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ROUGH TERRAIN CRANES IN DEMAND

Is the global Rough Terrain market still linked to the price of oil as it was always claimed? If so, it must have had a rollercoaster ride over the past six months with the price of the liquid gold soaring and then falling back every time a missile was fired, or the Strait of Hormuz was threatened. We take a look at this and much, much more.

The Rough Terrain crane market is certainly associated with oil prices in the USA where higher oil prices quickly lead to increases in drilling and development. Upward trends cause companies to scramble for the necessary equipment, causing demand spikes, longer lead times and higher prices. Such shifts are, however, usually caused by slightly longer demand and price movements than the recent peaks and troughs. In the Middle East, the fact that oil and gas refineries have been damaged by the war and will need rebuilding should have an impact when things calm down but are currently having a dampening effect.

The market has also changed over the past few decades, from one that was dominated by a few U.S. manufacturers, initially cab down models from Galion and Pettibone, with Grove and P&H taking over as swing cab models came on stream at the end of the 1960s. Then the late 1970s saw Tadano and Link-Belt join the fray, with Tadano making progress once it recognised that Japanese style Rough Terrains - which were more complex and closer to modern City All Terrains - would not cut it in North America and they designed a North American product line. Today Chinese manufacturers such as Sany, Zoomlion and XCMG are becoming significant players, especially in the Middle East, parts of Asia and Africa. They typically seem to be capable of cranking up production much more quickly or holding large inventories of new product 'on spec'. This is

bound to have a curbing effect on demand-led price increases.

However, alongside this traditional demand, there has also been a growing demand from new microchip facilities and data centres - particularly for the higher capacity RTs with longer booms, but also smaller, compact and more transportable units.

Last year we reported that market research at the time suggested that the Rough Terrain market across all sectors was projected to almost double during the 10 years leading up to 2032 - possibly reaching £8 billion. The main driver for this is the increasing demand from construction, energy and mining, particularly in emerging markets.

North America has remained the dominant market, particularly as the large number of infrastructure projects came on stream. The Middle East - often the second largest market - will probably remain so for several years, once the current 'war' is over, given the damage and rebuilding that it is generating. Europe has never been a big user of Rough Terrain cranes, with contractors using short term rentals for their lifting needs, which favour road going cranes such as All Terrains. Traditionally the demand that is there, tended to be concentrated in Southern Europe with Italy once a significant user with numerous local manufacturers, most of which are now long gone. With the rise of the day to day rental industry, Italy is now closer to other parts of Europe.



Given the fact that the USA is the major market for Rough Terrains, it was somewhat of a surprise how few were on display at Conexpo earlier this year. This may well be because it is technically a mature sector, in terms of product design, with few major players in what is a very traditional market.

RAIMONDI ACQUIRES TEREX CRANES

One of the more interesting developments over the past year has been the acquisition in November of the Terex Rough Terrain and tower crane operations by Italian based/UAE owned

tower crane manufacturer Raimondi. Terex had clearly lost interest in the cyclical and mature crane businesses as early as 2019, when it sold the Demag - All Terrains and lattice crawlers - part of the business to Tadano. With tower cranes and RTs now gone, it only has Franna pick & carry cranes left, which it says is a totally different type of market and fits well with its Materials Processing division.

The Raimondi deal includes the two Italian production facilities - the Tower Crane plant in Fontanafredda, and the Rough Terrain facility in Crespellano. However, it also includes the Terex North America Cranes service and support operation in Wilmington, North Carolina. Around 250 Terex employees will remain with the business taking the number of employees in the combined operations to around 400.

This is an interesting move for Raimondi once it figures out how best to integrate Terex tower cranes with its own tower crane operations. The addition of the Rough Terrain business seems much more adventurous, taking it into a completely new market, where it will have to compete with the Chinese. Given its Dubai based ownership, Raimondi is very well positioned to benefit from the projected growth of the Middle East RT market and could prove to be a very lucrative move. The company owners, KBW has a long term strategic outlook, which has served it well with the Raimondi acquisition which it made in 2014, after which time it committed to invest more than \$100 million in the business, which has taken it from an 'also ran' to a significant player. The Raimondi/Terex business is now part of Arada Industries - part of the Arada group - a holding company established by KBW owner Prince Khaled bin Alwaleed along with Sheikh Sultan bin Ahmed Al Qasimi.

