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# THE TELEHANDLER FAIRYTALE?

Once upon a time, not too long ago, purchasing a new telehandler was a relatively simple process because of the choice available. The market was dominated by a handful of major players - JCB, Manitou, Merlo in Europe and JLG/Skytrak in North America. These companies - which still account for almost 80 percent of total sales - controlled the market with the remaining sales split between manufacturers such as Dieci, Faresin, Bobcat, Skyjack, and Genie.

**Big construction equipment players such as Cat, Volvo, Case/New Holland, Komatsu and others tried their hand in the market, but made no real impression and withdrew. However, over the last couple of years a host of manufacturers seem to have got out of bed one morning and decided that the fixed frame telehandler market is where a fortune is to be made.**

The rate of new manufacturers entering the market picked up pace at Bauma last year and has continued to gain momentum with new manufacturers and models popping up at every exhibition since. In the latest C&A Source Guide (in last month's 28.2 issue) we listed 55 manufacturers from ACE Cranes in India to Zoomlion in China across 16 countries producing telehandler variants - fixed frame, compact, 360 degree and heavy duty models. Back in 2005 there were perhaps 20 and just a year ago the same report listed 38 manufacturers.

The new entrants are not however spread evenly between the various model types, the vast majority have launched product into the high volume markets including six metre compacts and regular fixed frame models up to 17 or 18 metres. Very few, if any, are entering the more technical 360 degree and heavy duty market sectors where machines are sold in relatively small numbers.

But why would new manufacturers enter a well-established, mature market, with two or three

dominant producers, with 'me-too' products offering little if any innovations? Most of the new manufacturers are based in China, some of them making equipment for OEMs. With the domestic general equipment market in decline over the past few years and a non-existent telehandler sector they obviously hope there is an opportunity to sell equipment under their own name into the growing global market, or perhaps as we saw with the aerial lift market a few years ago, the Chinese market is about to take off in a big way. If so they are ready.

The only thing that most of the new entrants can offer is a lower price, and in the telehandler market it is unlikely that they will turn a profit at the level some are selling. Manitou and JCB have the benefit of substantial volumes, and relatively modern factories. Anyone looking to compete will need to source western components - axles, transmissions, hydraulics etc... leaving the fabrications as one of the few areas where they might just have a benefit, especially the big companies such as Sany, Zoomlion and XCMG.

If you run a large JCB or Manitou fleet, why would you change? In most countries - the UK, France and North America are the major markets - you need to achieve very high utilisation levels to make telehandler rental pay, so top level reliability, fast parts delivery and good service are everything. On top of that many fleets change their high volume machines out every three years or so, making resale appeal and retention values



An XCMG 18 metre telehandler at Bauma

an important factor in the equation.

So far no one has managed to break the leading manufacturers hold on the mass market and many have tried. One sort of exception is Ricardo Magni, who took a very clever approach, by starting out by making a better 360 degree model. Over the years the reputation for quality, new features and models that no one else offered has paid off to such an extent that the company has moved on to introducing high capacity heavy duty machines and more recently more mainstream models, including a six metre compact. Magni models are unashamedly more expensive going up against German specialist producers such as Wacker Neuson and Sennebogen. But also, the ploy of using high end rotos as a sort of Trojan horse into the market appears to have paid off handsomely.

## GROWING MARKET

The telehandler market is growing steadily with annual sales running at between 70,000 to 80,000 units and could easily reach 100,000 by 2033 if some of the developing markets adopt them. Whether the dominant players can hold their current market shares, will depend on how they approach the potential mega markets of India and China. If they succeed as is entirely possible, there will be a good few disappointed sales directors out their unable to achieve their sales forecasts and targets.



*Bobcat TR60.260  
roto telehandler at  
Bauma 2025*

**MARKET BREAKDOWN**

Perhaps it is best to place the various manufacturers into divisions - like football - based on sales volumes and reputation. In the Premier league would be JCB, JLG/SkyTrak, Manitou, and Merlo with JCB, JLG/Skytrack and Manitou quite a way ahead of Merlo, Magni and Dieci.

The next division would include companies such as Genie/Terex, Liebherr, Skyjack, Bobcat, Ausa and Wacker Neuson all well-established marques with a good reputation and a good network of dealers to maintain and repair the machines but much lower sales volumes.



