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Size matters

C&a heavy duty scissors

Like most things in life size matters and this also applies to the world of cranes and access. Whether it is the small and compact minis (see feature on page 17) or the huge, 1,200 tonne All Terrain cranes, size brings its own benefits/problems and advantages/disadvantages. The aerial lifts currently reported as providing one of the best returns on investment and utilisation are the heavy duty and large or narrow scissor lifts. We take a closer look.

In the latest C&A UK and Ireland Rental Rate Survey a surprising statistic popped out from all the data - big scissor lifts are in big demand. This is also backed up by Riwal UK (see article on page 36) which is building up its company on the back of cross-hiring large booms and scissors. Demand for big product obviously exists but with the double whammy of the economic recession and reduced bank lending, few companies are able (or want?) to purchase high value machines. Those that can are therefore 'making hay' while the current situation remains.

In previous Rental Surveys the small electric scissor lifts have almost unanimously been reported as the powered access product providing the best return and the best utilisation. Over the 10 years or more we have been collecting the data, Rough Terrain scissors have yo-yoed up and down the charts being incredibly well utilised during peak construction activity and then crashing to pitiful levels in the slumps that followed and to average performance in the intermediate times.

Unusual results

The 2010 Survey however recorded



unexpectedly high levels for both utilisation and returns for big scissors an unprecedented result that had us doing a bit of checking. It would appear that the big change is a result of the type of products that are now beginning to populate this sector. Until relatively recently a big scissor lift was generally considered to have a 40 to 50ft platform height, up to 680kg of platform capacity, an overall width approaching 2.4 metres and an overall length approaching four metres. Other 'musts' included four wheel drive, good gradeability and a dual deck option.

This is changing though with a

significant number of larger and heavier duty or more specialised models now available in an increasing number of countries, including the UK. Investigation also revealed another buoyant big scissor sector – the 14 to 20 metre working height, heavy duty narrow electric scissor.

The largest scissor of them all is currently the Holland Lift 4x4 Megastar G-320DL30 4WDS/N - with a platform height of 107ft or 32.7 metres and a 1,000kg platform capacity, even on its three metre deck extension. It measures seven metres long and is just under three metres wide. This monster



A Holland Lift Q-135EL24 being used to pour concrete columns



Two HAB tall and narrow scissors working on a new warehousing contract

heavy duty scissors C&A



The PB scissors offer exceptional levelling capability

traditionally sold as a diesel is also now available with battery electric power. German producer H.A.B says that it is planning to introduce a 30 metre machine this summer but with a width of 2.5 metres and a gross weight of 29 tonnes both of which would make it easier to transport - although there will of course be some form of trade-off, possibly a small deck, lower capacity and limited drive height.

Dutch German consensus

This type of product type emerged in Holland and Germany in the early 1980s as much out of a dissatisfaction with the larger scissor lifts on the market at that time, with their unstable platforms and poor reliability. A number of Dutch rental companies and large end users were prepared to pay for a product that offered a more rigid platform, a capacity that suited the large deck size with better reliability and durability. Holland Lift obliged and the new products quickly found a ready market in Germany where the owners of the small rental companies that dominated the market appreciated the heavy construction and the use of high quality European components. In fact they were prepared to pay

almost double the price of the equivalent American or British products on offer at the time.

In other markets, such as the UK, buyers were more focused on immediate returns and could not bring themselves to pay a 100 percent premium, for a lift that was likely to go out, most of the time, at the same rental rate - better to have two cheaper machines.

However this type of product began to carve out a space for itself in the UK in the mid 1990's with the arrival of Liftflux with its greater lift heights. As the market has continued to mature, it is clear that even UK users are now appreciating the benefits of this type of lift for an ever wider range of jobs and current rates and utilisation levels are making them a good investment.

Having originated and developed this sector the market is supplied almost entirely by Dutch and German manufacturers - Holland Lift, PB Liftechnik, HAB and JLG/Liftflux. Holland Lift is without question the dominant player, having almost single handedly been responsible for the development of the heavy-duty scissor lift. The company introduced the first really

'big' scissor - a 20 metre machine - way back in 1986.

