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Is it business as usual?

C&A

truck mounts



Two Bronto truck mounts from Nationwide Platforms carrying out night time bridge maintenance

The mid to large truck mounted platform sector is still dominated by three players - Ruthmann, Bronto and Palfinger - despite the renewed efforts of Italian manufacturers. Cranes & Access looks at the latest trends.

Of the 'big three' both Palfinger Platforms and Bronto have undergone recent company/management changes. The most recent and perhaps the most significant is the acquisition of Bronto by the largest Japanese fire-fighting equipment manufacturer Morita Holdings last month for €80 million.

Established in 1907 and with annual revenues of around \$600 million, Morita made the acquisition to provide it with an international fire-fighting platform product line and access to a wider international market. The acquisition also gives it a full line of dedicated rescue platforms, to complement its ladder platform range, and takes Morita into the general purpose truck mounted lift market.

While the deal looks excellent for Morita, how will Bronto, its employees, customers and suppliers fare? Having a foreign owner is nothing new - US public

company Federal Signal has owned Bronto for 20 years. However a Japanese owner may be different. Bronto could benefit in terms of production and quality management techniques, areas in which Japanese companies still excel, but initially it looks like Morita will gain the most from Bronto's innovative engineering, strong brand name and international coverage helping it break out of the mature Japanese market.

Bronto has undergone several management changes over the past months which make more sense since the announcement of the acquisition. However with the recent growth from Ruthmann, and Palfinger still not quite firing on all cylinders as its new management team settles in, coupled with the growing presence of several Italian manufacturers Bronto could find itself with a bigger fight on its hands than it might have expected six months ago.

Thanks to heavy investment in recent years, Bronto has a major slice of the market for very large truck mounted and big insulated platforms. With this sector growing and the entry level high it is in a very good position. It recently completed a nine machine deal in the UK with Easi Uplifts and if rumours are to be believed it will also extend its XR range into the 65 to 80 metre range at Bauma in April.

Palfinger Platforms

Palfinger Platforms has also had a change of management, with joint managing directors Sebastian Simon for technology and finance, and Christian Eiring for sales and service, both taking office last April. Both are new to the access industry and it would appear that evolution rather than revolution is the order of the day as the company looks to regain the momentum it established for its class leading P480NX (Next Generation) and P550. Both managers also seem slightly surprised at the technological strength of its major competitors.

At the smaller end of its range, the more cost-effective products from Palfinger Platforms Italy (PPI) are progressing well, and helping grow market share and open new markets and increase exports for the company. It is hoping that this gathers even more pace in 2016. This could be made more difficult as competition increases in this sector. Two new German manufacturers - Klaas and Hubmeister - have launched new truck mounted platforms. For aluminium crane manufacturer Klaas this is its first proper truck mounted lift. The 25 metre Theo 25 mounted on a 3.5 tonne chassis has a 250kg platform capacity with an outreach of just over 12 metres or up to 17 metres



A Ruthmann Steiger TU 285 using its reach and jib on a property roof contract

with 100kg. Hubmeister's five model range extends from 16.8 metres to 26.5 metres. German manufacturers have struggled in the 3.5 tonne export market in the past, primarily because of keen pricing and less complexity from the dominant Italians. Palfinger's PPI machines compete directly in this market, and Ruthmann has looked at a similar solution, but whether the new German entrants can compete only time will tell.

The new management team has also restated the Palfinger Platforms' strategy to be technology leader in the sector, something that it clearly proved to be possible with the two Jumbo NX models. It says that new products to be launched at Bauma will prove that it can continue on the same track, with new models expected to include a new large chassis which will allow for a successor or replacement for the 103 metre Faun mounted WT 1000.



Is there going to be a replacement for the 103 metre Palfinger WT 1000 sometime soon?



A Socage TTJ 54

The Italians are coming

For many years Italian manufacturers have been threatening to make serious inroads into the larger truck mounted platform market. Several companies, such as Oil&Steel, Sogage and Multitel have all enjoyed limited success, never quite managing the major breakthrough. As we have seen with Ruthmann (see page 19) having a good product is only half the story, with distribution, marketing and after-sales support just as important.

