



The spider at work in the airport

MATURING GRACEFULLY

As with any new product sector, the spider lift market is changing as it becomes more mature, now driven as much by acquisitions and consolidation than radical new product development. We take a look at some of the latest developments in both areas.

Although the original spider lift concept was invented and introduced more than 40 years ago - by Danish company Falck Schmidt in case you ask - spider lifts really only began to move into the mainstream access market around 20 years or so ago when companies such as Hinowa and Oil&Steel arrived on the scene with compact 10 and 12 metre articulated models on rubber tracks. The original concept was a go anywhere, narrow, compact and lightweight machine with spider leg like outriggers to create a stable base and level up on uneven and sloping ground. As the concept has gathered pace the number of manufacturers and product range has ballooned with working heights now running from 10 to close to 60 metres, while most are available with a variety of power sources - often on the same machine.

As volumes have grown, and some early entrants reach middle age, larger more mainstream aerial lift manufacturers have been eyeing up the market along with a number of outside investors. As a result, company ownership changes have outnumbered the number of new product launches this past year.

TEUPEN ACQUIRED

German manufacturer Teupen Maschinenbau has been making spider lifts since 1987, gaining a reputation for its design innovation and quality. However, in April this year it was acquired by US based vehicle mounted platform and utility equipment manufacturer Altec, from owner Martin Borutta who acquired a majority holding

in the business from Hanover Finanz in 2017.

This was a particularly interesting move and follows a deal in which Teupen had been supplying Altec with an insulated spider lift - similar to the Leo 56AIC - for the past year or two following an initial order from Altec for about 100 units. Altec is heavily involved in the tree care and utility markets and would have witnessed the growing number of spider lifts coming into the tree care market, including pruning tress away from overhead power lines etc. Altec is known for having a policy "We don't like selling things that we do not own/make ourselves."

It also extends its footprint internationally, something the company has always struggled with even though it has been exporting its products over many years.

A company statement said: "This acquisition expands the footprint for Altec worldwide and provides a complement to our robust line of products and services designed for the utility, telecommunications, tree care and lights and signs markets."

Managing director Paul Crane added: "These products are designed with best in class reliability, durability and versatility in mind. They will allow us to provide our customers with a new type of equipment while still receiving the Altec experience they know and expect."

NEW 27 METRE TEUPEN

Just before the acquisition Teupen launched a new 27 metre Leo 27GT Plus, a drastically



A Teupen Leo 56AIC insulated spider lift



Teupen's new 27 metre Leo 27GT Plus is drastically different to its previous 27 metre spider lift

different machine to the 27 metre spider lift it had unveiled the previous year. The 'Take Two' version features the classic dual telescopic boom format with a three section telescopic riser/lower boom, topped by a three section upper boom plus a new 160 degree articulating jib, providing an outreach of 14.3 metres with a 12 metre up & over height with 100kg in the platform. The maximum platform capacity of 250kg is available at up to 12.5 metres outreach. A new outrigger setup option - Narrow Front/Wide Rear - allows it to be positioned in difficult to access situations such as between rows of seats/pews when working in university lecture halls or churches etc. All cables and hoses are routed internally

within the boom, protecting them against dirt and dust.

Other features include standard radio remote controls, an improved full colour display screen and new 'Fuzzy V' controls, as well as wider, longer rubber tracks and 180 degrees platform rotation. The machine's overall width is 890mm, overall length seven metres with the basket installed and 6.45 metres without, an overall height of 1.99 metres while weighing 3,900kg.

The track width can be varied hydraulically on its parallelogram track legs, raising the height of the machine so that it is higher when narrow for greater ground clearance and lower when wider when travelling under overhead obstacles. Power is supplied by a Kubota diesel for outdoor use and a 230 volt mains electric motor for indoor use with Lithium or AGM battery versions available later this year.

HANDING THE BATON AT PALAZZANI

Another well-established spider lift manufacturer undergoing change is Italian company Palazzani. The company dates back to 1935, producing its first spider lift in 1986. Palazzani now produces a wide range of spider lifts and has a particularly strong position at the top end of the market for machines with working heights of more than 25 metres.

