

access

INTERNATIONAL

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access
50

RENTAL FLEETS

Asia focus

Scaffolding

Low level access

Hybrids

IPAF

Official magazine of IPAF

INSIDE: ASIA INTERVIEWS, MANUFACTURER NEWS, SPAIN CONFERENCE, ACCESS IN ACTION

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Spreading the word

With powered access being at such an early stage in many parts of the world it is always reassuring to hear about the efforts being made by so many to promote its growth.

I headed out to Hong Kong for the IPAF Asia Conference in Hong Kong recently and was reminded of the flourishing access equipment market in the continent. For sure, there is some way to go before most of the markets there can be considered mature, although pockets of great activity exist in Japan, Singapore and South Korea.

Certainly, there are some significant variances between the other countries in the market. For example, most of Southeast Asia is at a fledgling stage but is starting to realise the benefits of powered access through used equipment bought from the rental companies in mature markets. Malaysia differs from its neighbours in that its used market is mainly made up of truck mounts, which are used for applications across the board including those associated with booms and even scissors.

In contrast, China has a small used market as the government imposes considerable duties on imported goods, thus promoting its many domestic powered access manufacturers. So, there are differences in the region but a great deal of enthusiasm among all those who use access equipment and a certainty it will eventually be adopted in large numbers. See the Asia focus, starting on page 41, for a discussion on these issue and more.

AI's annual **access50** listing of the world's largest access rental fleets is also published in this issue. (See page 17 onwards). As you will see, the table represents a steady confidence throughout the industry and includes a number of new entries, some from Asia, bringing the list up to 70 companies this year. We also include telehandlers for the second time in the list - the indications are that telehandlers increasingly play a significant and complementary role in the access industry. Interestingly, however, that is not the case throughout the world, with rental companies in Asia - no matter their size - having yet to adopt the concept of the telehandler.

Be sure to take a look at the Hybrid special, starting on page 27. Hybrid technology is increasingly being talked about in the industry as an answer to engine emissions, noise pollution and provide flexible working both inside and out. Nevertheless, hybrids are still a niche product in rental fleets and that is likely to be the case for a little while. This, however, won't stop developments in the sector, as the industry seeks to deal with the inevitable challenges coming our way, particularly in mature markets.

Euan Youdale
Editor

“There is a steady confidence in AI's annual **access50** listing of the world's largest access rental fleets and a number of new entries from around the world, including emerging nations.”



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ACCESS PORTFOLIO



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NEWS

Dinolift launches telehandler boom, JLG acquires Power Towers, Alimak Hek prepares to go public, Holland Lift launches narrow scissor, Van versions from Custers, Palazzani celebrates 80 years.

LOW LEVEL ACCESS

New developments in the low level access sector in recent months include a major acquisition and new light and compact models. *Euan Youdale* reports.

HYBRID SPECIAL

The hybrid is increasingly spoken about as a cost effective and environmentally-friendly option for the future. *Euan Youdale* explores how far the sector has come and where it is heading over the next few years.



ASIA FOCUS

SAFETY AT HEIGHT

Galmon has opened a world class training centre in Singapore set to influence safety awareness and the AWP industry across the region. *AI* reports from the event



IPAF ASIA CONFERENCE

The second IPAF Asia Conference took place in Hong Kong during May and highlighted the major issues affecting the continent and the growth of powered access. *Euan Youdale* was there.

BOEHLER REPORT

Brad Boehler, president of Skyjack, outlines seven key areas determining growth of the powered access industry in Asia.

INTERVIEWS

Malaysia is a fascinating market when it comes to AWP's with truck mounts dominant in the country, for now. *AI* spoke to two industry pioneers based there.

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AI's annual listing of the world's biggest powered access rental companies, ranked by fleet size, has a healthy glow about it this year, and for the second time includes telehandler fleet.

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The annual ANAPAT aerial work platform conference took place in Spain, with the confident message the country is on its way back to growth and some advice we could all benefit from. *AI* was there.

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Niftylift opened its new headquarters in the UK, marking its 30th anniversary year. The facility will drive increased production and new product design.



SCAFFOLDING INTERNATIONAL

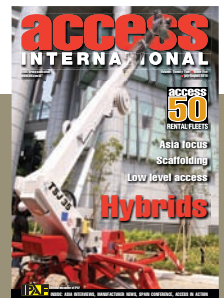
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Geoffrey Lee, general manager of Modern Access & Scaffolding in Hong Kong, spoke to *Euan Youdale* about the changes in scaffolding use there from bamboo to steel and then aluminium.

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AI reports on two very different access solutions, one designed to inspect the interior of piers in Germany, and the other to help prepare Southeast Asia's biggest church for its official opening.

ON THE COVER

A Palazzani XTJ35/R carries out maintenance the Concourse Skyline in Singapore. It is available in hybrid version - see the Hybrid special, starting on page 27.



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IN BRIEF

■ **Kranpunkten** has acquired Nofa Janneniska, based in Stockholm, Sweden. The buyout, made official on 11 May 2015, saw Kranpunkten take on Nofa's 13 employees and its conveniently placed depot at Cedersdalsgatan in Stockholm. Kranpunkten said the acquisition strengthened its presence in Stockholm, making it the largest company in Sweden in terms of self propelled and truck mounted platforms up to 104 m working height.

■ Italian aerial work platform producer **Socage** has delivered its first 44 m platform, the forSte 44TJ, to Swiss customer Fratelli Zanetti. The company has been active in the Ticino region for more than 30 years, with one of its main activities being forestry. The 44 m working height machine has an outreach of 30 m and is mounted on a three axle truck.

■ **Palfinger Platforms** Italy has launched the P130A, the first platform in a new pickup series in the manufacturer's Low Smart Class. With a maximum working height of 13 m, a maximum outreach of 6.3 m and a gross weight of 3200 kg. The platform is installed on a Ford Ranger 2.2 TDI, but will in future be available for installation on other models as well. The series will incorporate three further models by the end of the year.

■ **Isoli** has introduced the PNT 210 JD4 truck mounted platform to replace the PNT 210 J. The new model has been completely redesigned. "Aesthetically the differences are significant but technically there have also been important changes especially with the use of ultra high-strength steels." Working height is 21 m.

PALAZZANI AT 80

Italy-based Palazzani Industrie has celebrated its 80th anniversary with an open day for staff, former employees and their families.

The event, held at Palazzani's headquarters in Paderno Franciacorta was attended by 130 people and included a photo gallery presenting the history of the company from the 1930's to the present day. There were also demonstrations of aerial work platforms and earth moving equipment.

"The event was also an opportunity to thank everyone for their work over the years and to spread best wishes for the future," said a spokesperson. "Families had the opportunity to spend a day seeing the place where their relatives work." The day culminated in a lavish dinner for all.

Dinolift launches telehandler boom

The new 22 m working height boom lift from Dinolift has an extra large basket to carry more people and tools in the entire working envelope. Apart from being a fully functional heavy-duty work platform, the Dino 220XSE also performs as a remotely operated telehandler with a lifting capacity of 500 kg. The basket is mounted on the boom with forks that feature a safe, quick-release mechanism.

The 1.3 m x 2.4 m basket can accommodate three persons and can also hold a full size pallet inside. There are two entry gates, one for the operator and the other for a pallet.

Boom rotation is continuous, while basket rotation is 180°. Important safety features include the manufacturer's intelligent driving system, which means the



The new Dino 220XSE from Dinolift has a 350kg basket capacity and can be used as a telehandler.

lift will always drive forwards when the joystick is in forward position. Furthermore, the 220XSE comes equipped with a mechanical anti-crushing device to prevent crushing from overhead obstacles.

When the basket is detached, the machine can be used as a telehandler with a 500 kg lifting capacity. It is then operated by cable steer at a safe distance from the machine but with a good view of the lifting load.

Narrow scissor launched

Holland Lift has presented the 1.4 m wide electric-powered HL-330 E14 4WDS/N. It has a 600 kg capacity. Johannes Becker, Holland Lift sales manager for the German market, said, "The demand for this high reach, narrow and stable scissor lift is high, due to large warehouses all over Europe spurred on by the exponential growth of online shopping and the need to have logistics facilities close

to the market." The four wheel drive HL-330 drives at full height with maximum load and

incorporates the manufacturer's Easy Lube lubrication system. Eline Oudenbroek, managing director of Holland Lift, added, "We continue to elevate our standards with the introduction of the HL-330. We can offer our clients an even broader scope of solutions with this unique narrow aisle scissor lift."

Holland Lift will showcase the HL-330 at Platformers' Days in Hohenroda, Germany, on 11 and 12 September.

Holland Lift has launched its 33 m working height narrow scissor.



IN BRIEF

Germany-based **Ruthmann** has sold more than 650 Steiger TB 270 truck mounts since the model's launch five years ago. The 650th unit of the 27 m working height machine was purchased by French rental giant Kiloutou. The announcement was made at Intermat in France when Rolf Kulawik, Ruthmann's general manager and the company's area sales manager in France Remy Doyen, handed a trophy to Kiloutou's products manager Xavier Decoster.

The Haulotte Group has appointed Amandla Access, based in Cape Town, as its new South African distributor. "With dedicated Haulotte engineering support plus a prominent and established trading base, Amandla Access can only improve the customer experience in South Africa and The South African Development Community (SADC)" said Stéphane Hubert, Haulotte managing director - Europe and Africa. With workshop, sales, field support, transport and a sizeable premises Amandla Access will support the whole Haulotte range.

German rental company **Roggermaier** took delivery of the first of the new **Snorkel electric scissors** in Europe at the beginning of June.