Raimondi chief executive Luigi Maggioni said: "This strategic acquisition represents a milestone in our journey to become a fully fledged global lifting conglomerate. By integrating Terex's Tower and Rough Terrain cranes, we are creating synergies that enhance our ability to deliver a broader range of solutions, paving the way for sustainable, accelerated growth."



Raimondi acquired Terex Rough Terrain and tower crane operations last November

NEW 50 TONNE RAIMONDI TEREX ROUGH TERRAIN

One new Rough Terrain launched at Conexpo was the new 50 tonne Raimondi Terex TRT 55US, designed primarily to meet North American requirements. It is the first product to be launched under the Raimondi North America banner, a newly established US entity led by Andreas Ernst. The TRT 55US has been designed and developed in Italy by the Terex Rough Terrain engineering team, which has now been integrated into Raimondi.

The compact model features a 50 tonne nominal capacity at 2.5 metres, a 37.5 metre five section boom, while an eight metre swingaway extension takes the maximum tip height to 48 metres. A key feature of the new Terex RT is the Proportional Telescoping Boom mode, designed

to simplify and speed up operator's workflow. It has an automated boom extension setting that synchronises the telescoping of the boom's individual sections to ensure maximum overlap and best weight distribution. It is fully integrated into the crane's TEOS operating platform.

"This model reflects a focused engineering effort to align with North American performance expectations, safety standards, and application requirements," says Ernst. "Our new generation of Rough Terrains introduce a modern design approach built around high quality components and advanced systems such as TEOS and T-Link, further elevating control, monitoring and operational efficiency. Another key system is Idealift, which increases jobsite versatility by maximising the load chart through the use of asymmetric outriggers."

The 50 tonne Raimondi Terex Raimondi TRT 55US



The compact TRT 55US features a 37.5 metre five section boom and a maximum tip height to 48 metres

TADANO MISSES OUT?

The Raimondi/Terex acquisition however, did bring back talk for a while on why Tadano had not included at least one or both of these businesses when it acquired the Terex Demag crane business. But perhaps given the challenges that the deal has presented since then, it was a sensible move?

Tadano is possibly leading the charge - or is it a slow but steady advance - among Rough Terrain crane manufacturers towards more environmentally friendly cranes. Its all-electric 91 tonne Evolt eGR-1000XLL-1, which was ready for production at the end of 2024 has not exactly been a runaway success. In fact, sales have been very slow indeed, with the first unit delivered to a mine in South America earlier this year, while only a few are currently on the order books. The smaller 25 tonne Japanese style all electric Rough Terrain model, the Evolt eGR-250N is perhaps doing a little better, but then in Japan such cranes tend to travel on the public roads, where stronger environmental/emission rules apply.

There does, however, appear to be a reduction in enthusiasm for such 'electrification' across the larger equipment sector, especially in the USA, with most companies struggling to convert such major product developments into sales - for now. That was also true when the first All Terrain cranes were launched.

The Evolt has the same lifting capacities as the diesel powered GR-1000XLL-4 launched in 2020 and offers a full day's lifting or five hours of lifting plus five and a half miles of jobsite travel from a

single charge. When just travelling, it has a 16 mile range at a speed of 11 miles an hour and includes regenerative braking. The crane can

be recharged from a standard 480 volt AC grid power, taking approximately five hours for a full charge or two to three hours on a CCS1 charging



Tadano's 91 tonne, all-electric Evolt eGR-1000XLL-1 at Conexpo

TEREX ROUGH TERRAINS - AN AMALGAM OF MANY

The Terex Rough Terrain story goes back to the mid 1980s when it was acquired by Northwest Engineering, adding Lorain Schield Bantam and Koehring cranes, and later adding American, P&H, Century II, PPM and Bendini as well as American Hoist & Derrick which had tried its hand in the RT market in the late 1970s and failed. It is hard to say which of these brands had the most impact on the modern day Terex RTs? Probably Bendini given that Terex Rough Terrains are made in what was the Bendini plant in Crespellano.

