

Physical characteristics of new non-residential buildings 2020

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Preface

This is the sixth annual report providing the results of the BRANZ Non-Residential Survey. BRANZ surveys builders and designers of non-residential buildings on the physical characteristics of the building. The purpose is to obtain data on non-residential buildings that is not available from official sources. This data includes what type of materials are used. The data is useful for studies in the fields of sustainability, energy efficiency, durability and engineering.

Acknowledgements

This work was funded by the Building Research Levy. We would like to thank all of the builders and designers who filled in the survey form and returned it to BRANZ.



Physical characteristics of new non-residential buildings 2020

BRANZ Study Report SR466

Authors

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Reference

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Abstract

Official data on the characteristics of non-residential buildings is limited. Building consent data held by Statistics New Zealand gives numbers by building type, value and floor area, aggregated into territorial authorities and regions. However, there is no data on materials used.

BRANZ began surveying builders and designers in 1998 to obtain data on materials used. We have since compiled a database of approximately 400 non-residential buildings per year containing information on the materials used by building component.

This report contains the results of these surveys on the materials used in new non-residential buildings. The aim is to provide information useful to building material manufacturers, retailers/wholesalers, builders, designers, researchers and government officials.

Keywords

Materials, building envelope, claddings, floors, framing, insulation.



Contents

2. SUMMARY	
3. MAIN RESULTS	4
3.1 Roof claddings	4
3.2 Wall claddings	4
3.3 Main structure	5
3.4 Wall infill framing	6
3.5 Partition wall framing	
3.6 Insulation	
3.6.1 Wall insulation	
3.6.2 Ceiling insulation	7
3.6.3 Floor insulation	
APPENDIX A: TABLES OF DATA AND SURVEY FORMS	
Figures	
Figure 1. Value of new non-residential consents	2
Figure 2. Roof claddings market share.	
Figure 3. Wall claddings market share Figure 4. Main structure market share	
_	
Figure 5. Wall infill framing market share.	
Figure 5. Partition wall framing market share	
Figure 9. Colling insulation market share.	
Figure 8. Ceiling insulation market share	
Figure 9. Floor insulation	8
Tables	
Table 1. Roof claddings market share	9
Table 2. Wall claddings market share	9
Table 3. Main structure market share	
Table 4. Wall infill framing market share	9
Table 5. Partition wall framing market share	
Table 6. Wall insulation market share	10
Table 7. Ceiling insulation market share	10
Table 8. Floor insulation market share	
Table 9. Value of building consents by sector	10



1. Introduction

BRANZ surveys about 2,000 non-residential buildings per year in the BRANZ Non-Residential Survey. The survey also collects a variety of data on materials used in new and altered residential buildings.

The survey is a postal survey to the builder or designer identified on the building consent application form, and the questions relate to each individual consent. Generally, 400 returns are received each year. An incentive is offered (a Lotto ticket or book voucher) for the return of each survey form.

The consent information is obtained from the Whats On¹ building consent data. BRANZ uses this to determine a sample of non-residential buildings for each period from 31 territorial authorities. The territorial authorities surveyed are:

Auckland	Christchurch	Dunedin	Franklin
Far North	Gisborne	Hutt City	Hamilton
Invercargill	Kapiti	Manukau	Marlborough
Napier	New Plymouth	North Shore	Porirua
Palmerston North	Queenstown	Rodney	Southland
Tauranga	Thames-Coromandel	Tasman	Waikato
Waipa	Wellington	Western Bay of Plenty	Whangarei

Waitakere

The survey form is constantly evolving to include new questions as required. However, it is important for BRANZ to keep the survey form as simple, concise and clear as possible. Therefore, BRANZ keeps the survey form to a single page.

BRANZ weights the responses by the share of building activity for each building type in the calculation of the market share. This prevents some building types (such as farm buildings) from having a disproportionate share of the total market share should BRANZ receive a larger number of survey returns of one building type.

Using the data collected, representative estimates of the incidence and proportions of many different materials can be made. The components analysed are:

- roof claddings
- wall claddings
- main structure
- partition wall framing
- wall infill framing
- wall insulation
- ceiling insulation
- floor insulation.

1

¹ Whats-On report (Monthly). BCI New Zealand, Auckland, New Zealand.



