the Euromaid and Baumatic brands
 - ❄ providing growth via diversification into electrical retail, hardware and commercial building





Beauty brands

- ⌘ Dr LeWinn's skincare
- ⌘ A'kin natural skincare & haircare
 - ❄ Leveraging McPherson's strengths
 - ❄ Expansion in Pharmacy channel
 - ❄ Significant growth potential



[A'kin][®] DR. LEWINN'S

Beauty Agency

⌘ Partnership with Trilogy natural skincare



Partnership

trilogy®

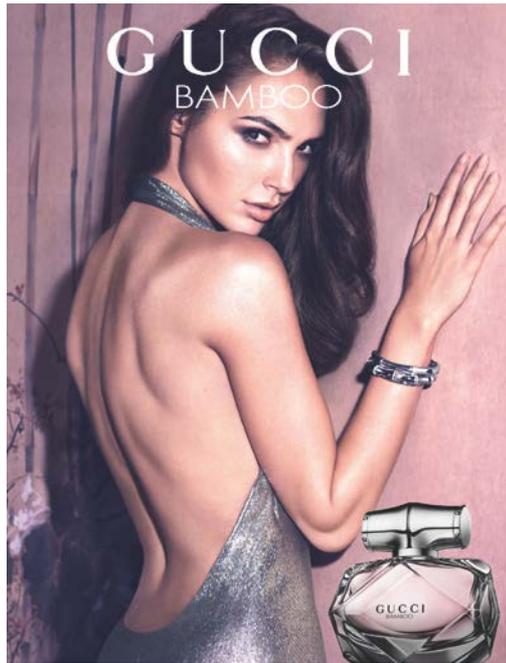


Beauty Agency

⌘ Partnership with Procter & Gamble Fine Fragrances



Partnership



GUCCI



BOSS
HUGO BOSS



D&G
DOLCE & GABBANA



Procter & Gamble



New Products

⌘ Pipeline of innovative new products across all divisions



Innovation



Performance improvement continuing >\$10 million in annualised benefit from:



Performance Improvement

Price Increases



Organisational Redesign



Product Cost Savings



IT System



In progress...

...brand consolidation, product rationalisation and digital transformation

Digital transformation ongoing

- ⌘ Digital transformation is technology enabling innovation, creativity, and growth
- ⌘ Driven by our strategic objectives and consumer expectations
- ⌘ Helps build meaningful relationships with consumers based on their actions
- ⌘ Leverages McPherson's capabilities
- ⌘ McPherson's selected e-commerce platform is:



Digital transformation impacts McPherson's across:



Platforms / Technology



Syndication



Marketing



Big Data



Customer & Consumer Relationships



Product

Outlook



Health and Beauty division

Current Status

- ⌘ Revenue 1H 2016 11% ahead of prior year
- ⌘ Successful new products under trusted brands
- ⌘ Acquisitions and new agencies boosting McPherson's presence in Pharmacy and Department Stores and reaffirming McPherson's beauty industry credentials



DR. LEWINN'S®



Outlook

- ⌘ Brand consolidation
- ⌘ Range harmonisation
- ⌘ Profitability boosted by price increases, structural reforms and operational initiatives
- ⌘ Focus on advanced beauty and natural beauty
- ⌘ Enhanced digital capability
- ⌘ Continued growth through:
 - ⌘ new product development
 - ⌘ the potential to utilise available DC capacity for additional product lines
 - ⌘ international expansion



Lady Jayne



Household Consumables division

Current Status

- ⌘ Multix branded revenue up 1% 1H 2016 and market leadership maintained
- ⌘ Profit impacted by:
 - ⌘ Unfavourable effect of weak AUD
 - ⌘ Delayed acceptance of price increases
 - ⌘ Increased 'promotional support' required
 - ⌘ Favourable lower commodity prices

Outlook

- ⌘ Multix market leadership maintained
- ⌘ Reduced private label involvement
- ⌘ Favourable impact of price increases, new products, sourcing initiatives and easing commodity prices but downside currency risk
- ⌘ Expansion in New Zealand



Outlook summary remains as per Half Year



- ⌘ Price increases, operational initiatives and reduced operational expenditure will improve profit in FY2016; however, currency downside risk remains longer term
- ⌘ Health & Beauty and Home Appliances to benefit from new products and continued growth
- ⌘ Multix to maintain market leadership but profitability dependent upon currency and commodity pricing mix
- ⌘ Housewares divestment strengthens the balance sheet
- ⌘ Company transformation to continue through further price increases, innovative new products, brand consolidation and expense reductions
- ⌘ Emphasis on Health & Beauty expansion through boosted digital capability and market development



Home Appliances

Steve Rorie

Chief Executive Officer

April 2016



Home Appliances division

Euromaid

Current Status

- ⌘ Excellent customer and supplier network
- ⌘ New products launched 2H2015 & 1H2016
- ⌘ Commercial building approvals up
- ⌘ Revenue up 18% in 1H 2016 but margins adversely affected by weak AUD
- ⌘ Uncertainty around Masters



Home Appliances – Gross Sales Approximately \$90 million

Key brands:

- Euromaid
- Baumatic
- ARC

Key Points:

- Channel Management Strategy
- Product Range
- Product displays
- Sales representation
- After sales service

Retail 70%

Key brands:

- Euromaid
- Baumatic

Key points:

- Product Range
- Merchant relationships
- Builder relationships
- After sales service

Commercial 25%

Key brands:

- IAG
- Baumatic - Studio Solari

Key points:

- Product range
- Merchant Relationships
- Product displays
- Customer service
- After Sales Service

Kitchen 5%

Home Appliances – Key initiatives

Implemented:

- ⌘ Organisational re-design
- ⌘ Core ranging of new lines
- ⌘ New products launched
- ⌘ Visual merchandising updated
- ⌘ Supplier consolidation



