

# access

## INTERNATIONAL

www.accessinternational.media | A KHL Group publication  
July-August 2023

### TOPLIST

**access**  
**50**  
RENTAL FLEETS

### INTERVIEW

**Pedro  
Torres  
Rival**



### IN REVIEW

**MIX**  
2023  
10th  
EDITION  
MAASTRICHT  
6 - 8 JUNE

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OF IPAF



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RELIABILITY IN ACTION

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# Markets of the future

**W**e publish the **access50** listing of the world's largest access equipment rental fleets in this issue, which as always provides an invaluable insight into today's rental market.

As in recent years the Chinese rental companies are showing the strongest growth. However, overall that growth is not quite as dramatic as it has been in the last three editions of the **access50** listing.

China has suffered some challenges in recent times, including a slowdown in its economy, and while the access equipment market is still growing at up to 40% year-on-year it is expected to tail off over the next three to four years.

This will leave the world wondering which markets will be the next to take off at the same rate as China did seven years ago. India, it would appear, has an increasing momentum that will soon lead to exponential growth in its access industry.

In this issue we hear from two ambitious rental companies, based India, both of which see a bright future for access.

APEX was an important show for the sector when it took place in the Netherlands this June. The industry was out in force and there were a number of significant launches at the show, including low emission equipment.

Although the realities of running heavy offroad electric equipment is some way off, there are real applications for the access sector. Yes, the charging infrastructure in Europe and the US is wanting, but the will is there to take the required leap.

The access industry is of course still young and has massive growth potential. If we think there couldn't possibly be anymore new major OEMs, following the surge in China, we may well be mistaken.

We are already seeing manufacturing in India and if the market there grows anywhere near as strongly as China's, there will no doubt be a whole new era of manufacturers to support it.

**Euan Youdale**  
Editor

“The world is wondering which market will be the next to take off at the same rate as China did five years ago.”



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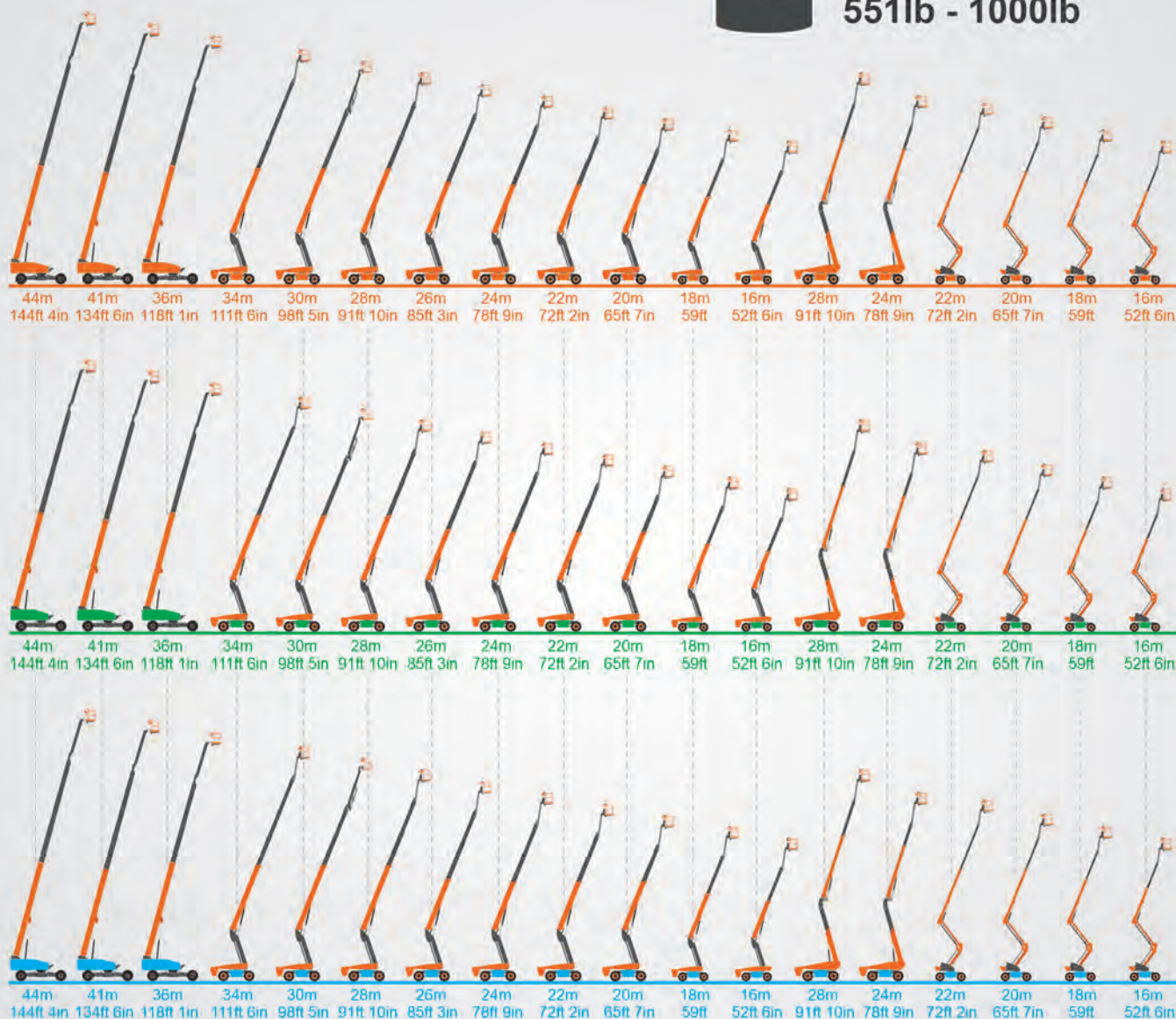


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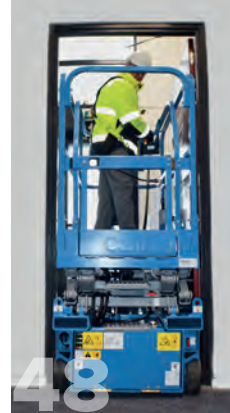
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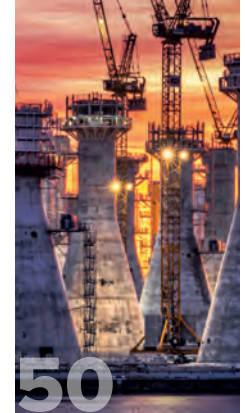
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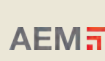
Following a period of uncertainty, confidence in the UK among manufacturers and rental companies had fallen, but is that confidence beginning to return?



## ON THE COVER

**Multitel Pagliero's  
MXE 170 truck mount  
demonstrates how  
this product type  
is adapting to the  
modern requirements.**

## MEMBER OF



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## IN BRIEF

■ MEWP manufacturer **JLG** and equipment rental giant **Riwal** held a joint event at APEX, in Maastricht, The Netherlands, to celebrate their longstanding partnership - which stretches back to 1986 and saw Riwal become a JLG distributor in 1995. Over 300 of the companies' partners and customers were invited to the event, which was opened by JLG's General Manager Karel Huijser and Riwal CEO Pedro Torres. "In the 28 years of our official distributorship, we have witnessed the rental market mature and develop."

■ **Mollo Noleggio** is expanding with the acquisition of another rental company in its home country of Italy. The investment in Manetta Noleggi, based in Mosciano Sant'Angelo, in the Abruzzo region, follows domestic acquisitions of Monia Noleggi, in Forlì, Parmiani Noleggi, in Sondrio, and very recently PMP in Udine. Led by brothers Mauro and Roberto Mollo, Mollo Noleggio specialises in construction, industrial, agriculture, logistics and events and makes its entrance into the Abruzzo region for the first time.

# First hydrogen boom set for July delivery

A partnership between UK and Ireland rental company Speedy Hire and Niftylift to manufacture the world's first hydrogen-electric powered access platform will see the first unit delivered in July.

The two companies co-developed the fuel cell-powered articulating boom lift and agreed a three-year partnership worth

£9 million (\$11.4 million) in the first year, that will see Niftylift manufacture the lifts at its Milton Keynes, UK, facility exclusively for Speedy Hire, alongside an additional fleet of Niftylift hybrid platforms.

The pioneering technology was developed to provide a commercially sustainable product, while meeting the

drive towards net zero as the UK construction sector is under pressure to reduce emissions.

Dan Evans, chief executive at Speedy Hire, said, "This world-first technology is a game changer for UK construction companies, enabling them to start using equipment powered by a zero-emission fuel such as hydrogen."

AI

## Leguan restructures assembly

Spider lift manufacturer Leguan Lifts has restructured its assembly process to enhance production efficiency and expand capacity.

As part of the Finland-based manufacturer's continued international growth, it has increased its staff levels by more than 25, including expertise in key parts of the assembly process.

Assembly can now be streamlined and improved to bolster Leguan Lifts' production capabilities and strengthen the company's competitive position



Inside Leguan Lifts' facilities.

in the market. There is also a focus on enhancing the high level of technology associated with the company's products.

The increased production efficiency will allow faster turnaround times, ensuring customers receive their orders promptly. Moreover, the

expanded capacity will enable Leguan Lifts to meet growing market demands and seize new opportunities by launching products in coming years.

"We are thrilled to announce we have completed the restructuring project," said Esa Vuorela, MD, Leguan Lifts. AI

## TALLEST PHILIPPINES TELESCOPIC



The Philippines has received its tallest ever telescopic boom lift, with a construction equipment rental company in the country taking delivery of a super boom from manufacturer Genie.

Hastings Motor Corporation, which already has the SX-135 telescopic and ZX-135 articulating models in its fleet, added the country's first Genie SX-150 machine - a model that delivers a working height of 48m (152ft) and an outreach 24.8m (80ft).

Ruthmann has confirmed that its new 100m working height truck mount will likely be launched early next year.

The Steiger T 1000 HF is based on the existing 90m T 900 HF model and was announced at APEX.

See the APEX review in this issue of AI.

(Right) Marcel Joly orders the first T 1000.





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2023

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8 June 2023

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www.platformers-days.de

APEX ASIA

24-27 October

Shanghai, China

www.apexasiashow.com

## PLATFORM BASKET ENTERS INDIA &amp; REGION

Platform Basket has appointed Nexa Global Infra Solutions as its sales agent for India, Nepal,



Bangladesh, Sri Lanka and Bhutan.

Owned by **ANIRBAN P GHOSH**, an

experienced sales manager in the access and lifting equipment sector of 25 years, Nexa Global Infra Solutions was founded in 2023 and has its head office in India.

Ghosh has worked at JLG India for 11 years and Hilti for five years, looking after their railway, defense and seaport business.

A Platform Basket spokesperson said, "We warmly welcome Anirban and his cooperation to our group. Being in this sector for a long time, Anirban will bring his knowledge in assisting customers and focus on our extensive product portfolio. We wish Anirban great success."

## New president for Skyjack

**C**harlie Patterson will take over as president of Skyjack following current president Ken McDougall's retirement, the company has announced. The two men will work together on the transition until Patterson takes up his new post in January.

The change will bring to a close McDougall's 36 year career at Skyjack's parent company Linamar, during which he led Skyjack for two separate periods.

Patterson, the current vice president of international operations, joined Skyjack in 2000 as UK sales manager and went on to head the UK and European operations for the organisation. He oversaw the opening of Skyjack offices in the UK, Germany, France, Sweden



Ken McDougall



Charlie Patterson

and Australia and previously led sales in Asia-Pacific.

McDougall started his career at Skyjack parent company Linamar in 1987 as a tool designer, moving up into various key roles including global sales and estimating manager, and vice president of operations.

His tenure saw the acquisition of two telehandler lines from Carelift/Zoom Boom and Volvo, a crucial foundation for the company's telehandler line. **AI**

## LGMG NORTH AMERICA HQ STARTS BUSINESS

LGMG North America has officially started business at its new US headquarters.

Based in Dallas, Texas, the new premises follows the company's relocation in late 2022 from Chambersburg, Pennsylvania.

The new location includes a warehouse and full training centre in addition to offices, and it will be responsible for sales across North America.

The Texas facility will be in close proximity to the manufacturer's plant in Mexico, allowing better communication and convenient transportation, and providing a logistical advantage for parts and service supply to customers, said the company.

LGMG's new Monterrey, Mexico factory will officially begin producing boom and scissor lifts in the second half of this year.

## Ommelift expands in key markets

Danish aerial platform manufacturer Ommelift has appointed a new equipment dealer for two key markets in Europe, adding equipment Norway-based rental and sales company Ådalen to its dealer network.

Ådalen, which is headquartered south of Oslo in Sarpsborg and has numerous service bases along the Norwegian coast, is a provider of access, forklifts and warehouse equipment from LGMG, Hinowa and Hangcha.

**Jesper Boysen, global sales & marketing manager at Ommelift (far left) with Ørjan Ådalen, CEO, Ådalen.**

Founded in 2006, Ådalen's status as Ommelift dealer will see it serve Norway and Sweden.

Ommelift said the partnership "marks a significant step" in its plans to expand and strengthen operations in Scandinavia. **AI**



PHOTO: OMMELIFT

## AI NEWSLETTER

**access** newsletter  
INTERNATIONAL news from around the access world

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## WORLD NEWS

### GERMANY SIGN UP FOR CTE

CTE has appointed ATG Lift as its new equipment dealer for Germany, signing the partnership deal at the 2023 APEX show in Maastricht, The Netherlands.

ATG Lift, which is based just north of Stuttgart in Bietigheim-Bissingen and has been in operation for over 20 years, specializes in the sale of new and used machines and provides servicing and spare parts for aerial platforms, telehandlers and forklifts.

Its deal with CTE will see it represent the manufacturer's CTE ZED, CTE MP, CTE B-Lift truck mounted platforms in South Germany, as well as provide sales and aftersales services for the CTE Tracess spider lift range across the whole country.

Massimo Franceschi, Export area manager CTE, said, "I'm proud to start this collaboration with them because they're strong with commercial activities and service support. ATG Lift is a young team, well appreciated."

CEO of the new joint venture, **JaloBMS, Sami Jalo (right)** with **Jens Enggaard, its chairman.**



## Specialist truck mount JV announced

**F**inland-based rental company Jalo & Jalo and Denmark located BMS have established truck mounted aerial platform joint venture company JaloBMS.

The new partnership, specializing in large truck mounted platforms, will have around 100 units in the combined fleet, with working heights ranging from 30m to 104m, making it one of Europe's

largest providers of this type of equipment.

The aim of the joint venture is to serve sectors including high voltage power line networks, wind energy and telecoms throughout Northern Europe.

Initially, JaloBMS will focus on the Scandinavia and Finland markets, where the two separate business are already strong, but will take on projects outside these markets from the offset.

## PEOPLE NEWS

Rentase has appointed a CEO to oversee its expansion in Bangladesh.



PHOTO: RENTASE

India-based rental company Rentase has employed **MOHAMMAD SUBAIL BIN ALAM** to lead the company's new division Rentase (BD) Limited.

Starting from 1 April, Subail has taken control of the full Rentase Bangladesh business and supports the Rentase Group in developing its business in other countries. Before joining Rentase BD, Subail was director of crane and specialised transport rental company Sarens Bangladesh, which he started in 2015.

As a subsidiary of Sarens NV Belgium, he also expanded the business into Thailand.