A limitation of the survey is that it does not ask why certain materials are selected. This means that the report contains no commentary on why material trends might be changing.

The value of new non-residential consents is presented in

Figure 1 broken down into three different building types – institutional, commercial and industrial.

After a brief decline in 2019, the value of new non-residential consents has risen to levels similar to those seen in 2018.

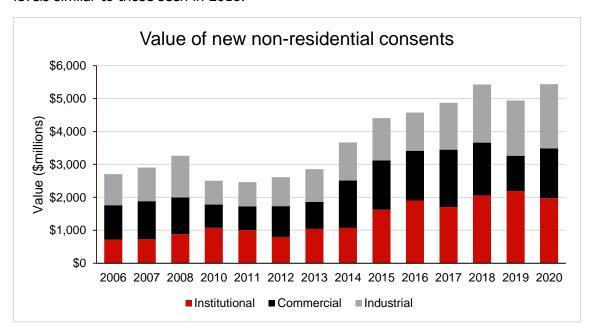


Figure 1. Value of new non-residential consents.



2. Summary

In general, many of the market shares of materials have been relatively steady over the years surveyed.

In 2020, partition wall framing market shares saw timber having a bounce-back year, increasing its market share for partition wall framing from 31% in 2019 to 57%. Steel remains the primary material for main structural framing. Steel and other metals are also the most common roof and wall cladding. Timber remains the most common material for infill framing – the framing between the main structural elements. Timber also experienced a large boost in use, rising from under 40% in 2019 to over 60% in 2020.

Steel, aluminium and other metals are the dominant wall cladding material, due to their dominance on industrial and farm buildings (Figure 3). Concrete (mainly precast panels) tends to be variable. After passing steel, aluminium and other materials in 2015, it is at its lowest level since 2010. The 'other' category decreased again in 2020 after a consistent climb upwards through 2015–2018.

For insulation, fibreglass is once again the most dominant category, overtaking the 'polyester and other' category for wall insulation. Polystyrene is still the most common insulation in insulated floors.



3. Main results

Key results are shown in the following charts. The data for these charts is in the tables in Appendix A.

Due to the variations in the mix of buildings year to year, market shares can be highly variable. Therefore, changes in share may be due to a change of building types rather than a change in preference for any particular building material.

3.1 Roof claddings

Sheet metal is still the dominant roof cladding for new non-residential buildings, even with a decrease in 2020 from 91% to 83% (Figure 2).

The 'other' category consists of membrane roofing, insulated panels and plastic film used on farm shelters. Use of plastic film on farm shelters has increased from 9% in 2019 to 17% in 2020 after a peak of 39% in 2016. Metal and concrete tiles are still relatively uncommon in non-residential buildings and barely feature in the 2020 results.

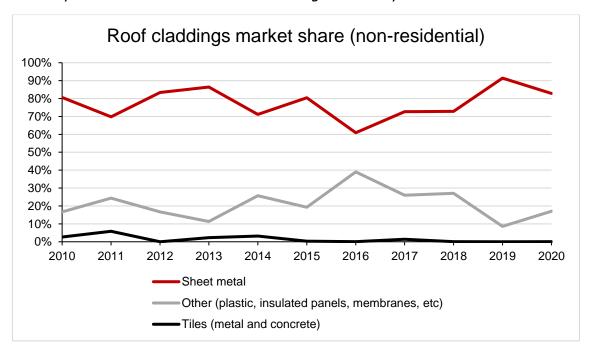


Figure 2. Roof claddings market share.

3.2 Wall claddings

Steel, aluminium and other metals are the dominant wall cladding material, due to their dominance on industrial and farm buildings (Figure 3).

Concrete (mainly precast panels) tends to be variable but has continued to drop since 2015. The 'other' category decreased again in 2020 after a consistent climb from 2015–2018.



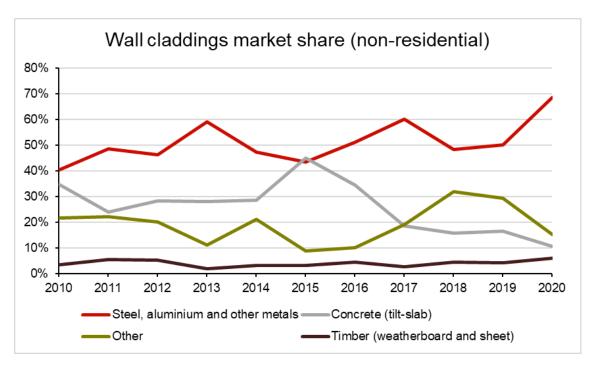


Figure 3. Wall claddings market share.