Core ranging – 54cm Wide Ovens

Home Appliances – Key initiatives

Implemented:

- ⌘ Range rationalisation
- ⌘ Supply chain review
- ⌘ Internal sales - Service Centre efficiencies
- ⌘ Aftersales – Service Centre efficiencies
- ⌘ Business margins re-set for lower currency environment



Core ranging – Rangehoods

Home Appliances - Outlook

- ⌘ Continued growth from recent new ranges:
 - ✱ new products launched 2H 2015 & 1H 2016
- ⌘ Uncertainty around Masters
- ⌘ Strong building approvals benefiting commercial
- ⌘ Kitchen channel sales bolstered
- ⌘ Supply chain savings
- ⌘ Savings from Service Centre efficiencies
- ⌘ Margin restoration through:
 - ✱ Price increases – effective 1 June 2016
 - ✱ Supplier consolidation delivering lower costs

Euromaid

Baumatic[®]

ARC
appliances

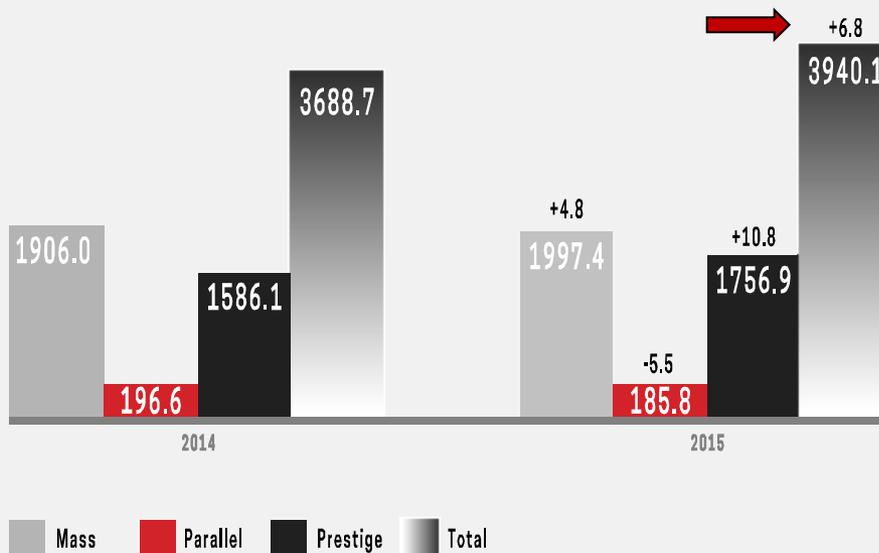
Donna Chan
Marketing Director
April 2016



MARKET GROWTH

BEAUTY CATEGORY MARKET VALUE

\$ Retail (M)



Source: Beauty Update Market Report 2015

Key growth drivers:

- Drop in AUD kept shoppers at home.
- Prestige segment +10.8%.
- High volume of purchasing from Chinese consumers.
- Internet (+18%) and Specialist (+16%) represented the fastest growing channels.

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PHARMACY CHANNEL

PHARMACY	MAT 03/01/2016	
	Dollars (\$M)	Dollars Growth % YA
Total Beauty Department	\$ 2,388	11.5
<i>Total Baby Care</i>	\$ 264	37.1
<i>Total Beauty Accessories</i>	\$ 108	7.3
Total Beauty Accessories Cosmetic Tools	\$ 52	20.0
<i>Total Fragrances</i>	\$ 441	3.2
<i>Total Hair Care</i>	\$ 286	5.0
Total Hair Care Shampoo & Conditioner	\$ 103	9.6
Total Hair Care Styling	\$ 42	9.2
Total Hair Care Hair Accessories	\$ 33	2.7
<i>Total Make-up Prestige</i>	\$ 21	10.0
<i>Total Make-up Self Select</i>	\$ 388	7.6
<i>Total Personal Care</i>	\$ 214	8.7
<i>Total Skincare Prestige</i>	\$ 19	-11.4
<i>Total Skincare Self Select</i>	\$ 547	18.0
Total Skincare Self Select Facial Self Select	\$ 299	17.3
Total Skincare Self Select Hand & Body Self Select	\$ 200	18.0
<i>Total Suncare</i>	\$ 100	15.8

69% of MCP H&B sales within Pharmacy Channel

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MCP leads the category with 43% market share

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Alchemy leads
Natural S&C with
34% market share
within Priceline

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MCP leads the category with 46% market share

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Fast growing categories:

- Natural +31%
- Cosmeceutical +29%

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MCP H&B GROWTH PLAN

Fewer, Bigger Brands

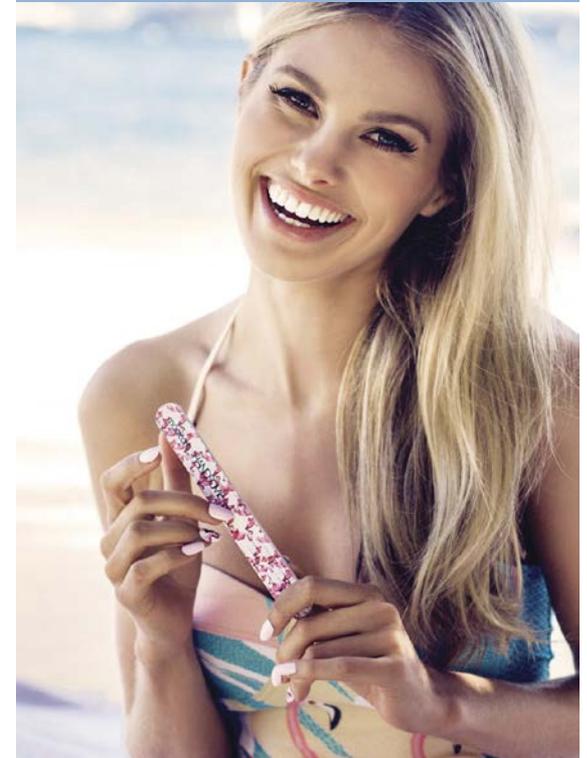
ADVANCED BEAUTY



NATURAL BEAUTY



ESSENTIAL BEAUTY



MCP STRATEGIC PRIORITIES

CATEGORY	KEY BRANDS	STRATEGIC INTENT	VISION
ADVANCED BEAUTY		High Growth	To be the renowned leader in Anti-Ageing
NATURAL BEAUTY		High Growth	To be the market leader in Natural Beauty
ESSENTIAL BEAUTY	 	Selective Growth	To be the leading player in Essential Beauty
HEALTH & BEAUTY		Margin Enhancement	Retail price and cost optimisation
HEALTH & BEAUTY	   	Digital transformation	Omni-channel consumer centric strategy



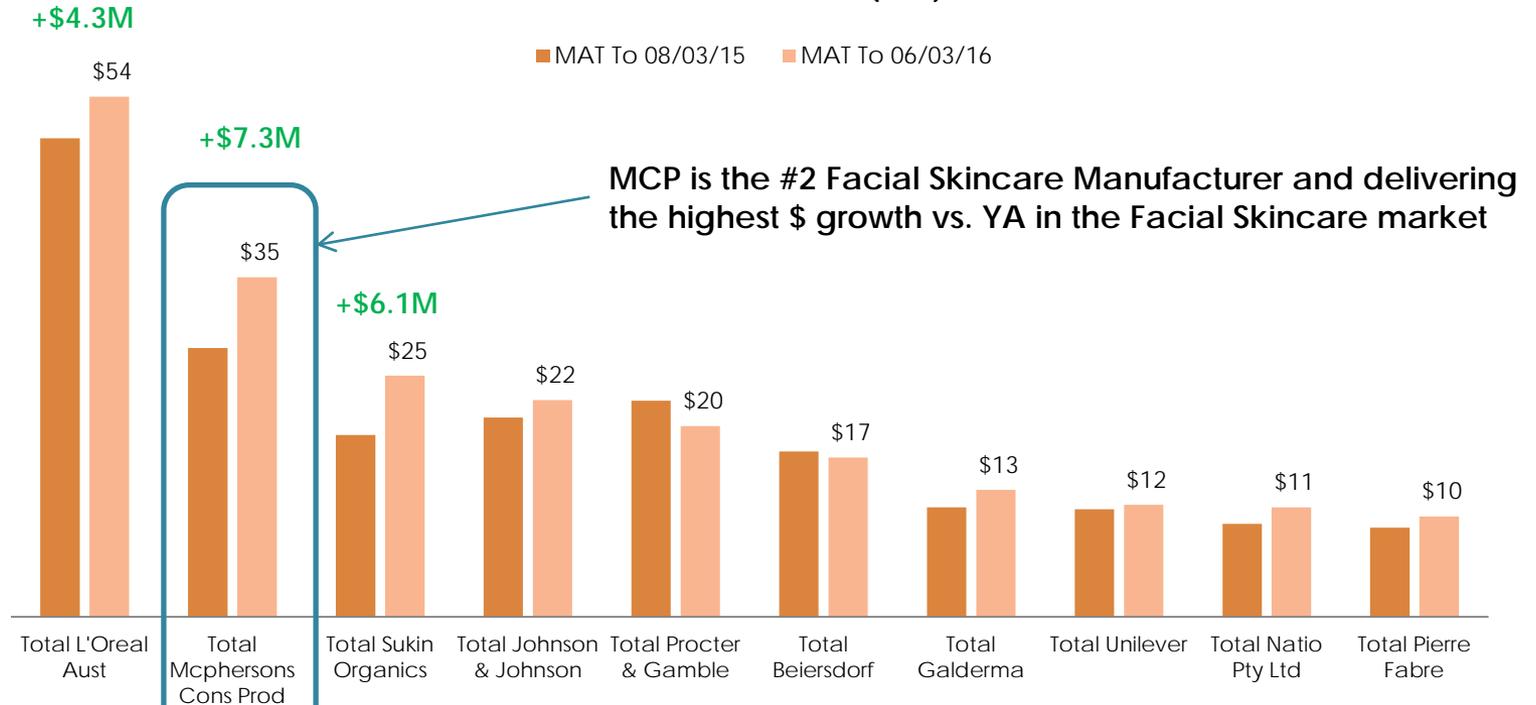
ADVANCED BEAUTY



PHARMACY FACIAL SKINCARE: MCP #2

Top 10 Facial Skincare Manufacturers MAT \$ Value, Share and Growth

AU Pharmacy Facial Skincare Sales (\$Ms)