At Bauma in October 2022 it introduced the world's largest spider lift to date, the 58 metre TTZJ58 with the first unit shipping at the end of last year. Its product range now extends from 17 metres upwards and includes a number of kits/accessories that can effectively turn most of its lifts into spider cranes. Last year it acquired a new facility that will eventually double its production space.

In March Paola Palazzani took over as company president, replacing her father Davide who became vice president. While stepping back a little from the day to day business, he is not exactly retiring and will remain actively involved, continuing to look after the finances while being available to assist the new senior team. At the same time, chief operating officer Francesco Zola has joined the board of directors as chief executive.

Paola Palazzani has been with the company for more than 27 years and has become the 'face of Palazzani' and been directly responsible, along with export director Laura Gasparini, for Palazzani's growing sales success in recent years. In her new role she will also lead the company's long term strategy, while continuing to contribute the ongoing development of the business and be heavily involved in new distributor appointments and major account sales. Don't expect to see any less of her at trade shows.

Paola Palazzani said: "I believe that our tandem leadership will consolidate and strengthen the company's position in the global market, while maintaining the values of innovation and quality that has distinguished us since the beginning."

Palazzani has been making spider lifts since 1986



REBORN IN THE USA


The new management team took little time to strengthen its position in the global market announcing a new direct sales and service operation in the USA - Palazzani North America - while appointing CPL as its new distributor in the UK. Located in Miami, Florida, Palazzani North America is a significant step in the company's geographic expansion plans and takes over from former distributor Spimerica which was appointed in 2020.



Palazzani launched the 58 metre TTZJ58 at Bauma 2022

The Hinowa LL40.18 features dual telescopic booms





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SPIDER LIFTS

The new venture will also handle sales into Canada and has been positioned for future management of markets further south. It also provides sales and service training along with full after sales support services while also managing major accounts and local dealers.

Over the past year or so Palazzani has faced a few legal issues in North America culminating in a court case which it won. As a result, the distraction has meant that it has lost some ground in what is a rapidly growing market for spider lifts. The market is roughly divided between two major sectors - tree care which is currently dominated by fellow Italians CMC and Platform Basket, and atrium maintenance and cleaning led by Danish company Falcon, an ancient adversary. Palazzani has products that compete in both market sectors but is particularly strong with its high end models for the atrium market.

"This is a very important moment for Palazzani Industrie," says Paola Palazzani. "The decision to open a new branch in Miami stems from our commitment to supporting and staying close to our American customers, as well as expanding our dealer network. We are keen to solidify our presence in a market that is of great importance to us."

UK DISTRIBUTOR

In addition to North America, Palazzani highlights the UK as a strategic and crucial market for the company. It has had a presence in the UK since around 1991 working mostly with rental distributors. While this has resulted in the delivery of a decent number of its spider lifts in the country, it has been slow and often patchy over many years selling to a limited customer base.

The appointment of CPL - part of France's Klubb group - is therefore an important move for the company given that it has significant resources, understands the importance of immediate service and support coverage, while working with large end user companies in the utility sector.

Palazzani sales director Laura Gasparini says: "For some time, we have been looking for



The standard support frame



The compact support frame

an efficient and reliable dealer to enhance our presence in this territory. And now, our longstanding acquaintance with CPL has materialised into a mutually favourable collaboration, which presents a significant opportunity for us, so we have high expectations for the future. And we look forward to giving the partnership a boost at Vertikal Days in September."

CPL chief executive Paul Murphy adds: "This partnership allows us to offer our customers a broader selection of premium access equipment, reinforcing our commitment to providing innovative solutions tailored to their needs."

NEW HARDWARE

While Palazzani has not introduced any new spider lifts this year it has added several attachments and accessories.

The first is a new winch attachment for its articulated 25 metre Ragno TZX 250 spider lift - part of its co-operation agreement with Multitel - transforming it into a spider crane with a maximum capacity of 250kg. The new winch is driven by a hydraulic motor and comes with 32 metres of seven millimetre diameter rope and a remote controller. The crane can take its 250kg capacity to a lift height of 22.5 metres and out to a radius of seven metres at an up & over height of seven metres or around five metres radius at an up & over height of 12 metres. The switch over from basket to hoist/winch is said to take just a few minutes. The new addition joins the

500kg and 980kg hydraulic winches on the larger TSJ and XTJ models, which have proven popular options particularly on the 37 to 52 metre larger models.