Roggermaier placed an order for 50 of the new lifts at **The Rental Show 2015** in February when they were unveiled for the first time globally.

The first batch of 13 **Snorkel S3219E's** and four **Snorkel S4732E's** have already been delivered and will be deployed into their rental fleet immediately.

Power Towers buyout

JLG Industries has acquired a 100% shareholding of low level access specialist Power Towers in a deal that will see the UK company retain a degree of independence under its new owner.

The UK-based company - which has produced around 12000 units since 2007, including the Power Tower, Power Tower Nano and Pecolift - will fill a product gap for JLG in the low level access niche, adding to its existing Toucan and vertical mast ranges.

Karel Huijser, JLG's vice president for Europe, Middle East and Africa, told *Access International*; "We understand that we have a gap in our portfolio in the low access area...customers told us to be in the space, and they nudged us towards this decision [to acquire Power Towers]."

"We were looking for a pioneer in the low level access space...you can be arrogant and say, 'we can handle this ourselves', but it is the people behind the product that are important. Product innovation is a very important part of this



From left: Karel Huijser (JLG), Brian King (Power Towers), Mark Richardson (Power Towers) following the signing of the deal on 1 June

deal and will stay, and maybe we can accelerate that."

Founder and managing director Brian King, who described the two companies as a "perfect fit", said he and fellow director and designer Mark Richardson, as well as Mr King's wife Sandra, would remain at the business "for at least five years, maybe longer".

He said the acquisition would allow Power Towers to grow faster than it would otherwise do.

GSR HITS 7000

Italian manufacturer GSR has delivered its 7000th E240PX truck mount to Dolleck Arbeitsbühnen, based in Varel, Germany.

The 23.3 m working height E240PX GSR was launched at APEX 2011 and sold to Dolleck through distributor Rothlehner Arbeitsbühnen. The fully-hydraulic double pantograph truck mount has an 11 m outreach.

In addition GSR has mounted one of its 20.2 m working height E200TJ platforms on a 12 tonne Mercedes Zetros 1833 truck. The considerable dimensions of the vehicle are counterbalanced by the functionality of the telescopic boom with a 125 degree jib, allowing easy positioning of the basket.

Van versions from Custers

Custers is introducing its Taurus 230-12ML and 230-14ML truck mounted platforms onto vans.

The 12 m and 14 m working height truck models were introduced in 2013 and 2014, respectively. The first articulated Taurus 230-12MV was supplied on a Sprinter van in April and the 14 m combined articulated and telescopic 230-14MV will

be introduced in August on a 3.5 tonne VW Crafter.

It is also possible to mount both platforms on other vans, like a Ford Transit and Iveco Daily. The van mounts have controls according the latest standards.

The platforms are also available on a 5 tonne van, meaning there is significant loading capacity left over, said the company.

DIARY

2015

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www.e-bices.org

ICUEE

Sept 29-Oct 1, 2015

Louisville, Kentucky, USA

www.icuee.com

GIS (The Italian Cranes & Access and Heavy Transport Show)

October 1-3, 2015

Piacenza, Italy

www.mediapointsrl.it

Europlatform

7 October, 2015

Copenhagen, Denmark

www.europlatform.info

ConExpo Latin America

October 21-24, 2015

Santiago, Chile

www.conexpolatinamerica.com



Alimak prepares to go public

Swedish access company Alimak has announced its intention to launch an Initial Public Offering (IPO) and list on Nasdaq Stockholm. The company, which is described as a global market leader in industrial rack-and-pinion vertical access solutions, expects the listing to take place before the end of 2015.

CEO Tormod Gunleiksrud said, "Alimak's international sales and manufacturing platform in both emerging and mature markets provides us with a key competitive advantage."

"We are seeing significant opportunities ahead in capturing strong growth in the mid-market segment, driving penetration of aftersales services in our installed base and continuing to innovate our product portfolio."

The company's accounts for the year ending 31 December 2014 showed total revenues of



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SEK1.74 billion (€184 million), a rise of almost €24 million on the previous year.

In more Alimak news: a new partnership between Manitowoc and Alimak Group



TCL

will see the pair jointly produce internal tower crane hoist called CabLIFT, to be exclusively sold by Manitowoc. Alimak will also supply external units to be distributed by both companies.

FINANCIAL HIGHLIGHTS

■ **Loxam** has entered into exclusive negotiations for the potential acquisition of the France and Spain businesses of Hertz Equipment Rental Corporation (HERC). The deal would see all shares of Hertz Equipment France and Hertz Alquiler de Maquinaria transferred to the European rental giant. The proposed transaction includes 60 locations in France and two in Spain. The potential divestiture of its France and Spain businesses would enable HERC to focus on its core market in North America and specialty markets in the Middle East and China. It also has a presence in seven other countries through franchise partnerships.

■ **Lavendon Group** has reported an encouraging year so far with growth in all its regions, except the UK, and a satisfactory overall revenue growth. In the first half trading update the group gave an indication of what can be expected from its complete half year results to be released on 28 August. It said group revenue for the six months up to 30 June increased by 3% on a constant currency basis and excluding ex-fleet equipment sales compared with the same period last year, with rental revenues increasing by 1%. In the UK Lavendon saw a drop in rental revenue of 2% - the UK is its biggest regional segment contributing 47% of total revenue. The rest of continental Europe showed a 2% increase, year-over-year, however, and the Middle East continued its rise with an 8% increase in revenue.

■ **The Ashtead Group**, which comprises Sunbelt Rentals and A-Plant, has announced profits before exceptional items, amortisation and tax of £490 million (€676 million) for the 12 months to 30 April. The figure was 35% up on 2014 and mirrored a strong performance in terms of rental revenue, which was up by 24% across the group at £1.838 billion (€2.536 billion). A-Plant's share of the revenue figure was £289 million (€399 million). Its total revenue was £323 million (€445 million). Ashtead, which described the results as "record breaking", also invested £1.063 billion (€1.467 billion) in its fleet.

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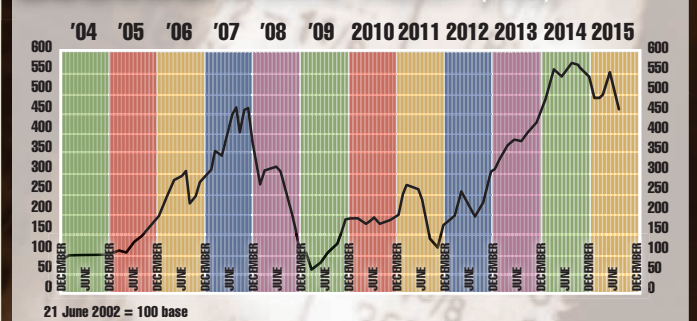
■ **Podcast:** The latest audio Access World audio podcast covers recent industry news and views rounded up by *Access International* Editor Euan Youdale and *Access, Lift & Handlers* Editor Lindsey Anderson. Regular editions will follow during the year.

■ **Tablet edition and news app:** Readers can view *AI* as a tablet edition with extra content. In the July/August issue you will find additional pictures of low level access machines, hybrid platforms and bamboo scaffolding. There are additional pictures taken during the IPAF Asia Conference and site visit, as well as pictures related to other features in the issue.

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Ashtead Group	UK£	0.47	12.21	9.99	-18.2
Kanamoto	YEN(¥)	-	3485	3025	-13.2
Lavendon	£	1.85	1.72	1.84	6.9
Haulotte Group	€	9.00	17.03	18.54	8.9
Oshkosh Corp	US\$	-	52.84	40.16	-23.9
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Mighty minis

There have been a number of developments in low level access in recent months with an acquisition and new light and compact models to grow the sector. Euan Youdale reports.

The big news of recent months in the low level access sector was JLG's acquisition of Power Towers.

The 100% buyout was finalised at the beginning of June with the announcement its founder and managing director Brian King, as well as other long-standing staff, will continue at the business. (See more about this in the News, starting on page 6).

Power Towers has produced around 12000 units since 2007, including the Power Tower, Power Tower Nano and Pecolift. The company's latest launch was the Ecolift launched at APEX June 2014, the new



A JLG Liftpod FT70 and FT140 carry out maintenance in an industrial setting.

addition to the Eco Range and uses the same patented stored power mast human-powered raising system as the original Pecolift but at 4.2 m offers almost a metre extra in working height. With no batteries and no hydraulic oil, it offers safety, efficiency and productivity compared to working on step-ladders, platform steps, podiums or small scaffold towers, says Mr King.

Based in the UK, the company will launch three new products in 2015 and cites its home market as the catalyst for the sector. "The biggest boost for low level access so far has come from the UK with the Work at Height regulations 2005 - now through using the products users understand the efficiency and productivity and commercial benefits of them." However, overall, says Mr King, the secret to the sector's continued success is common sense. "Let the user decide. Low level powered access is safer, more efficient and more productive. It also costs less."

According to Paul Kreutzweiser, global

The Genie GR-20 Runabout.



category director, scissors and verticals, at JLG Industries, Power Towers is a pioneer and market leader in low level access. "The acquisition satisfies our customer requests for more low level product choices from a single source. The addition will also allow us to continue to deliver innovative technology to the global customer base."

In addition to the acquisition, JLG launched its own LiftPod FT70 and FT140 personal portable lifts this year, in February and March, respectively. These are the newest products in the LiftPod line available in North America and provide working reach to 13 ft for the FT70 and nearly 20 ft for the FT140. The new generation of machines offers new platform heights of 7 ft and now 13ft, 6 inch for maximum jobsite flexibility.

The new LiftPod family improves upon the features of the originals being easily operated by one person, simple to assemble, easy to transport in a pick-up, van or SUV, requiring very little space to stow, and enhancing jobsite productivity.

