

MARKET REPORT ON THE FARM AND AGRICULTURAL SECTOR

1 Applications

A recent market survey by Construction Markets Ltd for the MCRMA focused on the general farm and agricultural sector. The report provided valuable information about the specific needs of the sector. MCRMA members are actively involved in manufacturing and supplying a range of products and systems for this important and distinct sector and the report provided a basis for future product and application development to support the industry.

The report sub divided the sector by application such as livestock, storage of produce and machinery buildings followed by specific sectors such as horticulture, market gardens and equestrian facilities.

The general high-level split identified that the overall market was segmented 70/30 for roof and wall applications and the construction projects were split two thirds between new build and one third repair, maintenance and improvement (RMI). This result aligned the activity in the farm and agricultural sector with that of the industrial manufacturing and warehouse sector, although the internal and external environmental requirements for the farm and agricultural sector are vastly different.

It was no surprise that, in the majority of cases, farm and agricultural buildings were unheated and therefore general roof and wall cladding systems for the housing of livestock and machinery did not include or feature insulation material. The exception to this was where a controlled environment was required for storage applications, packaging and process or poultry rearing.

2 Materials

The internal and external environments found in the agricultural and horticultural sector offers challenges but, with a clear understanding of the conditions, the choice of roof and wall cladding material can be tailored to meet the demands of the application. More importantly, some specific parts of the sector require specialist products and coatings to meet exacting circumstances and specific health and hygiene regulations.

The straightforward unheated storage and machinery outbuilding is probably the easiest to accommodate with pre-coated metal based roofing and cladding products matched with an appropriate area of translucent rooflights and associated fixtures and fittings.

Housing for livestock becomes more demanding because of the need to address difficult environmental conditions and the necessity to provide shelter with an appropriate level of air movement to deliver a healthy atmosphere for managing animal welfare.

Controlled environments are more onerous and therefore more specific in their internal environmental needs. This can also have an impact on materials, systems and surface coatings to meet with demanding regulations and health and hygiene rules.

The report from Construction Markets Ltd acknowledged the fact that some materials were roof specific and others were wall specific with a selection of materials which were common to both.

The roof on rural and agricultural buildings provides the specifier with an opportunity to select from two main products i.e. fibre cement and metal which includes both steel and aluminium plus, of course, rooflights to provide a natural daylight solution for a more pleasant working environment. Both fibre cement and metal have very specific attributes and the report clearly identified that both materials were closely matched when it came to market share but modern metal solutions offered many advantages at the installation and operational stages throughout the life of the building.

The choice of a metal-based solution was particularly relevant for buildings subject to a controlled environment, those which were required to meet strict health and hygiene regulations and those being used or adapted for rural diversification projects.

In contrast, for wall applications, the opportunity to specify a range of materials provided choice but, in many cases, choice was limited by application, end use and fitness for purpose. Heavy masonry for walls at lower levels falls clearly into a category which requires a product that is fit for purpose and one which could accommodate the rigours of a demanding and arduous life. The report identifies the systems, which is one used for low level applications in containment situations where bumps and knocks from either machinery or livestock can be handled without major damage.

At higher levels, above masonry walls, the research found that open sided structures with a light netting or mesh provided a degree of weather resistance for the housing of large livestock and this was narrowly followed by close timber boarding which offered a more robust solution for certain applications. However, the report clearly identified that metal-based systems and solutions lead the market with a share of over 35% of the total applications.

Discussion across the market sector, after the report was published, highlighted that there is a wide-ranging choice of materials available for different applications and the specified solution has to be based on detailed knowledge of the end use. However, metal based roofing and cladding solutions offer the widest opportunity for both roof and wall applications for the following key reasons:

- Product availability
- Cost
- Ease of installation
- Operating performance
- Colour and form

- Compliant with rural planning regulations
- Available as insulated or uninsulated systems
- Structural integrity
- Systems compliant with health and hygiene regulations
- Modern day appearance for construction of rural diversification projects

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