NEW BASKET SUPPORT FRAME

To help changing between basket and 500kg winch, Palazzani has introduced a new, more compact basket support frame said to be ideal for operators working on uneven ground or sites where space is at a premium. The support frames are used to remove and store the basket. The standard support is significantly larger with four wheels and a storage compartment for tools. It performs best on flat surfaces with a normal amount of space. The new compact unit is more of a 'skate' but still more than capable of removing and moving the basket around but so much easier to handle on rough ground or in tight spaces.

PLATFORM BASKET OPENS IN CANADA

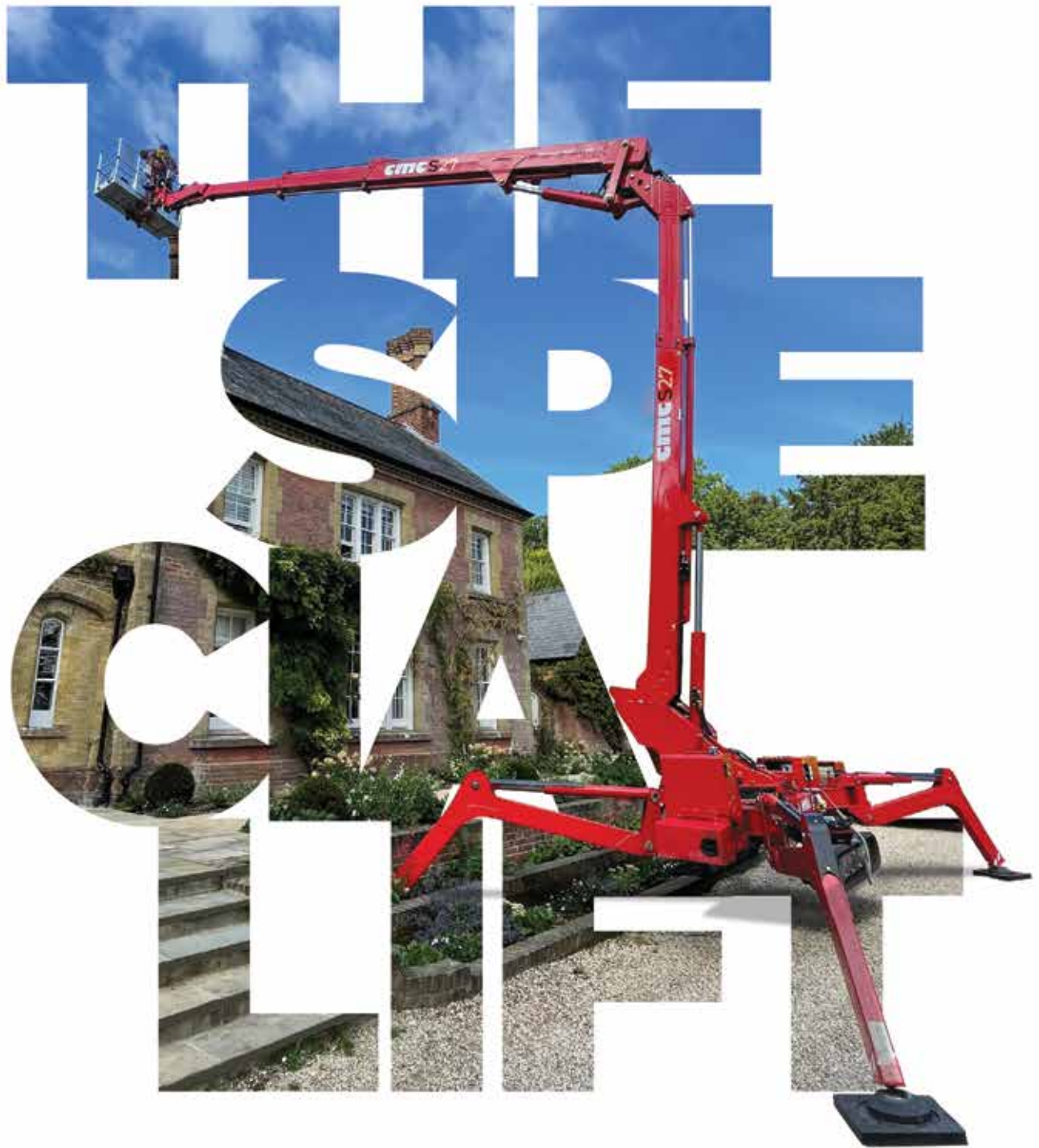
Another spider lift manufacturer opening a new overseas subsidiary is Italian manufacturer Platform Basket. The new operation - PB Canada - is based in Mississauga on the south west side of Toronto, Ontario. Chief executive of the new company is Platform Basket export manager Davide Franzini, but the business will be managed on a day to day basis by Nick Yannuzzi who joined the company in November after three years with CMC dealer Momentum Lift Equipment.