Oil & Steel - now owned by US crane company Manitex - will look to capitalise in its Eagle and Eagle Phoenix ranges from 32 to 62 metres with Manitex providing resources and giving it a good way

into the North American market. Sogage now has an eight model line-up spanning from 35 to 75 metres with either one or two jibs - the TJ and TJJ - launching its largest ever truck mount - the 74.2 metre forSte TJJ75 last year. Mounted on a 32 tonne four axle truck, the new machine has a five section main boom, four section main jib and a second short articulating jib. Outreach is said to be 40 metres and maximum platform capacity 600kg - with up to 360 degrees of rotation. A 900kg winch option is also available.

Multitel Pagliero also has an extensive mid to large truck mounted platform range up to the range-topping 75.1 metre MJ 750.

Its more recent addition in 2014 however was the all-new 37.5 metre MJ 375 mounted on an 18 tonne chassis with an overall length of 8.5 metres and a maximum outrigger spread of 5.9 metres, or 4.9 metres with single side jacking. It offers



An Oil&Steel Eagle S3224 truck mount



Multitel's largest truck mount the 75.1 metre MJ 750

up to 26 metres of outreach from its four section main boom and three section articulating jib. The new model, which fits between the company's 32 metre MJ 320 and 42 metre MJ420, offers three working envelopes, with 500, 280 or 120kg platform capacity. The company says that the new

machine, which includes a full remote diagnostics package, will be priced competitively and is aimed as a replacement for the large number of ageing 34 metre Bronto machines in rental company fleets.

Still a very interesting sector which may become clearer through 2016. Watch this space!



The new 25 metre Theo 25 from Klaas is on a 3.5 tonne chassis



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The changing face of Ruthmann



The 11 metre, 200kg K110

In spite of having been founded 115 years ago and producing its first truck mounted platform in 1954, it was only when new owners took over the company in 2003 that Ruthmann began to develop into the market leader we see today. This transformation stepped up a gear with the appointment of the current management team in 2010. Mark Darwin visited the company to find out more.

The German manufacturer has set its sights on being the clear European market leader and it certainly appears to have developed a slick efficiency and in-depth experience to ensure that it is heading in the right direction - in 2015 it built around 500 platforms.

Based in Gescher-Hochmoor about an hour's drive north of Dusseldorf, in North Rhine-Westphalia, Ruthmann has two product ranges - the unusual Cargoloader transport system with its easy loading/

unloading features and Steiger truck mounted platforms.

The company, founded in the predominantly mining area in 1901, made a variety of products, mostly for transporting goods for the mining and agricultural market, even producing bicycles at one point. However as the coal became harder to mine - being more than 1,000 metres below the surface - it became less of an influence but it has still left its mark. Miners used to operate in gangs and the foreman in control of raising everyone up the



The Ruthmann T190 on a 7.5 tonne chassis has a 17 metre outreach

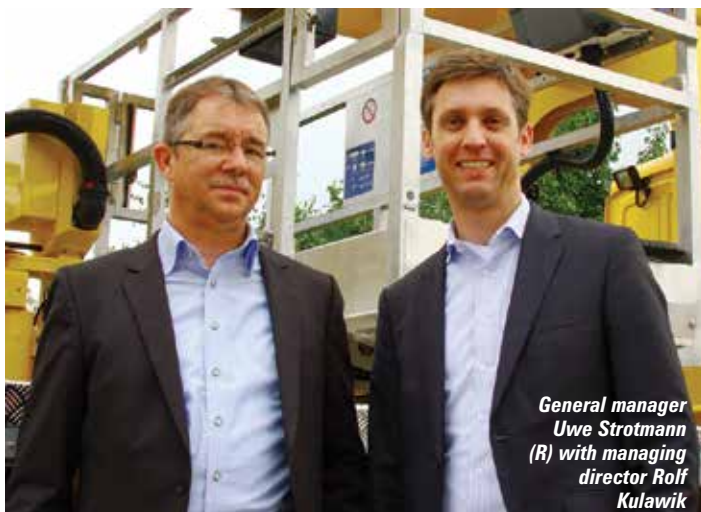
lift shaft elevators was called the 'Steiger'.

Like any long-established company, Ruthmann has experienced both the good and not so good times. But it was only after the Second World War that the company really started to expand. After mining, the area was heavily into textiles which were delivered by train. Ruthmann came up with a unique transport solution - the Cargoloader - a vehicle that allowed goods to be loaded and unloaded at various levels from the factory and onto train wagons.