*Merlo's 15.5 prototype  
compact telehandler*

Division three might include the more established Chinese manufacturers as well as the smaller European/North American players (in terms of sales numbers) - Sany, XCMG, Zoomlion, ELS Lift, Faresin, LGMG and MST.



*LGMG's 4,000kg/18 metre H1840*

So much will depend on new market developments. In Europe countries such as Germany and Italy have not taken off in a big way as so many smaller contractors and house builders prefer to use self-erecting tower cranes for onsite material handling. Oh, and one other factor we rarely mention is the much smaller agricultural market. In an increasing number of countries this market represents sizeable



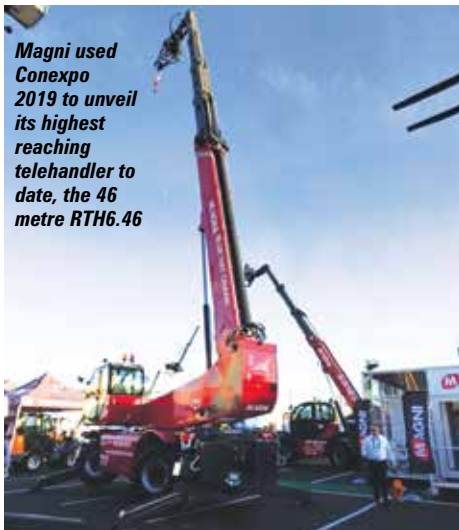
*JLG introduced a  
redesigned and upgraded  
version of its 12.9m, 3,600kg  
SkyTrak 8042 telehandler in 2024*

volumes, and sales depend on who the local dealer represents. Companies like Merlo do very well here and it could help the new entrants generate some volume.

**SPECIALIST MACHINES**

As mentioned earlier while a growing number of manufacturers are producing 'standard' telehandlers, far fewer offer 360 degree or high capacity, heavy duty models. Having said that over the past five years several manufacturers have entered the market, either by developing new products inhouse or, as in Bobcat and JLG's case, branding products made by others. The C&A Source Guide reveals that there are just nine manufacturers offering 360 degree products and just eight with heavy duty models.

As already mentioned, one company that has 'cornered' both of these markets is Magni - which came into the market at the end of 2012, after founder and chief executive Riccardo Magni, had given up his roles as chief executive of Manitou's Italian subsidiary MCI (Manitou Construzione Industriale) some eight years or so after it had acquired the business from the Magni family.



*Magni used  
Conexpo  
2019 to unveil  
its highest  
reaching  
telehandler to  
date, the 46  
metre RTH6.46*

Magni's policy was to initially target the specialist market with well designed, fully featured and top quality machines - and it has worked a treat. By launching the world's largest 360 degree telehandler Magni made a strong statement of intent from the start. Magni also has a good range of eight heavy duty machines from the 10 tonne HTH 10.10 up to the massive 50 tonne/14 metre HTH 50.14. Fortunately, it has the quality and backup to grow within the sector. Over the years it has added a range of fixed frame telehandlers and at Bauma 2025 launched its first compact machine which is selling well in spite of its premium price.



*Magni entered the  
compact sector at Bauma 2025*

**JCB DEVELOPMENTS**

With up to 50 percent of its sales in the UK and a further 30 percent in the rest of Europe, JCB is a leading player in both the construction and agriculture telehandler market. The company launched the first JCB telehandler, the two wheel drive, 2,000kg/6.4 metre Loadall 520 in 1977.

It gained its market leading position thanks to its incredible brand recognition in the UK which at the time was the world's principal market and

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**JCB is a major player in both the construction and agriculture telehandler market**



**JCB Hydraload 555-210R at its launch in 2019**

hydrogen as we don't see electric being the all-round solution, particularly not for our industry because it can only be used to power smaller machines. We will carry on making engines, but they will be super-efficient, affordable, high tech hydrogen motors with zero CO2 emissions. Hydrogen motors have the potential to help the UK reach CO2 emissions targets more quickly."

JCB did however, launch a totally new, all electric 6 metre/2.5 tonne compact telehandler - the 525-60E - a year before the hydrogen prototype. Its latest news is that it has invested £60 million in a new fully automated

powder paint plant as well as modernising its UK telehandler assembly lines.