BMS Group, headquartered in Aalborg, has more than 30 locations in Denmark, Sweden, and Norway, while Jalo & Jalo has more than 10 locations. **AI**

## FINANCIAL HIGHLIGHTS

■ In 2020 **Alimak Group** laid out its New Heights Programme; a two-to-three-year strategy that aimed to achieve revenue growth of between 5% and 7%, with an adjusted EBITA margin target of 14% to 16%. As a result of the programme Alimak's 2023 first quarter financial results saw it bring in revenues of SEK1.7 billion (€150 million). A figure that was further fuelled by its €500 million acquisition of working at height specialist Tractel, which subsequently saw Alimak restructure its organisation to incorporate the business.

■ A 22% increase in its rental revenue has seen **Ashtead Group** post record revenues of \$9.6 billion (€8.7 billion) for the year to 30 April 2023, a 24% increase. As expected, the US remains its largest market and accounts for \$8.2 billion of the total with a profit of \$2.4 billion, while the UK generated \$822 million and profits of \$78 million. Elsewhere, rental only revenue in the UK through Sunbelt Rentals UK generated revenues of £429 million (\$548 million) at a growth rate of 6%.

■ The **European Rental Association (ERA)** has revised upwards its forecasts for rental growth in 2023 on the back of better than expected construction growth, although the outlook for 2024 is less positive. ERA's consultants, S&P Global, uprated 2023 rental growth forecasts for all but two of the eight largest rental markets in Europe. France is expected to expand 3.1% rather than the 1.8% expected in late 2022. German growth increases from 2.4% to 4.3%, Italy is up from 4.4% to 6.5%. Norway (6.0%), Spain (5.2%) and the UK (3.3%) have all shifted up by around 1.0%.

### ACCESS SHARE INDEX (ASI)



21 June 2002 = 100 base

COMPANY	CURRENCY	START DATE	PREVIOUS	CURRENT	%
		21/6/02	03/05/23	13/07/23	
<b>Acces Industrie</b>	€	1.34	—	—	—
<b>Aichi Corporation</b>	YEN(¥)	208	842	862	2.4
<b>Ashtead Group</b>	£	0.47	46.94	53.94	14.9
<b>Kanamoto</b>	YEN(¥)	—	2257	2329	3.2
<b>Haulotte Group</b>	€	9.0	3.52	3.35	-4.8
<b>Oshkosh Corp</b>	US\$	—	74.95	90.30	20.4
<b>Tanfield Group</b>	£	—	0.04	0.03	-25
<b>Terex Corp</b>	US\$	23.08	48.25	62.93	30.42
<b>Ramirent</b>	€	15.0	—	—	—
<b>United Rentals</b>	US\$	21.47	349.76	467.30	33.6
<b>ASI INDEX</b>		<b>100</b>	<b>1377.65</b>	<b>1718.20</b>	<b>24.7</b>



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**Riwal's CEO Pedro Torres shares his vision of the access rental market and the challenges we face in getting there.**

# Rental projections

**W**hat marks Riwal out from many other rental companies is its commitment to remaining an access equipment rental specialist, despite its size and global presence.

With around 20,000 units in its international fleet, the Netherlands-based firm is also committed to developing the access sector in emerging markets, helped by its 60 depot locations in 14 countries throughout Europe, the Middle East, along with Kazakhstan and India.

Forging growth in emerging access nations is no easy task and takes knowhow as well as a long-term view. Such pressures in less mature nations coexist with a possibly even greater level of uncertainty in the already mature markets, thanks to a "perfect storm", as Riwal's CEO Pedro Torres puts it of supply chain constraints, inflation and interest rate rises and scarcity of employees, wrapped up with the problems associated with the war in Ukraine.

While ongoing conditions in Europe are difficult to predict, there has been a significant bounce back by the rental market since the end of the Covid pandemic, with continued growth forecasted this year, even if it is likely to be a little bit lower than previously expected.

As Torres says, in 2022 Europe returned to normal in financial terms with a €3 billion turnover in the rental sector. Riwal's revenue grew by 13% to €315 million that year, compared to 2021. And indicators show the market will remain positive in 2023.

## Tackling uncertainty

On the subject of fleet investment, the view is also positive, although, again, clouded by economic turmoil. Torres comments, "If we look at replacement value, we have been growing the fleet by around 40% in the last five years, including the pandemic period."

The company is in the midst of its strategic plan, which means little information about its capital expenditure can be shared now, except to say, "The plan is to

grow in the next year. We are going faster and speeding up the process, but we have to work around these uncertainties when planning the fleet, which is not an easy task."

Providing an example of the dynamic situation, Torres adds, "In June 2022 I was not very optimistic about the rest of the year, then we had a really strong Q3 and Q4, so it's really difficult to predict and this is the major challenge."

These economic fluctuations make decisions on capital investments difficult. "If you buy too much, you have a lot of pressure on your time utilisation. If you don't buy enough you have to sub rent, which affects your margins very much."

Therefore, visibility of the rental market is far from clear, says Torres, with projects in the medium term suffering continuous delays and sometimes cancellation. And, while the overall rental sector is reporting a buoyant environment, the IMF forecasts growth of just 0.6% across the Eurozone this year, which is lower than any other region in the world. "We reach the conclusion that we cannot control these circumstances, so we have to be flexible. Anything can happen."

Although supply chain-related issues

have improved in recent months, leading to more acceptable lead times, the market has fundamentally changed, says Torres. "You can get products much faster now but you still have to make quick decisions. This is a new way of operating rentals; you cannot plan in advance for many years because everything is changing so fast."

As the supply chain has been a major factor, so too has the increasing availability of products from the OEMs that have appeared on the international market, notably from China.

## Strong partners

As a longstanding and renowned JLG distributor in a number of its key markets, Riwal also has a large number of the manufacturer's products in its fleet.

"As a partner, JLG has always been and will always be our first choice," says Torres, adding, "But we also have to be open to other alternatives. We have to look to the new suppliers since the market is very competitive and we have to increase margins."

"We have to look for new products that bring good economic conditions and technology, and maybe faster delivery times, >

“There is a new way of operating rentals; you cannot plan in advance for many years because everything is changing so fast.”

**PEDRO TORRES,**  
CEO, Riwal.



## INTERVIEW RIWAL

but again, we will remain with JLG as our main supplier for the years to come.”

Adding to the hurdles for modern rental companies is the shortage of skilled labour, which has the potential to become the leading challenge to the market in the near future.

Torres comments, “In Northern Europe particularly it is very difficult to find technicians and even more difficult to find really good technicians.

“I do not think it will improve in the future and could get even worse. We have to do our homework and be an attractive employer.”

Riwal is actively working to create an even better environment for current and future employees. “We have many initiatives in training and a lot of sustainability targets and we are constantly measuring and improving employee satisfaction. With clear actions and a wide variety of events and initiatives, we aim to improve health and wellbeing and increase diversity and engagement.”

### Global opportunities

Returning to the clear positives in the market. MEWP rental on a global level is on an upward trajectory and will continue to be. This has a lot to do with the fact that penetration into existing and new markets is set to keep increasing.

“If we look at our own markets at Riwal, we have many countries with low penetration and there is abundant opportunity to grow in them.

“One huge market I foresee for us in the



years to come is India. India will develop its rental services over the coming years, as China did five years ago and it will become one of the economic centres of the world, along with the US, China and Europe.

“We are already the market leader in India and we are really looking forward to the market coming on really strongly.”

To take that growth forward, Riwal will focus on the most modern of technological offerings. The company invests in continuous improvement of its own digital services, such as the MyRiwal app and its Customer Portal, and develops new initiatives based on customer interviews and NP surveys.

“Digitalisation is really helping us provide an improved service to our customers.

“One important thing is that we have one single ERP system for all our countries - we spent a few years rolling it out and it took a lot of energy, but we are now starting to see many benefits, like good reporting, benchmarking of KPIs and efficiencies in many areas of the company.”

Another important benchmark by which companies are increasingly being judged is their efforts to enhance in-house sustainability programmes. Riwal sees the issue as fundamental to the future of the organisation and as such is concentrating on

### Riwal's Denmark-based IPAF training centre.

seven of the United Nations' 17 Sustainable Development Goals (SDG). Those being: good health and wellbeing, quality education, clean water and sanitation, affordable and clean energy, decent work and economic growth, sustainable cities and communities, and

responsible consumption and production.

### Financial benefits

Riwal is also working with international sustainability rating company called EcoVadis, which provides a score to companies based on their sustainable policies and achievements, out of a maximum 100 points. As Torres explains the company has dramatically improved its rating, which now stands at 62 points (Silver level).

Torres' aim is to reach Platinum level by 2025, which is only awarded to a company with 75 points, or more. Currently, just one percent of companies have reached this level.

A good rating also allows companies to take out larger sustainability linked loans. For example, Riwal's total credit facility is linked to this: based on four indicators measuring sustainability, the bank increases or decreases the interest rate.

One area that fits into a sustainable future MEWP market is the use of zero emission equipment. While increasing the number of electric units in the market is in everyone's interest, says Torres, the reality is not simple.

“Certainly, in Northern Europe, everyone is focusing on sustainability. But there are a couple of very important issues.

“The charging of electric equipment on site is very problematic - it is difficult for all the rental companies at the moment. We constantly look for ways to scale successful local sustainable projects, such as the possible deployment in all our countries of the off-grid solar-powered charging stations already used in the Netherlands.”

Nevertheless, there are great opportunities for a forward-thinking rental companies. “The plan is to keep scaling our operations in large countries with a small market penetration.

“There is a good trend in the UAE and Qatar, as well as India and the latter is where we intend to invest heavily.”

Torres adds. “We are analysing a couple of new countries and in terms of acquisitions and start looking for that potential in a few of the countries we are working in now.” **AI**





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# Compacts at the

**The smaller truck mount in the 3.5 tonne and below category is the prime area for the move into hybrid and electric, besides the challenge to provide greater capabilities all round.**

**A**ccording to Versalift the main challenges in providing solutions with greater capacity, height, and outreach on small chassis are securing payload while maintaining performance.

This is in addition to securing extra weight for battery packs in hybrid solutions, and balancing cost.

To approach these challenges, the company is using advanced stabilization technologies and optimising its frame design. "Additionally, we seek to secure extra weight for hybrid solutions by utilising lightweight materials and efficient power management systems," said a company spokesperson.

"We also identify cost-effective components and streamline the manufacturing process."

Versalift is part of Time Manufacturing Company with its partners in the group including France Elévateur, Movex and Ruthmann.

Together, they are looking into new market trends like Hydrogen driven vehicle solutions. "We are convinced that the battery-powered electric vehicles we see today are merely the first step on the evolutionary road to having emission-free vehicles that will meet and most likely at some point exceed our expectations."

## Waiting for maturity

Ruthmann's view is that the hybrid and electric sector for compact truck mounted equipment is developing slowly but steadily. "The market has been holding back, waiting for more mature products that can meet their needs. However, there has been an increase in demand recently."

Despite this, the industry is still at a tipping point, particularly in terms of range, which doesn't yet fully meet all customers' expectations.

As Ruthmann points out. "It's exciting that the industry has come to a point where it can deliver meaningful 100% electric solutions. However, it's difficult to stay below the 3.5 tonne limit, and we find that many customers are looking to move to the 4,250kg class." The 3.5 tonne class refers to EU vehicles that can be driven using standard driving licence as long as the GVW is below that weight.

However, concerning electric vehicles there is still no EU harmonised law that allows these vehicles to be driven with a B driver's license when there is a lift mounted, says Ruthmann. The industry is now waiting a dispensation for fully electric solutions.

The existing 100% electric Ruthmann Ampero is now available on the standard chassis of the new Iveco eDaily. Based on the current Steiger TBR 260, the Ampero TBR 260 E is the highest electric truck mounted aerial platform on the market. This latest generation offers a working height of 26m and an outreach of not less than 17m. Up to 150km and 30 full working cycles are possible with one battery charge – enough for one working day at least.

## Electric rise

Multitel Pagliero says the growth of the hybrid and electric vehicle mount sector over the last two to three years has been significant. "More and more rental customers in different countries are buying hybrid versions of all the most popular models.

**The Versalift VTX now has a hybrid solution.**



A clear sign of the market embracing the sustainability philosophy. For this reason, we will propose more hybrid solutions within our range."

The last hybrid model from Multitel is the MXE170 mounted on Piaggio Porter NP6, with LPG and petrol fuel. The low weight unit has a GVW of 2,800kg, allowing it to move on delicate surfaces, and a reduced length of 5.85m, while the stabilization is width is only 1.8m.

The compactness is complemented by the low height of 2.550m, making it one of the most compact platforms on the Piaggio NP6.

The choice of LPG, in addition to cost savings and less pollution, allows urban work at all hours of the day, without the constraints of traffic blocks.

## New introductions

At Versalift, there is a long history of providing hybrid and electric solutions. Currently, most of the company's platforms are available as hybrid solutions, while for fully electric solutions, it has been waiting for the market to mature. However, it has recently introduced two fully electric van mounts – one in the 3.5 tonne category and



**The Multitel MXE 170.**



# cutting edge



the lift structure leaves free space on the flatbed for the installation of a toolbox. The Optional toolbox is made from insulating “sandwich” plates that will keep the contents dry. The light structure of the lift, subframe, and toolbox allows a spare payload of up to 200kg. It has a reach up to 13m, with a bucket load of up to 230kg. The LMC system provides dynamic outreach, allowing the operator to have safe and optimized outreach. An E-Tech battery package is installed to convert to a hybrid solution.

## Co-designs

CTE's latest offering is on a fully electric truck. The CTE MP 20 Ev is mounted on a 3.5 tonne e-carry Green-G truck and offers 20m of working height, 13m of outreach and 250kg of capacity. The double boom configuration, one of which is telescopic with jib, is designed, engineered, and manufactured by CTE and SSAB.

Adhering to industry requirements, it offers a ground console with wireless remote and integrated display for wireless



**The all electric CTE MP 20 Ev in Verona city centre.**

another in the 4.25 tonne category, as well as offering the VTX 240 G3 as fully electric on a 4.25 tonne chassis. Moving forward, Versalift plans to expand its range of hybrid and electric solutions and keep a close eye on industry developments to meet the evolving needs of customers.

The VTX-240 G3 provides the established benefits of the VTX but now as a hybrid solution. Mounted on MB Sprinter chassis, it comes in at less than 3.5 tonnes, including fuel, driver and battery.

It has a basket capacity of 220kg, a very low transport height, and a unique working diagram that provides flexibility. It comes with a 2 x 90-degree basket rotation and has a knuckle between the lower and upper boom, to get up and over obstacles, which is ideal for working on roofs. The diagram also allows -3m below ground level and the chassis can be levelled on a 6° slope.

The VTL-37-130-F hybrid, mounted on a 3.5 tonne MB Sprinter is suited for work in places where there is little space, such as in cities. The shape of

## TRADITIONAL DEVELOPMENTS

Much of this feature has concentrated on hybrid and electric products, as the 3.5 tonne GVW and below is the most ideally suited to this. However, there have been developments in the traditional combustion engine arena as well.

The latest 3.5 tonne unit from Ruthmann is the Ecoline 270. With 27m working height and 16m outreach, the 270 extends the range by 3m working height. With a vehicle length of only 7.53m and a permissible inclination of the position of up to 5°, the model is designed to surpasses the industry standard in the low budget segment.

The features reflect the latest customer demands in the compact truck mount sector in several ways, including increased working height, by offering 4m more compared to previous models.

The unit's tolerance for positioning on slopes addresses a common customer demand for versatility in various work environments where uneven terrain or sloping surfaces are common.

The new V200 from Versalift is a new product aimed at a specific customer segment. The

high-performance telescopic lift comes with automatic stabilization as standard, making it an ideal choice for demanding work at height. It is installed on a 3.5 tonne Iveco Daily with a wheelbase of 3750 mm, enabling an optimal turning radius. In transport position, the V200 is less than 3m tall.