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system. The company says it can save around 22 tonnes of CO2 emissions a year compared to the diesel model.

And while recent new products such as the Evolt and Liebherr's 130 tonne LRT 1130-2.1 suggest that capacities are increasing, the majority of Rough Terrain cranes sold are still between 60 and 80 tonnes, although go back to the 1980s and that it was 20 to 30 tonnes! There is also a move towards smaller, more compact and more easily transported RTs.

SANY 45 TONNE COMPACT

One of Sany's more recent Rough Terrain crane launches is the 45 tonne SRE450N RT which will debut at Vertikal Days in September. The SRE450N features a five section 37.4 metre boom topped by an eight metre lattice swingaway extension with what it calls 'Auto-swing' installation operated by a handheld remote controller, providing a maximum tip height of 48 metres. All of which is very similar to the new Terex, however, it is slightly narrower, with an overall width of 2.55 metres compared to 2.72 metres on the Terex. The overall weight is 31.3 tonnes, although this can rise to 33 tonnes with certain optional equipment. The outrigger footprint is 6.3 x 6.2 metres. Power comes from a Stage V Cummins driving through a Dana transmission and Meritor axles.

Features include an upgraded cab with improved visibility and a 20 degree tilt function. Anti-slip ladders and walkway plates on the front and on each side make accessing the crane deck and cab easier and safer.



Sany's 45 tonne SRE450N RT will make its UK debut at Vertikal Days in September

Sany's push into Europe continues with its recent announcement in March of a strategic alliance with Crowland Cranes in the UK. The company will deal with all sales of Sany mobile cranes and provide service and support.

Construction is also currently underway on an expanded parts warehouse at Crowland's base in Peterborough. This facility is in addition to Sany UK's existing locations in Coatbridge in the north and Sittingbourne in the south.



Liebherr continues its steady push into the Rough Terrain market with its largest model the 130 tonne two axle LRT 1130-2.1

LIEBHERR'S BIG RT

Liebherr continues its steady push into the Rough Terrain market, its largest model the 130 tonne two axle LRT 1130-2.1, was unveiled at Bauma in late 2022, with the first sales booked on the stand, and the first deliveries made in 2024, mostly to the USA - surprise surprise. The All Crane group received the first five units, followed by Bigge which actually placed the very first order, then Mexico's ESEASA order for three and Germany's Wasel one.

Since then, further deliveries have been made to Brazilian rental company Milplan for work at a large mine, and unusually one to the UK where Roadcraft (Crane & Plant Hire) has added it to its fleet. More recently the first unit arrived in Ghana where local mining services provider Rocksure International has put it to work in another large mine.

The LRT 1130-2.1 features a seven section 60

metre main boom - the longest on a two axle RT - which can be topped with a 10.8 to 19 metre bi-fold swingaway extension with offsets of up to 40 degrees, along with a seven metre insert for a maximum tip height of around 88 metres. A 2.9 metre assembly jib can be stowed on the left side of the boom. Other features include VarioBase variable outrigger set up, monitoring and automatic load chart selection for the actual base configuration and a strong pick & carry chart.

The UK delivery is interesting in that such cranes are rare, Roadcraft's Mike Caine said: "The LRT1130-2.1 is an extremely versatile and powerful machine with excellent lifting capacities, exceptional manoeuvrability and compact dimensions. We brought it into our fleet with the needs of a specific customer in mind but will be a great asset to the business and into the future." ■



The handover to Brazilian rental company Milplan for work at a large mine



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A CRACKING PROJECT IN BELGIUM

Belgian international crane and heavy lift company Sarens has been using five of its Grove Rough Terrain cranes on one of Europe's most significant petrochemical projects - the €4.5 billion Ineos Project One in the Port of Antwerp, Belgium - an innovative, ultra-modern ethane cracker that converts ethane gas into ethylene using hydrogen generated during the cracking process as a lower-carbon fuel for the furnaces.

The project is the largest investment in the European chemical industry over the past 20 years, and will have taken four years to construct, while employing more than 3,000 at its peak. Due to be commissioned later this year, the project uses the high-tech, sustainable steam cracker to produce ethylene which is used in medical applications, lightweight car and wind turbine components, durable water and gas pipes, packaging to preserve food longer, smartphones and textiles with technical properties.



