

Physical characteristics of new non-residential buildings 2021

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Preface

This is the seventh 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 2021

BRANZ Study Report SR496

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 Stats NZ 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.



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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 surveys 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 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.

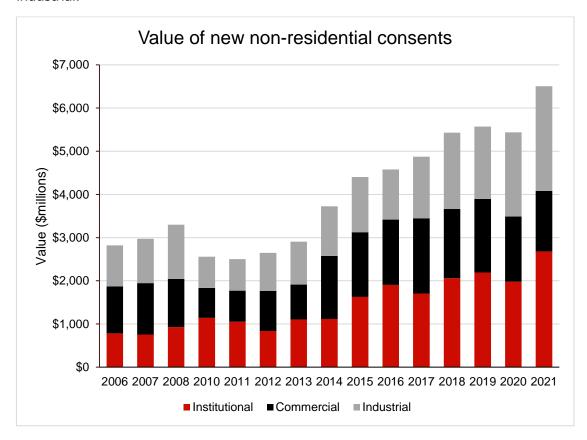


Figure 1. Value of new non-residential consents.



2. Summary

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

Sheet metal is the most popular roof cladding material (Figure 2). 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. Steel remains the primary material for structural framing (Figure 4).

Timber remains the most common material for infill framing – the framing between the main structural elements (Figure 5). The market share of timber partition wall framing has decreased in 2021 (Figure 6). Steel's market share increased sharply from 29% in 2020 to 49% in 2021. Meanwhile, the market share of 'other' partition wall framing options, which consists of insulated panels and glazing, decreased slightly.

For insulation, fibreglass is once again the most dominant category. 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 material for new non-residential buildings (Figure 2).

The 'other' category consists of membrane roofing, insulated panels and plastic film used on farm shelters. The 'other' category has increased from 17% in 2020 to 26% in 2021. Metal and concrete tiles are still relatively uncommon in non-residential buildings and barely feature in the 2021 results.

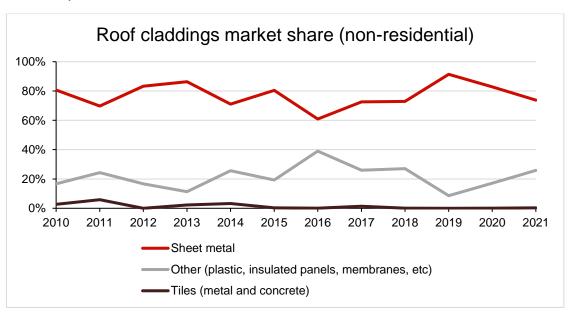


Figure 2. Roof claddings market share.

3.2 Wall claddings

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

Concrete (mainly precast panels) tends to be variable but has continued to drop since 2015. The 'other' category, which consists mainly of fibre cement products, increased in 2021 (Figure 3).



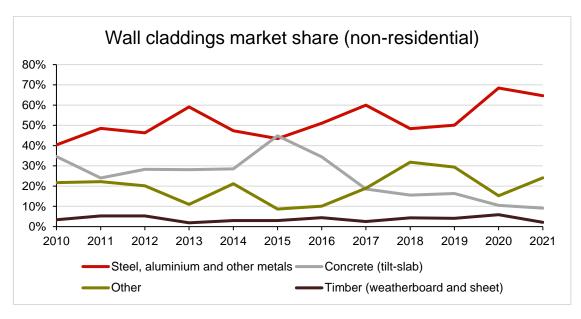


Figure 3. Wall claddings market share.

3.3 Main structure

Steel remains the most popular material for structural frames. The market share of steel has increased from 56% in 2020 to 74% in 2021 (Figure 4).