The CTE ZETA 22 offers 22m of working height, 10.5m of outreach and 250kg of capacity.

The total clearance platform, without any bulk underneath, makes this model the ideal machine for all maintenance activities, especially in green areas, reducing the risk of getting entangled or damage due to accidental impacts.





## SMALL TRUCK MOUNTS

operations. The basket console has the same look and feel of the ground console, with integrated display for easy familiarisation for the operator. It is equipped with CTE's CTE S3 EVO smart management control system.

The-carry Green-G provides a range of up to 70 km (WLTP) and 25 work cycles. The power supply system offers the advantage of it ability to work entirely on battery or in plugged-in mode connected to the mains with the 220V supplied charging device.

As the company says, such designs carry challenges. "The main challenges are to engineer, design and manufacture lighter structures maintaining stiffness and resistance to fatigue." CTE has achieved these results through FEA Fatigue analysis and physical tests correlation and has heavily invested in R&D in electric technology.

"The engine manufacturers are starting to introduce full integrated solutions, with engine, electric generator and system controls. Also, several electronic components manufacturers are developing specific solutions dedicated to motor and battery controls. Development of new battery management systems and materials is also on the horizon," said the CTE spokesperson.



**The 20m PNT model from CPL.**



**Isolì's PT160E.**



**The Movex compact range.**

### High precision

"At the same time, major players are also presenting their new vehicles fully electric, fully compatible with the actual installation. The future is certainly green on the vehicle side, while the distribution infrastructure must be implemented."

Movex's latest platform offers hybrid operation that offers the advantage of being able to work for extended periods of time indoors on battery power.

The SERIE TLH can be mounted on a Renault, Iveco or Isuzu and offers working heights of 16.4m, 18m and 20.1m, along with possible horizontal reach options of 9.6m, 10.7m and 10.8m. Basket load capacity is 230kg with two operators. The high precision electro-hydraulic controls are in the basket and at the base of the machine, while there is automatic basket leveling using compensated cylinders. The basket at the end of the telescopic boom has a rotation of 50 degrees + 50 degrees.

The combustion engine is used for transportation only, with the electric working autonomy of the platform for the TLH series being at least one working day.

### Green upsurge

The Klubb group has also witnessed the upsurge in the adoption of hybrid and electric green vehicle mounts in recent years, including mounted van platforms. As well as the reduced emissions, they contribute to lower operating costs, says the company, through decreased fuel consumption and

maintenance requirements. The innovative systems found in this technology also enhances overall efficiency, allowing for a more streamlined and productive operation, such as the PT range, as well as the PNT200 and the rest of the PNT Range.

"The demand for hybrid and electric vehicles is higher than ever before, particularly in the context of burgeoning urban areas," says Julien Bourellis, Klubb Group CEO.

"The significance of compact mounted vehicles cannot be understated, as they possess the agility and versatility necessary to navigate and reach diverse heights.

"Embracing these compact hybrid and electric solutions has become increasingly imperative to meet the unique demands of modern urban environments, while simultaneously fostering sustainability and responsible resource utilisation."

### Power optimisation

The PNT200HE is a truck mounted access platform offered by Isoli, with a working height of up to 20m and a maximum outreach of 12.8m. The PNT200HE has a hybrid power system, integrating an electric motor with a diesel engine.

The system optimises power distribution and is equipped with user-friendly controls.

The range is complemented by another range of truck mounted products in the 3.5 tonne and below GVW segment. From CPL, which is also part of the Klubb group, comes the PT ranges. Leading the pack is the PT160E, a 16m unit, ideally suited for a range of tasks with an outreach of 8.9m and a substantial load capacity of 300kg.

Next in the line is the PT180E, an 18m machine, boasting a maximum outreach of 12.5m and a load capacity of 300kg. As the company describes it, the flagship model is the PT200E, offering a working height of 20m and an outreach of 10.8m. With its maximum basket capacity of 300kg.

By broadening its product range through acquisition and new designs, Klubb says it aims to address the unique requirements of various industries with tailored solutions.

Therefore, Bourellis says, it will continue to expand its electric and hybrid range. **AI**





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# New on view

**A**PEX, alongside the International Rental Exhibition (IRE), attracted 225 exhibitors and saw multiple launches of new products and services, including many electric machines.

One of the main themes of the show, which returned following a six-year break due to the covid pandemic, was the move into green energy equipment, along with evermore compact and versatile equipment, capable of offering greater capabilities across the working envelope.

## New spider manufacturer

A new aerial platform company was launched at APEX.

I-Lift Access Solutions specialises in spider lifts and is based in Bari, southern Italy.

The company was founded by longstanding professionals in the spider lift sector from that region, with the factory opening in September 2022. The aim is to launch five sophisticated, yet easy to use models from 13m – 26m working height. The first model, on show at APEX, was the 18m working height IL18, to be followed soon by the IL21.

Features of the IL18 include an 18m working height, 8.3m outreach and 230kg capacity in the basket across the entire working area.

This is accompanied by a double pantograph boom, plus telescopic section and 90 degree articulating jib. This allows overpasses up to 8m. There is also an automatic stabilisation system. All hydraulic pipes and electric cables are placed inside the boom sections.

The company said the models are aimed at

**APEX made its return this year and there were plenty of items on show.**



outdoor use, which will be followed by more indoor potential when a lithium version is introduced. The suitable applications range from maintenance to tree care. For the latter, a compact turntable with a steel cover provides a sturdy exterior.

## First mast lift launch

Italy-based Platform Basket introduced its first vertical mast lift at APEX.

The bi-energy Heron 10 comes in two versions, a diesel-powered model and the Heron 10 E electric offering, both of which complement the manufacturer's spider lift products with their tracked undercarriage and light and compact design.

An important feature is the ability to tow the Heron 10 on a light trailer of less than 3 tonnes, making it easy to reach a range of maintenance jobs, painting work, window cleaning and tree care applications.

Both versions offer 9.6m working height and 3.45m maximum outreach, with an 8.3m height at the maximum outreach and a maximum platform capacity of 230kg with two persons. The units measure 2.71m length, 1.2m width and 1.99m height.

Another key feature is the automatic stabilisation with the push of a button and



incorporating four independent outriggers. In addition, operators will benefit from a direct electric e-drive system.

The easily interchangeable basket can be replaced with a 250kg lifting capacity hoisting winch.

The bi-energy option of the Heron 10 comes in the form of an additional 230Vac electric motor for indoor use. The Heron E, which is powered as standard by a lithium battery, has a powerful recharging system on board.

Fellow Italian manufacturer Imer had its new AC Series scissors on the stand. It consists of three models to replace the pre-existing 80 Series. They offer AGM batteries and AC electric motor, as well as 90-degree steering.

However, the manufacturer told *AI* that it planned to concentrate on spider lifts in the future. The increasing competition from the large number of new manufacturers in the market offering scissor lifts means that it is becoming too much of a crowded environment.

## Environmental firsts

LGMG introduced a range of MEWPS at the show.

With a key environmentally-friendly theme, LGMG displayed a variety of electric booms, including the lithium-battery powered telescopic lift, the T26JE, and the A13JE-Li articulating boom, as well as a new electric articulating boom lift, the A09JE.

T26JE features 4 wheel drive, 4 wheel steer and oscillating axles, allowing its wheels to grip the ground when driving on hard and uneven terrain. Its platform has a dual



**New Italian manufacturer I-Lift.**

**Platform Basket has launched its first vertical mast lift.**







The LGMG stand at APEX.

## WOMEN IN ACCESS

IPAF held a very successful event to promote women in the powered access industry at APEX. The breakfast networking event, entitled Women in Powered Access, took place on the Thursday morning before the show started.

Speaking at the event was Karin Nars, President of IPAF and MD of Dinolift, who launched the initiative. Nars co-hosted the event with Tjitske Van Hellemond-Wiersma from JLG, who discussed the importance of contribution, mentorship and collaboration among women in the industry.

An IPAF mentoring scheme was also announced at the event, which is designed to connect women starting out in the access industry with a longer standing female industry professional, to offer support and advice.



capacity design of 300/450kg to carry more materials.

Both the A09JE and A13JE-Li feature a compact tail swing and dimensions, enabling the machines easy access to tight and narrow spaces.

In addition, LGMG's latest vertical mast boom lift, the M0810JE, which features zero tail swing, compact design and a light weight, was also on the stand.

Meanwhile, LGMG's mini electric scissor lifts were also on show. They have a short machine length and compact design, suited to the low level access market and

restricted spaces often found on site.

Established in 2019, China-based Hered was presenting itself at APEX for the first time with a range of scissor lifts. In 2021 the company manufactured 490 units for the domestic market, then in 2022 sold more than 800 scissors, including crawler mounted scissors and boom lifts. In the first quarter of 2023 the company said this had increased to 1,600 units.

The company said the market is tough at the moment and it is concentrating on specialist equipment, having sold a large number of crawler spiders in 2022 and after, as well articulating crawler boom lifts.

The company says it is concentrating on quality as a benchmark for its products and accepts it will be a gradual process to gain traction in Europe. Nevertheless, the manufacturer says it is confident and is actively looking for dealers in Europe to complement its growing dealership elsewhere, including Modern in Hong Kong, for example. The company's aim to increase its annual production output to 10,000 units a year in the near term.

## Tracked platforms

Crawler mounted boom specialist Negano has extended its range with its first fully electric machine, which was presented at APEX. The E09AC was sold on the stand during the buildup to the show.

The unit is the electric version of its 6.8m platform height 09AC, with a 4.5m outreach and 160kg basket capacity.

Japan-based Negano used to be the producer of Aichi's crawler mounted booms, which were popular in Europe. Now the manufacturer is selling directly into the



The new electric Negano E09AC.



continent through its subsidiary Negano Europe and has been broadening its offering, with seven models now in the range.

Next up is the 20TC, which will be the largest unit in the range, and is now in production.

AlmaCrawler was showing the fully electric ML 1.5 FX tracked transporter. It complements the Italian company's existing range of Multi-Loader products.

Specifically tailored for crane rental companies, industrial material handling, routine and extraordinary maintenance operations, as well as the glass and glazing sector, the compact ML 1.5 FX has a transport capacity of up to 1,500kg and provides precise positioning of heavy loads. It is designed to navigate tight spaces and manoeuvre easily.

One of the ML 1.5 FX's key features is a

## VIRTUAL TRAINING

MEWP manufacturer Genie has revealed a virtual reality system that aims to help in the training of aerial platform technicians and service providers.

The VR tool demoed at APEX is an innovative device intended to deliver the practical part of the "Core Skill Training – Electrical," which is a training program that is already in place.

Currently in the testing phase, it comprises a VR headset and hand controllers and allows users to build a "simplified version of an electrical circuit" within an artificial environment, by interacting with a number of virtual electrical components, such as switches, bulbs and fuses.

The company plans to roll out the VR tool internally later this year and is hoping to make it available to its equipment dealers and customers, although a date for this has not yet been set.



**AI editor Euan Youdale is introduced to technician training.**



**New from Oil & Steel, the OctoPlus 21.**

fully electric drive system, eliminating the need for hydraulic oil.

Italian spider platform manufacturer Palazzani was present with three of its wide range of spiders, the TZX 250, TSJ 35.1 and XTJ 52+.

One of the new features was the 250kg hydraulic winch on the Spider TZX 250 model. This product has a 25m working height and is designed to be low weight. The aluminium telescopic boom with two articulated and telescopic sections allows unrestricted operation for two people in the basket. Stabilization is dual; wide and narrow and is quickly deployed. The machine has non-marking tracks and is ideal for outdoor and indoor gardening and maintenance works.

Italian aerial platform manufacturer Oil & Steel showcased three of its latest access machines, presenting two tracked platforms and a 3.5-tonne Isuzu truck mount.

The company's new OctoPlus 17 and OctoPlus 21 tracked platforms have been designed for easy use and reliability.

While both machines are fitted with a 250kg-capacity basket, the 21m OctoPlus 21 offers an outreach of 10.6m with an up-and-over reach of 8.2m.

As Oil & Steel's flagship model, it has stowed dimensions of 4.8m in length (without basket) and 1.99m in height for easy transport, and incorporates a system that allows the user to load/unload the machine onto trailers in just two steps.

Other key features include an electric working mode, three travel speeds and radio remote control system.

Incorporating similar features, the aerial platform's OctoPlus 17 sister model was



**Palazzani's latest winch offering.**

also on display at the access industry event.

Offering a 7.6-metre outreach, "it is available as standard with an electric motor and can be equipped with a battery pack, making it possible to work with zero emissions and in confined spaces," said Oil & Steel.

## Vehicle mounts

Alongside the two Octopus models, Oil & Steel highlighted its Scorpion 16 Pro truck mount, which is mounted on 3.5-tonne Isuzu chassis and is designed for "challenging" applications.

The fully hydraulic telescopic machine offers a working height of 16m, a maximum outreach of 11.3m and, unlike its sister model the Scorpion 16, the Pro version is fitted with a 300kg-capacity basket.

Time Manufacturing Company launched a range of products at APEX.

Ruthmann, part of the Time group, announced a new 100m working height truck mount and confirmed it will likely be launched early next year.

The Ruthmann Steiger T 1000 HF is based on the existing 90m T 900 HF model and was first announced at the show.

It is designed to be flexible to use and will be mounted on a 53 tonne standard chassis, up to 10 tonne lighter than other 100m working height machines, says the manufacturer.

The T 1000 HF is designed for use across a range of industries, including rental, wind energy, construction and maintenance and will offer a 600kg capacity basket.

Ahead of the model's launch in 2024, two units have already been sold. One of them will be delivered to

**Ruthmann announced it will launch a 100m model.**







## TELEMATICS LIVE

Skyjack has updated its telematics system with the launch of the Elevate Live 2.0 version, which provides a “substantial increase in field data availability and troubleshooting capability.”

Accessed by using a smart phone and a QR code - rather than by downloading an app, Elevate Live 2.0 now offers an “enhanced” user interface with two additional digital screen displays that show live equipment metrics, documentation and technical information.



**Skyjack's  
Elevate  
Live 2.0.**

France-based rental company Joly Location.

Among other Time group announcements were models from Versalift, France Elévateur and Movex.

The UPTO 15 van mount from France Elévateur, first launched at Bauma last year, has now been joined by the 13m working height UPTO 13, which has a shorter principle boom and shortened chassis. It will be followed by the UPTO 18 on a 3.5 tonne chassis.

In addition, the UPTO 15 is now available as a full electric version, alongside its sibling van mount, the e-Topy 11, now mounted on a Ford E Transit.

Joining the low emission product line is the TLRH hybrid series from Spain-based Movex with its 16m, 18m and 20m working height models.

New from Versalift is the VDTE with a new light construction allowing it to be mounted on a heavy electrical vehicle, while still offering good payload. The same boom can also be mounted on a conventional van mount to offer even more payload.

Moving up the size scale is the new Versalift V-200 with 14m outreach across the full 360 degree diagram. It is mounted on a 3.5 tonne Iveco, that is compact



**The all-electric  
P250BK eDrive  
from Palfinger.**

enough to allow a 3,750mm turning radius.

In addition, there is another new V series product, the V-170; which is a smaller model designed with France Elévateur.

This will be followed in 2024 by the V-225, meaning the Time group in

Europe will have a complete product line.

Austrian OEM Palfinger launched one of the first zero-emission truck mounts on the market. The 25m working height P250BK eDrive comes with a fully electric drive which powers both the platform and the vehicle itself. Palfinger says it offers the same power as a conventional diesel-powered truck mounted access platform - and can be recharged while it is in operation.