"In addition, operator ergonomics are

LOW LEVEL ACCESS



ATN's PIAF 660RC was launched at Intermat this year.

FORMWORK FOCUS

Bravi Platforms has introduced an accessory for holding slab formwork panels on its Leonardo HD range of access platforms.

The holder device has been specifically designed to make the shuttering and striking of Peri Skydeck panels safer and easier - Bravi has a long term cooperation with the falsework and formwork manufacturer.

The simple device, certified by TÜV SÜD Industrie Service, consists of three hooks made of galvanised steel, with a total weight of 4 kg. Up to three holders can be attached to a Leonardo HD at any one time, allowing it to carry the same number of panels.

"The Leonardo HD represents a number of unique characteristics: it is the only access platform that can be used for shuttering and striking of slab formwork systems, and it is compact and agile enough to move easily around obstacles and at the same time robust enough to stand up extremely well to the tough conditions encountered on a jobsite," said a company spokesperson.



becoming more important than ever before. Users always want longer duty cycles and faster charging batteries," says Mr Kreuzwiser, "We always look at ways to improve portability and reduce weight without sacrificing rigidity and stability. Facilities and contractors are looking for an alternative to ladders that provides the productivity of a work platform, like the ability to work with both hands within an enclosed platform, while maintaining the portability and compact dimensions of a ladder."

COMPACT AREAS

Genie offers the Runabout family of products. The Genie GR-12, 15 and 20 were followed by the GRC-12 followed in 2008 and the stocking picking QS-12, 15 and 20 came out in 2009.

The GR, GRC and QS products all have zero degree turning radius to provide access into tight or confined spaces. They can navigate into areas where larger equipment would not fit and offer precision proportional controls, says the manufacturer, and share many components with Genie scissors to simplify service and maintenance.

The manufacturer is currently researching new ideas to meet the changing needs of its customers.

Marie Engstrom, product manager, Terex AWP, says, "The industry will continue to demand smaller footprints to get into tighter spaces. More importantly, the industry will look for lighter floor loading as access equipment needs to get into spaces with restricted weight distribution allowances."

As Carlo Forini, director of business development at Terex AWP EMEAR, puts it, "Besides the three key driving factors, providing superior productivity, safety over scaffolding and ladders, and light weight, there are several global contractors who are restricting the use of ladders and scaffolding on their jobsites and low height products are filling that gap."

Looking at the sector's global distribution Mr Forini confirms that historically the highest concentration of machines is in the UK and the northern part of Europe.

However, as Ms Engstrom adds, it depends on whether the equipment is manually or self-propelled, with the areas of growth being different for each segment. "For 2014, North America saw slight declines for manually propelled products, while Europe was generally flat year over year. For self-propelled machines, there was modest growth in North America while Europe saw notable year-over-year growth."

Ms Engstrom adds, "Regions where jobsite best practices are continuing to evolve are taking a closer look at low level access solutions. In the UK for example, many contractors have adopted the preference for low level powered access over more conventional tools and equipment. These contractors include global companies who boast global footprints



with presence in other regions such as Middle East, Australia and even the Americas."

Daniel Duclos, owner of France-based ATN, confirms the UK's leading status and estimates a growth of 15% each year there. Other countries in Scandinavia, as well as Switzerland, are working to introduce low level access in sectors such as retailing, housing or industrial sector, adds Mr Duclos.

"Besides the UK, we have seen France, Spain, Belgium, Germany and Holland. These are mature markets where scaffolding is replaced by access and where safety and work at height is taken seriously."

ATN launched a low level access mast prototype, the PIAF 660RC, during the APEX exhibition, in Amsterdam, in 2014.

Following customer feedback at the exhibition, the company decided to modify some of the prototype features, for example, the first PIAF 660RC had not an extension deck and some optional features were changed to standard features. Then at Intermat the final version was launched with a sliding extension deck and a picking version. The unit's dimensions are 1.46 x 0.78 x 1.99 m, plus a low height of 980 kg and low ground pressure allowing it to fit in an elevator or through a standard door. Along with the zero turning radius, the PIAF 660RC can access the likes of narrow shelves in some areas where conventional lifts or scissors cannot.

The PIAF 660rc will probably be followed by other machines of lower working heights. "But we have not decided yet what features and heights they will have," explains Mr Duclos.

Applications of interest include the logistic markets, says Mr Duclos, with its large warehouses, particularly for the picking version. "Another market where our machines could fit is in DIY stores."

He confirms that such machines are taking market share from small scissor lifts thanks to their maneuverability and turning capabilities. "And with low level access we don't need to assemble or disassemble any structure



Bravi platforms carry out work in a factory setting.

[scaffolding], we can be in movement all the time, reducing time and being more efficient.”

SAFE HOLDING

Bravi recently launched its latest upgrade to the Leonardo HD with a holder for Peri Skydeck panels, jointly designed by Bravi and Peri, to increase productivity and safety during shuttering and striking of its panels, (see box story).

Marina Torres, sales manager at Bravi Platforms, says there is a greater need ‘to work smarter and safer’.

“In the old days people were looking at low level access purely as a consequence of more severe safety regulations, now they are looking for solutions to enhance their work. Safety is no longer the only driver, productivity is becoming equally important, if not more.”

Ms Torres comments that the construction industry is experiencing increasing competition, rising legal costs related to cost overruns and schedule delays, along with decreasing profit margins. “With the cost of materials now the same for everyone, cost, quality and scheduling are even more vital for any building company, not only to stay in business, but to be truly profitable.”

Ms Torres adds, “These symptoms are forcing many construction companies to realise that fundamental changes in the way they conduct business must be made if they are to remain competitive. In this perspective, productivity growth and reduction in work-related accidents are the key determinant of international competitiveness in the long term. The implementation of powered access at every stage of the project plays an important role within this quality oriented management philosophy.”

Concerning applications, they are growing for low level access, even though the majority of the products on the market are uniquely targeting final fit out and facility management, says Ms Torres.

“In general, AWP’s are still too often limited only to certain phases of a project, mainly for installation, fit out and final finishing. Mini-scissors are in certain cases too bulky, push-arounds are too weak and with low ground clearance. So, the lack of suitable equipment was forcing contractors to still use ladders, podium and scaffoldings at the beginning of the project, shifting them

WIDER WORLD

Chinese manufacturer Dingli is also looking towards the lower level market. It has a 6 m propelled scissor lift, the JCPT0607DC and 6 m push around scissor, the JCPT0607, both launched in 2012. The manufacturer will soon launch a 6 m self propelled mast lift, it says, with steerable front wheel with positive pothole protection.

Harry Chen, Dingli sales director, says the market will be looking for simple lifts that are well priced.

Outside of the larger markets of Europe and North America, Mr Chen says there is greater awareness elsewhere. “The developed countries out of USA and west Europe are starting to use low level access because the safety requirement is getting higher and higher.”

But he adds that good safety standards need to be in place for growth although its higher efficiency over ladders and scaffolding is also helping.



to mast lifts and compact scissor lifts during installation works, to then re-shift those with low level access or scaffolding once again.”

So the tendency is to select self propelled equipment, says Ms Torres, to avoid costly and time-consuming repositioning of non-self-propelled equipment. This is why the company decided back in 2010 to upgrade its Leonardo to the Leonardo HD to make it more flexible from the very beginning of indoor works to the end, from slab formworks to final fit out.

Ms Engstrom explains that low level access is being found in some more heavy duty applications including construction, demolition and trades work for electrical and plumbing. “Products in the Runabout family are found in renovation and upgrade projects where elevators are required to get to upper floors or single door access is needed.”

AI



Power Tower’s Ecolift was launched at APEX in June 2014.



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access 50 RENTAL FLEETS

There is a positive feel about this year's extended list of the world's biggest powered access rental companies, ranked by fleet size. AI reports.



On course

We have a healthy set of figures this year in *Access International's* annual **access50** listing, representing overall growth across the table.

Looking at the top 50 fleet sizes added together this year's figure is up 2.7% on last year at 523767. This reflects a steady increase from a majority of the established companies in the table; there are also a couple of notable new entries in the top 50. One of them, Modern Access & Scaffolding, based in Hong Kong, has one of the biggest access fleets in Asia at 3510 units. A new Australian company has also made it into the top 50 this year; Alfasi Hire has a fleet of 2000 units and also operates in Hong Kong.

In fact we have a number of new entries from Asia which fall just outside of the top 50. Shanghai Horizon appears in 51st place, and is the biggest AWP rental company in China. In 58th position is Tayeou Kao Kong Enterprise. It is based in Taiwan and has a fleet of 1300 machines. It goes to show that Asia is developing its AWP sector at a good rate and it means we will be seeing many more companies from the continent taking part in the list in the years to come.

