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Truck mounted Catch 22?

Over the past year or so there have been several interesting additions in the 3.5 tonne truck mount sector from the unusual - CTE 20.13MP and Cela DT21/24 - to the 'has it gone too far' 26 metre articulated CMC 260 and 27 metre Ruthmann TB270. All of these new machines offer advantages in one area or another - more working height, more outreach, more up and over capability or more versatility - BUT so far these exciting new products have only captured a relatively modest slice of the 3.5 tonne market. We take a look at the new additions to the self-drive sector and ask are they too radical for their own good?

Our last truck mounted platform feature in November 2010 (volume 12, issue 8) reviewed and compared the recently launched Cela DT21 and CTE 20.13 Multi Purpose. Since then Cela has added the larger DT24, first shown at Apex in September. Even the hardened access hacks at the Vertikal Press were excited by these new products. The new designs and features they offered looked as though they might take the 20 metre, 3.5 tonne sector to new heights, building on the original double boom concept launched in 2004 by Multitel Pagliero with its MX200 series.

But what has happened since?

Our enthusiasm for the products has not been reflected in sales of either machine although both have had considerable success in the German market, (CTE says it has orders for 56 units mainly in Germany but also in France, Italy and Belgium) where technology is possibly more appreciated for its own sake. In most other markets, end users and truck mounted rental companies have been 'playing safe' and sticking with the more traditional 18 to 22 metre machines, where an increasingly wide choice of products, means they are spoilt for choice.

Designed as dual purpose machine, the CTE MP can operate as a telescopic platform up to 13 metres and articulated to 20 metres, while its elevated slew ring eliminates any possibility of tails swing. A fantastic concept but is it too 'different' and perhaps complex for its own good? The fact that Germany is now buying in reasonable numbers (particularly arborists) means that they are at least getting to grips with the concept and feed-back suggests they like using it as well. But then the German market is different - for example the Bison counter rotating slewing system - now the Palfinger KS - is much appreciated in Germanic markets,

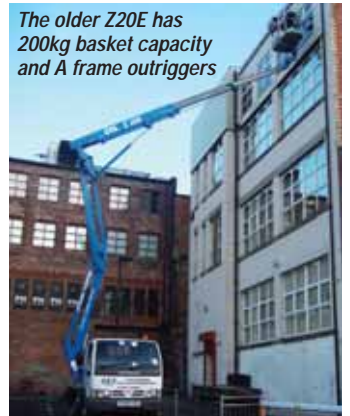


but considered to be overly complex and expensive elsewhere, in spite of all the advantages it offers.

The UK on the other hand has not yet shown much serious interest yet (zero sales) seeming to prefer the lower cost simplicity of CTE's multi-machine Zed range, such as the Zed 21J which has more up and over capability although it has A frame outriggers rather than the MP20.13's H type. The MP can also operate with its outriggers fully retracted, one sided and without jacks if required. The Cela DT21 on the other hand only has maximum outreach over the rear of the chassis. It is also much shorter than the MP but only with the basket removed and stored on the machine and which needs two people to fit when on site.

Both the CTE MP and Cela DT21 offer 200kg platform capacities, which as we discuss later, is perhaps not enough for fully

The older Z20E has 200kg basket capacity and A frame outriggers



equipped two man working, although both incorporate automatic and progressive overload systems, so technically a greater capacity could be easily offered at reduced outreach, assuming the structure is up to it. The more basic CTE 21J, which also has 200kg capacity, can be converted by installing a collar in the telescope cylinder to the 800mm lower 20J, boosting platform capacity to 230kg.



The CTE ZED20 CSH with H frame stabilisers and 250kg platform capacity



CELA launched the DT21 at SAI in 2010

Crowded marketplace

In recent years there has been almost constant demand for platforms mounted on 3.5 tonne chassis. A big part of this is the change in European driving license classifications, which limits the size of truck you can drive on a standard car licence. As each year passes fewer people are allowed to drive larger trucks without a special HGV licence. Demand for physically smaller vehicles is also being driven by increased congestion in city centres and other urban areas as well as environmental pressures.