Truck mount manufacturer Multitel Paglieri has released a video showing its new MXE 170 model.

The MXE 170 was one of a number of green energy products from the Italian company at the show, and is an articulated platform mounted on a Piaggio Porter NP6 Long Range chassis, with an LPG fuel supply.

While the aerial platform has a working height of 16.8m, an outreach of 7.3m with 100kg in the basket, and a maximum capacity of 250kg, the truck mount unit measures just 5.8m long and offers a height of 2.5m, which Multitel says makes it “one of the most compact platforms” currently

**France Elévateur's UpTo 15.**





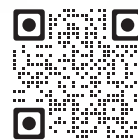


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available on the Piaggio NP6 chassis. it has been designed for use in urban areas with limited space, which is a common challenge for the compact truck mount sector.

## IN BASKET SAFETY

Haulotte released its latest safety innovation at the APEX exhibition.

The FASTN device, installed in the basket, requires the operator to attach their harness to it while a MEWP is being used, otherwise an audio and visual reminder will be raised.

The 'active anchorage' system can be installed easily on all types of MEWPs allowing a quick deployment within rental companies' fleets.

FASTN works on the same principle as a car seat belt, with the objective is to create the same behaviour seen with modern car drivers whereby MEWP operators automatically you connect their harness to the basket.

FASTN also features a wake up function.

If no operator movement is detected, the system will alert the worksite to a potential operator distress. An anti-bypass function on the device also alerts the worksite of a potential misuse.

All the events are recorded by the FASTN control box and provide data towards KPI reports.

**Haulotte's new FASTN operator safety device.**



## Batteries/charging

US Battery showed a revamped model at APEX in a narrower casing to meet modern access equipment designs.

The latest Narrow-Case Deep-Cycle Batteries are an updated version of its L16 and 305 deep-cycle batteries with a new, narrow case to fit modern machinery without sacrificing reliability and capacity.

The new L16N delivers a 385 amp-hour capacity at a 20-hour rate, while the 305N supplies 310 amp-hours at a 20-hour rate. Both feature US Battery's XC2 formulation for peak capacity, longer cycles and extended battery life with proper maintenance.

China-based battery manufacturer Quimo was exhibiting at APEX for the first time. As a battery manufacturer of more than 30 years, originally headquartered in Hong Kong, the company moved to the China mainland in 2008, due to the fast growing market in China.

The company specialises in AGM batteries, with customers including Zoomlion, Sany Palfinger, Sunward, Chufeng, Frontec and Runburg. Quimo already has a distributor in Denmark for Northern Europe and is now looking for more dealers.

To circumnavigate the tariffs imposed on MEWP-related equipment into the US, the company is planning to open production lines in either Cambodia



**Chinese battery manufacturer Quimo was at the show for the first time.**

or Vietnam by the end of this year or the beginning of 2024.

Currently, Quimo produces 100,000 batteries a day for low-speed vehicles in China, and while being very experienced in AGM is planning to expand production with a lithium offering at the end of this year.

Battery charger specialist Delta-Q launched the XV3300 charging system and RQ Series battery charger at the show.

The XV3300 sees a 3.3 kW battery charger, a 500 W DC-DC converter to power the vehicles' auxiliary loads and an EV charging station interface integrated together. These key features are encased in a ruggedized IP67 design.

The 700 Watt RQ700 is designed for light, battery-powered industrial equipment and is available in 24, 36 and 48 VDC versions, the compact RQ700 features a 12 VDC, 400mA auxiliary power supply that operates system components.

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# Calm amid the storm

Although average company growth levels are lower this year, the access50 listing remains healthy.



One of the major acquisition stories since the 2022 **access50** listing was published was United Rentals' investment in Ahern Rentals, which last year sat in 10th place with 30,4000 units in its MEWP fleet.

There has been plenty of speculation as to why United made the investment, including

the very real situation that rental companies have been finding alternative ways to procure fleet, when supply chain constraints meant kit was difficult to get hold of.

It nevertheless means that United is soaring ahead at the top of the table where it has been established for many years.

Sunbelt follows in its customary second place, followed by two China-based rental companies that have been working their way up the table at a blistering rate in recent years. Shanghai Horizon was in fourth position last year and is now

## TOP 50 FLEET SIZES

	2023	CHANGE	2022	2021	2020	2019	2018	2017
TOP 5	<b>591727</b>	17%	504837	419499	417614	377292	339351	291170
TOP 10	<b>785167</b>	14%	686390	586104	572984	504337	455788	523157
TOP 50	<b>1194378</b>	9.5%	1090112	957825	850914	799179	691465	645461

'23	'22	COMPANY	MEWP FLEET 2023	2022	CHANGE	TELEHANDLER FLEET 2023	2022	CHANGE	FLEET (SEE KEY)	BRANCHES	AREAS OF OPERATION	HQ
1	1	<b>United Rentals</b> <sup>(EST)</sup> (inc. Ahern Rentals)	<b>174000</b>	153990	13%	<b>34000</b>	29974	13.4%	S,B	1470	USA, Canada, France, Germany, UK, Netherlands, Belgium, New Zealand, Australia	USA
2	2	<b>Sunbelt Rentals</b>	<b>137230</b>	129850	5.7%	<b>29000</b>	31100	-6.8%	S,B	740	USA, Canada, UK, France, Germany	UK
3	4	<b>Shanghai Horizon Equipment &amp; Engineering Co.</b>	<b>131300</b>	97200	35.1%	<b>3</b>	3	9%	S,B	349	China, Saudi Arabia, Singapore, Malaysia, Indonesia, Vietnam	China
4	10	<b>Zhejiang Huatie Emergency Equipment Science &amp; Technology</b>	<b>77951</b>	56000	39.2%	<b>0</b>	0		S,B	192	China	China
5	3	<b>Loxam</b> (inc. Lavendon, Ramirent, Stavdal, Hune)	<b>71246</b>	67797	5.1%	<b>10739</b>	10150	5.8%	S,B,T,M,H	1091	Europe, UAE, Brazil, Morocco	France
6	6	<b>Zhong Neng United Digital Technology</b>	<b>46381</b>	41314	12%	<b>0</b>	0	0%	S,B	151	China	China
7	5	<b>Mateco</b>	<b>42586</b>	39256	8.5%	<b>2735</b>	1883	45.2%	S,B,T	170	Europe, Malaysia, Mexico	luxembourg
8	7	<b>Aktio Holdings Corp.</b>	<b>38564</b>	37926	1.7%	<b>0</b>	0	0%	S,B,T	1080	Japan, Thailand, Singapore, Malaysia, Taiwan, Indonesia, Myanmar	Japan
9	8	<b>Boels Rental</b> (inc. Cramo)	<b>35409</b>	32645	8.5%	<b>1881</b>	1515	24.2%	S,B,T,M	770	European Union (18 countries)	Netherlands
10	13	<b>Herc Rentals</b> <sup>(EST)</sup>	<b>30500</b>	28500	7.0%	<b>6400</b>	6000	6.7%	S, B	312	US, Canada	USA
11	12	<b>Nikken Corporation</b>	<b>30368</b>	27453	10.6%	<b>0</b>	0		S, B, T	255	Japan, USA, Thailand, Indonesia, Myanmar	Japan
12	11	<b>Nishio Rent All</b>	<b>26981</b>	24715	9.2%	<b>5684</b>	5427	4.7%	S,B,T,M	486	Japan, Southeast Asia, Australia	Japan
13	22	<b>Tonguan Machinery</b>	<b>25320</b>	25020	1.2%	<b>0</b>	0	0%	S,B	37	China	China
14	16	<b>Sunstate Equipment</b>	<b>24000</b>	21500	11.6%	<b>4500</b>	4350	3.4%	S,B	93	USA	USA
15	15	<b>H&amp;E Equipment Services</b> <sup>(EST)</sup>	<b>23800</b>	22350	6.5%	<b>3300</b>	3000	10.0%	S,B,T,H,M	106	USA	USA



third, while Zhejiang Huatie Emergency Equipment Science & Technology comes in fourth, having been fifth last year.

Despite their climb the fleet growth of the Chinese rental companies in the listing has not been as huge as in recent times with more than 100% increases year-on-year being having been seen. The two companies mentioned above have grown 35% and 39%, respectively, which reflects the current annual fleet growth in China.

### Steady growth

The largest fleets among the European rental companies can be found at Loxam

and Mateco in fifth and seventh positions respectively. They, along with the other European rental companies in the list, are seeing steady growth despite challenges in the market. As Pedro Torres says in this issue's interview the European market has been hit by a perfect storm comprising supply chain issues, alongside the war in Ukraine and rising inflation, among others.

This may cloud the fact that the future of the rental sector remains strong, although it may not be quite as buoyant over the next year as it was in 2022. The same is true in the US, which again is somewhat reflected in this year's listing, where growth in the

## THE SURVEY

■ This survey was carried out via an e-mail and e-cast campaign in the two months leading up to the publication of this list. Companies with MEWP fleet sizes above 500 units were asked to provide quantities of each platform type in their fleet, along with the other details shown in this listing.

■ Where figures have not been available, we have made an estimate based on industry and regional trends.

'23	'22	COMPANY	MEWP FLEET			TELEHANDLER FLEET			FLEET (SEE KEY)	BRANCHES	AREAS OF OPERATION	HQ
			2023	2022	CHANGE	2023	2022	CHANGE				
16	17	<b>Kiloutou Group</b>	<b>20700</b>	19900	4.0%	<b>4700</b>	3800	23.7%	S,B,T,M,H	605	France, Denmark, Germany, Poland, Portugal, Italy, Spain	France
17	14	<b>System Lift</b>	<b>20402</b>	22335	-8.7%	<b>1584</b>	2623	-39.6%	S,B,T,M,H	136	Germany, Austria, Poland, Switzerland, Netherlands, Italy	Germany
18	18	<b>Riwal/ Manlift Group</b>	<b>20000</b>	20110	-0.5%	<b>1100</b>	1100	0.0%	S,B,T	60	Europe, Middle East, India	Netherlands
19	23	<b>XCMG Guanglian Machinery Rental</b>	<b>14358</b>	10010	43.4%	<b>0</b>	0		S,B	608	China	China
20	20	<b>PartnerLift</b>	<b>14000</b>	13477	3.9%	<b>1090</b>	1066	2.3%	S,B,T	150	Germany, Austria, Switzerland, Romania	Germany
21	19	<b>AJ Networks</b>	<b>13530</b>	14000	-3.4%	<b>1279</b>	410	212.0%	S,B,T	17	South Korea, USA, Saudi Arabia	South Korea
22	21	<b>Kanamoto<sup>(EST)</sup></b>	<b>12263</b>	10000	22.6%	<b>29</b>	29	0%	S,B,T,M	575	Japan, Australia, China, Indonesia, Thailand, Vietnam, Philippines, Malaysia	Japan
23	25	<b>Mills Estruturas e Serviços de Engenharia (inc. Solaris)</b>	<b>11913</b>	9460	25.9%	<b>0</b>	2	-100%	S,B	56	Brazil	Brazil
24	32	<b>Renta Group</b>	<b>10608</b>	7782	36.3%	<b>462</b>	308	50%	S,B,T,M,H	137	Finland, Sweden, Denmark, Norway, Poland, Estonia, Latvia	Finland
25	24	<b>Korea Rental Corporation</b>	<b>9550</b>	9400	1.6%	<b>30</b>	30	0%	S,B	11	Korea, China, Vietnam, Saudi Arabia, Qatar, Kuwait, India	Korea
26	26	<b>Speedy</b>	<b>9100</b>	8700	4.6%	-	-	-	S,B,T	200	UK	UK
27	28	<b>Collé Rental &amp; Sales<sup>(EST)</sup></b>	<b>8800</b>	8496	3.6%	<b>850</b>	832	2.2%	S,B,T,H	19	Europe	Netherlands
28	31	<b>Dongguan Jiafeng Machinery</b>	<b>8750</b>	7880	53%	<b>0</b>	0	0%	S,B	16	China	China
29	27	<b>Pekkaniska</b>	<b>8700</b>	8200	6.1%	<b>0</b>	0	0%	S,B	20	Finland, Sweden, Baltics	Finland
30	29	<b>Coates</b>	<b>7577</b>	7500	1.0%	<b>1109</b>	1030	7.7%	S,B	165	Australia, Indonesia	Australia
31	34	<b>Acces Industrie</b>	<b>7400</b>	5741	28.9%	<b>1200</b>	1082	10.9%	S,B	41	France, Spain	France
32	36	<b>MEP Hire<sup>(EST)</sup></b>	<b>6500</b>	5200	25.0%	<b>0</b>	0	0%	P		UK	UK
33	30	<b>AFI-Uplift</b>	<b>6421</b>	6344	1.2%	<b>130</b>	95	36.8%	S,B,T,h	24	UK, UAE, KSA, Bahrain, Qatar	UK
34	38	<b>Aver Asia</b>	<b>6180</b>	4962	24.5%	<b>54</b>	29	86.2%	S,B	19	Singapore, Cambodia, Indonesia, Myanmar, Thailand, Malaysia	Singapore



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'23	'22	COMPANY	MEWP FLEET 2023	2022	CHANGE	TELEHANDLER FLEET 2023	2022	CHANGE	FLEET (SEE KEY)	BRANCHES	AREAS OF OPERATION	HQ
35	35	<b>Modern (International) Access &amp; Scaffolding</b>	<b>5800</b>	5300	9.4%	<b>2</b>	2	0.0%	S,B	3	Hong Kong, Macau, Singapore	Hong Kong
36	33	<b>Salti</b>	<b>5374</b>	5374	0.0%	<b>1562</b>	1562	0.0%	S,B,T,M	42	France	France
37	37	<b>GAM<sup>(EST)</sup></b>	<b>4900</b>	4770		<b>0</b>	0		S,B,T,M,H	100	Europe, North Africa Middle East, South America	Spain
38	71	<b>Advanced Access Platforms</b>	<b>4700</b>	4200 <sup>(EST)</sup>	11.9%	-	-	-	S,B	29	UK	UK
39	39	<b>Kranpunkten i Båstad</b>	<b>4477</b>	4550	-1.6%	<b>77</b>	70	10.0%	S,B,T, M,H	8	Sweden	Sweden
40	49	<b>Zeppelin Rental</b>	<b>3930</b>	3220	22%	<b>650</b>	580	12.1%	S,B,T,M,H	160	Germany, Austria, Czech Republic, Slovakia, Denmark, Sweden	Germany
41	41	<b>Mollo</b>	<b>3850</b>	4183	-8.0%	<b>671</b>	501	33.9%	S,B,T	57	Italy	Italy
42	40	<b>GV3</b>	<b>3700</b>	3500	5.7%	<b>495</b>	470	5.3%	S,B,T	36	Italy	Italy
43	44	<b>Cooper Equipment Rentals</b>	<b>3600</b>	3245	10.9%	<b>600</b>	457		S,B	67	Canada	Canada
44	51	<b>Star Platforms</b>	<b>3500</b>	2700	29.6%		0		S,B	7	England	UK
45	43	<b>Onsite Rental Group<sup>(EST)</sup></b>	<b>3200</b>	3100	3.2%	<b>310</b>	305	1.6%	S,B	32	Australia	Australia
46	47	<b>GTAccess</b>	<b>3137</b>	3,150	-0.4%	<b>10</b>	10	0%	S,B,T	11	UK	UK
47	45	<b>JMS Powered Access<sup>(EST)</sup></b>	<b>3100</b>	2700	14.8%	<b>0</b>	0	0%	S,B,M	5	UK	UK
48	48	<b>Height for Hire<sup>(EST)</sup></b>	<b>3000</b>	2900	3.4%	-	-	-	S,B,T,H	20	UK, Ireland, Slovakia, Hungary	Ireland www. easiuplifts. com
49	46	<b>Prangl Gesellschaft</b>	<b>2922</b>	2695	8.4%	<b>378</b>	349	8.3%	S,B,T	17	Austria, Europe	Austria
50	50	<b>High Reach</b>	<b>2800</b>	2600	7.7%	<b>570</b>	530	7.5%	S,B	5	USA	USA
51	53	<b>Alfasi Equipment Hire</b>	<b>2690</b>	3000	-10.3%	<b>190</b>	300	-36.7%	S,B	7	Australia	Australia
52	59	<b>United Forklifts &amp; Access Solutions</b>	<b>2504</b>	2297	9.0%	<b>184</b>	148	24.3%	S,B, M	11	Australia	Australia
53	52	<b>Brand Energy &amp; Infrastructure Services<sup>(EST)</sup></b>	<b>2500</b>	2400	4.2%	<b>9</b>	0	#DIV/0!	S,B,M	50	France, Holland, UK	USA
54	54	<b>MRT Makina Tic</b>	<b>2412</b>	2397	0.6%	<b>57</b>	66	-13.6%	S,B	6	Turkey, Kuwait	Turkey
55	56	<b>Tayeou Kao Kong Enterprise</b>	<b>2400</b>	2300	4.3%	<b>0</b>	0	0%	S,B,T	6	Taiwan	Taiwan, China
55	42	<b>Galmon</b>	<b>2400</b>	2400	0%	<b>0</b>	0	0%	S,B	1	Singapore	Singapore
57	59	<b>Locar Guindastes e Transportes Intermodais</b>	<b>2352</b>	2188	7.5%	<b>20</b>	0	-	S,B	11	Brazil	Brazil

rental sector is likely to be slower than last year. Despite that, there is still growth and the promise of a vast number of construction projects going forward, which is likely to be laying the foundations for another boom period.