3.3 Main structure

Use of steel in main structural frames decreased in 2020, back to its 2018 share (Figure 4).

Concrete has remained at 14%, and timber framing increased its market share in 2020 to 27% from 18% in 2019.

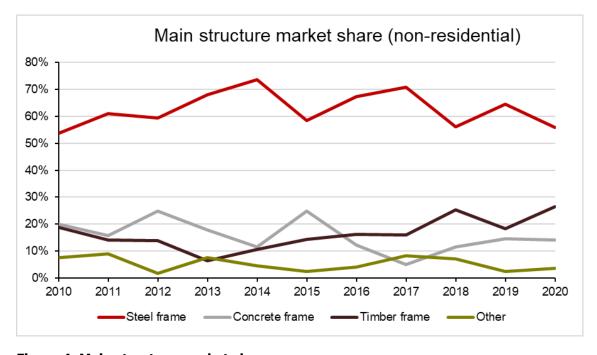


Figure 4. Main structure market share.



3.4 Wall infill framing

Wall infill framing is the framing between the main structural frames. Timber framing remains the main material type for this application, with a significant increase in 2020 to 66% from 37% in 2019 and concrete and 'other' both decreasing. Steel is in second place with a slight decrease from 2019 (Figure 5). The 'other' category often includes glazing.

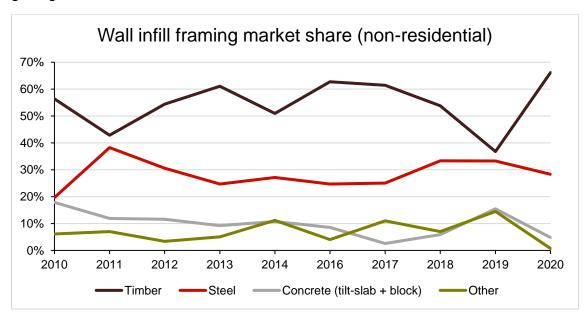


Figure 5. Wall infill framing market share.

3.5 Partition wall framing

Timber has increased its market share for partition wall framing from 31% in 2019 to 57%. The 'other' category includes insulated panels and glazing and has decreased from a 30% market share 2019 to a 14% share in 2020. Steel's market share dropped to 29% in 2020, down from 39% in 2019.

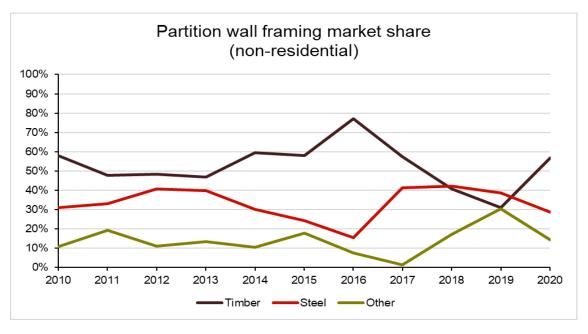


Figure 6. Partition wall framing market share.



3.6 Insulation

Wall insulation, ceiling insulation and floor insulation are dealt with separately in this section.

Farm buildings have not been included as it is uncommon for farm buildings to use insulation and they have a large share of the non-residential building market.

3.6.1 Wall insulation

Fibreglass is once again the dominant wall insulation material with a share of 68% after a brief drop in 2019 (Figure 7). The 'polyester and other' category now has a market share of 32%.

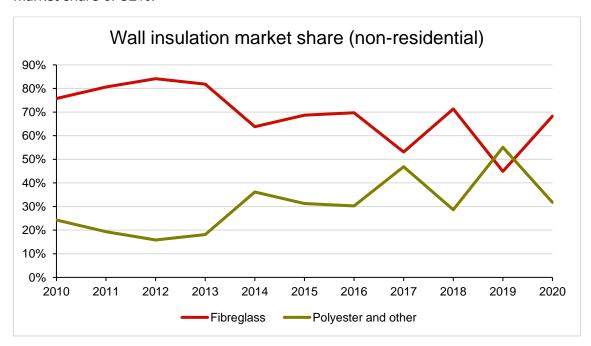


Figure 7. Wall insulation market share.

