

MARKETS & BRAND



Craig Reid
Chief Sales and Marketing Officer

Fisher & Paykel

LEADING POSITIONS AND STRONG BRANDS

- #1 in New Zealand
- #2 in Australia
- Niche high end market positioning in North America, Europe and China
- High end DCS cooking brand in North America
- Distribution of Haier brand in Australia and New Zealand



Fisher & Paykel

Haier



WHAT IS OUR MARKET STRATEGY

**AUSTRALIA AND NEW ZEALAND
PROTECT AND GROW**

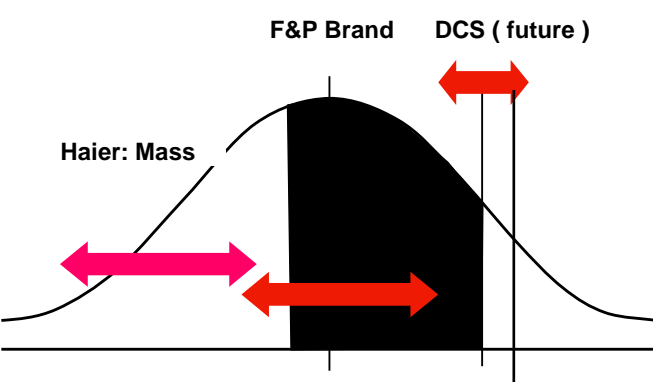
**NORTH AMERICA
PROFITABLE GROWTH**

**REST OF WORLD
PROFITABLE SALES**

**CHINA AND INDIA
LONG TERM GROWTH OPTIONS**

NEW ZEALAND & AUSTRALIA

BRANDS AND PRODUCT POSITIONING

	BRAND POSITION	PRODUCT RANGE / DISTRIBUTION
<p>HOME MARKETS – AUSTRALIA / NEW ZEALAND</p>		<ul style="list-style-type: none"> • Brand positioning: Premium (F&P); Haier (Mass) DCS (niche) • Some Niche FPA products to leverage Premium position • Range: Full product range across mass market • Multiple brand strategy: <ul style="list-style-type: none"> – Haier used as a flanking brand in the mid mass market – Elba brand in specific channels (e.g. DIY channel or entry level cooking) • Distribution: <ul style="list-style-type: none"> – via all major big box players, Buying Groups, and Independents including Specialist Kitchen (e.g. Harvey Norman, Good Guys, Noel Leeming, NARTA, Kitchen n' Things)

#1 BRAND PREFERENCE IN AUSTRALIA & NEW ZEALAND

AUSTRALIA

Unprompted Brand Awareness (Feb '11)

<i>Fisher&Paykel</i>	60%
Brand B	54%
Brand C	54%
Brand D	35%
Brand E	33%
Brand F	32%

NEW ZEALAND

Unprompted Brand Awareness (Sept '11)

<i>Fisher&Paykel</i>	87%
Brand B	41%
Brand C	28%
Brand D	27%
Brand E	22%
Brand F	20%

AUSTRALIA & NEW ZEALAND

STRENGTHEN THE CUSTOMER EXPERIENCE

A STRONG PIPELINE OF NEW PRODUCTS

EXPAND COMPLIMENTARY HAIER PRODUCTS

USE OEM TO COMPLETE FPA PRODUCT GAPS

PROMOTE CORE TECHNOLOGY

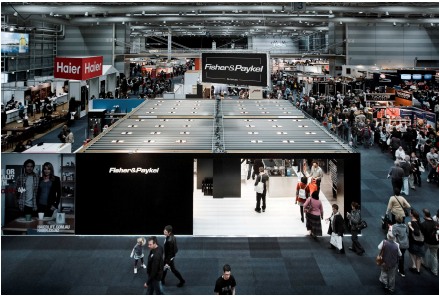
LEVERAGE FPA ADVANTAGE

STRENGTHEN CUSTOMER EXPERIENCE

**SDA
COMMUNITY**



EVENTS



**GREAT
SHOPPING
EXPERIENCE**



LEVERAGE FPA ADVANTAGE



- New Zealand's Most Trusted Brand 11 consecutive years
- Australia's Most Trusted Brand 2010 and 2011



- Australia's Canstar Award for outstanding customer service



- New Zealand and Australia's most extensive service network
- The highest first time fix rate of 94%