There are also new representative from South America, South Africa and Turkey in this year's listing. One of the reasons for this being, we opened the list up to companies with more than 500 AWP's in their fleet this

TOP 50 FLEET SIZES

	2015	% change	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005
Top 5	215462	-2.1	220192	204624	196656	165556	164237	173792	189850	179880	151178	140200
Top 10	300456	1.7	295334	271576	265888	240113	238181	254424	270510	251700	207758	187975
Top 50	537916	2.7	523767	481490	460758	434358	424853	449250	446956	402900	332700	283071

2015	COMPANY	AWP FLEET		%	TELEHANDLER FLEET		FLEET (see key)	BRANCHES	AREAS OF OPERATION	COUNTRY OF ORIGIN	WEBSITE
		2015	2014		2015	2014					
1 ¹	United Rentals	98950	108203	-8.5	17230	18224	S, B, T, H	880	USA, Canada,	USA	www.unitedrentals.com
2 ²	Sunbelt	52600	49406	6.5	10300	8557	S,B, M, H	430	USA	USA	www.ashtead-group.com
3 ³	HERC (Hertz Equipment Rental Co)	23631 (est)	22506 (est)	5	4042 (est)	3850 (est)	S, B	345	US, Canada, Europe	USA	www.hertzequip.com
4 ⁵	Nikken Corp	20281	19400	4.5	0	0	S, B, T	235	Japan, USA, UAE, Thailand, Indonesia	Japan	www.rental.co.jp
5 ⁴	Lavendon	20000	20677	-3.3	300	460	S, B, T	75	Europe, Middle East	UK	www.lavendongroup.com
6 ⁷	NES Rentals	19171	15350	24.9	2143	1866	S,B,T	75	USA	USA	www.nesrentals.com
7 ⁶	Ahern rentals	17971	17017	5.6	2752	4318 ^(est)	S,B,H	85	North America, Japan, China, Australia	USA	www.ahernrentals.com
8 ⁹	Sunstate Equipment Co LLC	16200	14250	13.7	3300	2700	S,B	59	USA	USA	www.sunstateequip.com
9 ¹⁴	Aktio Corp	16022	12000 (est)	33.5	0	0	S,B,T	644	Japan, Taiwan, Bangladesh, SE Asia	Japan	www.aktio.co.jp
10 ¹⁰	Loxam	15630	14000	11.6	4400	4500	S,B,T,M	630	Europe, Morocco	France	www.loxam.fr

TOP 20 TELEHANDLER FLEETS

COMPANY	TELEHANDLER FLEET SIZE 2015	TELEHANDLER FLEET SIZE 2014
1 United Rentals	17230	18224
2 Sunbelt	10300	8557
3 Loxam	4400	4500
4 Sunstate Equipment	3300	2700
5 Ahern Rentals	2752	2675
6 Blue Line Rentals	2526 (est)	2406
7 Kiloutou	2200	2200
8 NES Rentals	2143	1866
9 A-Plant	1700	1507
10 NEFF Corp	1522	1405
11 Salti	1445	1149
12 Hewden	1331	1323
13 System Lift	1000 (est)	1000
14 Hune	966	(Figure not provided)
15 Acces Industrie	896	893
16 TVH Group	880	822
17 ABKS Partnerlift	869	839
18 Riwal	703	626
19 Boels Rental	650	500
20 Collé Rental & Sales	648	(Figure not provided)



year, whereas, in the past, only companies with more than 1000 units were eligible. It allows companies like Goscor, based in South Africa, to join the list – it has a fleet of 645, yet is the second biggest AWP rental company in its country. However, there are also a significant number of new companies with fleets above 1000 units too. All rental companies around the world, with the required fleet number, are

2015	COMPANY	AWP FLEET 2015	2014	%	TELEHANDLER FLEET 2015	2014	FLEET (see key)	BRANCHES	AREAS OF OPERATION	COUNTRY OF ORIGIN	WEBSITE
11 ⁸	H&E Equipment Services	15246 (est)	14520 (est)	5	2460 (est)	2460 (est)	S,B,T,H,M	65 ^(est)	USA	USA	www.he-equipment.com
12 ¹³	Nishio Rent All	13557	12013	12.6	0	0	S,B,T,M	358	Japan, Singapore, SE Asia	Japan	www.nishio-rent.co.jp
13 ¹⁵	TVH Group	13080	11733	11.5	880	822	S,B,T	66	Europe	Belgium	www.tvh.com
14 ¹²	Riwal	12540	12237	2.5	703	626	S,B,T,M	54	Europe, Middle East, Brazil, India, Australia	Netherlands	www.riwal.com
15 ¹¹	Cramo	12522	12450	0.6	379	400	S,B,T,M,H	328	Europe	Finland	www.cramo.com
16 ¹⁷	Blue Line Rental (formally Volvo Rent)	11505 (est)	10978	5	2526 (est)	2406	S,B	132	USA, Canada	USA	www.bluelinerental.com
17 ¹⁶	Ramirent	10454 (est)	11004 (est)	-5%	480 (est)	505	S,B,M,T,H	40	Slovakia, Ukraine, Russia	Sweden	www.ramirent.com
18 ¹⁸	SystemLift	9600 (est)	9600	0	1000 (est)	1000	S,B,T,M,H	70	Germany, Austria, Switzerland	Germany	www.systemlift.de
19 ²⁰	HSS Hire Group (includes UK Platforms)	9073	8396	8	61	59	S,B	277	UK, Ireland	UK	www.hss.com www.ukplatforms
20 ¹⁹	Kiloutou	8700	8400	3.6	2200	2200	S,B,T,M	450	France, Poland, Spain	France	www.kiloutou.fr
21 ²¹	ABKS PartnerLift	8127	7514	8.2	869	839	S,B,T	145	Europe	Germany	www.partnerlift.com
22 ²⁷	Kanamoto	7600	5565	36.6	200	300	S,B,T,M	350	Japan	Japan	www.kanamoto.co.jp
23 ²²	Coates Hire	6750 (est)	6570	0	440 (est)	440	S,B,T	240	Australia, UK, Indonesia	Australia	www.coates.com.au
24 ²³	Mills Estruturas e Srvicos de Engenharia	6438	6568	-2	315	356	S,B,M	30	Brazil	Brazil	www.mills.com.br
25 ²⁵	Boels Rental	6500	5775	12.6	650	500	S,B,T,M	320	Europe	Netherlands	www.boels.com
26 ²⁴	Pekkaniska	6000	6000	0	0	0	S,B	25	Finland, Russia, Ukraine	Finland	www.pekkaniska.com
27 ²⁶	AFI	5729	5598	2.3	110	24	S,B,T	22	UK, Middle East	UK	www.afi-group.co.uk
28 ²⁸	Hune	4847	5459	-11	966	474 ^(est)	S,B,T	35	Europe	Spain	www.hune.com
29 ³⁰	GAM	4610 (est)	4610 (est)	0	0	0	S,B,T,M,H	100	Europe, North Africa, Middle East, South America	Spain	www.gamaquiler.es
30 ³²	Acces Industrie	4289	4192	2.3	896	893	S,B,T,M	32	France, Morocco	France	www.acces-industrie.com
31 ³³	Trico Lift	4218 (est)	4018	5	483 (est)	460	S,B,M	6	USA	New Jersey, USA	www.tricolift.com
32 ³⁹	AJ Networks	4160	3324	25.2	0	0	S,B	4	Korea, Vietnam, Saudi Arabia	South Korea	www.ajnet.co.kr
33 ³⁴	Gerken	3969	3780	5	420^(est)	420 ^(est)	S,B,T	15	Europe	Dusseldorf, Germany	www.gerken-arbeitsbuehnen.de
34 ³⁶	Star Rentals	3819^(est)	3638 ^(est)	5	648^(est)	618 ^(est)	S,B	17 ^(est)	Western USA	USA	www.starrentals.com



welcome to join the **access50**, so if that applies to you, please take part in 2016.

Adding the fleets of the top five companies together, there is a slight decrease of 2.1% overall. This is mainly due to United Rentals' 8.5% smaller fleet size, compared to the 2014 list. The others have made up much of the ground, although Lavendon Group has also seen a slight drop of 3.3%. Outside

the top 5 and through the top 20 there is almost unbroken growth among the entries. Just outside the top 20, at 22, is Japan based Kanamoto with an impressive 36.6% fleet growth over last year - it tops our chart of the biggest growing companies of 2015. It reflects good fortunes among the Japanese entries this year. Nikken Corp has jumped up one place from fifth in 2014, to fourth this year, and Aktio Corp has also made a good showing, although its figure was estimated last year, so we can't make a true comparison.

Telehandlers have been included for the second time this year and continue to make interesting reading. We asked all the companies that took part to tell us how many telehandlers they have. (See the top 20 telehandler fleets table). Again, it is the USA-based companies that dominate in the top five for telehandlers, although Loxam, in 10th place in the main AWP list, sneaks in there at third place. Outside the top 5, the list is rich with European companies, and across the board there is a general trend for companies' >

LARGEST % GROWTH

COMPANY	PERCENTAGE GROWTH
6 NES Rentals	24.9
39 A-Plant	17.8
8 Sunstate Equipment Co LLC	13.7
12 Nishio Rent All	13.7
25 Boels Rental	12.6
42 Kranpunkten	12.5
10 Loxam	11.6
13 TVH Group	11.5
41 NEFF Corp	10.6
21 ABKS PartnerLift	8.2