### CHANGES AT MANITOU

French telehandler manufacturer Manitou is in a transitional period at the moment with changes to its senior management team. Chief executive Michel Denis plans to leave the company when his current contract expires this month. His presence at Apex at the start of the month was his last show appearance. A few months after the Denis announcement, telehandler pioneer and Manitou founder Marcel Braud, died. Followed by his sister, Manitou group chairman Jacqueline Himsworth, a few months later.



**Sylvain Blaise**

still remains among the largest. Over the years it has concentrated on fixed frame machines up 17 metres and now 21 metres before finally entering the 360 degree machine in 2019, after years of dismissing it as a bit of a niche or fad market. The new model was dubbed the Hydraload 555-210R with a maximum capacity of 5.5 tonnes and a maximum lift height of 20.5 metres. Free on wheels capacity was 4.5 tonnes. It would be fair to say that it did not wow the market.

The current range - launched in 2024 - consists of two variations of the 558R PRO machines - the 558-210R and the 558-260R PRO - both are essentially the same machine with an increased capacity of 5,800kg but with lift heights of 20.5 metres and 25.5 metres. Forward reach is 17.8 metres and 21.4 metres respectively.

Apart from being slightly slow into the 360 market, JCB has been more innovative when it comes to power units, introducing the first prototype hydrogen machine at the end of 2021 after investing £100 million in a project to produce efficient hydrogen engines.

At that time JCB chairman Anthony Bamford said: "Our sort of machinery will need to be powered by something other than fossil fuels. We make machines which are powered by diesel, so we have to find a solution, and we are doing something about it now. We are investing in

New appointments include Sylvain Blaise as chief executive, who joins the business from Iveco's powertrain division FPT Industrial, where he has been chief executive for the past four and a half years. At the same time Christopher Himsworth became the new chairman board and Virginie Himsworth was appointed as a director - keeping it all in the family. It will be interesting to see how these new appointments affect the direction of the company going forward.

Manitou's latest full year financial results show a steep drop in profits with total revenues of €2.56 billion down 3.4 percent on 2024. It did however achieve a strong fourth quarter and start to 2026 and compared to many of its competitors is doing pretty well. Latest figures show strong gains in Europe - up 12.5 percent - although North America is down 14.2 percent and South/Central America and Asia Pacific down 12.9 percent.

The company says: "Europe is showing very strong growth, with the momentum driven by significant volume improvements in telehandlers, accompanied by an increase in market share. The decline in North America, on the other hand, reflects a toughening of the commercial environment, marked by the impact of customs duties and unfavourable foreign exchange effects."

In April it announced a £15 million, 200 unit telehandler deal with UK rental company H.E. Services as part of a two year renewal and expansion programme. The machines include fixed frame models from four metre sub compacts to 18 metre models. This follows a £40 million, 450 machine deal with the UK's largest telehandler rental company Ardent Hire Solutions - the largest single order ever placed with Manitou UK. The order, also part of a fleet renewal and expansion programme, and includes the same spread of machines as H.E. Services. While this is the largest UK order for Manitou, Ardent has placed significantly larger orders in the past with JCB. Ardent has more than 3,100 telehandlers, most of them regular fixed frame models.



**Some of the first new Manitou telehandlers to arrive at H.E.Services**

Manitou's latest new model introductions were seen at Bauma and included two new 4,000kg electric telehandlers - the 14 metre MT 1440e and 18 metre MT 1840e - which the company claims offer the same performance as the diesel versions but with up to 75 percent savings on energy costs. Battery warranty is five years or 3,000 hours and 70 percent battery SOH (State of Health). Also new was the 40 metre/7,000kg MRT 4070 360 degree telehandler with 21 metres of forward reach.

## TELEHANDLERS

**Manitou previewed this 40 metre/7,000kg MRT 4070 360 degree telehandler**



**Hidromek's new telehandler**

### NEW SHOW LAUNCHES

Bauma 2025 was the first exhibition where everywhere you turned there appeared to be a new telehandler or a new telehandler manufacturer - particularly from China and Turkey. Given that sales in the Chinese market are almost non-existent, hopes are pinned on taking a sliver of either the growing global market or perhaps hoping the domestic market dramatically improves.

Vanse from China showed the WSC1440, a 13.5 metre/4,000kg telehandler while a seven metre/4,000kg WSC740 is also available. Capacity at maximum height is 3,000kg and 3,300kg respectively with overall weights of 10.6 and 7.8 tonnes.