(L-R) Mark Sawyer of CPL with Laura Gasparini of Palazzani, Paul Murphy of CPL and Paola Palazzani



The TZX 250 can lift 250kg at a radius of seven metres



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A Dinolift 185XTC II



The new Leguan 195 will make its debut at Platformers Days and Vertikal Days in September

Platform Basket said: "This new branch will allow the company to reach existing customers in Canada more efficiently and quickly and to develop new business opportunities in this key region."

Davide Franzini added: "This is an exciting step for us at a time of rapid growth. The new branch marks a significant step in our international expansion and strengthens our commitment to serving customers in North America. We are excited about the prospects of working more closely with local businesses and communities."

CMC COMPLETES ALL ACCESS DEAL

Italian manufacturer CMC has finally completed the acquisition of its US distributor All Access Equipment, purchasing 100 percent of the equity from owners, the Polonski family. Although the deal took more than a year to finalise, the two companies had been moving closer together ever since it was announced at the end of 2022, with CMC chief executive Alessandro Mastrogiacomio spending a good deal of time at the All Access headquarters in Wilmington, on the north west side of Boston, Massachusetts.

In 2023, All Access achieved revenues of around \$80 million and currently employs around 60 staff between its Wilmington headquarters and a branch in Salem, New Hampshire. The Polonski family will continue to manage the business with Lenny Polonski having handed over the day to day running of the business to his sons Ryan Polonski who is now chief executive, and Nathan who becomes chief operating officer. Polonski senior will, without doubt remain involved.

Alessandro Mastrogiacomio of CMC said: "This transaction testifies to our confidence and ambition in pursuing our new industrial strategy, supported by the strong partnership we have with our majority shareholder Metrika which acquired a 70 percent stake in our business in October 2022."

NEW OWNER FOR CELA

Half way through last year Consilium Private Equity fund acquired a majority stake in Italian spider lift, truck mounted lift and fire rescue platform manufacturer Cela. The senior management team of Paolo Troni, Roberto Rocca and Simone Scalabrini retain a substantial stake in the business and chief executive Paolo Troni will continue to manage it with the additional

support of independent advisor Stefano Di Santo. Cela was founded in 1992 in Brescia by a number of ex-employees of locally based Cella, after it was acquired by Simon Engineering of the UK. Troni acquired the ailing company in 2009 having quit the rental business Rent Up following disagreements with his fellow shareholder. Today Cela has revenues in the region of €45 million and has achieved strong growth over the past couple of years as it has expended its product line and geographic spread.

Paolo Troni said: "The agreement with Consilium represents a further important step for the development of Cela. We are convinced that we have chosen the best partner to help us carry on the path that the company has taken in recent years."

FINNISH PLAYERS

While the spider lift market is dominated by Italian manufacturers, the concept comes from the far north, where three companies now participate in the market. Finland surprisingly has two manufacturers, Leguan and Dinolift. Dinolift unveiled its first model - the 18.5 metre Dino 185XTC in 2009 and today offers two second generation articulated telescopic models - the 18.5 metre Dino 185XTC II and the 22 metre 220XTC II. While substantial machines with excellent levelling ability they have not sold widely, possibly due to their premium price.

NEW MODEL INTRODUCTIONS

Fellow Finn Leguan on the other hand has had some success with its lightweight, ultra-compact models and is in the process of launching a new model, the Leguan 195. The new machine will make its debut at Platformers Days in Germany and Vertikal Days in the UK in September. The company says the 'next generation Leguan 195 combines the speed and versatility of the Leguan 190 with the smart controls and performance of the larger Leguan 225'.