In the UK, Holland Lift's dealer is West Midlands-based Russon Access which it owns 50/50 with founder Alan Russon, who has become one of the most experienced people in the sector. Russon's

appointment in 2004, followed many successful years representing the Liftflux range of heavy duty scissors which he had introduced to the UK market after his Skyjack distribution business became a casualty of the downturn of the early 1990's. As a Skyjack distributor he had a great success with the company's 9250 dual-deck scissor lift - a product still popular to this day and one that fits between the two categories of full size scissor lifts and heavy duty models.

The Liftflux story

Liftflux was rebranded for a period as Manlift after it was acquired in 2000 by Manitowoc as part of Potain, who had in turn snapped it up the year before. In late 2003 the closure of the Liftflux plant was announced, leaving Russon with an uncertain future. Following the Liftflux thread for a moment - JLG, Haulotte and Skyjack all took a look at what was the Delta Manlift business, however it was JLG that finally acquired the business, which included Toucan mast booms, Liftflux scissors and Grove booms, just before Bauma 2004. JLG ran its finger over the Liftflux designs and market potential throughout 2004, finally confirming that it would build some of the range - models over 15 metres/50ft - at its Maasmechelen plant in Belgium, with the first deliveries made in the spring of 2005. The JLG Liftflux product line initially comprised the SL172, the SL205, the SL210, the SL260 and the SL320 with platform heights of 17 to 32 metres. In the intervening years JLG has rationalised the Liftflux range so that currently there are currently just

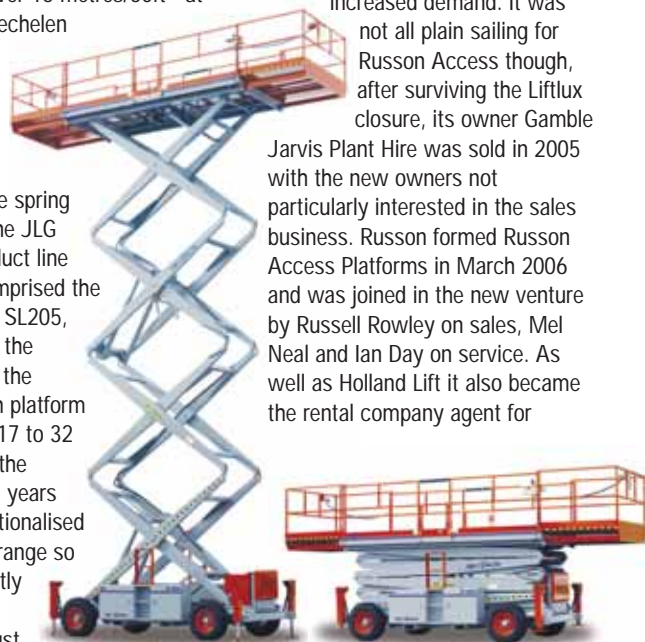
three diesel scissor lift available - the 203-24, the 210-25 and the 245-25 - and there appears to be some uncertainty with the long term prospects for the line.

In the early days, the Liftflux designs were very similar to those of Holland Lift having emerged from the same company in the mid 1990's when a number of employees left Holland Lift, then owned by MBB, with some of the designs to set up Liftflux. Liftflux gradually became a more popular product, thanks to it building a wider distribution network, possibly along with lower prices. After a number of financial failures it was acquired by Potain which then became part of the Manitowoc group which.....

Back to Russon who carved out a substantial niche for the high working height and narrow width scissors in the UK and Ireland despite initial price driven reluctance. However the increase in glass façade buildings, taller, high-rise warehouse construction and the fact that these large deck machines were ideal for cladding, roofing and sprinkler installation increased demand. It was

not all plain sailing for Russon Access though, after surviving the Liftflux closure, its owner Gamble

Jarvis Plant Hire was sold in 2005 with the new owners not particularly interested in the sales business. Russon formed Russon Access Platforms in March 2006 and was joined in the new venture by Russell Rowley on sales, Mel Neal and Ian Day on service. As well as Holland Lift it also became the rental company agent for





A HAB with lateral extension



Tall narrow scissors are ideal for warehousing and racking applications



Attachments are becoming more popular on big machines

Manitou boom lifts. Rowley left in 2008 to form his own company R2, taking Manitou with him and Russon added Italian manufacturer Iteco to its range.