The market share of concrete, timber and 'other' framing decreased in 2021. The sharpest decline has been timber framing, going from a market share of 27% in 2020 to a 16% in 2021 (Figure 4)

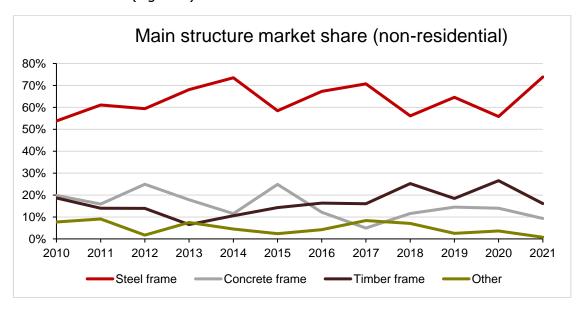


Figure 4. Main structure market share.

3.4 Wall infill framing

Wall infill framing is the framing between the main structural frames. Timber framing remains the predominant material type for this application (Figure 5). The market share of steel increased slightly in 2021. The market share of concrete has continued to decrease in 2021, while the 'other' category has remained the same. The 'other' category primarily consists of glazing.



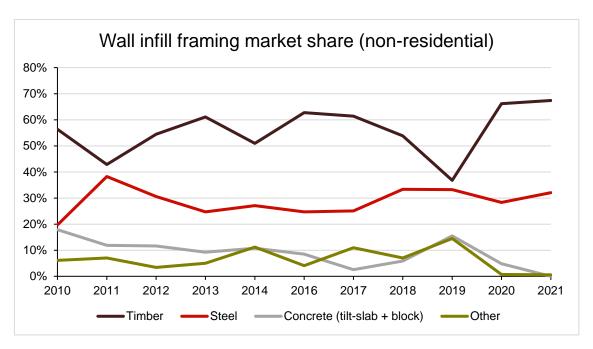


Figure 5. Wall infill framing market share.

3.5 Partition wall framing

Timber has decreased its market share for partition wall framing from 57% in 2020 to 42% in 2021. The market share of 'other' partition wall framing materials, which consists of insulated panels and glazing, has decreased from 14% in 2020 to 9% in 2021. The market share of steel increased significantly, going from 29% in 2020 to 49% in 2021 (Figure 6).

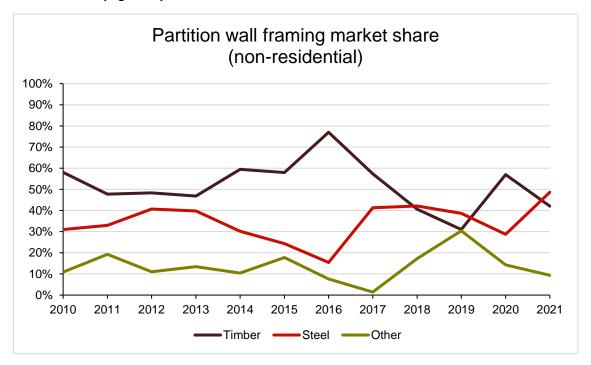


Figure 6. Partition wall framing market share.



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 has remained the dominant wall insulation material with a market share of 56% in 2021. However, this is a decrease from 68% the year prior (Figure 6). The 'polyester and other' category now has a market share of 44% in 2021.

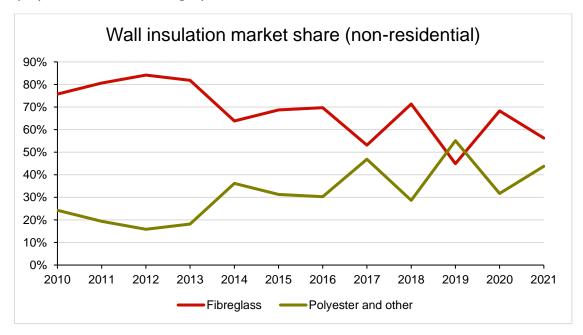


Figure 6. Wall insulation market share.

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.

While fibreglass remains the dominant insulation material, it has decreased from 76% in 2020 to 56% in 2021 with the 'polyester and other' category increasing to a similar level to 2015 (Figure 7).