Companies in the top 50
Not including estimated entrees

2015	COMPANY	AWP FLEET 2015	2014	%	TELEHANDLER FLEET 2015	2014	FLEET (see key)	BRANCHES	AREAS OF OPERATION	COUNTRY OF ORIGIN	WEBSITE
35	Force Access	3736	3731	0.1	147	294	S,B,T	13	Australia	Australia	www.forcecorp.com.au
36	Salti	3648	3478	4.9	1445	1149	S,B,T,M	33	France	France	www.salti.fr
37	Modern (International) Access & Scaffolding	3510	-	-	10	-	S,B	3	Hong Kong, Macau, Singapore	Hong Kong	www.modern-access.com
38	Solaris Brazil	3304^(est)	3552	-7	178	190	S,B	25	Brazil, Argentina	Brazil	www.solarisbrasil.com.br
39	A-Plant	2800	2377	17.8	1700	1507	S,B	131	UK	UK	www.aplant.com
40	Galmon	2800	2800	0	0	0	S,B	1	Singapore	Singapore	www.galmon.com
41	NEFF Corp	2766	2502	10.6	1522	1405	S,B	65	USA	USA	www.neffrental.com
42	Kranpunkten	2700	2400	12.5	50	240	S,B,T, M,H	7	Sweden	Sweden	www.kranpunkten.com
43	Collé Rental & Sales	2539	3000	-15.4	648		S,B,T,M	11	Netherlands, Germany, Belgium	Netherlands	www.colle.eu
44	Height for Hire/ Easi Lifts	2560^(est)	2559	0	121^(est)	121	S,B,T,H	14	UK, Ireland, Slovakia, Hungary	Ireland	www.easiuplifts.com
45	Venpa (GV3)	2558	2489	2.8	471	470	S,B,T	30	Italy, Eastern Europe	Italy	www.gv3.it
46	Nacanco	2409^(est)	2409	0	248^(est)	248	S,B,T	16	Italy	Italy	www.naconco.it
47	All Erection (All-Aerials)	2300	2466	-6.7	525	458	S,B	37	North America, inc. Mexico	USA	www.allaerials.com
48	Brand Energy & Infrastructure Services	2300	2300	0	20	20	S,B,M	50	France, Holland, UK	USA	www.beis.com/nl
49	Prangl Gesellschaft	2197	2046	7.4	295	289	S,B,T	21	Austria, Europe	Austria	www.prangl.at
50	Alfasi Hire	2000	-	-	100	-	S,B	5	Australia, Hong Kong	Australia	www.alfasi.com.au
51	Shanghai Horizon Equipment & Engineering Co.	1961	-	-	0	-	S,B	32	China	China	www.horizon-equipment.com
52	Voisin's Equipment Rental	1889	-	-	82	-	S,B	1	Canada	Canada	www.voisinrentals.com
53	Skyreach	1869	2040 ^(est)	-8.4	95	149 ^(est)	S,B	10	Australia	Australia	www.skyreach.com.au
54	Location d'outils Simplex	1762	4235 ^(est)	-58.4	132	420 ^(est)	S,B	35	Canada	Canada	www.simplex.ca
55	Kimberly Group	1539	2007	-23.3	9	15	S,B	6	UK	UK	www.kimberlygroup.co.uk
56	AGF Access	1400	-	-	9	-	S,B	8	Canada, USA	Canada	www.agfaccess.com
57	Instant Access	1350^(est)	1350	0	0	0	S,B,M	13	Australia, New Zealand	Australia	www.instantaccess.com.au
58	Tayeou Kao Kong Enterprise	1300	-	-	0	-	S,B	6	Taiwan	Taiwan, China	www.tayeou.com.tw
59	GT Access	1241	1078	15.1	0	0	S,B,T	5	UK	UK	www.gtaccess.co.uk
60	Alo Rental	1203	-	-	65	-	S,B,T	10	Chile, Peru, Panama	Chile	www.alo-group.com
61	Hewden	1019	1217	16.3	1331	1323	S,B	34	UK	UK	www.hewden.co.uk
62	Arentis	985	-	-	85	-	S,B,T	2	Netherlands, Belgium, Luxembourg, France, Germany	Netherlands	www.arentis.com

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2015	COMPANY	AWP FLEET		%	TELEHANDLER FLEET		FLEET (see key)	BRANCHES	AREAS OF OPERATION	COUNTRY OF ORIGIN	WEBSITE
		2015	2014		2015	2014					
63 ⁵⁶	Belaruslift	900 ^(est)	935	-3.7		64	S,B,T,M,H	6	Belarus	Belarus	www.belaruslift.com
64 ^{NEW}	Alimak Group	850	-	-	0	-	M,H	9	Australia, Germany, Benelux and France	Sweden	www.alimakhek.com
65 ^{NEW}	Maquinza	678	-	-	215	-	S,B,M	17	Spain, Columbia	Spain	www.maquinza.com
66 ^{NEW}	Advanced Access Platforms	662	-	-	0	-	S,B	2	UK	UK	www.advancedaccessplatforms.com
67 ^{NEW}	Goscor Access Equipment	645	-	-	28	-	S,B	6	South Africa, Namibia, Botswana, Mozambique	South Africa	www.goscoraccessrental.co.za
68 ^{NEW}	Rent Rise	607	-	-	6	-	S,B,M,H	5	Turkey, Azerbaijan, Georgia	Turkey	www.rentrise.com.tr
69 ^{NEW}	WS-Skyworker	584	-	-	32	-	S,B,T	7	Switzerland	Switzerland	www.skyworker.com
70 ^{NEW}	Manlift	552	-	-	6	-	S,B,T		Ireland, UK, Poland	Ireland	www.manlift.ie

Fleet details key: S – scissors B – Booms T – truck mounts M – mast climbers H – passenger hoists

telehandler fleets to go up and down at pretty much the same percentage rate as their AWP fleets. It demonstrates the complementary role telehandlers play in an AWP fleet, and explains why the telehandler is increasingly being linked with aerial work platform equipment, particularly in Europe. The story is very different in Asia, where telehandlers are yet to make an appearance in most rental fleets, and when they do the numbers are few.

Please take your time to look through this extended list, now up to 70 companies, and see where the headway is being made and by whom.

Turning back to the AWP listing and the companies with the largest percentage growth in particular, (see the table at the top of page 19), the upward leaps are lower than they generally were last year. For example, one company last year showed a 78.6% increase from 2013 and another recorded a 53% rise. This year the biggest rise is from USA-based NES Rentals, with a 24.9% increase in its rental fleet over 2014, followed by A-Plant, based in the UK, with a 17.8% increase. The pair reflect the two strongest access economies currently and their figures a good indicator of the accuracy of the Access50. **AI**

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 AWP 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. This year, for the second time, we have also shown the number of telehandlers in each company's fleet. Where figures have not been available it has been necessary to estimate them based on current market conditions. If you are not included in the list, please take part next year.

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Positive signs

The annual ANAPAT aerial work platform conference took place in Spain during May with the confident message that the country is on its way back to growth and some advice we could all benefit from. AI was there.

Spain has had it tough in recent years thanks to a crippling financial crises over recent years. While the country is not out of the woods yet, the mood at the 21st Asociación Nacional de Alquiladores de Plataformas Aéreas de Trabajo (ANAPAT) Conference, held in Bilbao, Spain, was distinctly positive.

Indeed, a common comment heard among the members of the Spanish association for aerial work platforms was, “the smile has returned to our faces.” Surely a sign that the country is finally back on track.

Speakers included Luis Ángel Salas, director general of Spain-based rental company Hune, Jonathan Dawson, senior director of sales at JLG and Gérard Déprez, president and CEO of Loxam. The conference was chaired by David Cagigas, president of ANAPAT; he is also country manager for Riwal in Spain.

During the conference, Mr Salas explained how companies must adapt and learn from a crises to ensure they don't ‘trip over the same stone twice’. This includes recognising a crises when it comes along and realising that appropriate changes must be made, but not falling into the trap of panicked decisions when it comes to price adjustment, fleet retention and workforce.

According to Mr Salas, Spain has been through three crises in recent memory, during the 1990's, then in the early 2000's, and most recently, the biggest one yet, taking place over the last five to six years. The rest of Europe shared in those experiences, particularly the latter, but Spain, along with other countries in southern Europe like Spain and Greece were hit the hardest.

“Every time a crises comes along we ignore it. Not just politicians do it, business people



ANAPAT conference speakers, from left: Gérard Déprez, president and CEO of Loxam; Luis Ángel Salas, director general of Hune; ANAPAT president David Cagigas; and Jonathan Dawson, senior director of sales at JLG.

do it too. So we delay corrective measures, and by not recognising the reality it makes things much worse.

“When there's evidence of a crises we panic and we see the opposition drop their price, then we see lay-offs, sell-offs, etc. It's all done in a rush and the sector loses value.”

LEARNING LESSONS

Another common urge is to restructure or merge with another company, says Mr Salas. However, he pointed out that once a company has taken this route it fundamentally changes. “If you manage a merged company in the same way as before it will not work. They have to be managed differently.”

This rule applies on on all levels, from workforce and production through to communication systems and administration, as it has become a different company. “If restructuring is done correctly them it will work well.

“We should better organise ourselves for the next crises,” continues Mr Salas, “because people have the capacity to forget.”

For those who do survive the crises, there will have been some fundamental changes in market and they will have learned to do things in a different way.

In Spain, the rental period is now much shorter, with fewer long-term projects and

more demand on price. The access sector in the country has also become very mature, adds Mr Salas.

“We have to focus on doing things a different way, with a more lean organisation, more flexibility and a better customer image.”

Included in all this is the development of more streamlined, flexible technology integrated in the equipment, and more advanced safety solutions. Mr Salas says there has not been one accident in the last seven years at Hune. “It's of great value to our customer.”

For example, some 30% of revenue at Hune is no longer derived from rental. For example, this year the company has trained some 17000 people. “We provide these value-added services to our sector.”

Another important factor is collaboration, “Only companies that cooperate with other companies will improve. You always go further in a group – by establishing links with associations, etc. Although healthy competition is also crucial.”

Mr Salas adds, “We have to copy the best practices of others and have a commitment to our environment.

He explains how Hune had looked at companies to buy, but tuned down many of them even though their figures looked profitable; the reason being, “They did not

SPAIN CONFERENCE

LOOKING AT THE FIGURES

Gerard Déprez, Loxam CEO, spoke about European growth figures over recent years, including construction in Spain. There has been a marked move in the right direction since 2013. He says construction in the country dropped 18.8% in that year, followed by a 2.4% drop in 2014. However, by the end of 2015 the country will see growth of 1.8% over the three-year period.