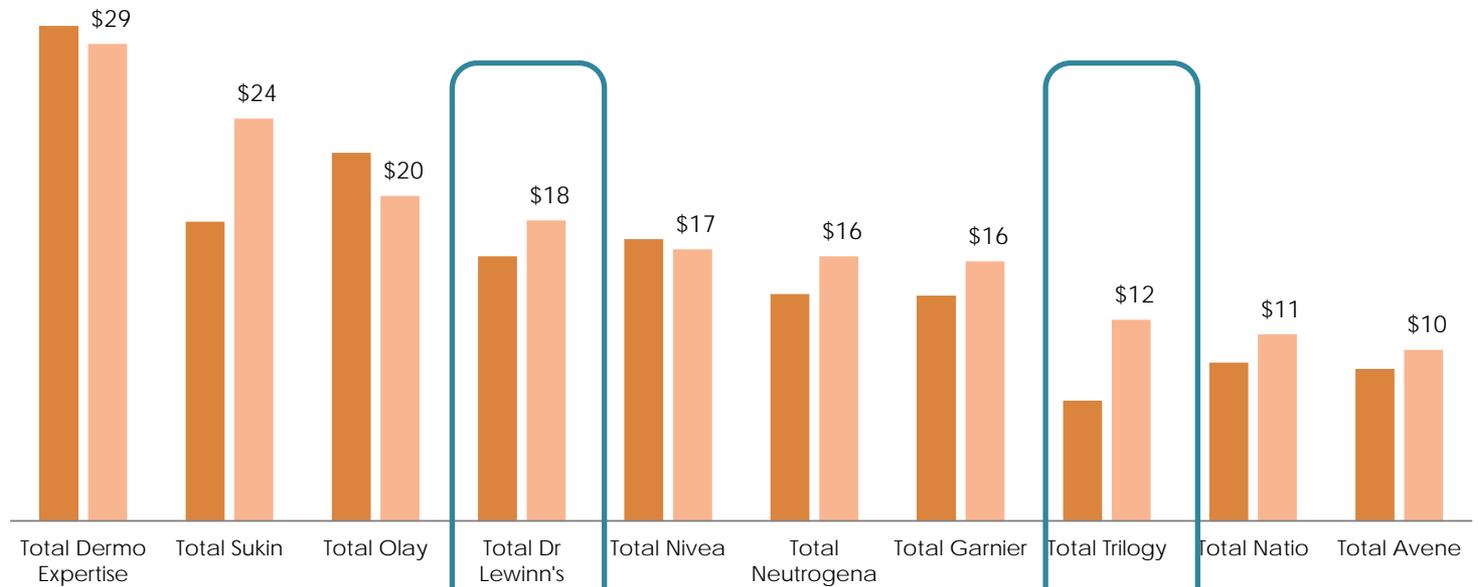
\$ Growth % vs YA	8.7	26.4	32.5	8.8	-11.8	-3.6	15.9	4.0	17.7	12.7
\$ Share of Facial Skincare	15.4	10.1	7.2	6.4	5.7	4.7	3.8	3.3	3.2	3.0

Dr LeWinn's RANKED #4

Top 10 Facial Skincare Brands MAT \$ Value, Share and Growth

AU Pharmacy Facial Skincare Sales (\$Ms)

■ MAT To 08/03/15 ■ MAT To 06/03/16



\$ Growth % vs YA	-3.7	34.5	-11.8	13.6	-3.6	16.7	15.1	67.3	17.7	12.7
\$ Share of Facial Skincare	8.3	7.0	5.7	5.2	4.7	4.6	4.5	3.5	3.2	3.0

VISION – Dr LeWinn's

To be the renowned leader in
Anti-Ageing.

- Engage consumers at every touch-point
- Increase trial & penetration
- Grow through leading edge innovation

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NEW BRAND COMMUNICATIONS

Ownable Brand Idea based on strong foundations and insights

	<p>#1 COSMECEUTICAL SKINCARE BRAND</p>	
	<p>♥♥♥♥♥</p> <p>Tammy From: Perth WA Age: 25 to 34 Gender: Female Eye Colour: Hazel Hair Colour: Blonde Skin Tone: Light Skin Type: Combination</p> <p>Dr. Lewinn's Eternal Yo This is lightweight formula plump, skin has visibly br There's not been a change light floral scent which is and won't shatter into a t pay as you get a day and</p>	
		

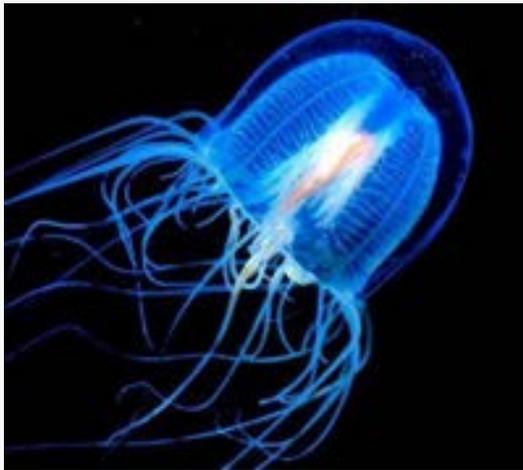
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LEADING EDGE NEW PRODUCTS

Insight led innovation

Highly experienced R&D team

Intriguing ingredient stories



Known ingredients



Visible Results



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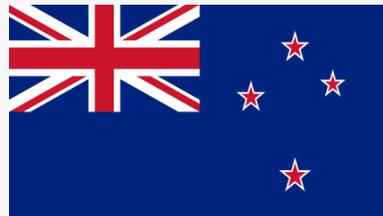
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McPHERSON'S

MARKET EXPANSION



AUSTRALIA
PRIORITY GROWTH
MARKET



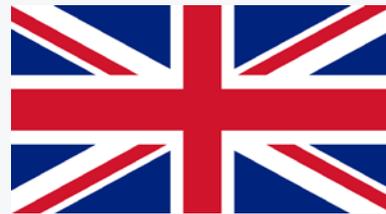
NEW ZEALAND
Growth Plan



SINGAPORE
Growth Plan



KOREA
Licensing Agreement



UK
Venture to secure
DLW trademark



CHINA
Developing e-commerce
go to market plan

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By end 2017, Dr LeWinn's will have....