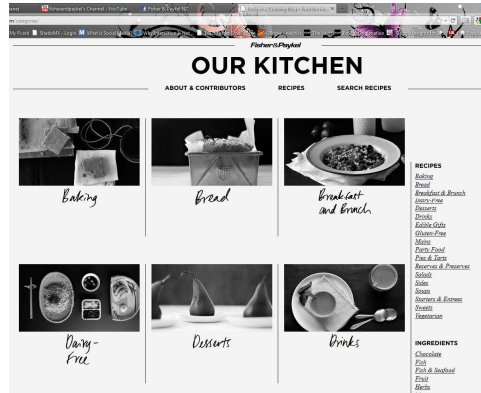


- Ranked one of the world's Top Three for After Sales Service *
- Voted the Best service company in Australia

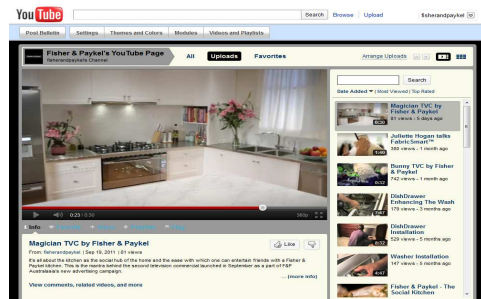
(* as ranked by D&G global survey)

PROVIDE THE RIGHT INFORMATION

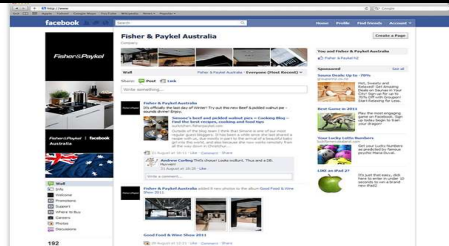
Blog



You Tube



Face Book



EDM (DCS)



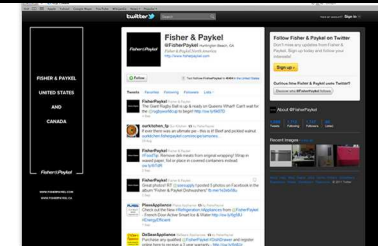
EDM (FPA)



SDA Specialist Website

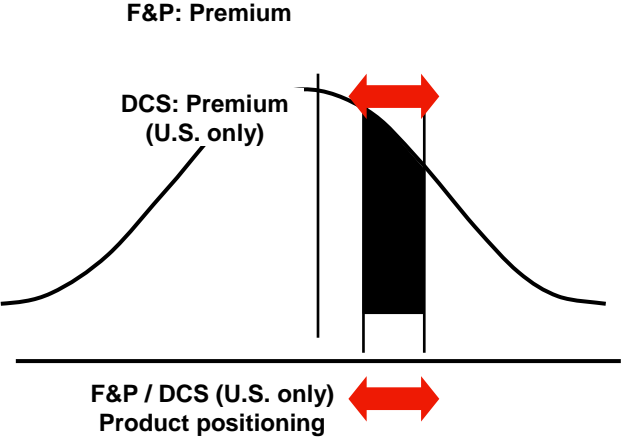


Twitter



OTHER MARKETS

BRANDS AND PRODUCT POSITIONING

	BRAND POSITION	PRODUCT RANGE / DISTRIBUTION
<p style="text-align: center;">U.S. / EUROPE / R.O.W</p>		<ul style="list-style-type: none"> • Brand positioning: Premium (F&P / DCS) • Range: Niche product range across all markets • U.S. & Canada <ul style="list-style-type: none"> – Premium with the F&P and DCS brands – Brand positioning aligned – Distribution via independents and Lowes (Sears exited) • Europe / R.O.W <ul style="list-style-type: none"> – Premium with the F&P brands • India and China <ul style="list-style-type: none"> – targeting the Specifier, Developer and Architect channel in the premium segment – Limited product range

NORTH AMERICA

STRENGTHEN CUSTOMER EXPERIENCE

STRENGTHEN DCS LINE UP

EXIT NON PROFITABLE BUSINESS

CONSOLIDATE RESOURCES

ALIGN BRAND PRODUCT AND CHANNELS

LEVERAGE CORE FPA TECHNOLOGY AND ADVANTAGE

REST OF WORLD / China & India

STRENGTHEN CUSTOMER EXPERIENCE

REVIEW ALL MARKETS

PROFITABLE SALES

ALIGN CHANNELS TO BRAND AND PRODUCT POSITION

PROMOTE CORE FPA TECHNOLOGY

LOW COST ENTRY INTO CHINA & INDIA

FISHER & PAYKEL GLOBAL BRAND PROJECT

DECEMBER 2011

Fisher&Paykel

OUR BRAND VALUES

REAL

HUMAN

GENEROUS

CURIOUS

BRAND POSITION

For us, everyday premium means high quality at affordable prices and aspirational design that is achievable to own. Everybody deserves product that is well designed, with real value and substance.