Outside of Germany, in markets such as France and the UK, Multitel, CTE and GSR have been leading the charge, along with other Italian manufacturers which together dominate the sector. In the home market and increasingly overseas Oil&Steel, Socage, Isoli and CMC are also chasing hard, each with their own strong holds - for example Socage has done extremely well in Italy since it uncoupled from Fassi, while CMC has a particularly strong position in Holland and is now looking to replicate that in the UK. At the same time more recent entrants such as Hinowa and Easy Lift are looking for a slice of the action.

German manufacturers including Palfinger and Ruthmann unquestionably produce an excellent product but are often seen as being either too expensive or in some cases too complicated for the self-drive rental sector. Meanwhile in the UK, British truck mounted lift

manufacturer Ascendant is carving out a place for itself, building on the reputation of its 22 metre 7.5 tonne platform and gaining more followers for its relatively new 18 metre unit.

Staying in the UK the country's largest truck mounted access rental company - EPL Skylift, recently rebranded as the Specialist Vehicle Division of Nationwide Platforms - is looking to spend around £5 million on new truck mounted lifts in 2012, but will not be looking at the more 'unusual' products. According to executive director Rob McMeeking, Nationwide is spending money on replacing its older 3.5 tonne platforms including some of its 70 strong fleet of 20 metre CTEs.

"We are not in the position of being 'early adopters' with new products and prefer to concentrate on providing proven equipment for our customers," he said. "When others have tried these new products then perhaps we may look at adding them to the fleet."

Nationwide is not the only rental company with this 'play it safe' equipment policy and herein lies the crux of the 'Catch 22'. New products that introduce new concepts may offer several advantages for an end user, but until proven or demand has been developed, it struggles to sell to major rental companies. Without sufficient exposure end user demand is not generated and so it remains unproven and demand is not developed. In this way rental companies often serve as blockers to technical advances and new



The Ascendant 22m on a 7.5 tonne has won over many users



CTE 20.13 MP



The Hinowa Orchidea



The low weight Nissan Cabstar is a very popular chassis in the 3,500kg category



This 22m comet Eurosky was launched at APEX



Isoli PNT205S



concepts, particularly in markets where the vast majority of users rent, rather than buy. On the other hand this 'wait and see' attitude can offer up-and-coming rental companies a perfect opportunity to differentiate themselves from the larger companies as has already happened in the spider lift market. However it needs a good number of smaller companies to promote the concept in order to make an impact and create sufficient demand for the 'big boys' to take note.

Specialist machine impact?

It is a fact that the CTE 20.13MP or the Cela DT21 have yet to make a



The 20.13MP in transport mode

significant impact on the overall European market. Our review last year compared these two machines with the Multitel MX200 which had enjoyed enormous success since it was launched, in part helped by



An Ascendant A18-13 at Vertical Days

being substantially lower than any other machine on the market at the time - of particular interest was the fact that it could easily pass under a 2.5 metre overhead obstacle, opening up a wide range of applications, particularly in Southern Europe. Although the Cela DT21 is substantially lower than the MX200, at 2.007 metres compared to 2.435 metres, once you can pass under 2.5 metres the next break-point is possibly two metres? So little has changed over the past year. According to Multitel, the MX200 continues to be its single best-selling model and it claims to have made further penetration into export

markets with its MX225 and more recently its "class breaking" MX250. "In its first three months on the market the Multitel MX 250 has achieved more orders than the CTE 20.13 and not much less than the Cela DT21 has achieved since it came to market," says Melvyn Else of Access Industries, the UK Multitel distributor. "Whether it is the present economic climate, the reluctance of rental companies to try new things, or the fact that the new models provide solutions to problems that are not encountered often enough to generate immediate demand is not clear."

A Ruthmann TB270 used by an arborist

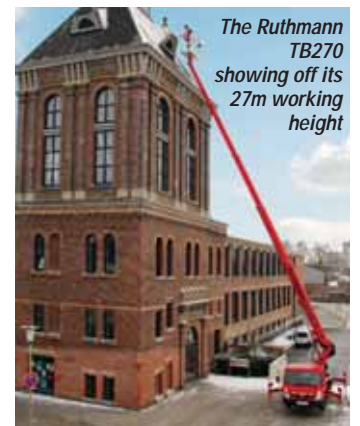


UK manufactured platforms

As in many other areas, the UK has often been 'different' from mainland Europe when it comes to cranes and access equipment. These days there are very few dedicated truck mounted producers in the UK although the van mounted lift sector is well served. Ascendant Access is looking to change that. Although times have been hard for the fast growing business, it has survived the recent downturn and a lack of funding due to the short termism of UK banks. It recently moved into larger 1,500 square metres (16,000sq ft) premises in Gateshead, in north east England, in order to satisfy a healthy order book for its machines that continue to be designed by owner and managing director, Steve Dean.