- Transformed into a brand with a strong positioning and purpose
- Acquired the attention & hearts of skin care users
- Improved margins to fuel investment in top-line growth
- Own an exciting, viable platform to expand into new categories, new distribution channels and internationally



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MCPHERSON'S

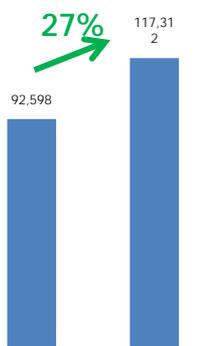


NATURAL BEAUTY



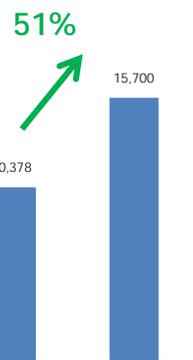
HIGH GROWTH CATEGORY

AU Pharmacy
Natural Skincare
Sales \$000s



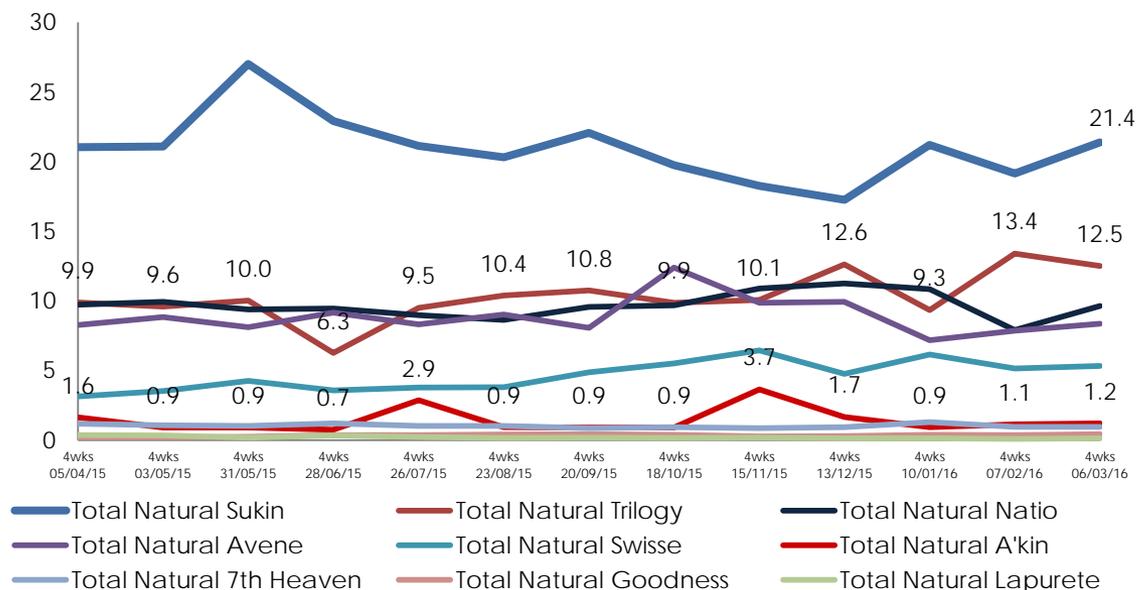
MAT To 08/03/15
MAT To 06/03/16
Category \$
Growth

AU Pharmacy
MCP Natural
Skincare Sales
\$000s



MAT To 08/03/15
MAT To 06/03/16
Our \$
Growth

Natural Skincare Scorecard



Australia Pharmacy	MAT To 06/03/16				Quarter To 06/03/16			
	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA
Total Natural	117,312	26.7	100.0	0.0	31,036	18.2	100.0	0.0
Total Natural Sukin	24,483	34.5	20.9	1.2	6,315	21.0	20.3	0.5
Total Natural Trilogy	12,232	67.3	10.4	2.5	3,735	56.4	12.0	2.9
Total Natural Natio	11,342	17.7	9.7	-0.7	2,958	12.2	9.5	-0.5
Total Natural Swisse	5,486	119.0	4.7	2.0	1,681	133.7	5.4	2.7
Total Natural Jurlique	3,514	23.3	3.0	-0.1	829	10.1	2.7	-0.2
Total Natural Antipodes	1,626	32.0	2.0	-0.0	625	96.2	2.8	0.9
Total Natural Rosehip By Essano	1,923	73.5	1.6	0.4	688	56.5	2.2	0.5
Total Natural A'kin	1,658	32.3	1.4	0.1	324	-5.2	1.0	-0.3
Total Natural Goodness	389	7305.8	0.3	0.3	116	2104.7	0.4	0.4

BRAND HERITAGE

- 1987: One man's vision to pioneer advances in natural chemistry to create **pure and natural** products free of chemicals, containing **more than a drop** of concentrated goodness to deliver effective results.
- 1994: **Al'chemy** haircare was launched.
- 2002: **A'kin** natural skincare was launched to complement Al'chemy.
- 2014: McPherson's acquired the brand.



NO PARABENS
NO SULPHATES



NO NASTIES



CRUELTY
FREE



100% VEGAN



AUSTRALIAN
MADE & OWNED

VISION – A'kin

To be recognised as a leading natural skincare & haircare brand.

- Extend appeal and reach to a wider group of consumers
- Transform with a relevant and distinctive brand proposition
- Increase awareness and trial
- Build a global brand (AU, NZ and Asia)

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A'KIN BRAND TRANSFORMATION

Natural Heritage + Pure, Fresh, Efficacious + New Pack Design + Loved by Consumers

ONE BRAND

[A'kin][®]



AUSTRALIAN
MADE & OWNED



A'kin

OVERALL STAR RATING



5/5 stars from

[FOLLOW THIS PRODUCT](#)