The European Rental Association (ERA) forecasts growth of 2.5% in 2015, following a 2% decline in 2014. Mr Déprez says, "Based on my experience I am confident of these figures. There is big potential in Spain, so companies are looking to grow there, including Loxam."

Mr Déprez adds, "After a long period of recovery the construction sector has used equipment and it needs new equipment. Today it is uncertain if it wants to buy new, and this is a positive for the rental industry as construction companies will decide to rent rather than buy. So, when construction starts stabilising it will be good for the rental sector."

"But we have to prepare for that upturn; the market has changed so companies must change; we cannot just rely on the upturn of the market."

Mr Déprez explains that some generalist rental companies will have missed the rise of the access industry. "Maybe they do not know what is required in the sector even if it seems obvious. The biggest access companies started from scratch as access specialists and in Spain those that offer access have a very large amount of it."

Mr Déprez used the example of mini excavators, explaining that 20 years ago there was none of this equipment type in the market. So, we can use the trends of the adoption of existing equipment to judge the adoption of other newer equipment types, he says.



respect the environment or legal requirements."

JLG's Jonathan Dawson explained how new equipment, like hybrid technology and a range of safety features, must adapt to the modern working environment and provided an insight into how technology will enhance the way we work in the future. That could include smart safety vests and other wearables with sensors to detect proximity to permanent structures and other potential hazards.

Augmented reality is also a likely possibility, providing immediate access to user manuals, for example, in relation to work being carried out in real time.

PICKING UP

Concerning Spain Mr Dawson said the country is on the right tracks. "The Spanish economy is picking up and we want to be a part of that. But the market has changed and yesterday's competitors might be today's partners."

So, what unique benefits can we offer our customers to do business with us? "This sounds

simple, but it's actually quite hard.

"As a manufacturer we have to offer good products, after sales service and technological development to shape the future, but we don't know what that future is going to be."

So, how do we prepare ourselves for the future? Financing is important as is the way people choose to approach it.

Looking at equipment, Mr Dawson says, "What if we had a machine that could heighten utilisation? Hybrid technology has the ability to work with zero emissions and equals or better performance compared to a diesel machine. Hybrid allows us to reduce our operating costs and use energy rather than lose it as heat."

"We are looking to improve performance with smaller, more efficient engines, while customers demand increased capacity with less cost of ownership."

The fact is, the industry is quite young, he says, "Safety evolves the industry and pothole protection, fall arrest systems, etc, etc, equal a more efficient, productive industry." **AI**



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A red LOXAM boom lift is positioned on a concrete bridge under construction. The lift's arm is extended, and a worker is visible in the basket. The LOXAM logo is prominently displayed on the boom. The background shows the concrete structure of the bridge and some greenery.

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Making their mark

The hybrid AWP is increasingly spoken about as a cost-effective and environmentally-friendly choice.

Euan Youdale **explores how far the sector has come and where it is heading over the next few years.**

The hybrid aerial platform is still a niche product and it is unlikely to be dominant in rental fleets over traditionally combustion engine powered products, certainly in the immediate future. It could even be that the lithium-ion battery has a brighter future when used as a single power source.

Nevertheless, hybrids are becoming increasingly common, particularly in established markets like Europe and North America for inside construction applications and industrial applications. This may lead to greater use on outside construction sites as the technology develops. The benefits being cost efficiency, noise reduction, lower pollution and the fact they can be used across a range of applications inside and out.

At this point it is worth differentiating hybrid and bi-energy tracked platforms from booms and scissors, particularly in the rental sector where they are a niche product. A relatively high proportion of tracked platforms already use this technology compared to scissors and booms as it is often complementary to their core use. And while rental companies commonly have a handful of tracked platforms in their fleets it is few compared to the conventionally-powered scissors and booms.

Chris Banks, technical director at UK-based

distribution specialist Access Platform Sales, part of the IAPS Group, provides his view of the hybrid sector.

“The advantage of the hybrid is it can be used in a multitude of places because you can use it on battery or mains internally, yet if you have an external use you can still power it with the battery, but if that starts to get low you can use it with the engine or just the engine.”

Despite this, hybrid has its limitations.

“A rental company would probably use a hybrid machine internally or around a

DEFINITIONS: (CHRIS BANKS, APS)

HYBRID

A machine that runs from a battery pack via an AC or DC motor but that has the ability to charge the batteries with a small fuel-efficient engine.

TRI FUEL

A machine that can be powered by three power sources: engine, battery and mains AC power either direct or through a battery charger.

BI ENERGY

A machine that has two clear power sources normally engine and battery via a DC motor, but this could be engine and mains power.

LITHIUM

A machine that is powered by at least one lithium battery pack normally through an AC electric motor, but it could also have other power sources.

A Bluelift crawler mounted machine carries out arborist work.



An Easy lift R360WB in a shopping centre.

HYBRID SPECIAL

factory-type environment – more industrial applications rather than construction applications. On a construction site it would probably use a fully diesel machine, however it's not to say some hybrids couldn't work on that site, particularly where they are purely being used inside."

Partly it's a question of technology and the ability of hybrids to match their combustion engine counterparts. "The drive system in new hybrids now is getting so good. Before, an electric machine had very poor gradeability, now the gradeability is getting better so it is possible that we may see some of these big diesel-only four wheel drives disappear."

In competition

As Corey Raymo, global category director, boom lifts, at JLG, explains, there are two types: Series hybrid and parallel hybrid. JLG's products are considered as series hybrids. "In series hybrid technology, the engine and electric motor or generator are independent and the electric drive or traction motors can be powered by the batteries alone, which are assisted by the combustion engine." In the parallel system both motors contribute to the propulsion, possibly at the same time.

Hybrids have some competition, with a serious contender being lithium-ion battery technology used on its own without any

One of Omme's 'true hybrids' refurbishing a chimney.



A TSJ35 wheeled Palazzani with outriggers.

other power source as a back-up. The light weight of the battery pack, its longevity, short charging times and greater usage periods are all advantages, says Mr Banks.

"You can get one day's use out of a lithium machine at the moment and depending on the network you can charge the pack to around 80% in around two hours and after about 8000 working hours the pack will still be about 80% of what they were originally.

"You would know no difference in performance with the lithium machines that are on the market compared to a diesel engine, accept there is no noise."

Mr Banks believes the lithium will generally remain as an independent power source, although it is quite possible we will see a lithium hybrid with a diesel/petrol engine that charges the lithium pack.

The only disadvantage is the relatively high cost compared to other types of batteries or indeed combustion engines. "In certain

applications the lithium outweighs the other machines so much the customer is prepared to pay a premium. As more and more manufactures use lithium the technology and the price will come down. I guess we could be talking five or 10 years down the line."

Despite these considerations, Mr Banks is of the view there will always be a place for hybrids. "With any battery-powered machine there is always the limitation that at some point you will run out of battery power. If you have the ability to recharge that battery pack via a diesel or petrol engine, you broaden the use of the machine, meaning it is not just for one customer and can be used for many different types of applications.

He says, "I see existing electrics decreasing as hybrids take slightly more percentage, however I think there will always be a market for electric machines," adding, "I think Europe and the USA will increase their percentage of hybrid and lithium machines."

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Rental perspective

Many rental companies are still cautious about the adoption of hybrid machines, particularly outside of the USA and Europe where their benefits are not yet required. However, even in those mature markets, rental companies would pause for breath before suggesting they will ever take over from mainstream scissors and booms in the construction sector.

For example, in the USA, rental giant NES Rentals has few hybrids in its fleet. “We don’t have many hybrids and don’t have any specific plans to add more. We will buy hybrids as necessary and as customer demand dictates,” says a company spokesman. As far as tracked platforms are concerned, it has around 20 units.

European major Riwal has invested in a number of hybrids, including Holland Lift’s HL275 H25 and JLG’s M3369LE and M4069LE scissors and JLG H340 AJ, M450 and M600 booms.

“We will continue to invest in hybrid scissor and boom lifts as these machines will enable our customers to work for a longer period on a jobsite - outside on rough terrain as well as inside. This will save our customers time to off-rent and on-rent machines as well as bring savings in transport costs,” explains Søren Rosenkrands, Riwal’s COO.

The company’s technical manager Nico den Ouden, adds that for working heights where no environmentally friendly boom lifts are



A JLG 800AJ converted to electric by Riwal.



available on the market, Riwal has converted diesel machines to electric, including the JLG 800AJ and JLG 860SJ. “We will be looking at converting machines of even higher working heights, depending on the customers’ request.”

However, Mr Rosenkrands is assured hybrid machines will be of increasing importance to Riwal’s fleet, “They respond to a market need for more versatile and environmentally-friendly machines with reduced emissions, lower noise levels as well as fuel savings.”

Higher investment

These machines are being used in construction and maintenance where lower noise levels or

A Genie GS-4069BE rough terrain scissor.

lower pollution is required such as city centres, offices, close to hospitals, in tunnels and indoor maintenance. Also multi-storey buildings where interior works are required.

“For us the investment in a hybrid machine is higher compared to conventional access equipment and the maintenance costs are higher,” explains Mr Rosenkrands, “The challenge is to explain the added value of a hybrid machine to the customer and charge the appropriate rental rate. The customer will pay for it when there is a specific application for the hybrid use. We expect it will remain a niche product for quite some time.”

To ease these challenges, Riwal hopes manufacturers create ‘smarter batteries’ with stronger output, as well as, ‘smarter electric motors’ that are maintenance-free.

“We believe that one of the key drivers is that larger construction companies increasingly incorporate sustainability in their strategy and set environmental objectives to reduce their footprint. This includes more sustainable construction projects using more environmentally-friendly equipment,” adds Mr Rosenkrands.