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



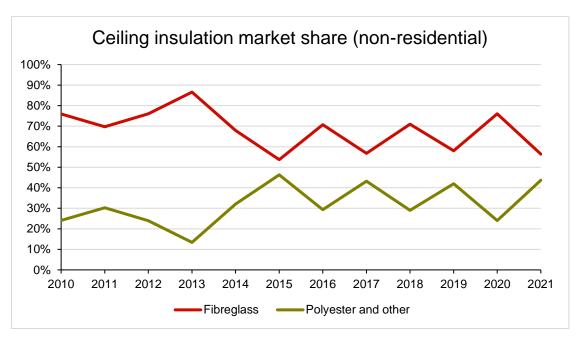


Figure 7. Ceiling insulation market share.

3.6.3 Floor insulation

For those buildings with floor insulation, sheet polystyrene is the still the most common floor insulation material (Figure 8).

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. The market share of waffle pod, fibreglass and 'other' materials have increased significantly in 2021 (Figure 9).

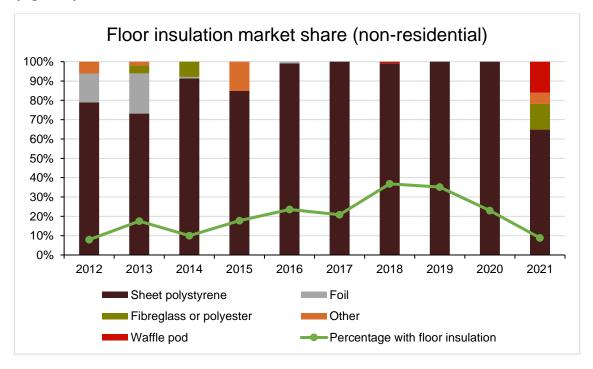


Figure 8. Floor insulation.



Appendix A: Tables of data and survey forms

A.1 Tables of data for the charts

Table 1. Roof claddings market share.

Yearly data 2010-2021												
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	202
Sheet metal	81%	70%	83%	86%	71%	80%	61%	73%	73%	91%	83%	74%
Tiles (metal and concrete)	3%	6%	0%	2%	3%	0%	0%	1%	0%	0%	0%	0%
Other (plastic, insulated panels, membranes, etc)	17%	24%	17%	11%	26%	19%	39%	26%	27%	9%	17%	26%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 2. Wall claddings market share.

Wall claddings market share in	new non-	resider	ntial bui	ldings								
Yearly data 2010-2021	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Steel, aluminium and other metals	40%	49%	46%	59%	47%	43%	51%	60%	48%	50%	68%	65%
Concrete (tilt-slab)	35%	24%	28%	28%	29%	45%	34%	19%	16%	16%	10%	9%
Timber (weatherboard and sheet)	3%	5%	5%	2%	3%	3%	4%	3%	4%	4%	6%	2%
Other	22%	22%	20%	11%	21%	9%	10%	19%	32%	29%	15%	24%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Note: Percentages weighted to allow for di	ferent buildir	ng types										

Table 3. Main structure market share.

Main structure marke	t share in nev	v non-r	esiden	tial buil	dings							
Yearly data 2010-2021												
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Concrete frame	20%	16%	25%	18%	11%	25%	12%	5%	12%	14%	14%	9%
Steel frame	54%	61%	59%	68%	73%	58%	67%	71%	56%	65%	56%	74%
Timber frame	19%	14%	14%	7%	11%	14%	16%	16%	25%	18%	27%	16%
Other	8%	9%	2%	8%	4%	2%	4%	8%	7%	3%	4%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Note: Percentages weighted	to allow for differe	nt buildin	g types									

Table 4. Wall infill framing market share.