A'kin Jojoba & Corn Gentle Exfolia
refines skin texture by using jojoba



NO PARABENS
NO SULPHATES

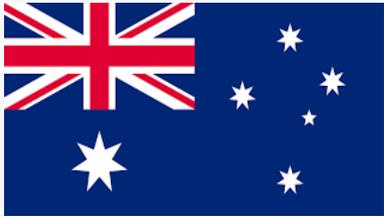


"This product just about
changed my life!"
BEAUTYHEAVEN MEMBER

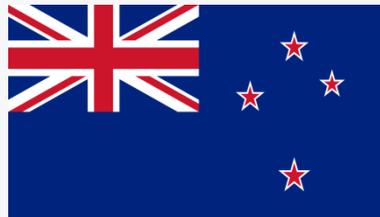
"My skin has never been
so soft and supple."
BEAUTYHEAVEN MEMBER

EMPOWERING YOU TO LOOK & FEEL YOUR BEST

MARKET EXPANSION



AUSTRALIA
PRIORITY GROWTH
MARKET



NEW ZEALAND
Growth Plan



CHINA
Developing e-commerce
go to market plan



SINGAPORE
Growth Plan

EMPOWERING YOU TO LOOK & FEEL YOUR BEST



McPHERSON'S



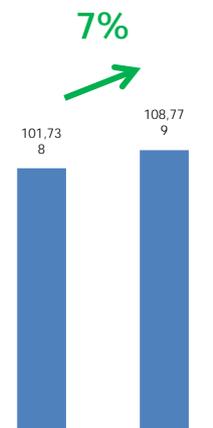
ESSENTIAL BEAUTY



CLEAR MARKET LEADER

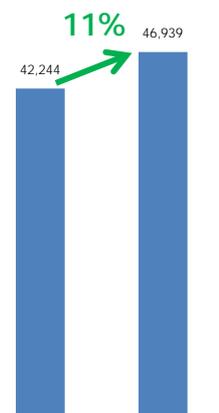
Beauty Accessories Scorecard

AU Pharmacy
Beauty Sales
\$000s



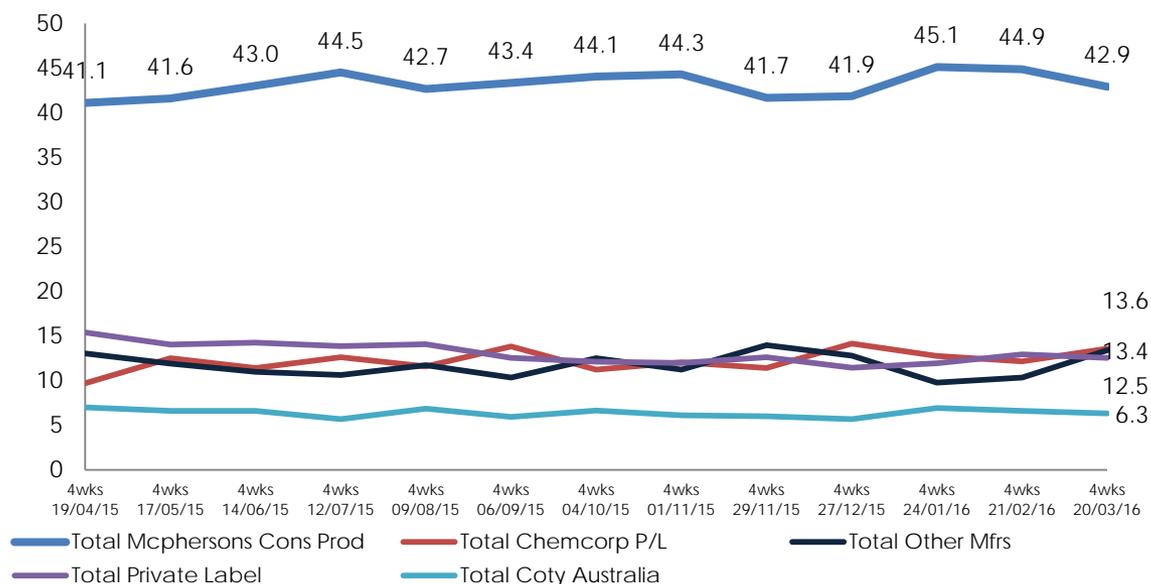
MAT To 22/03/15
MAT To 20/03/16
Category
\$ Growth

AU Pharmacy
MCP Beauty
Sales \$000s



MAT To 22/03/15
MAT To 20/03/16
MCP
\$ Growth

Trended Brand Share
AU Pharmacy



Australia Pharmacy	MAT To 20/03/16				Quarter To 20/03/16			
	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA
Total Beauty Accessories	108,779	6.9	100.0	0.0	27,813	6.0	100.0	0.0
Total Mcphersons Cons Prod	46,939	11.1	43.2	1.6	12,203	11.3	43.9	2.1
Total Private Label	14,093	6.6	13.0	-0.0	3,441	-6.8	12.4	-1.7
Total Chemcorp P/L	13,345	34.4	12.3	2.5	3,687	40.0	13.3	3.2
Total Other Mfrs	12,829	1.4	11.8	-0.6	3,124	-2.2	11.2	-0.9
Total Coty Australia	6,907	-12.7	6.4	-1.4	1,814	-11.8	6.5	-1.3