Sarens has been using five of its Grove Rough Terrain cranes on one of Europe's most significant petrochemical projects - the €4.5 billion Ineos Project One in the Port of Antwerp, Belgium



The cranes - four 90 tonne GRT8100-1 and one 73.5 tonne GRT780 - are all manufactured at the Grove/Manitowoc plant in Niella Tanaro, Italy

The cracker has been designed using modular construction methods, with sections built offsite and transported to Antwerp by ship. Some modules weigh up to 6,000 tonnes and are up to 50 metres long, 40 metres wide, and 60 metres high. The wider development also includes storage tanks, pumping systems, extensive pipe networks, electrical distribution systems, pipe racks, cable routes, roads, underground systems, and site infrastructure.

Sarens is responsible for the project's transport and lifting operations, including road and sea transport, modular assembly and precision installations. It also includes planning, coordinating and executing all lifting and transport activities.

The Rough Terrain cranes - four 90 tonne Grove GRT8100-1 and one 73.5 tonne Grove GRT780 - are all manufactured at the Grove/Manitowoc plant in Niella Tanaro, Italy.

The Grove GRT8100-1 features a five section 47 metre main boom topped by a 10.1 to 17.1 metre bi-fold swingaway extension with up to 40 degrees of offset. An additional 6.1 metre insert takes its maximum tip height to 73 metres. The GRT780 has a boom and extension similar to the GRT8100-1 and can pick & carry up to 15.2 tonnes.

Both cranes feature Manitowoc's intuitive Crane Control System (CCS) and Sarens added the MAXbase variable outrigger positioning system, enabling asymmetrical outrigger configurations while optimising lifting operations at the front and rear of the crane.

The company also opted for the Grove Connect telematics platform with remote diagnostics, maintenance planning, and operational monitoring.

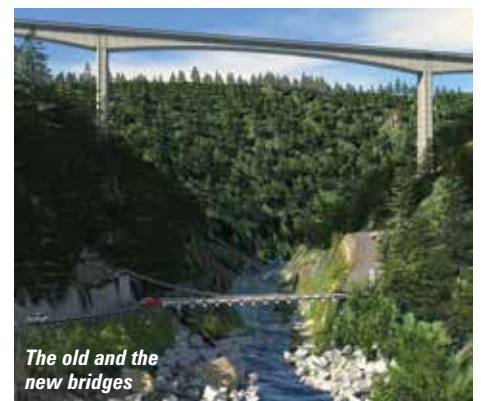
LINK-BELT RT HELPS SPEED UP EMERGENCY SERVICES

An old single track timber bridge in northern California has been replaced in order to speed up emergency services' response times to nearby forested areas. The new bridge on Mosquito Road north of Placerville is being built by critical infrastructure contractor Shimmick and will span 365 metres over the south fork of the American River. The old timber bridge, which dates back to 1939, is now a pedestrian bridge.

Shimmick used a 120 tonne three axle Link-Belt RTC-80130 SII Rough Terrain crane, which features a five section 49.3 metre boom and weighs just over 60 tonnes. The crane worked from the structure's north side where it was able to make the best use of its reach and capacity, lifting 3.4 tonne shoring beams at a 27.4 metre radius. However, to reach the remote job site, the crane had to travel through the Eldorado National Forest under its own steam. With a top speed of 17mph it took nearly four hours. "The journey through the forest involved some really tricky rough terrain, including nearly five miles of dirt roads and switchbacks on steep grades and long downhill. Most other cranes would have overheated under similar circumstances," said Shimmick's Adam Almborg.



Heavy civil construction company Shimmick is building the 365 metre span bridge



The old and the new bridges

On completing the bridge deck construction, Shimmick drove the RTC-80130 a further 10 miles to the site of a temporary concrete batching plant used to pour the bridge deck surface and substructure. The crane assisted with turning the 35 tonne batch plant for disassembly and removal.

Almborg added: "There were a lot of big pieces at the batch plant. Having the right crane for the job made all the difference."



To help with the new construction is a 120 tonne capacity Link-Belt RTC-80130 SII Rough Terrain crane

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