### India increase

An interesting development in the list is represented by two rental companies based in India. Sudhir Power's fleet has grown by 53% since last year and RentEase International has grown its fleet by 19.8%. It demonstrates the growth that is developing in India, which many feel is on the brink of massive growth.

### LARGEST MEWP FLEET % GROWTH

	COMPANY	MEWP FLEET 2023	MEWP FLEET 2022	CHANGE
1	<b>Sudhir Power</b>	<b>2000</b>	1300	<b>53.8%</b>
2	<b>Dongguan Jiafeng Machinery</b>	<b>8750</b>	7880	<b>53.0%</b>
3	<b>XCMG Guanglian Machinery Rental</b>	<b>14358</b>	10010	<b>43.4%</b>
4	<b>Zhejiang Huatie Emergency Equipment Science &amp; Technology</b>	<b>77951</b>	56000	<b>39.2%</b>
5	<b>Renta Group</b>	<b>10608</b>	7782	<b>36.3%</b>
6	<b>Shanghai Horizon Equipment &amp; Engineering Co.</b>	<b>131300</b>	97200	<b>35.1%</b>
7	<b>Star Platforms</b>	<b>3500</b>	2700	<b>29.6%</b>
8	<b>Acces Industrie</b>	<b>7,400</b>	5,741	<b>28.9%</b>
9	<b>TH Tong Heng Machinery</b>	<b>1709</b>	1341	<b>27.4%</b>
10	<b>Mills Estruturas e Serviços de Engenharia</b>	<b>11913</b>	9460	<b>25.9%</b>



'23	'22	COMPANY	MEWP FLEET			TELEHANDLER FLEET			FLEET (SEE KEY)	BRANCHES	AREAS OF OPERATION	HQ
			2023	2022	CHANGE	2023	2022	CHANGE				
58	55	The ALL Family of Companies	2350	2350	0.0%	430	430	0%	S,B	33	North America	USA
59	58	Location d'outils Simplex <sup>(EST)</sup>	2300	2100	9.5%	110	148	-25.7%	S,B	43	Canada	Canada
60	57	Kennards Hire <sup>(EST)</sup>	2150	2085	3.1%	71	69	2.9%	S,B, T	197	Australia, New Zealand	Australia
61	69	Sudhir Power	2000	1300	53.8%	0	11		S,B	8	India, KSA, UAE	India
62	61	Alo Group	1876	1827	2.7%	139	128	8.6%	S,B,T	18	Argentina, Colombia, Chile, Panamá, Perú	Chile
63	62	AGF Access <sup>(EST)</sup>	1800	1650	9.1%	14	12	16.7%	S,B,M	26	Canada, USA	Canada
64	NEW	Eazi Access	1781	NA	-	197	-	-	S,B,M,H	20	South Africa, Mozambique	South Africa
65	73	TH Tong Heng Machinery	1709	1341	27.4%	3	4	33%	S,B,T	6	Malaysia	Malaysia
66	67	Fatih Vinç	1705	1496	14.0%	1	1	0%	S,B,T	8	Turkey, Bulgaria, Azerbaijan	Turkey
67	68	Mtandt Rentals	1681	1582	6.3%	4	4	0%	S,B,T,M,H	7	India, Sri Lanka	India
68	65	Rom Israel	1600	1490	7.4%	9	8	12.5%	S,B	2	Israel	Israel
69	63	China Conctruction Bright Futures Equipment	1492	1462	2.1%	0	0	0%	S,B,T	7	China	China
70	70	Fortrent	1180	1180	0.0%	108	108	0%	S,B,M,H	18	Russia	Russia
71	75	Rent Rise	1176	1007	16.8%	2	2	0%	S,B	5	Turkey, Azerbaijan, Libya	Turkey
72	74	Goscor Access Solutions	1150	1072	7.3%	61	55	10.9%	S,B	6	Africa	South Africa
73	72	LH Construction and Machinery Leasing <sup>(EST)</sup>	1100	1050	4.8%	0	0	0%	S,B	3	Singapore	Singapore
74	81	Istanbul Vinc	1003	819	22.5%	7	7	0%	S,B,T	7	Turkey, Netherlands, Bulgaria, Turkmenistan	Turkey
75	77	Vietnam Rental - Tuyet Nga Co.	911	907	0.4%	10	10	0%	S,B,T	7	Vietnam, Laos, Cambodia	Vietnam
=76	78	Byrne Equipment Rental <sup>(EST)</sup>	900	838	7.4%	250	246	1.6%	S,B,M,H	20	UAE, Kuwait, Oman, Qatar, KSA, Bahrain	Dubai
=76	76	JP Nelson Access Equipment <sup>(EST)</sup>	900	900	0%	0	0	0%	S,B	7	Southeast Asia	Singapore
78	79	Instant Access	890	835	6.6%	0	0	0%	S,B	6	Australia, New Zealand	Australia
79	80	RentEase International	800	668	19.8%	8	8	0%	S,B,T,M	9	India, Bangladesh	India
80	82	Ayhanlar Platform	732	770	-4.9%	1	0	-	S,B,T	3	Turkey	Turkey

(EST) = estimated | NA = not applicable | Fleet details key: S = scissors; B = booms; T = truck mounts; M = mast climbers; H = passenger hoists; P = pusharound

## TOP 10 TELEHANDLER FLEETS

	COMPANY	TELEHANDLER FLEET 2023	TELEHANDLER FLEET 2022	CHANGE
1	United Rentals	34000	29974	13.4%
2	Sunbelt	29000	31100	-6.8%
3	Loxam (inc. Lavendon, Ramirent, Stavdal, Hune)	10739	10150	5.8%
4	Herc Rentals <sup>(EST)</sup>	6400	6000	6.7%
5	Nishio Rent All	5684	5427	4.7%
6	Kiloutou Group	4700	3800	23.7%
7	Sunstate Equipment	4500	4350	3.4%
8	H&E Equipment Services <sup>(EST)</sup>	3300	3000	10.0%
9	Mateco	2735	1883	45.2%
10	Salti	1562	1489	4.9%

So, overall we are seeing a less dramatic listing than in more recent years. However, this does not reflect a long-term dampening of the market. More likely, it is taking a breather before the next major climb. **AI**

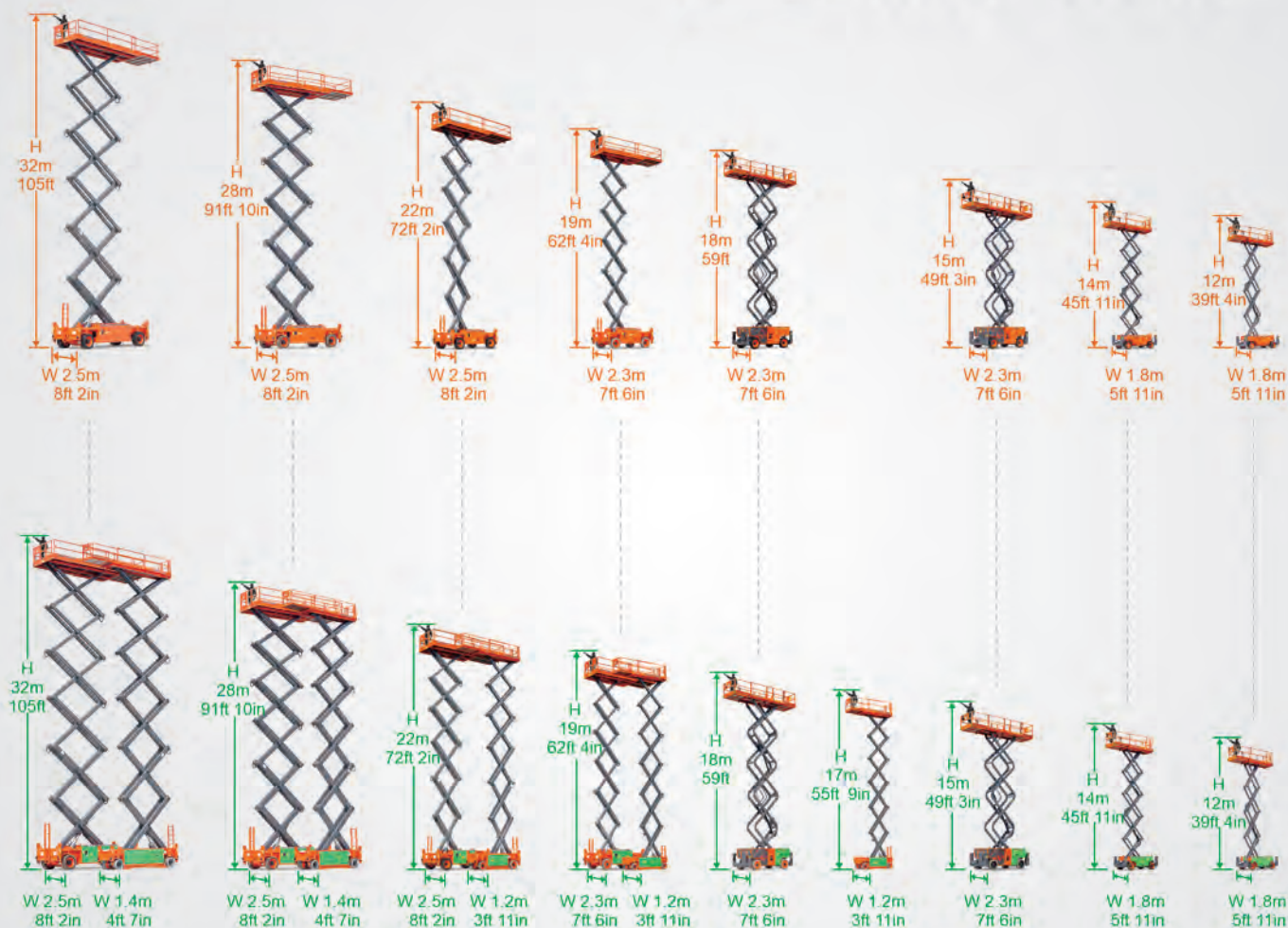
## access50 EXTENDED

An extended version of the **access50** feature is set to be published soon, with further analysis of the rental fleets in the 2023 listing. Look out for this special digital supplement on the **AI** website, newsletter and in future communications.





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# Assessing rental

Matt Brereton, IPAF's communication manager, weighs up IPAF's latest Rental Market Reports covering Europe, US and China.

In 2022, both the European and US mobile elevating work platform (MEWP) rental markets boomed to exceed pre-pandemic levels – though some key indicators such as rental and utilisation rates have yet to return to levels seen in 2019. Uncertainty around high inflation and the ongoing conflict in Ukraine cloud the outlook for 2023-24, according to the latest analysis conducted for the International Powered Access Federation (IPAF) by Ducker.

## Rebounding activity

The European MEWP rental market reached €3.2 billion total revenue, driven by rental companies investing in their fleet, catching up on renewal and expansion plans that were hampered by supply-chain issues and limited availability of some new machines from manufacturers, the 2023 IPAF Rental Market Report indicates.

The European fleet stood at approximately 340,000 units at the end of 2022. Most European markets under study experienced

elevated levels of growth and rebounding activity in both construction and non-construction sectors. Overall, the European MEWP rental market grew by 8%, with Spain (12%), France (9%), the Netherlands and Italy (both 8%) showing the highest levels of growth, while the four Nordic countries (Denmark, Finland, Norway and Sweden) showed 4% growth.

The total rental MEWP fleet size in the 10 European countries under study was estimated to stand at approximately 340,000 units as of the end of 2022. In 2022, on the back of the strongest growth out of the 10 European countries under study, France kept its position as having the largest MEWP rental fleet, exceeding 67,000 units after growing by approximately 5,000 units. Second in terms of size was the German

fleet, at close to 62,500 units, followed closely by the UK fleet, at almost 60,000 units (low-level access units excluded).

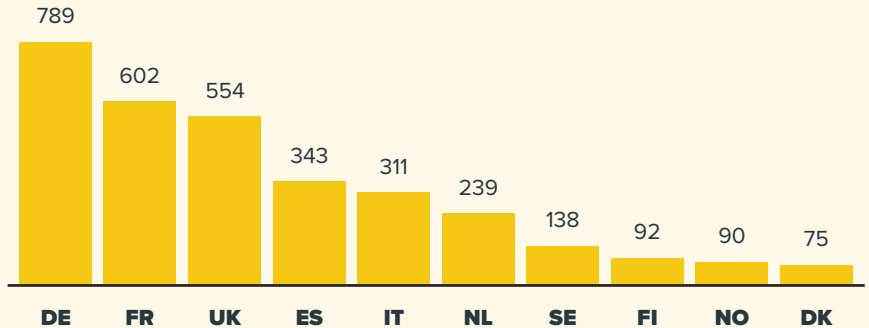
Average revenue increased to €9,505 per unit and, as in previous years, Germany had the highest revenue per unit. Across Europe, utilisation rate went up by 1% to an average of 65%, after a steep recovery in 2021, partly driven by limited availability and fleet expansion and partly by elevated demand. After a slower recovery in 2021, Spain saw utilisation rate increase by 3% during 2022.