Holland Lift has also had a chequered history. Founded in 1984 it was rescued in 1993 by MBB - a division of Daimler Benz and sold to Terex five years later. The high value machines did not sit well with the Terex philosophy and the company was sold to Chicago-based agricultural and construction equipment manufacturer Stoneham Equipment in 2002, with sales director Menno Koel and financial director Pieter Boogert acquiring a minority stake. Five years later the two teamed up with a small Amsterdam-based private equity firm to buy out Stoneham (owned by Roger Tracey) while boosting their share in the business to 40 percent. Not long after it also took a 25 percent stake in Russon Access which was later increased to 50 percent. The company has now settled into full management ownership and has been increasing production consistently in order to keep pace with growing demand.

Today Holland Lift's largest markets are Holland, the UK and Germany. The UK market for these heavy duty scissors has continued grow throughout the recent slowdown, when sales of many other products almost dried up. Russon says that

the UK population of Holland Lifts is now approaching 200 units. At last year's Vertical Days it closed a £2 million deal with AFI-Uplift - which included three, 32 metre Megastars and six 16.5 metre N-165EL-12 and 19.4 metre N-195EL-12 Combistars. The new additions gave AFI the largest fleet of 32 metre scissors in the UK with five machines along with more than 35 Holland Lift narrow electrics.

This year looks set to be our best year for sales in five years," says Russon. "There are already 24 big Holland Lift scissors on order and with the interest in the new 14 metre working height 11812 Ecostar, we are forecasting 40 to 50 machines this year compared to a normal year of 20 to 25 units. Surprisingly all the units on order this year are for electric scissors - last year it was all diesels, primarily replacing older 10-12 year old Liftflux machines. In all we took in 30, 22 metre Liftflux machines as well as some Skyjacks which were then resold into Eastern Europe."

Higher platform height electric scissors seem to be the flavour of the month and this bodes well for the new Holland Lift 11812 Ecostar which is a compact model, more comparable dimensionally with the mass-produced 26 to 32ft slab scissors than traditional Holland Lift products. The new model will naturally go up against Haulotte's Compact 14 and the Iteco IT12122 which are lighter duty models that almost certainly carry a more attractive purchase price.

Narrow 14 metres working height - a crossover

The market for narrow aisle lifts above 32ft /10 metres platform height has until recently been limited to the heavy duty, narrow and long products from Holland and Germany. Iteco and Haulotte have challenged that by stretching their 32ft models to almost 39ft and the sector is just being to take off - Haulotte launched the Compact 14 in the USA this month as the 3947. Holland Lift is now set to add to the new sector with a higher version in its lower cost, more compact Ecostar range in the form of the 38ft 11812.

Russon explains: "The Holland Lift N165-12 is probably the company's most popular electric scissor but many go out on jobs not requiring

the full working height. There is nothing much available above 10 metres platform height until the massive 15 metre models so a less costly, more compact 14 metre machine fills the gap, both in terms of height, size and cost. The 14 metre compact models cost around £30,000 less than the larger narrow models. There is absolutely no point paying £50,000 for an 18.5 metre working height N165-12 to put it out on a 14 metre job that might only bring in £250 a week, when a 14 metre Iteco would give a 1 to 1.25 percent return on that rate."

"There are now 15 or so 32 metre Megastars in the UK which should satisfy normal market demand. The larger machines can be rented out - with a height limiter - for lower jobs, but the difference in revenue can be significant. A 32 metre scissor for example has a weekly rental of between £2,250 and £2,500, compared to weekly rental of say £1,000 for a 27 metre model."

"The hot sector at the moment is the 14 to 20 metre narrow electric scissor with drive at full height option which saves operators time and extends the machine battery life. The £500 cost is a small percentage of the overall cost of around £70,000 for a 20 metre narrow electric scissor. Retro fitting the option is up to £2,000," says Russon.