3.6.2 Ceiling insulation

Normally, most buildings use the same insulation material in the wall and ceiling, which means that market share in each market tends to follow the other.

Fibreglass remains the dominant insulation material with an increase to 76% in 2020 with the 'polyester and other' category decreasing to a similar level to 2012 (Figure 8).

'Other' primarily consists of polystyrene, which is common as part of insulated panels in industrial buildings.



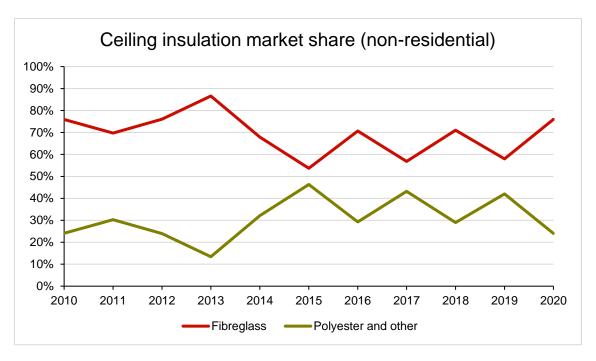


Figure 8. Ceiling insulation market share.

3.6.3 Floor insulation

For those buildings with floor insulation, sheet polystyrene is the still the most common floor insulation material (Figure 9).

Note that the question on insulation of concrete slabs was changed in 2015. This chart assumes that all buildings that selected underslab full/partial used sheet polystyrene, although non-polystyrene waffle pod systems have entered the market.

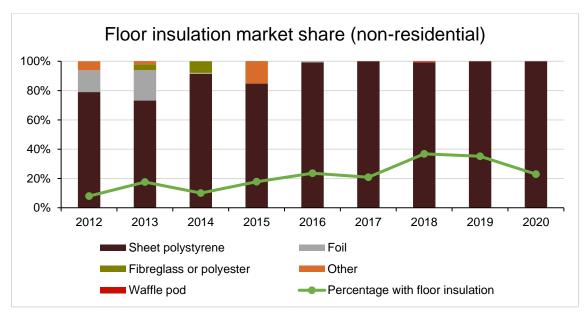


Figure 9. Floor insulation.



Appendix A: Tables of data and survey forms

A.1 Tables of data for the charts

Table 1. Roof claddings market share.

Yearly data 2010-2020											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Sheet metal	81%	70%	83%	86%	71%	80%	61%	73%	73%	91%	83%
Tiles (metal and concrete)	3%	6%	0%	2%	3%	0%	0%	1%	0%	0%	0%
Other (plastic, insulated panels, memb	17%	24%	17%	11%	26%	19%	39%	26%	27%	9%	17%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 2. Wall claddings market share.

Wall claddings market share in	new no	n-reside	ntial bui	ldings							
Yearly data 2010-2020	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Steel, aluminium and other metals	40%	49%	46%	59%	47%	43%	51%	60%	48%	50%	68%
Concrete (tilt-slab)	35%	24%	28%	28%	29%	45%	34%	19%	16%	16%	10%
Timber (weatherboard and sheet)	3%	5%	5%	2%	3%	3%	4%	3%	4%	4%	6%
Other	22%	22%	20%	11%	21%	9%	10%	19%	32%	29%	15%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Note: Percentages weighted to allow for	or different b	uilding typ	es								

Table 3. Main structure market share.

Main structure		share in	new no	n-resi	dentia	l buildir	igs				
Yearly data 20	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Concrete frame	20%	16%	25%	18%	11%	25%	12%	5%	12%	14%	14%
Steel frame	54%	61%	59%	68%	73%	58%	67%	71%	56%	65%	56%
Timber frame	19%	14%	14%	7%	11%	14%	16%	16%	25%	18%	27%
Other	8%	9%	2%	8%	4%	2%	4%	8%	7%	3%	4%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Note: Percentages	weighted to	allow for	different b	ouilding	types						

Table 4. Wall infill framing market share.