## Rate hikes

With unprecedented market demand and both inflation and MEWP purchase prices rising, rental companies were forced to substantially increase rental rates in most European countries, leading to an average

## MEWP RENTAL MARKET (€M) - 2022

TOTAL = €3,234m

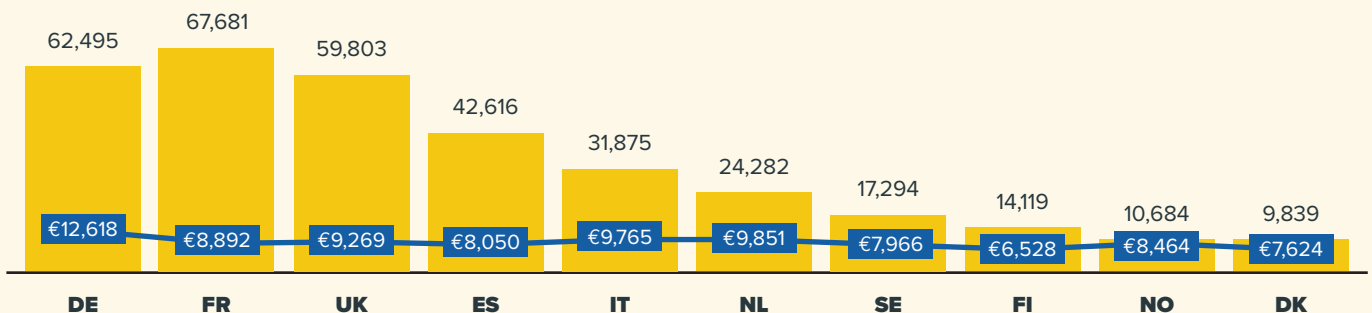


Ten European countries under study

Source: Ducker for IPAF

## MEWP FLEET SIZE AND REVENUE PER UNIT, 2022

TOTAL FLEET SIZE = 340,189 UNITS - AVERAGE REVENUE PER UNIT (€) = €9,505



Ten European countries under study

Units — Average revenue per unit (€)

Source: Ducker for IPAF

rise of around 4% in 2022. Only the Nordic region experienced challenges, owing mainly to consolidation activity, increasing already fierce market competition, which suppressed rental rate growth.

Levels of investment remained positive, increasing by 24% in 2022 compared to 2021. In addition to high demand, investment was driven by rental companies wanting to renew fleets and transition to greener technology. Market outlooks remain positive, as manufacturer lead times are expected to reduce over the next 12-18 months and rental companies forecast continued healthy demand and revenue increases, driven by rental rate rises to offset the effects of inflation and input-cost pressures.

## US Records

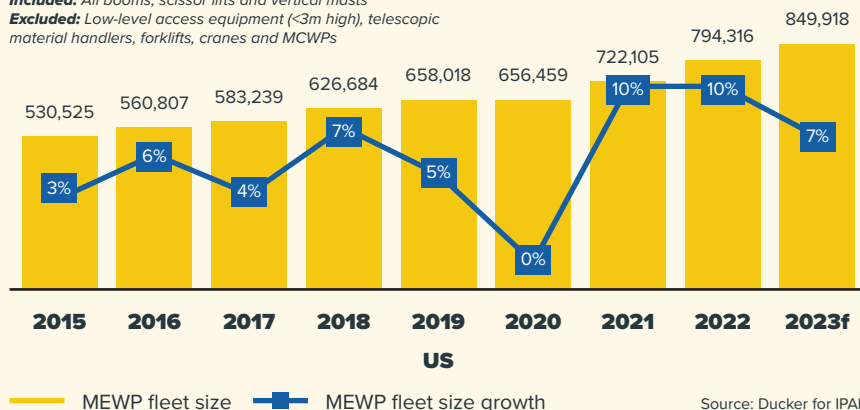
The report indicates that 2022 was also a year of rapid growth in the US; with both the wider economy and construction activity at elevated levels, most main indicators returned to pre-pandemic levels or even exceeded them.

MEWP rental revenue reached a record high, a direct consequence of the country's rapid market growth, rising by 15% to reach US\$13.6 billion. Total fleet size expanded, while rental companies were able to increase rental rates by an average of five per cent in 2022. Utilisation rates increased to an all-time high of 73%, though these are expected to fall back once supply chain issues abate.

Rental market value grew 15% year on year and is expected to remain at these elevated levels over the next two years, owing to the US's continuing strong economy. Rental revenue increased as a result of rental companies increasing rental rates and expanding fleet size in line with increasing

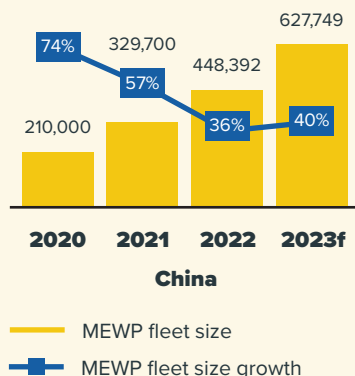
## MEWP FLEET SIZE AND MEWP FLEET SIZE GROWTH

**Included:** All booms, scissor lifts and vertical masts  
**Excluded:** Low-level access equipment (<3m high), telescopic material handlers, forklifts, cranes and MCWPs



## MEWP FLEET SIZE AND MEWP FLEET SIZE GROWTH

**Included:** All booms, scissor lifts and vertical masts  
**Excluded:** Low-level access equipment (<3m high), telescopic material handlers, forklifts, cranes and MCWPs



demand in the market. Demand is expected to remain high, though revenue growth is expected to slow down over the next few years owing mainly to decreasing demand.

## Sustained performance

Overall, the US total fleet size increased by around 10% across 2022, adding more than 70,000 units to the country's estimated total MEWP fleet. The US fleet is forecast to continue growing in 2023, sustaining record years of growth. Wherever possible, MEWP rental companies expanded their fleet in 2022, owing to peaks in demand. The total number of units in the US MEWP fleet is expected to reach almost 850,000 units by the end of 2023.

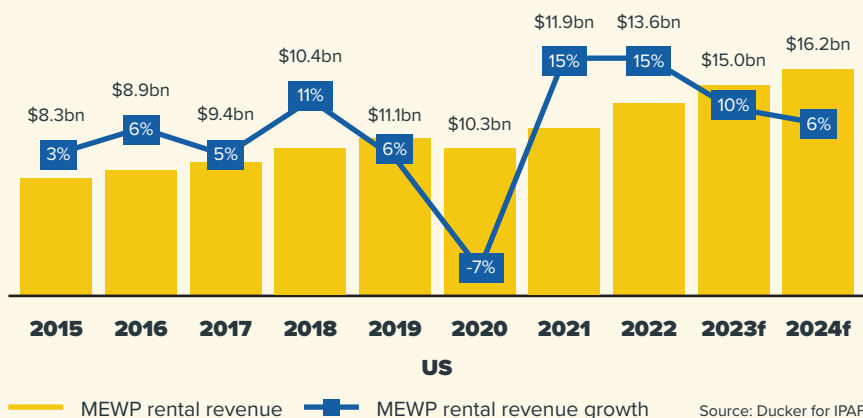
Within the total US fleet, all MEWP categories saw similar increases in 2022, with the exception of particularly robust growth rates reported for spider/tracked lifts, owing to their versatility and suitability for use in tight spaces or on rough terrain. Spider lifts are increasingly used in forestry, gardening, painting, and industrial cleaning. Overall fleet mix remained broadly the same as in previous years and is expected to remain relatively unchanged in years to come.

## Fleet retention

Owing to ongoing supply-chain issues, average retention period increased in the US, raising concerns about ageing fleets, which is expected to keep investment levels high in 2023. As predicted in 2022's report, high tariffs imposed on Chinese-manufactured machines restricted availability in the market, increasing purchase-price pressures.

US average rental rates increased by 5% in 2022 to compensate for the increase in MEWP procurement costs and inflationary pressures. Most companies expected further

## MEWP RENTAL REVENUE AND MEWP RENTAL REVENUE GROWTH





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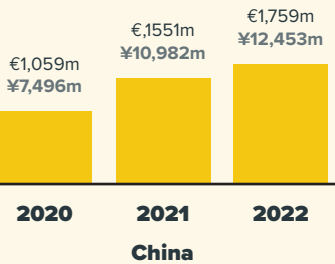
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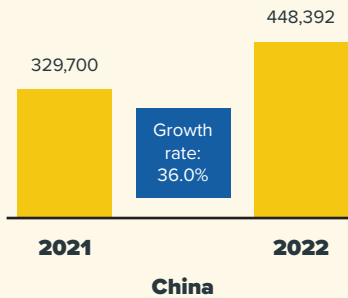


## MEWP RENTAL REVENUE

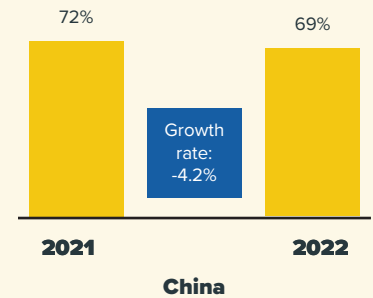
CAGR: 28.9% Compound annual growth rate



## MEWP FLEET SIZE



## AVG TIME UTILISATION



rental rate increases in 2023, though at a slower pace, as is it hard to sustain client relationships with high year-on-year increases.

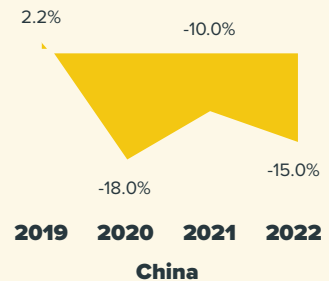
### China focus

As in previous years, the report contains a special China Market Focus, which shows that in 2022, Chinese MEWP rental revenue grew by 13%, primarily driven by the expansion of rental company fleets. However, both rental and utilisation rates decreased in 2022 owing to insufficient demand during recurring regional pandemic lockdowns

and enduring fierce market competition, worsened by rapid fleet expansion. With rental demand recovering in the first quarter, utilisation is expected to rise again in 2023 from the lows experienced during the peaks of the pandemic.

■ For detailed analysis of European, US and Chinese markets, the 2023 IPAF Rental Market Reports are available now. IPAF manufacturer, supplier, distributor and rental company members can apply for a free copy of the relevant report by filling in the form at [www.ipaf.org/reports](http://www.ipaf.org/reports); non-members are able to purchase the report.

## STATED GROWTH IN MEWP RENTAL RATES



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India is destined for huge growth in its access sector, and it may come sooner than some might think. AI gets a full view of the markets from two of its up and coming rental companies.

# The next major

**JNK Lifters  
MEWPs in  
a factory  
revamp.**

**M**uch has been said about the opportunities in India over the years, considering the country has a population of 1.4 billion, yet a tiny MEWP population in comparison.

It has always seemed probable that one day the number of units would match the larger markets in the world. However, up until now it has been more of an ambition than a direction of travel.

Over the last couple of years, however, there has been a shift in that view and there is now a firm belief India is on the cusp of major growth.

Estimates of the number of MEWPs working in India currently range between 11,000 – 15,000, with the overwhelming majority being older used equipment.

Ankit Bhati, the general manager for Sudhir Rentals' India business, explains how the country has always been a second-hand MEWP market and a very price conscious one at that. Currently the average MEWP in India was manufactured between 2008 and 2015, says Bhati. "Five years ago it was worse and it's getting better every year.

"And in 2023 I see people buying new machines."

As Ankit goes on to explain, the small

number of units in India has a lot to do with the fact the market is young, "I would say people have been using AWP's in India for the last 20 years but the actual growth only started around eight years ago.

"Before that people were using them in ones or twos, but with the increasing amount of infrastructure and increasing number of multi-nationals coming to India, they have given a larger push for applications and the use of this product."

## Strong vision

Sudhir Power is an example of a company that saw the future of the MEWP sector in India. Sudhir is in its 50th year of business. Some 20 years ago the group started a power generation and distribution wing, which, for example, produces around 80,000 generators every year. The rental business was formed in 2014 and includes a range of products such as generators, material handling equipment and MEWPs, as well as other items like air conditioning units and chillers. The company is also a distributor for JLG and Genie in the country.

Sudhir has more than 800 units in its India fleet and around 2,500 units in total across India and its other markets UAE and Saudi Arabia. In addition to that Sudhir acquired UK rental company Star Platforms in recent years, which has a further 3,400 units in its fleet.

Ankit adds, "In five to eight years the



**RentEase is introducing  
spider lift rental to India.**

market in India has doubled. That's a good sign but there are lots of places in India where the acceptability is less."

Sudhir is one of around 10 to 12 MEWP rental companies based in India that could be described as series players in the market with a commitment to developing the product and associated services.

Another is RentEase International, which was formed in 2017 with a vision at the time of investing in new electric scissors, and acquired units from the likes of Haulotte in their hundreds.

Since the Covid pandemic there has been a change in direction at the company, alongside international growth, which has seen it move into used equipment sales and widen its new equipment distribution





offering by becoming an exclusive dealer for Niftylift and Scancilmer in India. Its new entities in Belgium and the USA, will see an office in the latter opening soon as a trading and sourcing centre for its used equipment division.

All that is in addition to a new rental branch in Bangladesh, which already has around 120 MEWPs in its fleet. This next step into developing even younger MEWP markets such as Bangladesh are clear signs of where the access industry is ultimately heading – towards a truly mature international market.

### Mature expansion

Vipul Tulsian, managing partner at RentEase, says, “Covid was a speed breaker in our journey. After Covid we had time to think and how to reach our vision. We realised things should be a bit different, so we increased our verticals (boom lifts), and took ownership of distribution and started used machines sales. And we have grown in a more mature way and kept our strategy clear and focused.”

On the subject of its used equipment wing, Tulsian comments, “Where we have brought machines from the Middle East and Southeast Asia, etc, this is something the banking system doesn’t allow in India so we are doing that with our other companies.”

**MANLIFT**, part of the Netherlands-based access equipment rental specialist Rival group, is the largest access rental company in India, and has been integral in the growth of the MEWP market there. Find out more about Rival in the interview in this issue of *AI*. For more information on Manlift read the online version of this feature at [accessinternational.media](http://accessinternational.media)

Demonstrating India’s relative immaturity as far as MEWPs are concerned is the fact that 90% of the fleet in the country is comprised of boom lifts, which ultimately got in the way of RentEase’s original strategy to focus on electric scissors.

“We wanted to start developing electric scissors and new equipment but the size of the country and numbers in the [AWP] population didn’t match so we thought we needed to do something different.

Nevertheless, after RentEase started its move into slab scissors, it has seen electric scissors becoming more prevalent in India. Recently the company also set up a spider lift division and invested in 25 units. “We want to create that market. Facilities usually buy their own and very small numbers are available for rental.” Additionally RentEase has taken on the distribution of spiders from Italy-based Easy Lift.

### Scissor potential

According to Ankit the scissor lift market is set to increase substantially thanks to demands from major companies from outside India that are expanding into the country, and Sudhir Power intends to take advantage of that.

“Very recently a couple of good companies like Samsung and Kia have said only scissors are to be used in their plants in India. With that kind of manufacturing mindset there are now projects in India with more than 300 scissors used in the same place for more than six months.”

While Ankit add that there are still relatively few examples of this. “Slowly and steadily, we are getting enquires for 12m or 14m jobs, where scaffolding was used, and are now getting converted to a scissor lift. It is increasing and I am confident it will be getting better and better every year.”

While the country has a long way to maturity, OEMs are lining up to offer their products to the market. All the major scissor and boom manufacturers are now present in India, says Ankit.

That includes the established companies from Europe and North America, as well as the more recently founded China-based manufacturers. “There are eight to 10 manufacturers in India selling and servicing their equipment. When we started there were was only Genie and JLG,” says Ankit.

“There have been a lot of transitions from 2015 to 2023, and we feel the market size for new machines is still so small but the competition is becoming more complex.”

This comes from a company that claims to have been the first in India to have bought





## COUNTRY REPORT INDIA

new equipment to the country when it invested in 100 units in 2016.

### Rental growth

There are between 12 and 15 major rental companies in India with hundreds of units in their fleets. Then there are the dozens of smaller localised companies, possibly around 100, that can have as few as two units in their portfolios.