We are in the middle and upper middle positions in the market, over the best of the conventional offerings and below the ultra-premium solutions. This is where our heritage and legacy has brought us and where we can add real value.

**LAUNDRY
REFRESH**

Fisher&Paykel

Technology mark



**POWERED BY
SMARTDRIVE™**

NEW PREMIUM INSTORE DISPLAYS





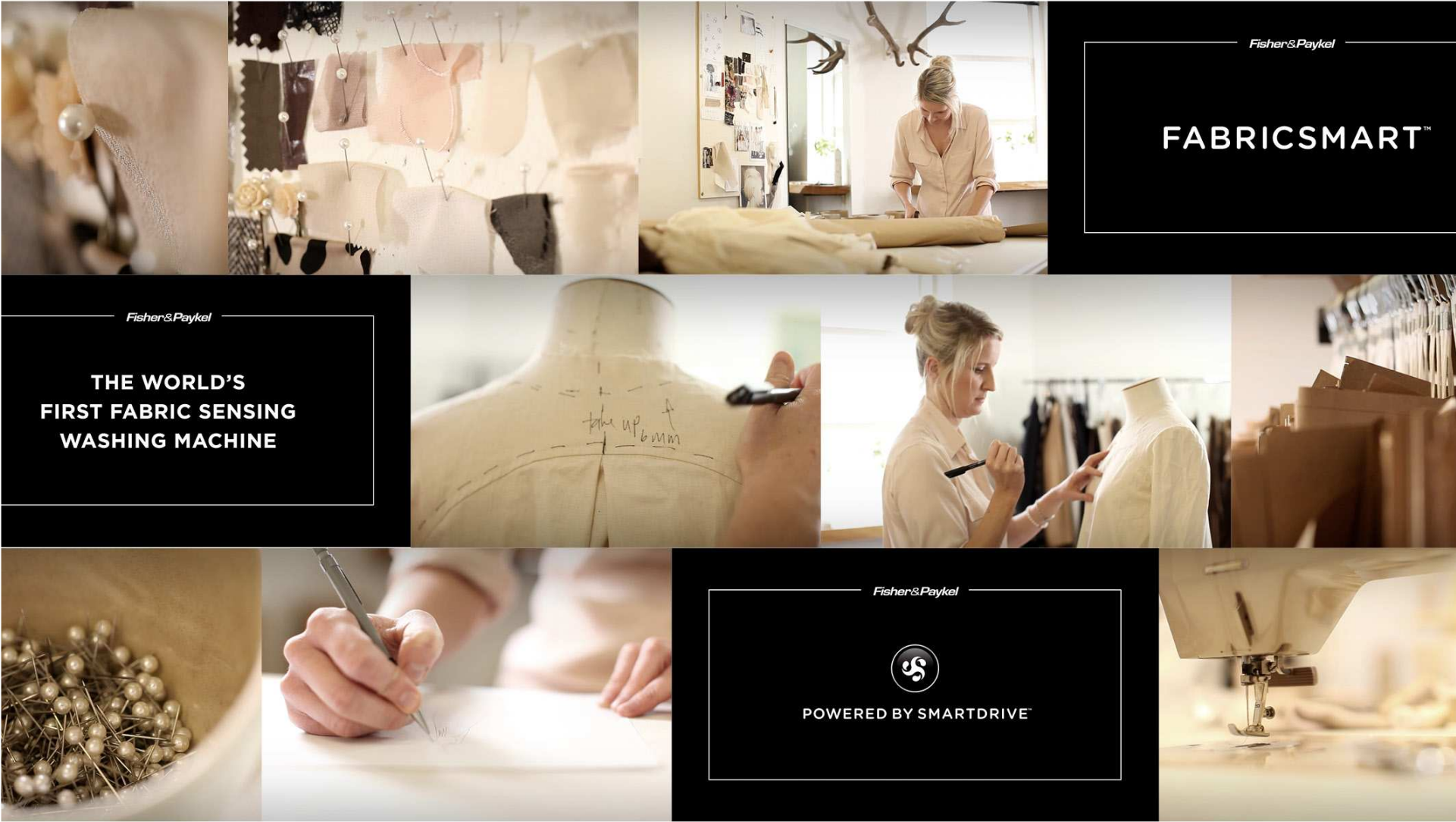
Message-carrying products



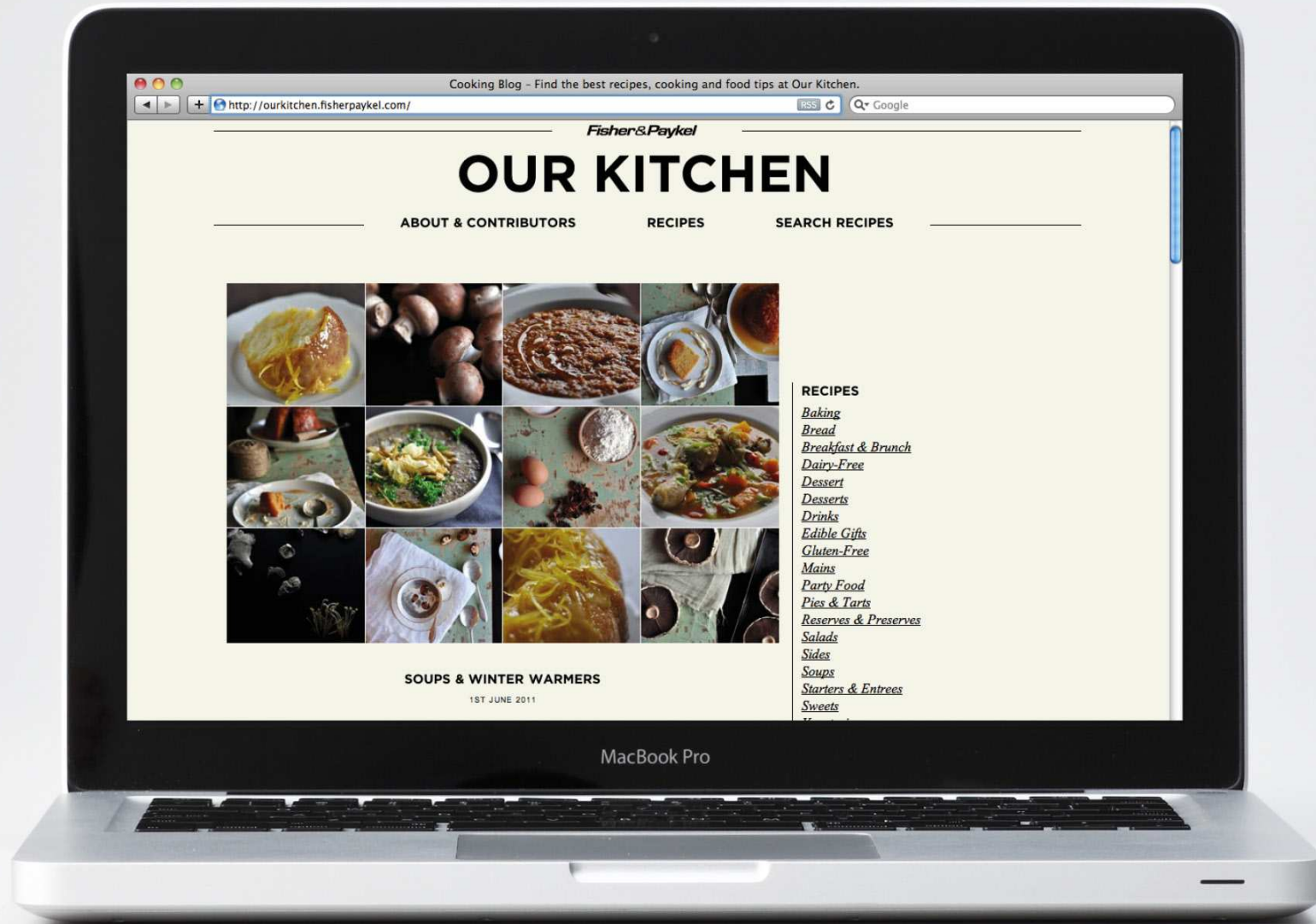
ONLINE

Fisher & Paykel

Social media campaign



Our Kitchen Food Blog



IMPORTANT NOTICE

This presentation has not taken into account any particular investor's investment objectives or other circumstances. Investors are encouraged to make an independent assessment of Fisher & Paykel Appliances Holdings Limited and its subsidiaries.

All currencies are expressed in New Zealand dollars unless otherwise stated.

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