Yearly data 2010-2020	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Timber	56%	43%	54%	61%	51%	49%	63%	61%	54%	37%	66%
Concrete (tilt-slab + block)	18%	12%	12%	9%	11%	18%	9%	3%	6%	15%	5%
Steel	20%	38%	31%	25%	27%	22%	25%	25%	33%	33%	28%
Other	6%	7%	3%	5%	11%	11%	4%	11%	7%	14%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 5. Partition wall framing market share.

Year	ly data 20°	10-2020									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Steel	31%	33%	41%	40%	30%	24%	15%	41%	42%	39%	29%
Timber	58%	48%	48%	47%	59%	58%	77%	57%	41%	31%	57%
Other	11%	19%	11%	13%	10%	18%	8%	1%	17%	30%	14%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%



Table 6. Wall insulation market share.

	ı <mark>lation</mark> ı data 20'		re in new no	n-resident	ial build	ings					
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Fibreglas	76%	81%	84%	82%	64%	69%	70%	53%	71%	45%	68%
Polyester	24%	19%	16%	18%	36%	31%	30%	47%	29%	55%	32%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Note: Perc	entages v	veighted to al	low for different b	uilding types							

Table 7. Ceiling insulation market share.

Yearly da	ıta 2010-2020				ntial buil						
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Fibreglas	76%	70%	76%	87%	68%	54%	71%	57%	71%	58%	76%
Polyester	24%	30%	24%	13%	32%	46%	29%	43%	29%	42%	24%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 8. Floor insulation market share.

	2012	2013	2014	2015	2016	2017	2018	2019	2020
Waffle pod	0%	0%	0%	0%	0%	0%	1%	0%	0%
Sheet polystyrene	79%	73%	91%	85%	99%	100%	94%	100%	88%
Foil	15%	21%	1%	0%	1%	0%	0%	0%	12%
Fibreglass or polyester	0%	4%	8%	0%	0%	0%	0%	0%	0%
Other	6%	2%	0%	15%	0%	0%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%
Percentage with floor insulation	8%	18%	10%	18%	24%	21%	37%	35%	23%

Table 9. Value of building consents by sector.

Value of new non-r Yearly data 2006-2		consents (\$mil	llions)											
	2006	2007	2008	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Institutional	717	730	885	1,077	1,003	803	1,043	1,073	1,628	1,903	1,706	2,061	2,190	1,978
Commercial	1,047	1,153	1,112	704	720	930	816	1,436	1,496	1,513	1,742	1,601	1,075	1,510
Industrial	940	1,024	1,270	726	739	880	996	1,160	1,280	1,162	1,427	1,767	1,676	1,947
Total non-residential k	2,704	2,906	3,267	2,507	2,463	2,613	2,854	3,670	4,404	4,578	4,875	5,429	4,941	5,435

Source: Statistics New Zealand



A.2 Survey form March 2007

	ION-RESIDENTIAL BUILDII		
_	-	or the building consent listed ov	er the page.
Contract value of wo	ork (incl sub-trades) \$	Inci GS1.	
Type of Building		(state type) e.g. Office, scho	ool, farm building etc
New	tick Floor area sqm	Number of store	nvo
Addition			•
	sqm		heightm
Alteration		(describe altera	•
Main Structure tio	ck one or more tick	tick	Laminated wood
	Timber frame	<u> </u>	Laminated wood
Steel frame	Tilt slab	Otner	(state)
Floor base material	D (1 D)	D	
Concretesqr		<u> </u>	.sqm Other (state) sqm
Partition Wall Framing Timber	Steel	k one or more Other(st	cate)
Amount of Timber Framing	(only applicable if framing	g work is done)	
Cub metres	Wall/floor area	Sizes/spacing	
Walls Walls	or with		
Floors	or with		
Roof	or with		
Roof	or with		
cum	sqm	450-50	
Example Wa	•	150x50mm @600 ctrs. 100x50mm @450 ctrs.	
Roo	•	100x50mm truss @900 ctrs.	
Secondary Wall Framing	tick one or more		
	teel Douglas fir	Concrete block C	Other (state)
Nadiata	Douglas III	Control block	(State)
Timber treatment (for frami	ing)	Please tick one or more	
	Untreated kiln dry	Untreated Wet H1.2 T1	1.2 (orange) H3.1
State where used (eg outer walls,			
Building wraps Flamestop® The	(tick one or mor ermakraft Bitumac®	,	Black Paper Other (state)
Roof Tamestope	Simakian Bitamace	Tadioid E	other (state)
	(tick one or mor	<u>e)</u>	
Flamestop® T	yvek® Thermakraft coverup	FrameGard II Greenwrap	Fastwrap Black Paper Other (state)
Wall			
Wall cladding (only application State type		idding)	
Type		tilt slab, 60%	also plywood, solid plaster(min 18mm),
Type	% area	· ·	plaster on polystyrene, sheet
Туре	% area	glazing, 10%	steel, PVC weatherboard, etc.
Туре	% area	fibre cement, 15%	
		Total 100%	
If yes to Fibre Cement claddi	ing what is the Manufacturer		
Hardies	BGC CSR	PRIMA Other	
Fibre Cement Product was u	ised as (Circle one or mor	e)	
Applied text	ture finish sheet, Flat shee	et, FC plank, FC we	eatherboard/Linea
If solid plaster, what backing	? (circle one if solid plaster	•)	
fi	ibre cement, plywood,	paper, Triple S, b	block/brick, metal lathe
Wet area linings (bathroom,	. kitchen, laundry etc)		
,	ck one or more and the appro	ximate square meters used.	
	eratone Villaboard	Hardiglaze GIB	Aqualine Other (state)
m2	m2 m2	m2 m2	m2 m2
Roof cladding (only applica	able if there is new roof cla	dding)	
		Roof area	sq metres.
, ·	w profile, trough steel profile		·
	bber sheet, bitumen asphalt		
Thank You. Please fold this			Mar-07