As Tulsian explains, 80% of India's MEWP fleet is operated by the 50 largest rental companies.

But that is likely to change as the market starts to ramp up and becomes 'educated'. "People are seeing the advantages of new machines. And if they buy used they now buy less than 10-year-old equipment."

However, there are fewer used MEWPs available the market. This is partly due to supply chain constraints and long lead times, which have led to fewer used machines coming into the country as they are snapped up in their countries of origin.

"Many big rental companies now look for the opportunity to go for new machines. And that is where the Chinese manufacturers come in," says Tulsian.

"In the past we had it in mind that the quality [of Chinese MEWPs] was not as good. Now it is good and the big reputable names are utilizing Chinese manufacturing. They are filling the gap in delivery and supply chain demand."

As Ankit adds, Chinese companies have become much stronger. This, he says, is "Primarily because of pricing and India is a price sensitive market."

Also, Ankit says, "Most of these companies are in the crane business and have a presence in India already, so they have leverage on that. Chinese companies are leading the market, that's for sure."



While there is no sign of new safety laws on the horizon in India, the adoption of MEWPs in the country will be forced by investment from mature countries.

### New awareness

Gradually, foreign investment is coming in. With that comes safety guidelines.

Tulsian adds, "If we compare it to three years ago, before Covid, there is a big difference. Foreign investment now brings safety standards, as the sub-contractors understand the importance of safety, so when they go onto the next site they use those guidelines."

This will be helped by the Indian government's target of a \$5 trillion economy by 2030, driven by mega projects from industry to transport, including high-speed rail and more than 100 new airports.

This will mean the MEWP population in India is set to grow by 20% each year over the next five years.

On top of this, Ankit says the country now has to solve two major factors: the lack of safety regulations and the lack of skilled manpower, then the MEWP market in India "will beat any other in the world."

One dynamic that is different to nearly other access equipment markets is that all MEWPs on rent in India are supplied with an operator. "Therefore, if a company increases its fleet from 800 units to 1,500, it also has to find almost the same level of extra labour. This is particularly challenging as utilisation is up at around 80% in India."

### Remaining challenges

As this would suggest, it is not the cost of labour that is the issue, unlike in other countries. In India, the cost of labour is relatively cheap, which is another reason why the growth of the MEWP market is being held up.

An additional problem is the issue of training all the MEWP operators. "There is no formal training infrastructure in India. We are not able to train the number of operators for the number of units that are coming in this year," says Ankit.

Apart from this, Ankit adds, "It is high time that India introduces stringent safety norms."

Rental rates, on the other hand are relatively strong. "From the end of 2021 there was a shortfall of machines and rental rates are now improving."

They are up 25% on pre-Covid rates. Having said that, other costs have gone up too. Ankit concludes, "Rental companies realised if they didn't increase prices, they would be hit hard. Customers were not happy but now the market has settled." **AI**

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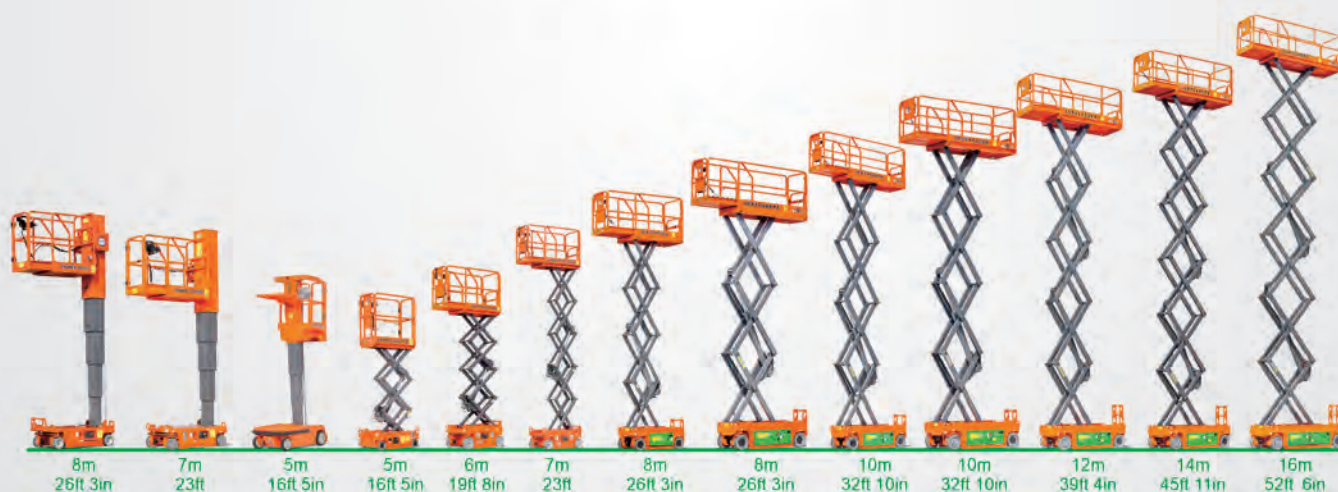


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Following a period  
of uncertainty,  
confidence in the UK  
among OEMs and  
rental companies  
had fallen, but is that  
confidence returning?  
Lewis Tyler reports  
on one of the world's  
most mature markets.

Left to right, Hans Aarse (XCMG),  
Mark Kennedy (Genesis), Eden Qiao  
(XCMG) and Edwin van der Laar  
(XCMG). PHOTO: ACCESS INTERNATIONAL

# The road to recovery

**“T**he UK market is mature and increasingly competitive.” These are the thoughts of Andrew Kendrick, director of sales & support, Genie, on the MEWP market in the UK. And, while market conditions may have varied in recent years, it’s a statement echoed by many in the industry. Despite the impact of high inflation, the supply chain crisis and conflict in Ukraine, there’s an element of optimism among businesses in the UK.

Looking at the wider construction industry, this optimism is backed up by a report from construction insight and intelligence company Glenigan. In its UK Construction Industry Forecast 2023-2025, it linked significant challenges facing the industry to difficult economic conditions and predicted declines of 18% in 2023.

## Market optimism

However, while current conditions may look unfavourable, the report also found that the future looks more positive, with a predicted increase of 12% in 2024 and 3% in 2025.

So, what is behind that optimism? A strong pipeline of infrastructure projects across the country is a

good indication of what’s to come and is helping to abate a somewhat less optimistic outlook for the private housing market which is expected to decline by 11% in 2023 according to the Construction Products Association (CPA).

There is of course hope that the number of infrastructure projects, coupled with an ease in the supply chain could see demand for access equipment increase in the UK and allow OEMs to clear order backlogs. That is the belief of Kendrick, who says the company is seeing “strong demand for aerial equipment” as well as “steady growth.”

Kendrick says, “While there have been some disruptions in the supply chain, particularly concerning electronic components, we are finally seeing improvements in that area. This is great news because our customers are eager to receive the equipment they have ordered, and we’re excited to fulfil this need.”

## Sector confidence

In terms of sector confidence, it is worth noting that in the anonymous ERA/IRNRentalTracker results for Q1 of 2023, rental companies in the UK were largely positive about the current state of play for the market.

&gt;



## UK FOCUS

Using the metrics of employment intentions, fleet investment, utilisation rates, current conditions and future conditions, UK respondents remained positive.

In particular, UK responses were positive on business forecasts for the next 12 months. 58% of respondents said that they were expecting business to be 'better' or 'much better' in that period, compare that to just 29% of respondents operating in France.

The same percentage (58%) were also predicting growth in Q1, while only Spain (66%) was higher in predicting increased investment in 2024.

Delving deeper into some of those companies who are active in the country, Ashted Group says its UK business, Sunbelt Rentals, generated £685 million in revenue, down from the £726 million it posted in its previous financial year. However, rental only revenue for the company hit £429 million, up by 6% from the previous year.

Elsewhere, Speedy Hire says it is seeing growth in both its hire and services, despite what it describes as a "changing macro-environment." Revenue increased by 13.9% in 2022, up to £440 million and a £54 million rise when compared with 2021.

David Shearer, chairman of Speedy, said the results demonstrated the "strength and resilience of our business model" amid a challenging time for the UK economy, while CEO Dan Evans said it reflected a "strong performance in core hire and Customer Solutions."

### New players

As Genie's Kendrick said, the market in the UK is becoming increasingly competitive, with a number of other manufacturers seeking to make the most of untapped opportunities within the market.

Earlier this year the aerial lift and telehandler division of China-based OEM XCMG announced the appointment of Genesis Equipment Sales as exclusive distributor in the UK.

Genesis, which is part of Northern Ireland-based Ballyvesey Holdings, will take delivery of a range of XCMG machines for distribution to the UK, including telehandlers, forklifts, scissor lifts, articulated and telescopic booms.

According to Hans Aarse, business development director for access in Europe, XCMG, the company had been approached by a number of access rental companies before deciding to appoint its own distributor.

The company will be led by Mark Kennedy, director, plant division, Ballyvesey Holdings. According to Kennedy, the construction industry in the UK is "on the rise again" and there is a "growing demand for reliable and efficient access equipment."

Kennedy said, "We're excited to introduce Genesis Equipment Sales as a new player in the UK access equipment market. Another OEM pressing into the UK is Finland-based Dinolift. The company appointed CPL as its new distributor, making it responsible for sales and customer support of DINO trailer-mounted MEWPs, DINO lightweight 4x4 and DINO spiders.

Speaking to *AI* at the Vertikal Days exhibition in June when the partnership was officially launched, Karin Nars, managing director of Dinolift said, "Dinolift has always had the philosophy on focusing our resources and the UK is a mature market. If you want to be respected, you should be here."



**Ashted Group says its UK business Sunbelt Rentals generated a rental increase of 6% from the previous year. PHOTO: SUNBELT RENTALS UK**

### Future focus

So, as supply chain issues ease and the number of projects in the UK increase, what does the future look like for the country?

One important factor that will likely shape the future is sustainability. OEMs are being tasked with producing low-emission or zero-emission equipment.

This was the driver behind a new partnership between Speedy Hire and Niftylift that will see the companies produce the world's first hydrogen-electric powered access platform.

Evans said, "Our investment into this partnership with Niftylift enables us to accelerate the sustainable and technological evolution of the sectors we operate in and supports our ambitious plan to become a net zero business by 2040, ten years ahead of the government target."

The focus on electric was also on show at Vertikal Days with many companies showcasing the latest innovations in alternative power. For Dinolift, this came in the form of its Dino 280RXTE full electric battery-operated 4x4 self-propelled boom lift, equipped with an AGM or Li-Ion battery pack.

Elsewhere in the electric space, LiuGong showcased its new LA20JE telescopic boom. The machine has a 22.2m maximum working height and is said to deliver clean, quiet performance, while its 4-wheel drive provides "unrivalled rough terrain capability" according to the company.

With an increasing focus on reducing emissions, it's likely the future will see more machines in this space launched in the UK.

Outside of sustainability, Kendrick is also predicting changes in the UK and anticipates "continued growth" with an "upward trend in demand."

Kendrick said, "We sense there could be some improvements in the supply chain, which would naturally lead to decreased lead times. While we cannot predict the future with absolute certainty, we are optimistic about the possibilities in the coming months."

**AI**



**The partnership between CPL and Dinolift was officially launched at Vertikal Days, with the former assuming responsibility for sales and customer support of DINO trailer-mounted MEWPs, DINO lightweight 4x4 and DINO spiders.**

**PHOTO: ACCESS INTERNATIONAL**





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## IPAF DIARY

IPAF will host or participate in the following events. Full details are at [www.ipaf.org/events](http://www.ipaf.org/events)

### 2023

3-4 August

**IPAF ASIA**

**CONFERENCE 2023**

Hilton Sukhumvit Bangkok, Thailand

6-7 September

**IPAF ELEVATION**

**BENELUX 2023**

Rotterdam, Netherlands

8 September

**IPAF CONGRESO**

**CONOSUR 2023**

NH Collection Plaza  
Santiago, Chile

8-9 September 2023

**PLATFORMERS' DAYS**

Messe Karlsruhe, R  
heinstetten, Germany

13 September

**K-CONSAFETY EXPO 2023**

KINTEX Exhibition Hall 2,  
Goyang-si, South Korea

15 September

**IPAF ELEVATION**

**SWITZERLAND 2023**

Sport Resort Fiesch,  
Feriendorf, Switzerland

21-23 September

**PLATFORM GÜNLERİ 2023**

Tuzla'daki Autodrom,  
Istanbul, Turkey

27 September

**MATS CONFERENCE 2023**

Coventry Building Society Arena  
(formerly Ricoh Arena),  
Coventry, UK

27 September

**IPAF WEBINAR: MAST  
CLIMBING WORK  
PLATFORMS**

Online, via Zoom

# Reports rise but fatality rate falls, Global Safety Report shows

**D**espite reports increasing over the past year, the fatality rates of the leading types of accidents have declined – an encouraging sign that collective action across the powered access industry to tackle key underlying causes of accidents is starting to take effect, according to the latest report from the International Powered Access Federation (IPAF) based on analysis of incidents logged through its Accident Reporting Portal.

Launched via webinar on 28 June, the IPAF Global Safety Report 2023 analyses the latest data collected via the IPAF portal ([www.ipafaccidentreporting.org](http://www.ipafaccidentreporting.org)) covering the period 2013-23, focusing particularly on year-on-year trends to identify how well the industry is doing in tackling the key causes of accidents.

While MEWPs, mast-climbing work platforms and construction hoists are statistically among the safest ways to work at height, this

year's report shows that in 2022 there were 759 reports of safety incidents from 34 countries, up 15% and 21% respectively. There were 831 people involved, and 102 deaths reported, a decline of around 19% on 2021.

In terms of incidents resulting in deaths or major injury, falls from the platform remained the most common underlying cause, with overturns second. Hit by machine, vehicle or object was third, entrapment fourth and electrocution or electric shock fifth. Mechanical failure was joint seventh with falls from height (no machine involved) – a notable reduction following a spike in reported incidents across 2021.

In 2022, the main sectors from which reports were received were rental activity, construction, and facilities management.

■ To view the IPAF Global Safety Report visit [www.ipaf.org/accident](http://www.ipaf.org/accident); the launch webinar is available via IPAF's YouTube channel to view now.

AI



**Global MEWP Safety Report 2023.**

## IPAF APPOINTS A NEW COUNTRY REPRESENTATIVE



A new representative to assist IPAF's Swiss members has been appointed,

with **ROGER GROSSNIKLUS**

taking up the post as Switzerland Regional Manager in June. Based in the Lausanne region, he is no stranger to the powered access industry, having been the Managing Director of Loxam Switzerland since 2019. Before that he worked in a variety of roles in both Switzerland and the UK for Matisa, a manufacturer of specialist rail track maintenance equipment, since making a career move from infrastructure and civil engineering in 2005.

Romina Vanzi, IPAF's Head of Regional Development, says: "Switzerland is one of IPAF's core locations, with a very diverse and engaged membership. This year marks IPAF Switzerland's 18th anniversary. IPAF is very pleased to be able to announce the appointment of someone so experienced and well known in our industry to this key role.

"Roger will initially shadow Christine Lell in the role and will take over full responsibility when Christine retires later this year."

Roger says: "I look forward to meeting Swiss members to hear their views on the benefits of IPAF and continue to build."

## 'Wheel of Misfortune' illustrates hazards

Representatives of IPAF used both the Vertikal Days and Plantworx 2023 events, held in May and June respectively at the East of England Showground near Peterborough, UK, to

promote its Safe Loading and Unloading campaign; spinning a "wheel of misfortune" to teach visitors to the IPAF stand all about the risks involved in loading, transporting, and unloading MEWPs and how to mitigate them.