C&a truck mounts

Its latest platform - the Ascendant 20Z - features a sigma type articulated riser and boom complete with 120 degree articulated jib and is mounted on a 3.5 tonne chassis which gives nine metres of outreach with a decent 250kg platform capacity. Ascendant has always had a slightly different design philosophy to other truck mounted manufacturers, tending to look at outreach first and foremost, with the working height being almost a bi-product. With outreach a very important element of the 20 metre truck mounted sector it has the required height, good outreach and good capacity. Features include H



The Ruthmann TB270 showing off its 27m working height



PT 225 Truck mounted platform

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type out-riggers, aluminium basket, IP67 water proof rated electrical system, and straight forward full-hydraulic controls, all of which should result in a reliable and user-friendly platform at an economic price. Other nice touches include, marine quality rods on exposed hydraulic cylinders, shot-blasted and powder-coated paint finish and stainless steel pivot pins and fastenings, plus all models come with timber outrigger mats as standard.

Ascendant is having some success with this platform and together with CTE, GSR and Multitel account for most of the 20 metre, 3.5 tonne chassis demand in the UK.

Pushing the envelope

Over recent years there have been several platforms that push the working envelope on a 3.5 tonne chassis to the extreme. Two platforms lead the way - the straight boomed 27 metre Ruthmann TB270 and the 26 metre articulated CMC 260 launched in September at Apex, where Multitel also unveiled its MX250.

The extraordinary performance of the Ruthmann TB270 which not only has a class leading height of 27 metres but also offers a 14.8 metre outreach, has been achieved by using ultra high-strength, fine-grained steel in the boom. The boom sections also feature single-weld construction and flanging.

"By using high-tech materials, we have not only been able to improve overall performance but have also increased the platform capacity from 200kg to 230kg," says Ruthmann. The TB270 is available on a variety of chassis including the Sprinter, Maxcity and Cabstar or

Multitel says its MX200 continues to be its best-selling model



four wheel drive/off road chassis. Mounted on a Nissan Cabstar the CMC TB260 has a maximum outreach of 13.5 metres and a 200kg platform capacity. The company's existing 24 metre unit is still available, giving customers a lower priced alternative. However as with all types of aerial lift, one of the critical operating factors is the general feeling of stability and safety when operating while elevated. In order to achieve these increasingly impressive platform heights within the weight limitations, manufacturers must use a stronger, thinner steel structure, the downside of higher tensile steels is that they tend to be more flexible or spring like, which can be detrimental to the 'feel' at the end of the boom.

In addition to everything else 3.5 tonne chassis are getting heavier, the latest Euro 5 engine Nissan Cabstars for example is around 30kg heavier than the outgoing Euro 4 version, meaning manufacturers have to save weight just to stand still, before they consider adding extra height or outreach.

Platform capacity is also an increasingly important factor, with more end users preferring 230kg or even 250kg to the more typical 200kg. Manufacturers are required to allow 80kg per person plus 40kg for tools etc. But a fully clothed, booted and harnessed person is increasingly likely to weigh around 100kg, especially as obesity becomes more of an issue, leaving a 200kg 'two man basket' close to, or over its rated capacity before you even consider tools and equipment. The fitting of platform load cells that progressively limit outreach and height, is surely a welcome addition in this area?

Overweight or not?

With the weight of 3.5 tonne chassis growing all the time, manufacturers specialising in this sector of the market are very aware of the challenge of complying with the road regulations. Even using the latest high strength steels, weight reduction is obviously increasingly more difficult. There is only so far manufacturers can go to taking out weight before the instability or 'feel' factor kicks in.