Europe and the USA are likely to adopt these changes more quickly than other markets, “Companies there are more environmentally-conscious and also governments have a higher focus on reduced emission and noise levels.” **AI**

TRENDS IN JAPAN

Nikken Corporation, based in Japan, has a few Z-Boom Genie hybrids in its fleet. Hiroshi Horinouchi, executive officer and general manager, corporate planning office, Nikken Corp, says, “We don’t have any plans to increase our volume of hybrid scissors and boom fleets. There is limited demand for such hybrid equipment from our customers in Japan.”

Mr Horinouchi does not see any major changes to the current situation in the short term. “It may change to some extent in the long run, like more than 10 years, but we can’t tell for the moment.”

It is simple, says Mr Horinouchi, the customer must see a benefit in the use of such equipment before investing in it. “Customers need to see a reduction in their operating costs by using hybrid equipment.” Ultimately, that means, “Low cost production to persuade rental customers to accept hybrid equipment.”

At the moment in Japan, “Users are satisfied with the efficiency of machines available today and there is no reason to purchase high-cost equipment for the time being.”

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Manufacturers

JLG

Hybrids in the JLG camp are the 10.29 m platform height H340AJ, 18.39 m platform height M600JP and the 13.72 m platform height M450AJ booms.

All JLG hybrids are series hybrid rather than parallel hybrid. For example, the H340AJ combines diesel fuel and an electric power system, providing the power and durability of a diesel-powered machine while saving operational costs. It is quieter, less than 69 decibels, and produces fewer carbon emissions. It has four independent electric-drive motors that provide rough terrain performance with a Tier 4 diesel-powered generator for recharging. Electric power is stored in eight 6V batteries, each requiring less recharging time than lead acid batteries.

According to the manufacturer, "Many of the technologies present in AWP today were pioneered in automotive years ago. Examples include GPS, telematics, system sensors, control systems, etc. Hybrid systems and technology could likely follow a similar path. When adoption of a new technology, like hybrid technology, is low and the concept is new, OEMs may be limited in the types of hybrid technologies they can offer.

"Fleet owners and end-users are becoming more and more cost-conscious, and fuel and maintenance costs are one of those factors that could sway a fleet owner to a hybrid."

Genie

Genie has three hybrid booms, the Z-34BE,

Z-45BE, TZ-50BE and three scissors, the GS-2669BE, GS-3369BE, and GS-4069BE.

The Genie bi-energy system currently used on the Z34 and Z45 boom lifts, for example, consists of eight six volt batteries and a T4F 13hp diesel driven alternator. Running the engine provides nearly 100 amps of power sufficient for machine functions and charging the batteries. The machine can also be operated strictly from battery power in areas that require low noise or no emissions.

The GS-69BE rough terrain scissor lift bi-energy system consists of eight six volt batteries incorporating an integrated, onboard TF4 6.7hp diesel engine direct driving a 2.4 kW generator. The system is capable of simultaneously and automatically self-charging the batteries and powering AC power hand tools at the platform or on the ground. When in Hybrid mode, the power management system automatically monitors the state of the batteries and controls the operation of the onboard generator.

Genie says, "Hybrid systems are quickly finding their place in the aerial market. Fleet owners are able to leverage the flexibility of indoor/outdoor performance for longer term rentals and higher utilisation. The industry continues to focus on productivity and ROIC and hybrid systems will support this focus.

"As emissions standards continue to increase the complexity of the diesel engine systems, hybrid and electric systems will provide alternatives that become comparatively more cost effective."



A Manitou 170 AETJ bi-energy articulated boom.

Manitou

Manitou's AWP range offers the 150AETJ Bi-Energy and 170 AETJ Bi-Energy. These two models have a 15 m and 17 m working height, respectively.

The main power source of the machine is electric, batteries, which run an electric pump and engine wheel motors. A small 9KW Lombardini engine is fitted and charges the batteries when needed. The machine can then be used inside using batteries and outside, the engine is used to charge the batteries and provide power to wheel motors.

"Hybrids still represent a bigger investment in the future than traditional technologies, that's why these products will progress slowly in the rental fleets. Mentalities are changing and people are more and more aware of environmental issues. If regulations become stricter then behaviours could change quickly."

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**Holland lift 's 27.5 m working height
HL-275 H25 scissor.**

Skyjack

Skyjack offers the SJ6832 RTE. It marries the benefits of its diesel-powered counterpart with an electric engine.

The electrically-powered rough terrain scissor can still elevate 454 kg to 9.8 m but the package is narrower and lighter. Built on the same chassis as the existing diesel and dual fuel 68RT units, it features a 16 hp AC electric motor as standard, Skyjack also offers a hybrid powerpack variant featuring a 2.2 kW genset, which provides on-board power to recharge the 48V 250Ah battery pack, while the machine is working. The operator can set the system to automatic mode, whereby the generator will start and provide battery charging when the operating charge reaches 50%.

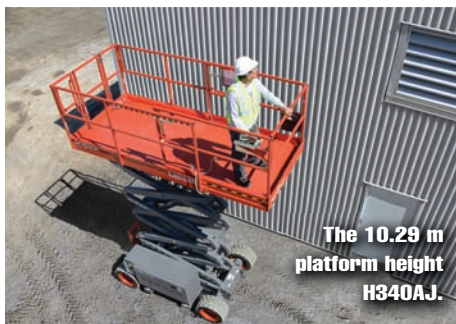
Haulotte

Haulotte offers two self propelled boom lifts that come standard with hybrid power. The 45 XA and 55 XA use a system that combines a petrol or diesel engine with batteries. The IC engine and batteries work together to power the travel function, and the batteries power the boom functions, with recharging provided by a generator that's driven by the engine. The 45 XA has a maximum working height of 15.5 m and the 55 XA has a working height of 18.7 m. Both have a maximum platform capacity of 227 kg.

Omme

Omme Lift prides itself in its 'true hybrid' offering and provides a range of hybrid trailer and crawler mounted models, including the 16.6 m 1650 EBD - 29 m 2900 EBD trailers and 17.2 m 1750 - 42 m 4200 RBDJ crawler mounts. The Omme system has a diesel/battery and petrol/battery drive train.

The lifts offer an on-board charger during lift operation without interruption. The batteries are automatically re-charged by a generator when the engine is running. When the engine is started up, there is an automatic transfer from battery to engine power and vice versa. The engine can be used where heavy, constant performance is required and full battery for operation in areas where air or noise pollution is regulated. "We believe that hybrids are very important to rental fleets. Lifts that are only used indoors can rely on just battery



**The 10.29 m
platform height
H340AJ.**



power. However, the rental fleet needs lifts that are flexible so they have the capacity for indoor and outdoor use. You can always improve and modify the technique, for example by, using lithium batteries."

Holland Lift

Holland Lift's 27.5 m working height HL-275 H25 scissor has a 100 kg basket load. By using parallel technology, the batteries are not used unnecessarily, thus making its lifespan longer and the machine more reliable. The scissor lift can be used without being dependant on a charging point. At the same time it can be used both inside and out. The battery capacity is sufficient for one to two full working days. If it should come to a stage the battery is empty, the machine can be run on generator mode. The diesel engine, electric motor and hydraulic pump are connected through one shaft and using a clutch the engine can be disengaged from the drivetrain.

Niftylift

The manufacturer has a complete hybrid range. For example, the HR28 Hybrid can lift three people and tools to a working height of 28 m or an unrestricted outreach of 19 m. Its system utilises power-optimised diesel supported by the machine's batteries when extra power is needed. A Diesel Re-Gen feature recharges the batteries without a mains power source and the electric-only mode allows zero-emissions. The Advanced Exhaust Purification system, including catalytic converter, reduces emissions: particulates by 30%, hydrocarbons by 80% and carbon monoxide by 90%.

Bluelift

Blue lift offers all its line of tracked platforms up to 22 m working height as a hybrid option, except for the smallest 12 m working height C12 which is available only lithium. They can also be offered with hybrid option: lithium battery + combustion engine.

The company says, "We started with the hybrid option in 2013, focusing especially on the USA." This is because, "The 110 v in the USA is not enough for a good performance with a standard electric pump, so the hybrid option is the solution to this problem."

MEC

MEC has the 4069ERT scissor lift, which combines battery power with a recharging



France Elevateur fits electric-powered platforms on standard vans.

genset. It has 40 foot maximum platform height and 800 pound lifting capacity.

Easy Lift

The manufacturer supplies all its tracked platforms as a hybrid version. The manufacturer has a small, medium and large range from the R130 with a 12 m working height to the R410 with a 41 m working height. The big machines can be supplied with tracks or wheels.

The different hybrid systems on offer are: lithium battery + electric motor; traction battery + electric motor; lithium battery + electric motor + combustion engine, traction battery + electric motor + combustion engine

"The hybrids versions are in continuous development through new technologies from lithium battery as it more compact and quick to recharge. The main problems of hybrid tracked platforms are the small spaces they have to get into and the power consumption, we think that in the coming years the battery version will have smaller dimensions and consumption will be lower," says Easy Lift.

France Elevateur

France Elevateur says all its range can be fitted with hybrid technology. It also fits electric-powered platforms on standard vans and trucks and offers a 100% electric platform and carrier.

"We have been making machines with battery packs for more than 20 years for the national French electricity company ERDF, and have been following the evolution of this technology."

For example, the 11 m Topy 11 to the 28 m 248 TBE has a hydraulic system with batteries which can supply enough power to work for 15 full cycles, and can be fitted with solar panels to help charge the batteries faster.