It has a working height of 19.7 metres, up to 9.9 metres outreach and 250kg maximum capacity. It claims to have 'market leading' Rough Terrain capabilities operated by a new intuitive and user friendly joystick controller. It also features a one button home control which automatically stows the machine, while a one button 'back to work' function returns to the previous stored work position. The new lift also features a shielded boom that protects components from knocks and



Leguan 195 and 225



The Leguan 195 control panel

falling branches etc, making it an ideal unit for arborists.

Power is supplied by a 21hp Kubota diesel with automatic engine RPM control and a 230/110 volt electric motor. Other features include auto levelling outriggers, proportional outreach monitoring, a battery powered emergency lowering system and lower controls with integrated service display. The platform console includes standard USB outlets for users.

Speaking of the new model Leguan vice president Jori Mylläri said: "Leguan spider lifts are known for their premium performance on slopes, hard to reach areas and uneven work sites thanks to their automatic levelling, advanced track design and low center of gravity, and the new Leguan 195 is no different. Our users have been requesting a Leguan model that retains the 190's agility, compact size and speed but adds the intuitive controls and smart features of our flagship model. And this is our answer."

'FALCON 330 WHEEL'

Danish spider lift manufacturer Falcon's latest new product introduction is the 33 metre all-electric wheeled spider lift, the 'Falcon 330 Wheel' based on the Falcon 290 Wheel and its predecessors the FS290 and FS320.

It has a maximum outreach of 14 metres at an up & over height of just over eight metres with 100kg in the platform, while the maximum



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The Falcon 330 Wheel is based on the FS290 and FS320 above

platform capacity of 200kg is available at an outreach of just over 13 metres. This is achieved using a five section telescopic boom topped by a long double jointed articulating jib which provides wide ranging reach capabilities including a five metre below ground reach and even under & up reach, handy when working in high ceilings exhibition spaces with beams and other obstacles.

Despite its working height, the machine is just 800mm wide when stowed, 1.98 metres high and 7.2 metres long. Overall weight is 4,150kg. A wide range of outrigger configurations are possible with widths of between 1.4 metres

at the front to between 3.6 and 5.4 metres at the rear. It also has up to one metre of levelling ability.

54 METRE SPIDER

Following the excitement of two large new spider lifts - the 58 metre Palazzani and the 53 metre Easy Lift - at Bauma 2022, Platform Basket has joined the select band of manufacturers with 50 metre plus machines with its 54 metre Spider 54T. Falcon also has a 52 metre spider lift.

The Platform Basket Spider 54T was launched at GIS 2023 last October, and is now being delivered with the first unit delivered to Italian

company Minoe in May. The lift has a working height of 54 metres and a three stage hydraulic jib giving an outreach of 18.5 metres at an up & over height of 45 metres with a platform capacity of 400kg and 20 metres outreach with 136kg in the platform.

The Spider 54T can also be fitted with a 1,000kg capacity winch mounted directly on the jib. Other features include a wind speed monitor with alarm, rubber protection for the platform, PBT - Platform Basket Telematics - system and an intercom.



Platform Basket's Spider 54T has a working height of 54 metres and 18.5 metre outreach with 400kg in the platform.

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Raptor 15S

NEW RAPTORS

Socage launched the new Raptor spider lift brand last year with plans for an initial range of three models - the 15 metre 15S, the 18 metre 18S and the 21 metre 21S. The next new model, the 25 metre 25S will be launched at Vertical Days in September. The lift will come with a high specification, including automatic outrigger set-up and stowage. The 35 metre 35S is expected to be released later this year.

UNUSUAL APPLICATIONS

One of the more unusual applications for spider lifts is cleaning solar panels on roofs. German agricultural company Agravis Ost has taken delivery of a 19 metre CMC S19N spider lift, primarily for this task using a cleaning robot from Gronau based HyCleaner. The S19N features a two section telescopic boom and articulating jib with a working height of 18.8 metres, an outreach of 8.8 metres with a maximum platform capacity of 230kg. It can handle 150kg at its maximum outreach with an up & over height of 8.5 metres.



A CMC S19N using a HyCleaner cleaning robot

AND FINALLY...