CLEAR MARKET LEADER

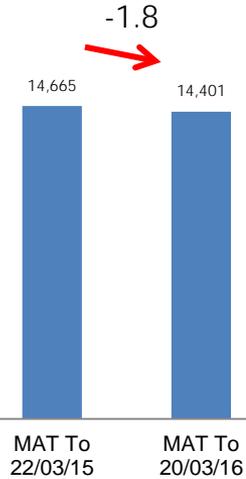
Hair Accessories Scorecard

AU Pharmacy
Hair Sales \$000s



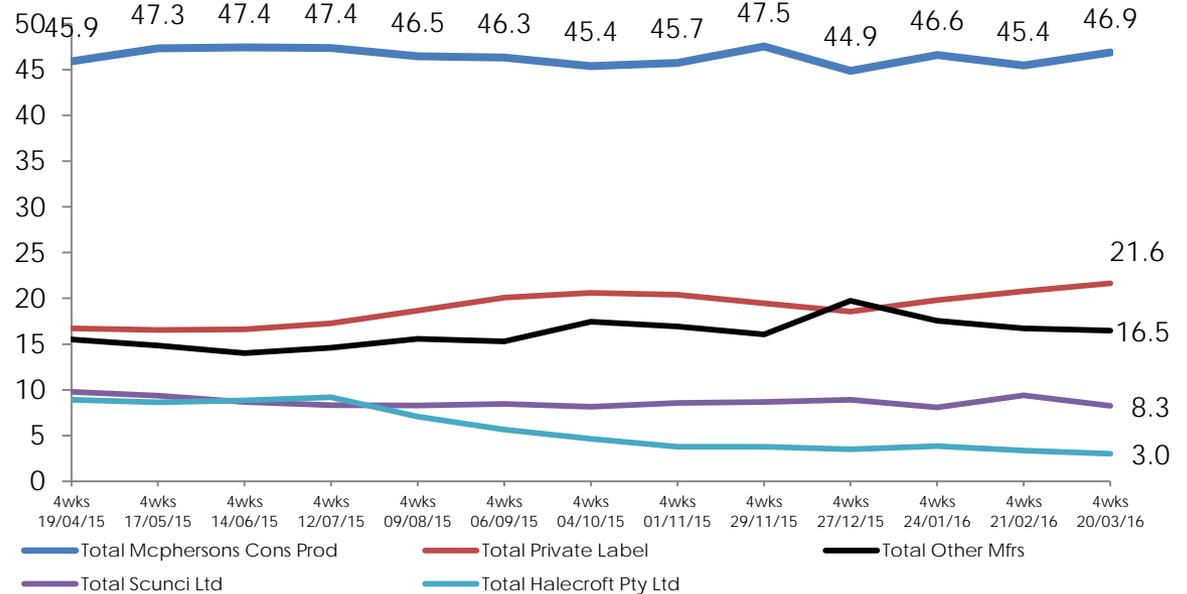
Category
\$ Growth

AU Pharmacy
MCP Hair Sales
\$000s



MCP
\$ Growth

Trended Brand Share
AU Pharmacy



	MAT To 20/03/16				Quarter To 20/03/16			
	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA	Dollars \$000s	\$Growth % vs YA	\$Share to Category	\$Share Pt Change vs YA
Australia Pharmacy								
Total Hair Accessories	31,049	-0.4	100.0	0.0	7,713	-3.8	100.0	0.0
Total Mcphersons Cons Prod	14,401	-1.8	46.4	-0.6	3,556	-1.4	46.1	1.2
Total Private Label	5,913	25.6	19.0	3.9	1,580	9.3	20.5	2.5
Total Other Mfrs	5,053	5.0	16.3	0.8	1,333	6.3	17.3	1.7
Total Scunci Ltd	2,698	-10.6	8.7	-1.0	662	-12.5	8.6	-0.8
Total Halecroft Pty Ltd	1,751	-41.0	5.6	-3.9	267	-63.1	3.5	-5.6

VISION

Essential Beauty

To be the leading player in the Essential Beauty market.

- Attract younger consumers to Manicare and Lady Jayne through innovation and re-invention
- Increase brand relevance and conversion to purchase
- Drive advocacy and endorsement across multiple touch points

EMPOWERING YOU TO LOOK & FEEL YOUR BEST



FASHION COLLABORATION

- New news on top selling core beauty and hair accessories
- Attract the attention of younger consumers



tropical inspired BEAUTY ESSENTIALS

Sydney swimwear label, We Are Handsome, have teamed up with Manicare® & Glam By Manicare™ to create a limited edition collection of exotic-fusion beauty tools and accessories. So prep in style this Summer with your newest, purse-worthy beauty essentials.



CONSUMER ADVOCACY

- Awards voted by consumers leveraged on -pack, on-line and in-store
- Reviews and ratings
- Digital marketing campaigns featuring blogger amplification



CHANNEL EXPANSION

manicare

BEAUTY TOOLS · MAKEUP BRUSHES · EYE LASHES · NAILS · BODY & FEET · HOME & TRAVEL · BEST SELLERS · EXPERT TIPS · Discover MANICARE

NEW ESSENTIALS COLLECTION DESIGNED BY
MEBE HANDSOME
LIMITED EDITION

Home · Beauty Tools

Showing 1-24 of 200 Results

Sort Options 24

SHOP BEAUTY TOOLS

- Eyelash Curlers
- Tools
- Sponges
- Tweezers
- Cleansing
- Hairdressing Scissors

PRICE

TWEEZER TYPE

BEAUTY TOOLS
EXPERT QUALITY FOR FLAWLESS PRECISION

Manicare Ultimate Slant Tweezer \$14.95

Manicare Ultimate Point Tweezer \$14.95

Lady Jayne

BRUSHES & COMBS · HAIR ACCESSORIES · STYLE COLLECTION · BEST SELLERS · GET THE LOOK · Discover LADY JAYNE

It all starts with
The Right Brush

Home · Brushes & Combs

Showing 1-24 of 200 Results

Sort Options 24

SHOP BRUSHES & COMBS

- Expert
- Everyday
- Essentials
- Combs

PRICE

SUITABLE FOR

ESSENTIALS COLLECTION
Ultra-lightweight, everyday brushes ideal for purse or travel!

Sh & Knotless Brush \$14.95

Two-Time Styling Comb \$14.95

Smooth & Knotless Brush \$14.95

**- WHICH -
LASHES FOR ME?**

Use the Glam Lash Selector to find your perfect lash, no matter what the occasion. All of our lashes are re-usable, easy to apply and come with a hypo-allergenic adhesive which goes on white but dries clear.