### GO TURKEY

Turkish manufacturer Hidromek launched its first telehandler in the form of the visually striking 4,000kg/18 metre HMK 40-18 TH prototype. With modern, angular styling, it features a high pressure piston type hydraulic pump, powershift transmission and reverse cooling fan. Maximum lift height is 17.65 metres with 13.1 metres of forward reach. Overall width is 2.4 metres and weight is 12,500kg.

Hidromek joins Turkish manufacturer MST which has been making telehandlers in the country for many years now. Still only a tiny market, the presence of two local producers knocking on customer doors may well help stir things up.

### THE NEW GERMAN

The German market is said to be growing with Manitou, JCB, Merlo and Faresin - which has started supplying Cat distributor Zeppelin branded

versions of its telehandlers after Cat pulled out of the European telehandler market last year - the main manufacturers.

At Bauma German company Thaler showed its compact 48T18. Weighing 3,350kg it has an overall width of 1.8 metres and height of just under two metres. Lift capacity is 1,800kg and maximum lift height 4.8 metres.

Meanwhile Liebherr plods on with a focus on the very long term, Wacker Neuson has gradually extended its range, and Sennebogen remains focused on ultra rugged specialist material handling models.

**Thaler 48T18 compact telehandler**



### CHINESE PLAYERS

After many years of seeing a Sunward telehandler at various exhibitions only to disappear at the next, it would appear the company is now making a concerted effort to enter the market. Last year Laurent Pons, previously with Manitou - was given the go ahead to develop Sunward's aerial lift division with boom and scissor lifts along with telehandlers and the five and 10 tonne telescopic crawler cranes. Its latest telehandler is the 3,500kg/7.4 metre SWTH 3507 for Europe. The company says that it also has US spec high boom machines for the North American market. At Apex Pons said that Sunward would be launching two new diesel telehandlers - a 14 and 18 metre - in



**Sunward's latest telehandler - the 3,500kg/7.4 metre SWTH 3507 - at Apex**



**Faresin supplies Zeppelin with branded versions for the German market**



**Sennebogen remains focused on ultra rugged specialist material handling models**

the very near future, possibly next month? Sunward says its price advantage coupled with good backup from its 180 dealers around Europe has resulted in good 2026 sales, and it expects a lot from the new models.

Sany's telehandler range continues to expand and now includes the 13.9 metre/4,000kg STH1440, the 17.55 metre/4,000kg STH1840 and the seven metre/4,200kg STH742 with the addition of the new all-electric six metre/2,500kg STH625E with regenerative braking and boom lowering, which can, it says, extend its eight hour battery life by 15 percent. The compact machine is less than two metres high and wide with a 34kWh LFP

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## TELEHANDLERS



*Sany's new all-electric STH625E telehandler with regenerative braking and boom lowering energy capture*



*Sany's growing telehandler range*

battery, which can be charged from its portable charger with 230V or 370V AC outlets.

The company is starting to have some sales success in Europe, with UK rental company Mr Plant Hire taking delivery of its first two 18 metre/4,000kg Sany telehandlers last summer. The new machines were part of a 50 unit order including an unspecified number of telehandlers - but was its largest telehandler order at that time - placed by parent company AER. The STH1840s can take its 4,000kg maximum capacity to a lift height of 11.5 metres or forward reach of 2.8 metres with the outriggers deployed. They can also handle 550kg at a maximum forward reach of 13.4 metres and 2,500kg at their maximum lift height of 17.55 metres.

In April this year Sany strengthened its UK telehandler team promoting Philip Boddy - 17 years with JCB before joining Sany in 2020 - to global product director telehandlers, having been a regional product manager for the past five and a half years. It also promoted Christopher Jarvis to head of telehandler sales for the UK & Ireland, having been sales manager for the past two and a half years.



*Phil Boddy*

Zoomlion now has an interesting range of telehandlers including a high boom, North American style machine - the ZTH1056 - although no technical specs are currently available. However, if the nomenclature follows other Zoomlion machines it has a capacity of 4.5 tonnes and a lift height of 17 metres. The five model fixed frame European style machines include the 2.5 tonne/six metre ZTH2506, 3.5 tonne/seven metre ZTH3507, 3.5 tonne/12.7 metre ZTH3513, 4 tonne/13.8 metre ZTH4014 and 4 tonne/17.6 metre ZTH4018.