In 1954 it built its first truck mounted platform - an eight metre working height lattice boom with a basket. Two years later it produced its first telescopic boom and continued developing truck mounted lifts, with many significant milestones and records along the way, including the first 60 metre TTS 590 in 1983 and the 100 metre trailer mounted TTS 1000 in 2001. Unfortunately - or perhaps fortunately given what followed -

the TTS 1000 was partly responsible for a massive financial crisis at the company, resulting in continual downsizing and restructuring between 2001 and 2003 during which half of its employees were made redundant. The TTS 1000 was mounted on a six axle trailer chassis and totally unsuitable for the European market. Ruthmann had however structured the company around selling 20 units a year, holding up R&D on other models and causing the company to virtually grind to a halt.

"Only two TTS 1000s were built and sold and although both are still working perfectly - one in the USA and the other in Malaysia - they were produced at the wrong time and for the wrong market," says managing director Rolf Kulawik. "Building the company around a 100 metre machine was a big mistake. Apart from anything else, Ruthmann was not geared up for exports, with at that time just five to 10 percent of revenues - less than €1 million



General manager Uwe Strotmann (R) with managing director Rolf Kulawik



Boom assembly



Steiger TB 220

- coming from customers outside of Germany, and yet the price for a TTS1000 was about €1.5 million!"

The company was rescued in 2003 by Heinrich Winklemann and Heinz-Jurgen Buss who invested in new products to bring stability to the company. In 2010 Winklemann's father died and he felt obliged to run the family business - an automotive supplier with revenues approaching €700 million. He then appointed the current management team of general manager Uwe Strotmann, managing director Rolf Kulawik and commercial director Uwe Strapper.

Strotmann started working for Ruthmann in 1994 and in 2003 was tasked with growing the export business. He did this with the new TB 180/220 truck mounts launched in 2002, on 3.5 tonne chassis. He also began setting up distributors across Europe, including the company's Austrian subsidiary its only wholly owned distributor.

The TB range sold well in France, the UK, Benelux, Sweden and Norway and today's models are quite similar but include the company's multi-bend round boom profile introduced in 2007. It has become the basis for all Ruthmann booms on 3.5 tonne chassis. This development also allowed the company to develop products such as the 3.5 tonne 27 metre TB 270 in 2010. Ruthmann now

has nine years' experience with this technology and its use has spread to other components such as superstructure weldments. The result is both strong and lightweight, useful with the heavier chassis brought about by new engine legislation. Ruthmann now uses high strength Docol 1200M steel from SSAB - one of the strongest high-strength steels on the market.

"The steel is quite flexible," explains Strotmann, "and in the early days competitors said that it was too thin, easily damaged and difficult to repair. Having used it for several years we have had very few problems, if anything it resists impact better than thicker, weaker steel and we get the performance required."

Product range

Ruthmann currently produces truck mounted lifts from 11 to 72 metres and claims to be European market leader in the 22 to 72 metre range on chassis above 3.5 tonnes. Introducing new models has been a high priority with the team using exhibitions such as Platformers Days, Bauma and Conexpo as 'fixed development points' for new product launches.

"We are not looking at platforms above our 72 metre T720," says Strotmann. "One of the major developing markets for larger truck mounted platforms is the US where there is big demand for erecting and maintaining wind turbines. However with our two major competitors already active and only 30 machine sales forecast over the next 10 years it doesn't make sense to make the huge R&D investment. We need bread and butter machines. Revenues are driven by product and the most important area was the 7.5 tonne sector, particularly for Germany and the UK to replace the hundreds of older 30 metre machines. We produced the 33 metre T330 in May 2011 and have sold hundreds into both countries, as well as a few into Austria."

Ruthmann has focused mostly on three chassis sectors - 3.5, 7.5 and 18 tonnes - and has looked again at the 3.5 tonne market to see what was missing or needed. "It was obvious that everyone in Europe has a 22 metre machine, but most are on larger chassis," says Kulawik. "We wanted a machine that allows rental companies to offer a real 22 metre platform but that can be driven on a 3.5 tonne driving licence. The smaller chassis means that the machine can cost 30 percent less than a 7.5 tonne truck, but rental rates are the same. The end result was the 22 metre TBR 220 which has a 16.4 metre outreach and 230kg platform capacity, in less than two years we sold more than 250 units."