Multitel is one of the few manufacturers to use aluminium booms on its platforms to help keep weight down. At Apex it also showed off an aluminium sub-frame on its 25 metre MX250 articulated boom mounted on a 3.5 tonne



The Cela DT21 has now been joined by the larger DT24



CMC TB260



Oil&Steel 2311 Snake Compact REL



CTE 20.13MP just using the telescopic boom



Multitel MX200



Teupen Euro B18GT

chassis. The unit has up to 12.2 metres of outreach and thanks to the new sub-frame is said to weigh in at a reasonable 3,280kg.

We have heard (unofficially) of VOSA guidelines in the UK, that automatically imposes a fine if a truck is up to five percent overweight, although this has not been confirmed. As with all these regulations, guidelines will remain as guidelines until there is an accident and a legal precedent is established.

With all these contributing factors the weight that manufacturers have to play with is constantly being squeezed, and with all the paraphernalia carried by operators, it is increasingly easy to exceed the 3,500kg maximum. Surely there has to be some point where manufacturers will be unable to reduce weight and be forced to return to lower machines?

Re-branded

International access rental company Lavendon recently announced a consolidation of its UK operations - Nationwide Platforms, EPL-Skylift and Panther - under the Nationwide Platforms brand. But how will this affect the largest truck mounted rental fleet in the UK? Cranes & Access spoke with Rob McMeeking, executive director of what is now known as Nationwide Platforms Specialist Vehicles.

"EPL-Skylift was already working closely with the self-propelled side of the business so this 'consolidation' will not involve any major changes to the way the business is run," says McMeeking. "By early next year, it was already our plan for the Leeds, Manchester and St Albans depots to be the only 'stand alone' vehicle mount depots, with all the others in joint locations. It does not involve any changes to the way we interact with customers. They will speak to the same teams they do now and can expect the same high levels of service. It's just that having two depots in an area rather than a single shared one, means significant duplication of costs - such as two wash bays at £25,000 each and expensive IT connections - so co-locating makes sense on so many different levels. We would have continued with this strategy irrespective of the branding."

By its own admission, Nationwide Platforms configures its fleet to provide national coverage and so it is typically not an early adopter of niche products. So what does it make of the latest, more unusual offerings on 3.5 tonne chassis?

"We keep up to date with new developments and have toured the Ascendant, CTE, Multitel and Ruthmann facilities this year. This gives us the opportunity to look at manufacturing processes, get a feel for the company and the quality of its products. Factory visits also allow us to talk face to face with engineers and designers about particular issues we experience with certain models and what they are doing to overcome these issues."

"We looked at the CTE 20.13MP but as yet it is unproven. However the new CTE Zed 20 CSH with H frame stabilisers and 250kg platform capacity ticked all the boxes, being



an updated/improved model. Slightly wider than other similar CTE products, it now gives us a range of 19 and 20 metre units with safe working loads varying from 200kg to 250kg. The new CSH model has the platform load cell and more precise measurement of potential overloading has to be of benefit to the user's safety."

"We look at equipment from the customer's point of view and take feedback from our customers prior to purchasing new models. In addition our technical manager tells us what it is like to maintain and flags any longevity issues - particularly on the 3.5 tonne units, where manufacturers face a constant battle to keep within the required weight.



Larger trucks can be fitted with a specific TV cage.



The business currently has more than 250 truck mounts, the majority mounted on 3.5 and 7.5 tonne chassis, and around 330 van mounts, including some that came with the EPL acquisition. For 2012 Nationwide Platforms is expecting to spend around £24 million on new equipment, of which £5 million is allocated for vehicle mounts. Larger models are not due for replacement, so most of this spend will be on the smaller machines and van mounts.

"When replacing we obviously look for updated equipment with better performance and features. We have been very pleased with the 22 metre Ascendant platforms and like the look of its new 3.5 tonne, 18 metre model which has great outreach. It is all about achieving a good return on investment - it is no use having a fantastic piece of kit if it only goes out one day a week."

Because of its size and national coverage Lavendon rarely buys single units normally taking a minimum of three to five units at a time, especially at the smaller end. It says it is adopting a 'wait and see' attitude to products such as the CTE 20.13MP.

Fleet makeup

The truck mount fleet currently comprises models from various manufacturers, a consequence to a degree of the purchase of the business and assets of EPL Access in 2009.