*Zoomlion's high boom ZTH1056*

Zoomlion also has two 360 degree machines - the 4.5 tonne/18 metre ZTH4518R and the 4.5 tonne/24.8 metre ZTH4525R. Both are CE certified, with the smaller weighing 14.3 tonnes and the larger 17 tonnes. Machine features for both models include hydrostatic 4x4 drive, 360 degree continuous slew, a 10.1 inch display screen which integrates monitoring, control and entertainment, and a standard floating fork and optional platform, bucket, boom and other attachments.

Zoomlion sales are beginning to take off in certain European markets. In the Netherlands and Poland it is represented by Dutch sales and rental company BAC - at Apex the two companies extended their distribution contracts, to three or five years, depending on who you spoke with.

BAC worked with Zoomlion to fine tune and develop the telehandler range, before agreeing to buy any or represent it. The company now says that it has 100 Zoomlion telehandlers in stock in the Netherlands and a further 100 in Poland, ready for immediate delivery. This, combined with a good specification and a keen price, could give the manufacturer a real boost to winning market share.

### INDIAN ASPIRATIONS

Another first at Bauma came from India's Action Construction Equipment which showed its telehandler for the export market, the AT350 with a capacity of 3.5 tonnes - 2.5 tonnes on rubber - and a lift height of just over seven metres. Maximum capacity at its maximum forward reach of 3.62 metres is 1,200kg. Overall weight is 7,510kg and it is powered by a Perkins Tier 3 diesel. Hydrostatic drive gives a maximum speed of 28 kph.



*Zoomlion's ZTH range of telehandlers*



*Action Construction Equipment launched its AT350 for the export market at Bauma 2025*

When it comes to the wider Indian market Manitou is producing a specific model in the country for the local and regional market. At the same time - while it has not said much about building telehandlers at its Indian plants - JCB is extremely well ensconced in the market for its other products. India makes a huge contribution to the company's revenues and profits. If, or rather when, the Indian market does break, JCB is well placed to grab market leadership.

**THE CHINESE MALAYSIAN**

Chinese manufacturer Noblift produces most of its aerial work platforms and material handling equipment in Malaysia, but not the new compact telehandler - the 2.5 tonne/three metre FTH25-30N - first seen at Bauma last year.

It also has the larger FTH3007, FTH3507 and FTH4007-4Z as well as the 360 degree FTTH4015-4Z. The company, established in 2000, is a leading

Chinese manufacturer and service provider in the material handling sector. Listed on the Shanghai Stock Exchange it has been the world's largest manufacturer of hand pallet trucks for several years and is recognised as a leading manufacturer of Class 1/2/3 forklifts in China. It employs more than 5,000 worldwide and has manufacturing facilities in Vietnam and France as well as China and Malaysia, along with sales subsidiaries in North America, the EU and South East Asia.

Perhaps more interesting is its 360 degree, four tonne/15 metre FTTH4015-4Z which can take 2,500kg on outriggers and 1,500kg on tyres to its maximum lift height. Forward reach is 10.5 metres where it can lift 1,000kg on outriggers or 800kg on tyres. Overall weight is 16 tonnes, and it is powered by a Cummins Euro 3 diesel.

Of course, one of the main reasons to purchase a 360 degree telehandler is its ability - through the

use of various attachments - to carry out a variety of tasks, even replacing a small crane. Like many of the 360 degree manufacturers, Noblift offers a variety of quick change attachments, such as a work platform, wood clamp, rotating paper roll clamp and hooks.

**FARESIN ELECTRICS**

Italian manufacturer Faresin was the first to launch an all-electric telehandler - the 626 unveiled at Bauma 2019. It proved to the rest of the industry that a simple to use, electric compact telehandler was possible. It was based on its standard diesel 626 with six metres lift height and 2,600kg lift capacity. Three years later at Bauma 2022, Faresin added the 17 metre/4,500kg 17.45 full electric telehandler - another world first. The 17.45 features a 45.36 kWh, 435 high voltage lithium-ion battery pack powering two electric motors, one to drive the transmission, while a smaller unit is dedicated to the hydraulics.