'Rental' machines?

With many other manufacturers offering lower cost 'rental machines' is this an area Ruthmann is looking to enter?

"Six years ago we had the chance to build machines in Hungary via Teupen Hungary/Power and decided to build the first TB 220 with folding outriggers. The goal was a 22 metre Ruthmann with a price of a Multitel i.e. good quality and low price," says Strotmann. "We managed to produce the machine for €65,000 saving money on labour and with a cheaper chassis. The quality was excellent and the strategy was

to sell them in Eastern Europe to build up a market for our premium machines."

"However sales were slower than anticipated, several machines were sold into Poland and were very reliable, however we needed to buy the manufacturing company and this proved very difficult. Due to delays and different business practices we were unable to pursue this strategy, particularly because in 2010 to 2012 we had a lot of success with our new products developed in Germany. So yes we have thought about it to open more markets with a quality machine but at a lower price point. However, with the success of machines built in Germany this has taken a back seat. Maybe there is an opportunity in the future if we find the right partner."



Steiger TK 170



The multi-bend round boom profile introduced in 2007 has become the basis for all Ruthmann booms on 3.5 tonne chassis



The new T170 working on a movie set

Market info

The markets around Europe for truck mounted platforms vary enormously. In France the 3.5 tonne truck mount is huge, with Italian companies such as Multitel dominating. In Germany sales for the 3.5 tonne machines are good, but not as good as for larger machines. Over the past two years France has been Ruthmann's best export market - machines such as the TB 270 selling well. At Intermat 2014 Ruthmann marked the sale of the 650th TB 270 sold since its introduction five years ago. The landmark machine went to rental company Kiloutou.

In the big truck mounted sector the 'big three' - Bronto, Palfinger and Ruthmann - dominate, although Italian manufacturers such as Multitel and Socage are starting to find success for their larger models outside of their traditional markets.

"Manufacturers need a certain number of machine sales to justify the R&D costs and then a big investment is needed in after sales support," says Strotmann. "In the near future I cannot see

another manufacturer competing with the established big truck mounted marques. We have had good success with machines from 38 to 72 metres. The new products have hit the market at the right time. Around 90 percent of the larger models have been replacement machines, so I don't see the market growing too much - apart from the UK which is the only market growing for large truck mounts helped by the wind sector, particularly in Scotland."

"In Germany we have the wind in the north but the power is needed in the south. There is a move by the government against nuclear power but this requires more green energy. The problem is where to put the turbines and how to transport the power south. This gives work to truck platforms during erection, maintenance and working on the transmission grid."

New 66 metre insulated boom

The ICUEE show in Kentucky last September saw Ruthmann's partner - Time Manufacturing - launch the

66 metre Skybird 215I a brand new insulated truck mount designed specifically to work on high-voltage power lines. The platform is a collaborative effort between Time and Ruthmann, with the German manufacturer supplying a modified kit version of its 72 metre T720. The 500kV-insulated lift features a five section main boom and a fully-insulated telescopic upper boom. It offers an outreach of 32 metres with 100kg and a maximum platform capacity of 600kg. Features include a 300kg material handler attachment, fibre optic controls and a clear text display for diagnostics

and sensor outputs. Marketed globally under the Versalift brand name, both manufacturers see sizeable worldwide potential.

"The co-operation between the two companies began in 2011 when we bought the German subsidiary Time-Versalift Deutschland and acquired the Versalift dealership for Germany Austria and Switzerland. At the same time Time became Ruthmann dealer for Denmark, Norway and Sweden," says Strotmann. "This was a win-win situation for both companies. In the US we made Time our distributor for the non-insulated machines but an insulated

Ruthmann's partner - Time Manufacturing - launched the 66 metre Skybird 215I insulated truck mount last year



versalift.co.uk

ETM36-F
VAN MOUNTED PLATFORM



Mounted on a 7.5 tonne chassis the 17 metre T170 has 12 metres of outreach, 320kg platform capacity and 185 degrees of jib articulation

machine was always on the cards. It is Time's home market and they know the customers, machines and techniques. What they didn't have was a big, high performance platform. Even before the show there was interest from China, South and North America, and we hope to sell between five and 10 machines a year just in the US."