So far we have not mentioned any Chinese manufacturers primarily because this sector is dominated by European manufacturers and there is not yet a domestic market in China sufficiently large to attract the larger Chinese manufacturers with their high volume production policies. There are a few smaller niche companies such as Gorman, while Sinoboombadges Falcon lifts for sale in the region.



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Sinoboom badges Falcon lifts for sale in China



Last year Zoomlion dipped its toe into the market with the 27 metre twin telescopic boom ZX27AE

However, last year Zoomlion dipped its toe into the market with the sizeable 27 metre twin telescopic boom ZX27AE with lithium ion battery power. Maximum outreach is 14.2 metres at an up and over height of 12.7 metres with 120kg in the platform, while the unrestricted platform capacity is 230kg.

The Zoomlion lift looks well designed but doesn't really add anything new. It will be interesting to see if the company follows the experience of other major manufacturers such as Dingli

and Sinoboom that built a machine, only to find that it was a distraction to their mainstream business and abandoned the idea. This was almost certainly what deterred major western manufacturers such as JLG and Genie from jumping into the spider lift market when it began to gain a little traction.

In the past 18 months or so this has changed a little, with JLG having acquired market leader Hinowa. Perhaps this is the route the big Chinese companies will follow? Watch this space. ■



Hinowa platforms at work

CASE STUDY

SPIDER LIFT MATS SPIKE

Brilliant Ideas has seen a surprising 500 percent spike in demand for its Alimats load spreading solutions for spider lifts in recent months. Managing director Dan Westgate says: "In our experience most spider lifts are used on newly constructed suspended floors, so a lot of our enquiries are for load spread solutions for both the tracking and operating condition. The key difference between tracked and wheeled machines is that the tracks apply the load along their length, covering a larger area compared to wheels, so load spread solutions when moving are a little simpler."

"However, we also receive enquiries where it's proposed to spread the load with sheets of plywood, that simply doesn't work. We've seen multiple cases where such proposals have been rejected by the client's temporary works. Plywood is simply not stiff enough to spread the load, and therefore won't reduce the pressure applied to the supporting floor below."

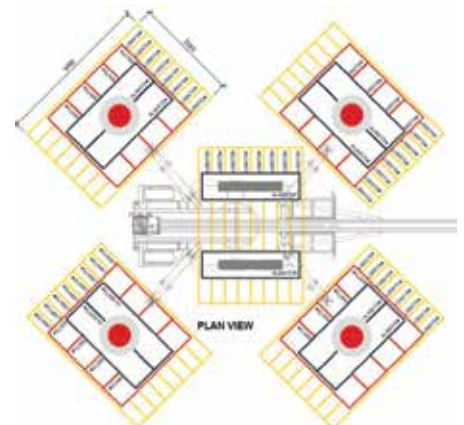
Brilliant Ideas has helped with numerous tracking projects such as University College London where its interlocking Alimats system was used by concrete cladding contractor Techrete to provide a solution to track a spider lift from the landing zone all the way to the operating area. It used 40, 3.48 metre x 290mm, interlocking modules laid on top of an Ethafoam base layer. The second layer used 26, 2.18 metre x 580mm mats laid end to end and placed perpendicular to the first layer to create a path for the machine's tracks. When

the spider set its outriggers, the first layer mats were wide enough to support the machine. Another project involved a large spider lift on a site in Woolwich, London. Although much shorter, the tracking solution was identical to that used at University College London, however when the outriggers were set, the load under each foot had to be spread over the entire mat area. To achieve this each outrigger needed an Ethafoam base layer, topped by eight 3.48 metre x 290mm interlocking modules, four 2.18 metre x 580mm modules placed perpendicular, then a top layer of two 2.18 metre x 580mm units placed parallel to the first layer with a 50mm thick, one metre diameter Nylacast outrigger mat under the outrigger feet.

"We find that even a single layer of our interlocking system can seamlessly spread the load when tracking," says Westgate. "Due to their length and the machine's tracks being in contact with multiple mat modules at any given time as it tracks across. Our extra-long narrow modules - 3.48 metres x 290mm - come into their own in these scenarios."



A typical example of the Alimats system



"In a rolling road scenario, we often use our core Alimats outrigger mats, so that surplus mats from the rolling road can be used as regular outrigger mats, reducing the number of mats on a project saving on transport and hire."



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