*Noblift unveiled its FTH25-30N at Bauma last year*



*Noblift produces this four tonne/15 metre 360 degree FTTH4015-4Z which can take 2,500kg on outriggers and 1,500kg on tyres to its maximum lift height*



*Faresin's 17.45 Full Electric at its launch at Bauma 2022*

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Faresin's most compact telehandler is the FS 6.26



Merlo's 4,000kg/13 metre P40.13

Italian company Faresin currently has four Full Electric telehandlers from six to 16.4 metres and capacities from 2.6 to 4.5 tonnes - the 6.26, the 14.42, the 17.40 and the 17.45. Last year it launched its Middle series of FS Next Generation telehandlers with lift heights of seven to 10 metres and capacities of 4,000 to 4,500kg. Features include a new tapered engine cover and reduced blind spots for the operator as well as a redesigned interior and LED lighting. All models have the S420 steel boom with double C-profile.

Faresin also launched its FS 6.26 - its most compact telehandler - which replaces the FR6.26 of which more than 2,000 units have been sold worldwide. Changes include visibility improvements and an electronically controlled, stepless transmission. Its three model Heavy Duty range has lift capacities from six to seven tonnes and lift heights of nine and 10 metres.

### MERLO'S LATEST

One of the premier league manufacturers with a full range of telehandlers is Italian company Merlo. The company has been buying up its independent distributors over the past year or two, acquiring the shares that it did not already own in its German Subsidiary - Merlo Deutschland - last summer from Port handling and storage group Heinrichs Holding which has owned a stake in Merlo Germany business for around 33 years dating back to when the Merlo and Clewing families began working together.

Prior to that it set up its own operation in Ireland, while it has owned a stake in its UK business since it was set up in 1993 by John Iles and bought the rest of the shares when he retired in 2011. It also owns its distributors in France, Spain and Australia. One of the advantages of running company stores is that it allows the company to operate a strong local dealer network, without worrying so much about splitting margins etc. A dealer network is essential for telehandlers, especially in the ag market, where a higher portion of the sales volume goes to end users,

rather than rental companies than say the crane or aerial lift market.

Germany and the UK are two of its better markets, both in construction and agricultural. While it has a strong position in the 360 degree market, its small to medium fixed frame models are all popular. It launched an all electric eWorker model in 2020, but it was off and on in reaching full production. This year it launched a new second generation model, the 2,500kg/4.8 metre 25.5-60 with two wheel drive and four wheel drive 25.5-90 with a claimed eight hour battery life.

### DIECI STANDARDISES DTS

Italian telehandler manufacturer Dieci is now including its Telematics System (DTS) as standard on all compatible machines along with a 36 month subscription and three year warranty. It provides real time monitoring of operating data such as machine location, fuel levels and operating hours. Other features include remote diagnostics and assistance, maintenance scheduling, and



Dieci Pegasus 60.40

geofencing. The system will integrate with existing fleet management platforms, as well as supporting mixed fleet management. The company has also launched an Android and Apple/iOS app for remote machine monitoring and service reminders.

### SKYJACK UPDATES TH SERIES

Skyjack has updated six of its TH Series telehandlers for North and South America with capacities ranging from 2,495kg to 5,443kg and lift heights from 5.82 to 17.14 metres. Maximum forward reach runs from 3.44 to 12.9 metres.

Skyjack says that improved gearing and more efficient hydraulics allows the use of smaller engines without sacrificing performance. The new telehandlers feature Smartorque, engineered to require no DPF, DEF, or any active exhaust aftertreatment. The machines also feature a single, multifunction pilot operated joystick controls, a new 'Flexcab' for easy conversion between open and enclosed cabs, with easily sourced flat glass panels.

A wide range of carriages, fork options and additional attachments are available. All major service points are easily accessible and Skyjack's coloured and numbered wiring system is Skycoded for easy troubleshooting and maintenance.

The company has also launched a new Multi-view Camera & Sensor System, which incorporates two additional cameras and a tri-view monitor display to enhance blind spot visibility and awareness. The colour monitor allows the operator to toggle between individual views to the left, right, and rear of the machine, or simultaneously display all three views, providing 220 degrees of visibility. A numeric visual proximity indicator on the rear view and an audible warning provides improved object proximity awareness when reversing. ■



Dieci is now including its Telematics System (DTS) as standard on all compatible machines



A 2,700kg/six metre Merlo P27.6 compact telehandler



Skyjack has updated six of its TH Series telehandlers

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