A.3 Survey form November 2011

NON-RESIDENTIAL	
Please give this form to the builder or designer to fill out for the building consent listed over the page.	
Contract value of work (incl sub-trades) \$ incl GST	
Type of Building (state type) e.g. Office, school, farm building etc	
New sqm Number of storeys: Addition sqm Average storey height: m	
Alteration (describe alteration)	
Are you claiming "green" building features? Yes / No If Yes, what type?	
Main Structure	
Concrete Frame Concrete block LVL Glulam	
Steel Frame Tilt Slab Other (state)	
Floor Base Material	
Concrete sqm Particle Board sqm Plywood sqm Other (state) sqm	
If concrete, have any steel deck trays been used? Yes / No (circle one)	
Partition Wall Framing (tick one or more)	
Timber Steel Concrete Other (state)	
Wall Infill Framing (between main frame) (tick one or more)	
Radiata Steel Douglas Fir Concrete block Other (state)	
Prefabrication	
Are any prefabricated components used? Yes / No If yes, describe applicable component(s) below:	
Prefab Frame Prefab Floors	
Prefab Other Prefab Other	-
Insulation Pink Bradford Premier Brown FG Greenstuf Other Other	er
(tick one or more) None Batts Gold Fibreglass Rocwool (polyester) Polyester Wool Polystyrene (stat	te)
Wall insulation	
Ceiling insulation	
None Warmfeet Under Slab Floor Foil Floor Cupolex (state)	
Floor insulation	
Builder Other (please specify)	
Insulation Installer (name)	
Building Wraps (tick one or more) Black Other	
Flamestop Thermacraft Bitumac CoverTek Pauloid Paper (state) Diflex 130 Tekton Roof wrap	
Black Other	
(tick one or more) Flamestop Tyvek Thermacraft Frameguard Home RAB Fastwrap Paper (state) Diflex 130 Tekton Ecoply Ba	ırrier
Wall wrap]
Wall Cladding State type and approximate % wall coverage	
e.g. Fibre cement, 75% Other examples include: tilt slab, concrete block, steel zincalum, glazing, alumunium,	
Clay Brick, 15% radiata WB, linea WB etc.	
Cedar WB, 10%	
Туре % area Туре	
Type % area Type % area	
Hardies BGC CSR PRIMA Other Eterpa	ın
If Fibre Cement cladding is used, who is the manufacturer?]
Fibre Cement product used as Applied texture finish sheet, Flat sheet, FC plank (7.5mm), Linea (16mm)	
If solid plaster, what backing was used? Fibre cement, plywood, paper, Triple S, block/brick, metal lathe	
Wet Area Linings (bathroom, kitchen, laundry etc)	
Please state the approximate square metres used	
Formica Aquapanel Seratone Villaboard Hardiglaze GIB Aqualine Other (state)	
m² m² m² m² m² m² m²	
Roof Cladding (only applicaple if there is new roof cladding)	
What roof cladding was used? (circle one or state below)	
metal tiles, prepainted corrugated, trough zincalum, other steel profiles, concrete tiles, butyl, asphalt shingles,	
other (state) Approx. Roof Area: sqm	
Type of roof structure Timber Steel Concrete Slab	
Thank you. Please fold this form, and freepost it in the return envelope Nov-1:	1