■ Visit [www.ipaf.org/safe](http://www.ipaf.org/safe) to find out about all IPAF's global safety campaigns.

AI



**Wheel of Misfortune at Vertikal Days 2023.**

# IPAF Elevation UK 40th anniversary event booking quickly

**P**laces are booking fast to attend IPAF Elevation UK – a special event to mark the 40th anniversary of IPAF's foundation at The Belfry Hotel & Resort in the West Midlands, on 16 & 17 November 2023.

The event is the biggest yet, with places for up to 250 delegates to join, and will celebrate 40 years of IPAF in the powered access industry. A networking lunch, afternoon conference, drinks reception and gala dinner with entertainment are included and the following day, delegates can choose to participate in golf and spa activities. IPAF's UK Country

Council will also meet during the first morning of the event.

The conference theme will be "It's all about the people" – focusing on recruitment, behaviour, working with the next generation and a look forward to what IPAF will be doing in the future. The full line-up will be announced in due course.

In the evening, guests will enjoy a three-course dinner followed by entertainment, details of which will be announced in the next few months. Previously this event has featured The Office impressionists Tim Oliver (David Brent) and Brett Sirrell (Gareth Keenan), TV & radio



IPAF Elevation UK in 2019.

comedian Rob Deering, and Ted Robbins, actor and stand-up.

Peter Douglas, CEO and Managing Director of IPAF, comments: "For those who've already booked, we'd love to hear your key memories from across the past four decades. Simply post on social media using the hashtag #IPAF40. IPAF will feature some at the event."

■ Please visit [www.ipaf.org/elevation](http://www.ipaf.org/elevation) for details of IPAF Elevation UK at the Belfry, 16 & 17 November, and to book your place.

AI

## IPAF SIGNS SAFETY AGREEMENT WITH KOREA CRANE ASSOCIATION

IPAF has agreed a memorandum of understanding (MOU), committing to closer co-operation in the realm of work at height safety with the Korea Crane Association (KCA). The MOU was signed on 17 May by Romina Vanzi, IPAF's Head of Regional Development & MCWPs, and One-Kyu Chung, Chairman of the KCA.

The signing of the MOU is the first of its kind in the Republic of Korea, where IPAF has steadily been increasing its profile since appointing Roberto Kim as a dedicated representative for the country in early 2020.

Among the MOU's objectives are a commitment for the two organisations to cooperate in the Korean powered access industry to promote and enable the safe and effective use of mobile elevating work platforms (MEWPs), to aid companies in achieving compliance with legislation, national and international standards, expanding quality training, and to jointly participate in relevant exhibitions, conferences, and seminars.



**Romina Vanzi, IPAF Head of Regional Development, and One-Kyu Chung, Chairman of the KCA.**

## NEW MEMBERS

**IPAF welcomes the following new members.**  
Full contact details are in the Membership Directory at [www.ipaf.org](http://www.ipaf.org)

### ASSOCIATION

**Associação Brasileira das Empresas Locadoras de Bens Móveis em Geral (ALEC)**, São Paulo, Brazil

### DEALER/ DISTRIBUTOR

**Color-fer**, Telgate, Italy  
**Scaligera Service**, Verona, Italy  
**Tracked Lifts**, York, US

### HIRER/RENTAL

**Access Master Romania**, Voluntari, Romania  
**Altura Locação**, Diadema, Brazil  
**Archis Hoist Solutions**, London, UK  
**DC Rental**, Passo Fundo, Brazil  
**Emil Egger**, St Gallen, Switzerland  
**Femav**, Monte

Claros, Brazil  
**Imprenol**, Sondrio, Italy  
**Lokan**, Bauru, Brazil  
**Lorenzon**, Itu, Brazil  
**META**, Pavia, Italy  
**Maryam Khadran Al Azmi Transportation**, Jubail, Saudi Arabia  
**Novital**, Agrate Brianza, Italy  
**PL Máquinas Ltda**, Jaboatão Dos, Guararapes, Brazil  
**Tecboom Equipamentos**, Colombo, Brazil

### INDEPENDENT INSTRUCTOR

**Callum Batty**, Drighlington, UK  
**Chris Lowe**, Littleborough, UK  
**Sacha Habermacher**, Aargau, Switzerland  
**Stephen Butler**, Rochester, UK

### INDIVIDUAL ASSOCIATE

**Jasling Ong**, Singapore

### MANUFACTURERS

**LiuGong Machinery**  
**Asia Pacific**, Singapore  
**Sinoboom North America**, Houston, US  
**XCMG Brasil**, Pouso Alegre, Brazil

### TRAINING

**Advance Training (Scotland)**, Bellshill, UK  
**Arbrit Safety Training and Consultancy**, Dubai, UAE  
**Business Services Company for Equipment Rental**, Al Dammam, Saudi Arabia  
**CAEMP**, Santiago, Chile  
**Deutsche Lufthansa**, Köln, Germany  
**Easy Training**, Breganzona, Switzerland  
**HPFormation**, Renens Vaud, Switzerland

**PLT Training**, Wolverhampton, UK

### SERVICE/ COMPONENT SUPPLIER

**Autec**, Caldoggno, Italy  
**AV Statutory Inspections**, Sittingbourne, UK  
**Delta Plus Italia**, Vicenza, Italy  
**TTControl**, Bressanone, Italy

### SAFETY PROFESSIONAL

**Abdul Hakim bin Slamati**, Singapore  
**Bong Briones**, Riyadh, Saudi Arabia  
**David Turner**, Dunston, UK  
**Joseph Hunter**, Iselin, US  
**Kim Kuhn**, Langenthal, Switzerland

### SMALL USER

**QVS Maintenance**, Liverpool, UK





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**Thomas Bitter**

Senior Vice President Technology  
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**AI delves into the directions low level access is taking.**

**L**ow level access comes in a variety of forms, whether that be pusharound units, powered vertical masts or scissor lifts. Manufacturers are expanding their ranges with all of the above as the low level access niche steadily grows around the world.

According to Justin Kissinger, marketing manager at Custom Equipment, which produces Hy-Brid Lifts, more countries around the world are adopting low level access by reducing ladder and scaffold use to

### ALL-ELECTRIC FIRST

This year, US-based MEC Aerial Work Platforms launched the Nano10-XD, its first all electric scissor lift.

Powered by standard lithium-ion batteries to enable faster charging and longer operation, the machine is equipped with an all-electric lift, steer, and drive and is said to require zero hydraulic oil.

With a maximum platform height of 3m (10ft) and an operating weight of 560kg, the NANO10-XD can easily fit into a standard elevator and is said to be suitable for use on a wide range of floor types.

Other features include a standard Xtra Deck to get through 2'x 2' ceiling grids and use in hard-to-reach areas, standard swing gate and ground to platform step height which removes the need for a ladder.



**The NANO10-XD electric scissor lift.**

# Designs for

maximize worker safety, minimise damage to finished surfaces and reduce rework costs.

Kissinger says, "Contractors are responding to new safety legislation by limiting the use of ladders, stilts and scaffolding on jobsites. We're also seeing an increase in specialized projects requiring lightweight or compact low-level access solutions like Hy-Brid Lifts."

According to Haulotte, demand is driving the market and low level access is growing fast in areas where standard access products are now mature. The France-based company says in 2019 the new equipment sales market reached approximately 6,000 – 7,000 units per year. In 2023, that market size will have doubled.

### Micro demand

Christian Dube, product manager at Genie, says regulations and employer restrictions discourage the use of ladders and increase demand for low level access platforms, particularly the UK; "But we are also seeing demand for micro-scissors around the globe, including elsewhere in Europe and in North America."

In 2021, Genie introduced its GS-1932m and GS-1432m micro scissors. The GS-1432m weighs less than 900kg and has a maximum indoor platform height of 4.3m and a maximum outdoor platform height of 3.66m.

The GS-1932m, which measures 0.81m x 1.12m, is only 1.97m tall when

**Genie says micro scissor accessories are part of its strategy for the product line.**



stowed. With a full-width platform size and a weight of 1,179 kg, it is well suited for tasks that traditional scissor lifts perform, while also offering the ability to reach

jobsites out of reach for standard-sized scissor lifts as a result of its light weight.

Singing the praises of compact scissors, Dube adds, "Slab scissor lifts in general are extremely popular because they enhance safety and productivity for a variety of tasks. For example, for applications in warehouses and data centers."

### Scissor option

Hy-Brid Lifts has also increasingly embraced the scissor lift option, with its most recent launch being the Zero-Turn Series ZT-



**Haulotte launched into low level access in 2022.**



# expansion



The Hy-Brid Lift ZT-1630.

1630 as an alternative to mast lifts.

The compact scissor is designed with counterrotating wheels and a less than zero degree turn radius for unmatched maneuverability on complex jobsites. Operators can navigate doorways and other confined access spaces without worrying about damaging finished construction.

The ZT-1630 features a platform on average 96% larger than mast lifts and allows work at height without compromising workspace due to a mast. It also has a 650 pound platform capacity, 22ft working height, 25% gradeability, 30-inch EZ-Glide slide out extension deck, electric drive and steer, low floor load pressures, full height cantilever gate, proportional controls and active load sensing.

The company has also launched new options and attachments for existing products to increase ROI, including lithium batteries, a pipe rack, confined access solution, and soon the company will launch its own telematics system.

Kissinger adds, "We must also reflect new ANSI A92 standards and other updated standards around the world to ensure operator safety. Hy-Brid Lifts were compact before these standards

went into effect, so fortunately we didn't have to make any significant adjustments. Our scissor lifts can fit through doorways, elevators around tight corners, and confined spaces without the need for additional features like folding rails."

Additionally, there have been more requirements for leak containment on jobsites. Hy-Brid Lifts minimises the potential for leaks by ensuring only one hose from the pump to the cylinder is needed and to add an additional layer of comfort on jobsites, the company has developed LeakGuard for the Pro.

## Power duo

As JLG says, operators are always looking for easier ways to bring people and materials to height in the most safe, ergonomic and efficient manner.

JLG's Power Tower Duo and the Nano 35 will be launched in the third quarter of 2023.

The Duo can accommodate two people in the basket indoors and is rated for outdoor use with one person. It will also be able to lift materials since it is equipped with mechanical outriggers that extend when the platform is raised. This means that the machine gains stability for the added weight.

The Nano 35 will be the first push around vertical mast lift that can reach a 5.5m working height without the need for outriggers. It weighs under 500kg and will also allow operators to reach higher levels in congested areas that cannot currently be reached with traditional equipment, says the company.

The company will also launch tool tethering that will be certified to use on all JLG's low level access Power Tower machines.

## Making the move

Indeed, the move into low level access is one that the traditional scissor and boom lift manufacturers have been taking, including with JLG's acquisition of Power Towers in recent years. Haulotte chose to launch its own range when it announced its arrival into the product category in 2022, which included a combination of scissors and vertical masts.

**JLG's soon to be released Power Tower Duo.**



## ACCESSORY VIEW



**Bravi's line of accessories and add-ons for the Leonardo can cut labour costs in half, according to the company.**

Bravi Platforms has been concentrating on its accessories in recent times.

The company's new Solo-Gyps system can be activated from the company's Leonardo HD platform. Solo-Gyps allows operators to position panels up to 12 ft long and weighing 88 pounds. According to Bravi, Solo-Gyps can cut labour installation costs in half, allowing a single worker to install up to 50 plasterboard ceiling panels per day without any additional assistance.

Bravi has also launched the Small-E inspection device, also made for the Leonardo HD line. A customised and movable top control box comes as a standard with the accessory and can be placed on the extra deck, so that the operator can comfortably drive the MEWP into position while on the Small-E.

The Move Up mast lift line is composed of two push-around models – one purely manual and the other with an electric lifting device, delivering maximum working heights of 4.6m and 5.6m, respectively.

The Swift Up scissor lift line is available in a push-around version, with working height of 3.8m or 4.5m, and the Swift Up SP which is a self propelled version, offering electric drive and a maximum working height of 4.5m.

As their compact size of a maximum 75cm width makes it easy to navigate through confined spaces, such as narrow store aisles, data centers, open-plan offices, or warehouses. Their narrow turning radius allows tight maneuvers without difficulty and they easily fit into elevators. Lightweight and equipped with non-marking wheels, they are adapted to sensitive floors, such as carpet, wood floor, marble and tiles. **AI**

A range of construction hoist applications showing how the sector is lifting into the future.

### FAÇADE DELIVERY

Inventive façade designs are driving hoist innovation to improve construction efficiency. For example, two Alimak passenger and materials hoists adapted to the varying positions and dimensions of terraces on the outside of the Bosco Verticale skyscrapers in Milan, Italy. The terraces became home to more than 900 trees.

The first Alimak Scando 450 hoist had a 80m lifting height and 17 landings. The second hoist reached 112m and had 25 landings. General contractor Colombo Costruzioni collaborated with scaffolder ACG 5 to devise a landing solution on all floors that was easy and fast use.

Alimak's ALC-II control landing system increased hoist efficiency, reducing waiting times at landings and optimizing loading and unloading. The job's third big access challenge was to increase hoist uptime. The remote monitoring sent reports to engineers to avert downtime and keep maintenance on schedule.

**Two Alimak passenger and materials hoists were used by Colombo Costruzioni during the construction of the Bosco Verticale skyscrapers in Milan, Italy.**



PHOTO: ALIMAK



Over 50 Geda platforms were used for the Fécamp offshore wind farm project.

## Offshore investment

Transport platform and hoist specialist Geda and French crane rental company Uperio have expanded their partnership.

Uperio invested in 56 units of Geda's 500 Z/ZP transport platforms all of which have been for the construction of France's massive 500MW Fécamp offshore wind farm, situated off the coast of Normandy.

The platforms are ensuring the safe transport of passengers at the construction site and eliminating the need for "strenuous, hazardous climbs."

"The reliable and robust helpers [platforms] served their purpose for a

period of around ten to twelve months," and while most of them have now been serviced and added to Uperio's rental fleet, a limited number of "very well preserved second-hand" units and accessories are now available for sale from Uperio.

The units, which can be used in harsh construction site conditions, have a maximum payload capacity of 850kg when transporting construction materials and a 500kg payload capacity when used in passenger mode to transport site personnel.

The GEDA 500 Z/ZP can lift construction materials at speeds up to 24m/min and 12m/min for passengers. **AI**

## Labour attraction

The scale of construction's labour shortage is pinching productivity on all shapes of vertical construction. The Associated Builders and Contractors developed a model that forecasted last February that the construction industry will need to attract nearly 650,000 additional workers on top of the normal pace of hiring in 2022 to meet the demand for labor. As of November, industry employment had risen by just 248,000 over the previous 12 months.

"The use of mast climbers and hoists is advantageous in this situation," says Corinne Dutil, sales director at Fraco Products, "Because if teams are smaller when starting a project, these units increase productivity, speed, but also satisfaction of the workers."

The strength of this return on investment in hoists is pushing back the limits of the equipment.

SafwayAtlantic recently completed the tallest hoist on a common tower and the world's largest continuous rack and pinion hoist for a six-car construction complex for construction of the Central Park Tower. Located on Manhattan's "Billionaires' Row"

and overlooking Central Park, it is the highest residential tower in the world.

The common tower made from shoring and scaffolding components decked at each entry level for access reached the 99th floor, a world-record height of 1,515 feet 6 inches. To maximise labour productivity, a Hydro Mobile mast climber above the hoist cars improved scheduling efficiency and eliminated interference between construction crews and tower-erection crews. **AI**



PHOTO: FRACO

**Façade designs are driving hoist innovation to improve construction efficiency.**



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