If he was building a truck mounted fleet from scratch McMeeking says he may well have fewer manufacturers. "Perhaps we would standardise on a manufacturer for each height/application. It keeps things simpler for both our engineers and operators. However if one manufacturer knows it has all the business at a particular height there is less room for price negotiation."

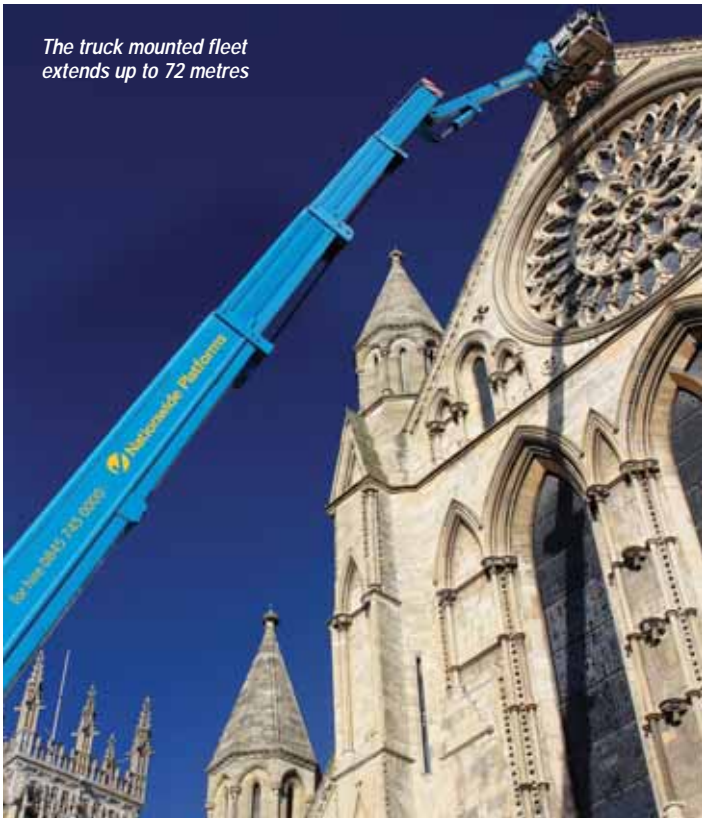
"We also have the luxury of being able to get feedback from our German sister company Gardemann,

however the markets differ as German self-drive truck mounts go to more than 30 metres, whereas in the UK only a few customers will self-drive at 22 metres and fewer still a 26 metre platform," he says. "It is useful however, to be able to share knowledge and experience when evaluating both products and manufacturers. We have a product grid to evaluate different models including backup, spare parts pricing, purchase cost, and service history. We are moving towards a system that gives cost breakdowns for individual machines, but we don't have it yet. When buying platforms above 30 metres we specify left hand drive, allowing us the flexibility to use them in any of our territories. Left hand drive units also generate higher residual values in general."

The company does run a number of specialist platforms, including track mounted machines and 4x4 units, mounted on Unimogs and Land Rovers. "Due to the specialist nature of these units, demand and hence returns can vary. The move to a single brand will help here. Our whole sales force selling our entire range can only improve returns."



The truck mounted fleet extends up to 72 metres



"During the worst of the last downturn we took the decision in our self propelled business to invest in maintenance and painting programmes to improve the quality of our equipment and service levels

to underpin our profitability at a time when other companies were cutting back. This has been of benefit to us. Customer feedback is that our equipment and service levels match their expectations. We were behind

in the specialist vehicle side of the business but have rectified this through 2011".

The McMeeking file:

McMeeking joined Lavendon in 1997 running the UK finance department following the company's flotation the year before.

In 2002 he was appointed group commercial director in charge of equipment purchases and disposals, a position he held for five years. Work also involved commercial input on fleet replacements and due-diligence on the group's acquisitions during this time. He was also a member of the group's executive management team.

In 2007 he returned to the UK business as finance director, assisting in the integration of the various acquired UK businesses and the re-sizing of the overall UK business through the downturn.

He was appointed managing director of EPL Skylift in October 2010 and also controls the property portfolio, machine sales and fleet replacements for the UK business.



Nationwide Platforms has a number of Land Rover and Unimog-based platforms

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