Rival UK has also rapidly built up a fleet of 18 Holland Lifts including



The new 14 metre from HAB

heavy duty scissors C&A



two 32 metre units, four 25 metre and 12, 20 metre diesel machines all sourced from its Dutch-based parent, Holland Lift's single biggest customer. Holland Lift's success in the UK has inevitably encouraged the other heavy duty scissor manufacturers. PB Lifttechnik of Germany appointed Ranger Equipment as its dealer in 2009 and at Vertikal Days last year H.A.B announced the appointment of Ascendant Access. H.A.B claims to have supplied more 28 metre platforms – 35 units worldwide - than any other manufacturer. Andy Northwood of Ascendant says: "There are only a handful of companies in the UK buying 22 to 32 metre scissors at the moment. A 30 metre scissor is a big investment and takes a lot of confidence to purchase. Finance companies are also reluctant to back such a purchase, so we have decided to start out with the new 14.2 metre, 1.2 metre wide model that was launched at Bauma and is now in full production. We need to find a gap in the market and this product gives us more opportunities being closer to mainstream products, while still specialised. We feel the H.A.B product is a more

modern design with superior quality steel and components than the mass produced models."

H.A.B sales manager Frank Thierer adds: "The company and product is very popular in Germany, Austria, Spain and Holland but in the UK we are starting from scratch. Our approach to machine design is more technical and products tend to weigh a more but are stronger. Liftflux used to sell 50, 23 metre machines a year in the UK and these are now reaching the end of their useful life." H.A.B has tended to build more specials than some of the others and has found a ready market for its lateral platform extension option. Its 14.5 metre platform height S 165-24 D4WDS for example has a lateral side extension of 1.2 metres, with 500kg capacity. It also equips most of its machines with four wheel drive, four wheel steer, oscillating axles and self-levelling jacks as standard.

The number two producer in the heavy duty scissor market is PB Lifttechnik, and is now possibly the market leader in Germany. Its products tend to be a little different with a unique scissor stack design and exceptional levelling and off-

road ability. The company has made inroads in Holland but has so far struggled to gain any volume in the UK, although Yorkshire-based Lifterz took delivery of the first two machines - the 68ft/20.5 metre platform height PB 225-12E, narrow aisle battery powered units last year.

PB has been manufacturing aerial lifts for nearly 25 years but scissor lift production only began in 2003 following a major safety issue with over 800 German Standard Lift scissor lifts. Problems included cracked scissor stacks and faulty brakes. As a result of the claims GSL went bust, but PB stepped in and developed a cost effective repair for the units and has since taken over where GSL left off.

A major distinguishing feature of a PB scissor is its main lift cylinder located half way up the lift mechanism which it says reduces weight on the larger machines through using a single cylinder, while reducing stress on the lower arms. Another feature is the dual sized scissor pack which provides a better closed height, while lowering the centre of gravity to within the bottom third of the fully extended machine, providing a lower weight with increased stability.

Lifterz specialises

Rental company Lifterz has a few 18 to 22.5 metre diesel scissors, but promotes itself as specialists in the tall and narrow electric scissors.

"We are making this type of equipment the company's USP," says founding director Malcolm Bowers, "not that we have seen a huge growth in this market but many other rental companies have sold their specialist equipment and are concentrating on bread and butter mainstream products, such as the 19, 26 and 32ft slab scissors. The problem with investing £70k in a big scissor is that when it is standing in the yard it is costing a lot of money."

Having said that the company has recently added four 53ft Genie 5390s bought from Limerick-based Skylift as the company downsizes its fleet from 800 to 150 machines. "Our machines are aimed at the fit-out sector rather than construction and we are in the process of developing and CE marking our own pipe stands. The narrow, tall electrics are designed for the high bay warehousing/ sprinkler/ racking/ ventilation and extraction sector. After a slow start with the PB225s we now rarely see them. The PB is fantastic for the

few sites that need to go to that height but only a few warehouse jobs really need more than 20 metre so we are now investing in eight Holland Lifts – two N195s, two N165s and four of the new 14 metre working height Ecostar 11812s - which covers the majority of the high bay market and the areas we are trying to develop. Whatever we buy it must be driveable at full height. We are also investing in the latest double-deck Skyjack 8841E machines. The 2011 models are now driveable at full height."

With the four new 14 metre working height Holland Lifts, Lifterz will have 27 units in this class of machine, the majority being the Iteco 12122.

"We have been in discussions with HAB regarding its new 14 metre although the machine is too high a specification," says Bowers. "We don't need oscillating axles and differential flange sprockets as 90 percent of the time it would go out as a regular machine so a more basic model would suit us better."