A.4 Survey form October 2015

NON-RESIDENTIAL
Please give this form to the builder or designer to fill out for the building consent listed over the page.
Contract value of work (incl sub-trades) \$ incl GST
Type of Building (state type) e.g. Office, school, farm building etc
tick floor area New sqm Number of storeys:
New sqm Number of storeys: Addition sqm Average storey height: m
Alteration (describe alterations)
Are you claiming "green" building features? Yes / No If Yes, what type?
Main Structure
Concrete Frame Concrete Block LVL Glulam
Steel Frame Tilt Slab Insulated Panel Other (state)
Floor Base Material
Concrete sqm Particle Board sqm Plywood sqm Other (state) sqm
If concrete, have any steel deck trays been used? Yes / No (circle one)
Partition Wall Framing (tick one or more)
Timber Steel Concrete Other (state)
Wall Infill Framing (between main frame) (tick one or more)
Radiata Steel Douglas Fir Concrete block Other (state)
Prefabrication
Are any prefabricated components used? Yes / No If yes, describe applicable component(s) below:
Prefab Frame Prefab Floors
Prefab Walls Prefab Other
Insulation Pink Bradford Knauf Autex Other Other
(tick one or more) None Batts Gold Premier Earthwool Greenstuf Polyester Wool Polystyrene (state)
Wall insulation
Ceiling insulation
Concrete slab insulation Timber sub-floor insulation
Floor insulation Underslab Perimeter Under full/partial edge footing Polystyrene Polyester Glasswool Foil
full/partial edge footing Polystyrene Polyester Glasswool Foil
Builder Other (please specify)
Insulation Installer (name)
Building Wraps Flamestop Bitumac Tyvek Supro CoverTek Thermakraft Fastwrap Pauloid Other (state)
Roof Wrap
(tick one or more) Bitumac Tyvek Homawra Watergate Covertek Thermakraft Tekton Fastwrap Pauloid Ecoply Barrier Other (State)
Wall Wrap
Wall Cladding State type and approximate % wall coverage
e.g. Concrete block, 75% Other examples include: tilt slab, concrete block, steel zincalum, glazing, alumunium, Clay Brick, 15% radiata WB, linea WB etc.
Cedar WB, 10%
Type
Type % area
If Fibre Cement product, what is it used as? (circle one) Applied texture finish sheet, Flat sheet, FC plank (7.5mm), Linea (16mm)
Wet Area Linings (bathroom, kitchen, laundry etc)
Please state the approximate square metres used
Formica Aquapanel Seratone Villaboard Hardiglaze GIB Aqualine Other (state)
m ²
Spouting
What profile is the SPOUTING? % round/quad % round Old gothic Box Other (state)
% round/quad % round Old gothic Box Other (state) What material is the SPOUTING?
PVC (White) PVC (Colour) Steel Aluminium Copper Other (state)
Who installed the SPOUTING?
Roofer Spouting installer Builder Plumber Other (state)
Downpipes
What profile are the DOWNPIPES?
65mm round 80mm round 100mm round 65x50mm rectangular 100x50mm rectangular
Other (state)
What material are the DOWNPIPES?
PVC (White) PVC (Colour) Steel Aluminium Copper Other (state)
Who installed the DOWNPIPES? Roofer Spouting installer Builder Plumber Other (state)
Roof Cladding (only applicaple if there is new roof cladding) Roof Cladding (only applicaple if there is new roof cladding)
What roof cladding was used? (circle one or state below) metal tiles, prepainted corrugated, trough zincalum, other steel profiles, concrete tiles, butyl, asphalt shingles,
other (state) sqm
Type of roof structure Timber Steel Concrete Slab
Thank you. Please fold this form, and freepost it in the return envelope Oct-15
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