Can't stop developing

True to its development strategy Ruthmann has launched several products over the past six months including the T170 and T360.

The T170 is aimed at the street lighting, tree and power line clearing, with compact dimensions, a decent payload and rigid platform. Ruthmann says this type of platform is popular in central Europe, with a population of more than 500 units, many of which have aged as manufacturers have not offered this type of unit for around eight years, and larger 19 to 23 metre platforms do not offer the required payload.

Mounted on a 7.5 tonne chassis the 17 metre T170 has 12 metres of outreach, 320kg platform capacity and 185 degrees of jib articulation. With an overall weight of 6,900kg it offers a cargo capacity of 600kg. The new 36 metre T360 for 15 tonnes chassis and above, aims

to offer a replacement for older 35 metre platforms with cutting-edge design and state-of-the-art features. The company claims to have ground-breaking technology hidden within its five section boom, which is topped by a jib with 185 degrees of articulation, offering up to 31 metres of outreach with 100kg platform capacity, maximum capacity is 350kg. The overall length of the T360 is 9.47 metres and overall height 3.77 metres it claims a healthy 600kg spare payload for drivers, tools and equipment. Both new platforms will feature Ruthmann's new operator 'cockpit' information and control unit, which has been developed over the past two years and will be available on every new model.

In 2014 it launched the 28 metre TU 285. "We know that 100 Wumag WT250s were sold, so we said if



New platforms will feature Ruthmann's new operator 'cockpit' information and control unit, which has been developed over the past two years

A pre-production 36 metre T360 spied at the factory



A Steiger T360 carrying out inspections on a theme park ride

we can make a machine with jib out of the existing 30 metre model and sell 50 units over two years then it is worth doing," says Strotmann. "We launched the TU 285 on a 7.5 tonne chassis with a rear mounted turret, it has the same outreach as a 30 metre machine but three metres more to the rear. It is also compact, making it attractive to sectors such as window cleaning - where speed is money."

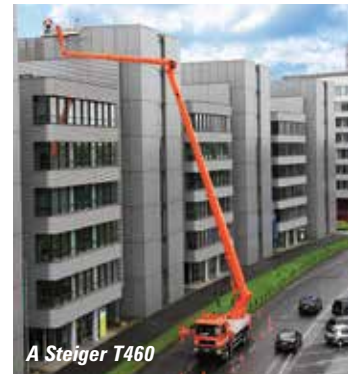
Willing to listen

Ruthmann says that its whole philosophy is summed up by the fact that it is happy to develop machines for customers. "If a customer has a serious suggestion we are not too big a company, so can react quickly and the answer is usually yes," says Kulawik. "A year ago we set up a new innovation unit which collects ideas from sales reps (or innovation scouts as we call them) and customers who are asked what should Ruthmann do next? The more feedback we get the better." "In 2012 there were a lot of changes in the company however we are now a better organisation - more able to react and more efficient with reduced costs. We are now really competitive with a great company spirit, well designed products and a great service network - particularly in our home market."

10 percent of Ruthmann's 400 strong workforce are currently on a three-year part-time 'electro-mechanics' apprenticeship scheme, and when finished will be placed in the assembly or aftersales divisions. It has also upgraded its senior technical staff and now boasts four with PhDs in electronics and hydraulics.

Performance overseas

Ruthmann's main growth in recent years has come from new products and overseas expansion. "Developments in 2013 and 2014



A Steiger T460

was mainly in the High Performance range, together with expansion to new markets such as Australia," says Strotmann. "MJ Rental in Melbourne purchased two 46 metre platforms in 2012 and it is now taking its 10th big Ruthmann topped with a 63 metre unit. They were a reference customer and from them we found dealer Nifty-Lift which covers Australia."

The company has grown revenues from €50 million in 2010 to €109 million in 2014 made up of €75 million of new product sales - including Versalift - €13 million of service, €15 million Ruthmann finance and €6 million from Ruthmann Austria. It says that 2015 will be at least as good. You cannot fail to be impressed with the way Ruthmann goes about its business. The company is certainly determined to be the clear market leader and looks well placed to succeed.



A Steiger T300



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