"With 450 units in our fleet we are a small player and the eight new Holland Lifts are a big investment for us. We will go bigger at some point – Holland Lift does a 26.5 metre 1.3 metre wide machine but we will take some work before we are ready for machines of that height. At the moment we are not seeing any demand for 25 metre electric scissors."

"We aim to get about 1.25 percent of the purchase price per week for the shorter life machines such as the Iteco and would love to get one percent on the long-life equipment such as the Holland Lifts but more typically achieve around 0.8 to 0.85 percent a week at the moment."



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Thoroughly nice people to do business with

Riwal is one of Europe's leading access and telehandler rental brands with operations in 14 countries across Europe as well as Brazil and joint ventures in several other countries in Europe and the Middle East.

However since it started in 1968 it has not had a permanent presence in the UK. That is until June 2009 when three experienced senior managers – Tim White, Dave Freebody and Les Warren – had an idea. Cranes & Access visits a very busy head office to find out more.....

Based in Chelveston near Rushden, Northamptonshire Riwal UK appears to have landed on its feet. The tightly-knit company has three experienced, hands-on joint owners, keen on the long-term success of the company, willing to put in the long hours, hard work and financial sacrifices needed to make it work.

"We all worked together in the South East region of Nationwide Access looking after a couple of thousand machines and knew each other well but left amicably after the acquisition of The Platform Company," says White. "While playing golf one day we talked about doing something together. We were all out of work, had been employed in senior positions and had 50 years of combined experience in the access industry, so we thought about starting a small rental company hiring electric scissors in the Hatfield area which was equi-distant to where we all lived."

Les Warren, knew Riwal's Jeff Eisenberg however and he suggested a meeting with chief executive Dick Schalekamp, which resulted in the three forming Riwal UK.

Whilst the idea of a UK operation was not on Riwal's list of 'things to do' the downturn in the European economy had reduced its utilisation levels and with a fleet of over 12,000 platforms, even a small percentage reduction in utilisation leaves an extra 1,000 machines available. This fact combined with Riwal's policy of moving when and wherever it finds entrepreneurial people that fit with its family-type culture sealed the deal.

Experience gained from their days at Nationwide meant that all three knew that the prospects for a new player with a fleet of 45ft booms and 19ft scissors were not rosy, those market sectors were overcrowded and rates were sinking fast by 2009.

Going for big kit

"We knew there was, and is, a gap in the market for big kit – 25 to 30 metre diesel scissors and 80ft plus booms - with customers sometimes having to join a waiting list to hire them, and we quickly realised that this would be the best for long-term success," says White. "There is still a decent market for this type of equipment in the UK and with Riwal having a ready supply of big JLG booms and Holland Lift scissors this was the route we decided on."

"We then discovered niche products for warehousing such as high, narrow electric scissors - Holland Lift N265s, N195s and N165s - products highly utilised in Holland, but the downturn meant there was some spare capacity while there was a shortage in the UK - so it all fitted together very nicely. Now 18 months on, we still have more 80ft booms than 45ft in the fleet and are sticking to the niche 'big kit' market."

Riwal UK was also aware that many of the independent access rental companies were unable to secure finance during the crisis for new equipment purchases and were turning away rentals for this type of equipment.

"Our first port of call was to these companies offering the big equipment, allowing them to offer the larger and more exotic booms and scissors. A lot of our work is still re-hire, including supplying most of the top 10 national access companies."

Although head office administration is in Chelveston, the company has depots in Wellingborough and to the East of London. It also has well-developed plans to open in the West of London (in the Heathrow area) and further

Two Holland Lifts - a M250 and T210



A JLG 1350

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A 450AJ on a steelwork contract

north in the Birmingham/Stoke area. According to White the geographic spread of depots is purely to reduce transport costs rather than to compete in the local market.

"If we get a week's hire for a JLG 1250 in Swindon, transport may be £500 each way, add this to the machine rate and we lose competitiveness. Where we have a local depot however we also offer a wider product range."

The three are also considering another two depots 'further north and Scotland' by the end of next year. "At the moment it is difficult supplying large kit to the north and Scotland for short hires," says White, "for the longer contracts – such as a six month job for a large number of machines in Teesside - we provide a permanent engineer. That job was won through our relationship with Riwal Holland and really got us going in the UK. The customer was looking for a Holland Lift N265 which they had previously hired from Riwal in the Netherlands. We were able to supply a brand new machine and this led to more and more of our equipment being requested on site."