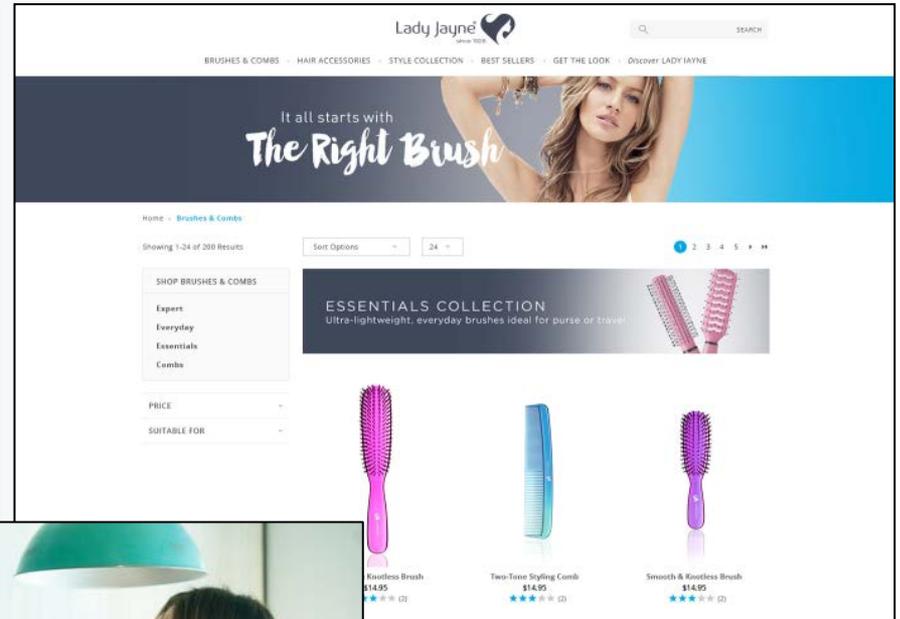
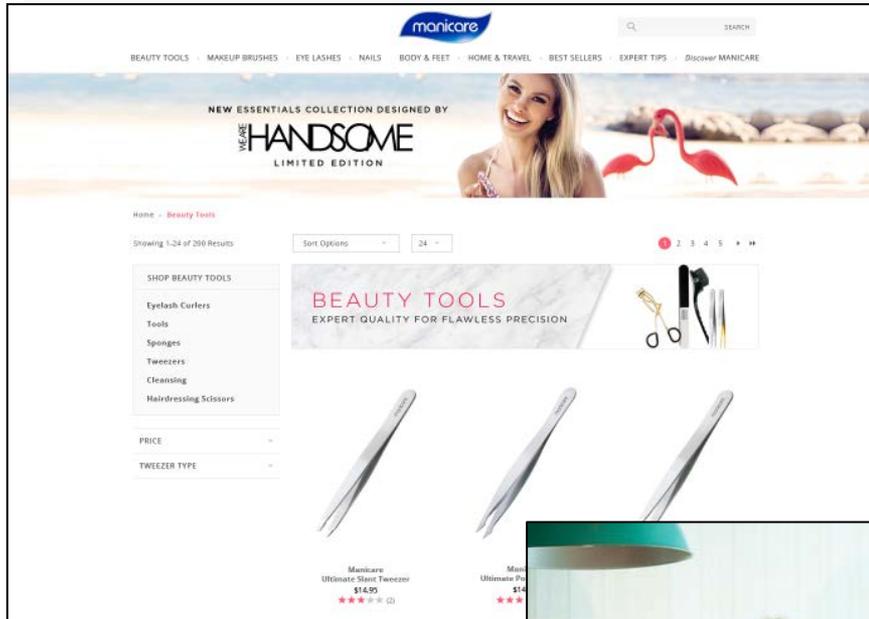
ALL NATURAL GIVE ME LENGTH **PLUMP UP THE VOLUME** IT'S GETTING INTENSE SOOOO DRAMATIC CUSTOMISE MY LOOK

JESSICA MIRANDA MILA

CANDICE KELLY



CHANNEL EXPANSION



MCP H&B GROWTH PLAN

Fewer, Bigger Brands

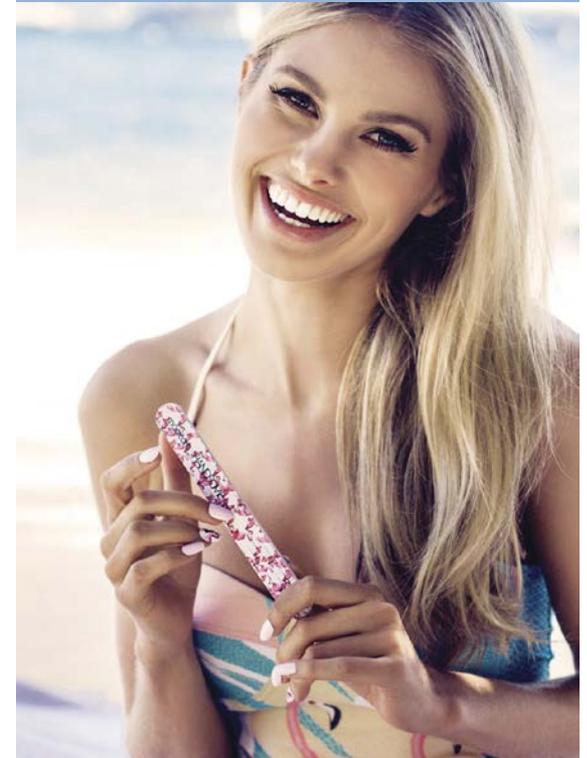
ADVANCED BEAUTY



NATURAL BEAUTY



ESSENTIAL BEAUTY



McPherson's Limited