Wall infill framing market	share in	new no	on-resid	dential I	building	gs						
Yearly data 2010-2021	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Timber	56%	43%	54%	61%	51%	49%	63%	61%	54%	37%	66%	67%
Concrete (tilt-slab + block)	18%	12%	12%	9%	11%	18%	9%	3%	6%	15%	5%	0%
Steel	20%	38%	31%	25%	27%	22%	25%	25%	33%	33%	28%	32%
Other	6%	7%	3%	5%	11%	11%	4%	11%	7%	14%	1%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Note: Percentages weighted to all	ow for differe	ent buildin	g types. [Does not i	nclude fa	rm buildin	gs					



Table 5. Partition wall framing market share.

Partition wall framing m	narket share	in nev	v non-re	esiden	ial buil	dings									
Yearly data 2010-2021															
	2006	2007	2008	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Steel	37%	36%	25%	31%	33%	41%	40%	30%	24%	15%	41%	42%	39%	29%	49%
Timber	56%	59%	50%	58%	48%	48%	47%	59%	58%	77%	57%	41%	31%	57%	42%
Other	7%	6%	25%	11%	19%	11%	13%	10%	18%	8%	1%	17%	30%	14%	9%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Note: Percentages weighted to	allow for differe	nt building	g types												

Table 6. Wall insulation market share.

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Fibreglass	76%	81%	84%	82%	64%	69%	70%	53%	71%	45%	68%	56%
Polyester and other	24%	19%	16%	18%	36%	31%	30%	47%	29%	55%	32%	44%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 7. Ceiling insulation market share.

Ceiling insulation market	share in	new no	n-resid	ential b	ouilding	ıs						
Yearly data 2010-2021												
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	202
Fibreglass	76%	70%	76%	87%	68%	54%	71%	57%	71%	58%	76%	56%
Polyester and other	24%	30%	24%	13%	32%	46%	29%	43%	29%	42%	24%	44%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Note: Percentages weighted to alle	ow for differe	nt buildin	g types									

Table 8. Floor insulation market share.

Yearly data 2012-2021										
	2012	2013	2014	2015	2016	2017	2018	2019	2020	202
Waffle pod	0%	0%	0%	0%	0%	0%	1%	0%	0%	18%
Sheet polystyrene	79%	73%	91%	85%	99%	100%	94%	100%	100%	73%
Foil	15%	21%	1%	0%	1%	0%	0%	0%	0%	0%
Fibreglass or polyester	0%	4%	8%	0%	0%	0%	0%	0%	0%	15%
Other	6%	2%	0%	15%	0%	0%	0%	0%	0%	6%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	113%
Percentage with floor insulation	8%	18%	10%	18%	24%	21%	37%	35%	23%	9%

Table 9. Value of building consents by sector.

Value of new non-residential con	sents (million	ıs)												
Yearly data 2006-2020															
	2006	2007	2008	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Institutional	781	756	926	1,141	1,051	836	1,105	1,115	1,628	1,903	1,706	2,061	2,190	1,978	2,678
Commercial	1,089	1,191	1,115	695	722	933	808	1,461	1,496	1,513	1,742	1,601	1,705	1,510	1,404
Industrial	952	1,026	1,256	724	730	876	993	1,149	1,280	1,162	1,427	1,767	1,676	1,947	2,423
Total non-residential buildings	2,821	2,973	3,298	2,559	2,503	2,645	2,907	3,724	4,404	4,578	4,875	5,429	5,572	5,436	6,505

Source: Stats NZ



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
- t- th
tick floor area (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 Timber 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)
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 Premier Brown FG Greenstuf Other Other
(tick one or more) None Batts Gold Fibreglass Rocwool (polyester) Polyester Wool Polystyrene (state)
Wall insulation State St
Ceiling insulation
Expol Polystyrene (not Polythene) Snug Sisalation Ribraft Other
None Warmfeet Under Slab Floor Foil Floor Cupolex (state) Floor insulation
Tiod 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
(tick one or more) Flamestop Tyvek Thermacraft Frameguard Home RAB Fastwrap Paper (state) Diflex 130 Tekton Ecoply Barrie
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%
Type
Type
Hardies BGC CSR PRIMA Other Eterpan
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 m²
Roof Cladding (only applicable 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-11
MOV-11



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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