With a ready supply of modern, large equipment which is in demand, a healthy re-hire business and growing local business, the three founders look like they are onto a winner.

"We have been very open with our customer base and have been doing a lot of work in Northern England, East Anglia and the South West where we have put equipment into rental company yards on spec, allowing them to take rentals, PDI



JLG 800AJ

and deliver machines that they would not normally have in their fleet. This allows us to keep costs down but the key element is honesty and trust between both parties – which is also the philosophy of Dick Schalekamp. Dick has been tremendously supportive with supplying and making equipment available. In return, we had to show our commitment by getting the company up and running on our own and as such each of us worked for six months without taking any salary."

"We are currently working on a five year business strategy but have submitted a plan for 2011 that

includes an increase in the fleet numbers (202 units - up from 37 in 2009, with a plan for well over 400 this year and who knows how many by the end of 2012) and a doubling in turnover," says Dave Freebody. "Initially we approached customers that we knew and built up a fleet of 20 units. We then worked on having a stock over here that we could draw on, rather than getting machines from Holland every time we needed more. We took a consignment stock of new Mec electric scissors which they had in Holland, while the larger equipment is sent over when we have work for it, bearing in mind Dordrecht is only one night away, but tends to stay

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A Rival truck mount

here when the job is finished, becoming part of our fleet through a rental purchase scheme."

"Some equipment though - such as the 30 and 36 metre Teupen spider lifts that we supplied to the Olympic project - were taken in on a pure re-hire basis from Rival International, knowing that when the contract ended we would not be able to keep them all busy. We don't want to get into a sector that we know nothing about - such as the spiders, No single company could have supplied that number of large Teupen platforms so quickly. With a choice of 12,000 machines it gives us the flexibility others cannot match."

Rental rates?

"We are generally happy with our re-rent rates but have tried to push rates up," says White. "everyone we talk to says it is getting better - apart from the £145 a week for a Z45 madness! Which we stay well away from"

The company expects the fleet mix or balance, to remain roughly as it is over the next two years. Rival UK currently has ten JLG 1250s and five 1350 big booms and this is set to double by the end of the year. It also runs JLG 800s, 600s and 450s - with more of the larger units than the smaller - and a fully refurbished 150ft JLG 150HAX.

"The vast majority of the machines we are adding this year will not be

19ft scissors!" says White. The company does though have a sizeable fleet of Holland Lift diesel scissors including two 32 metre, four 25 metre and twelve 20 metre units. Utilisation is said to be 'very good' running at close to 90 percent for these specialist heavy duty scissor lifts. In 2009 when we started Rival had quite a lot of excess equipment parked up at its Dordrecht head office. Now the economy is picking up there are fewer and fewer of these machines. We certainly started at the right time."

"It was reassuring to find that the Rival brand and name is strong in the UK which has helped us get started," says Freebody. "Each of the new depots which should be up and running by the mid to third quarter of this year will be fully operational with hire desk, engineering and sales personnel. Up to now the three of us have pretty much been doing everything ourselves. This expansion will take the current total of 15 staff to around 22 by the end of the year."

But where will it end?

"If we continue on the current growth plan we may reach a fleet of 1,000 machines within three years or so," says Freebody, "but where we will go from there, who can say? As we grow the rehire business will probably shrink as a percentage of the total, but it will always be there as buildings

continue to get bigger, higher, narrower so more specialist kit is needed. We are also willing to partner other companies to cover certain regions, rather than go into competition.

Equipment choice

The equipment the company adds to the fleet naturally follows Rival's purchasing policy, which of course offers a number of benefits. If there is a local need however for other equipment that Rival does not normally buy, the three have to put forward a solid case for it. An example given was for Niftylift HR12s for their low overall weight. If the case stacks up there is generally no problem in obtaining it they say.

And leaving the final word to the three - "Our overall strategy is simply

- to become an acknowledged access equipment specialist in the UK, renowned for its high level quality, service and responsiveness. And so far, we are making the planned progress."



Rival UK can draw on a substantial fleet of Teupen spiders



A Holland Lift G300D working in London