Palazzani

Palazzani uses the parallel system in its Ragno models, which can be recharged direct from 220 V mains power source. This system provides a better performing battery, says the manufacturer, and it guarantees more autonomy in electrical mode. In the system, the diesel motor activates the generator that charges the battery. The generator is connected to the diesel motor with a belt that multiplies the number of revolutions. The DC to AC inverters control the motors that activates the pump. **AI**

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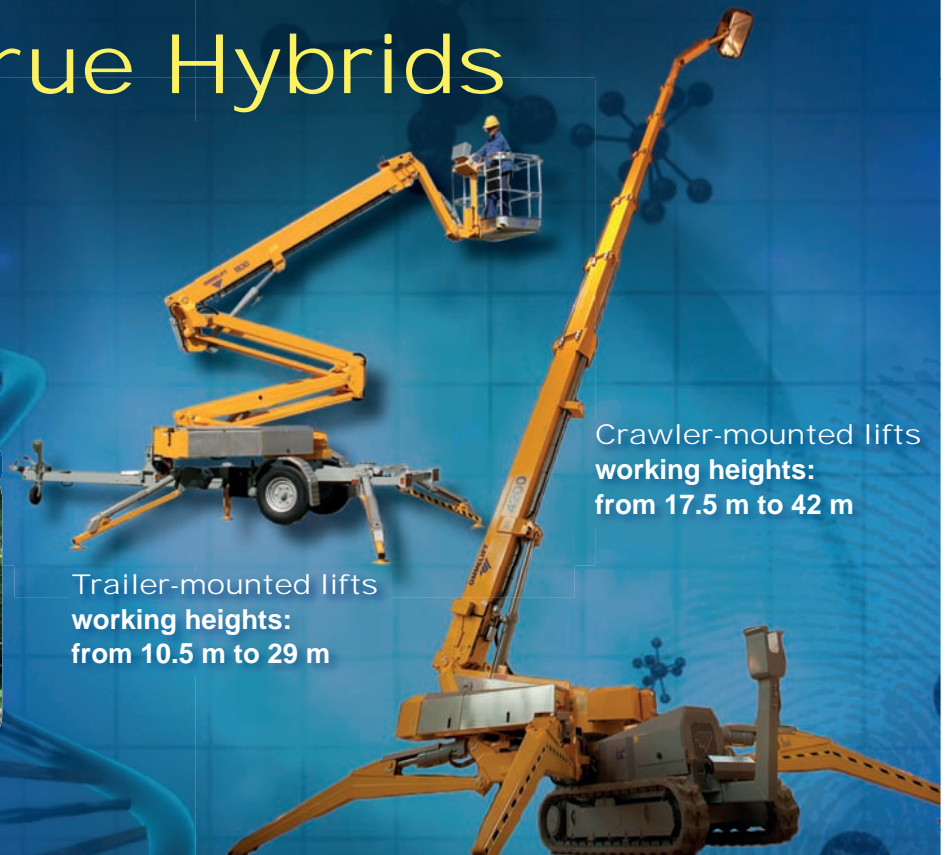


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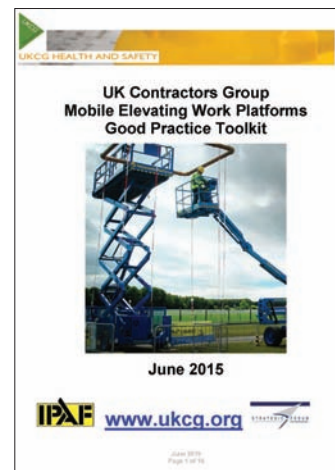
Updated UKCG toolkit stresses PAL+ requirements

The Mobile Elevating Work Platforms (MEWP) Good Practice Toolkit published by the UK Contractors Group (UKCG) has been reviewed and updated to include additional guidance around the selection of MEWPs, MEWPs for Managers requirements, ground conditions requirements and Powered Access Licence (PAL / PAL+) competence.

First issued in January 2014, the toolkit provides guidance

for UKCG sites and for the supply chain on how they should plan, manage and use MEWPs on their sites, and on how to ensure that they comply with all requirements.

The revised toolkit highlights competence requirements for operators and users: "Operators of MEWPs will hold an IPAF PAL or CPCS qualification for the appropriate category of MEWP. The UKCG recommends that all IPAF PAL qualified



The revised UKCG MEWP Toolkit is available at the Publications section of www.ipaf.org



PAL+ is a must for net riggers and steel erectors working on UKCG sites, and is also recommended by the UKCG for all PAL qualified operators to demonstrate experience and competence.

IPAF promoted the safe use of MEWPs at the Safety & Health Expo in London in June, as part of the Access Industry Forum (AIF). IPAF technical & safety executive Chris Wraith spoke at the IOSH conference in the session on "Working at height: How leadership and innovation can drive change in the world's leading cause of death and injury in the workplace".



operators should obtain the PAL+ qualification within the first two years of obtaining their PAL qualification in order to demonstrate a higher level of experience and competence. It is likely that some UKCG members will have additional requirements, for example where there are high-risk work activities or where a challenging project means they only permit IPAF PAL+ qualified or CPCS Experienced Worker (blue card) operators to work on site."

The document also reiterates that the UKCG implemented a requirement on 31 October 2013 that safety net riggers, steel erectors and associated trades working on UKCG sites must hold a PAL+ qualification or a relevant CPCS Experienced Worker card. The document further states that: "Where inexperienced workers or trainees need to gain experience prior to obtaining the PAL+ qualification, the worker may operate a MEWP only when supervised (in the basket) by a PAL+ qualified or CPCS Experienced Worker operator."

PAL+ is an additional one day of category-specific training aimed at operators working in higher risk or challenging environments.

More information about PAL+ is at www.ipaf.org/palplus

NEW MEMBERS

IPAF welcomes the following new members. Full contact details can be found in the Membership Directory at www.ipaf.org

COMPANY ASSOCIATE

- Ralf Jordan, Germany
- TAV Construction, UAE

DEALER/DISTRIBUTOR

- Equipinc AWP Sdn Bhd, Malaysia
- HMF Makina ve Servis San. ve Tic. AS, Turkey
- Sinoboom Europe BV, Netherlands

HIRE/RENTAL

- Alpha Platform (SSP Group Inc), USA
- Ecoeleva Slu, Spain
- Shanghai Horizon Equipment & Engineering Co Ltd, China
- Shing Fung Construction Material Ltd, Hong Kong
- Total Access Ltd, New Zealand

HIRE/RENTAL (GROUP)

- Rapid Saudi Arabia Co Ltd, Saudi Arabia

HIRE/RENTAL/DEALER

- PT United Equipment Indonesia, Indonesia

HIRE/RENTAL/SERVICE

- Movicarga SA, Brazil

HIRE/RENTAL/TRAINING

- Plantool Ltd, UK

HIRE/RENTAL/TRAINING (GROUP)

- LTC Group87 Ltd, UK

INDEPENDENT INSTRUCTORS

- Steven Edinborough, UK
- Armin Henschke, Germany
- Markus Kappe, Germany
- Joop Lems, Netherlands
- Henri Schuurmans, Netherlands

MANUFACTURERS

- Aerospace New Long March Electric Vehicle Technology Co Ltd, China
- Changsha Skyboom Heavy Industry Co Ltd, China
- Faraone Industrie Spa, Italy
- Xuzhou Heavy Machinery Co Ltd, China

MANUFACTURERS (GROUP)

- JLG Industries Inc (UAE), UAE
- Oshkosh-JLG (Singapore) Technology Equipment Pte Ltd, Singapore
- Palfinger Comércio e Aluguer de Máquinas SA, Portugal
- Palfinger Platforms Italy Srl, Italy

SERVICE

- Airborne Industrial Services Ltd, UK
- Alift Plataformas Elevatórias, Portugal

- Delta-Q Technologies Corp, Canada

- DICA Marketing Inc, USA

- Dutest Industrial Establishment, UAE

- Equipamentos Dcon Ltda, Brazil

- Exmile Industry & Construction Tyre Co Ltd, China

- Shanghai HeZo Mechanical & Electrical Technology Co Ltd, China

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The first meeting of IPAF members in Hong Kong

IPAF Asia Conference signals regional success

Close to 150 people attended the IPAF Asia Conference held at the end of May in Hong Kong, marking growing interest in the emerging use of powered access equipment and in safety concerns.

The conference offered a unique opportunity to hear and learn from speakers in the region.

The day before the conference, many delegates attended the site visit at Modern, the first IPAF-



IPAF CEO Tim Whiteman (left) with Barry Wong Heung Ming, an IPAF certified instructor with Modern in Hong Kong. About 75 delegates attended the site visit hosted by Modern's general manager Geoffrey Lee.



Presentations from the IPAF Asia Conference 2015 can be viewed at www.ipaf.org/asiacconference

approved training centre in Hong Kong.

IPAF's Hong Kong members held their first member meeting the day after the conference and agreed to work towards the creation of an IPAF Hong Kong Country Council in order to share information about good practice and safety.

EUROPLATFORM.INFO THE CONFERENCE FOR EUROPEAN ACCESS PROFESSIONALS in Copenhagen

The Europlatform access rental conference will be held on 7 October 2015 in Copenhagen, Denmark.

This year's event will again provide the latest expert advice and strategic thinking on how to succeed in access rental. A networking event will be held on the evening of 6 October.

The Europlatform venue is the Copenhagen Admiral Hotel, housed in a converted 18th century warehouse in the heart of the city and along the waterfront.

IPAF has secured delegates a special room rate.

Early bird conference rates apply until 7 September.

Book your place early at www.europlatform.info

IPAF DIARY

IPAF will be at these events:

2015

30 July
IPAF Brazilian Country Council Meeting (members only), São Paulo, Brazil

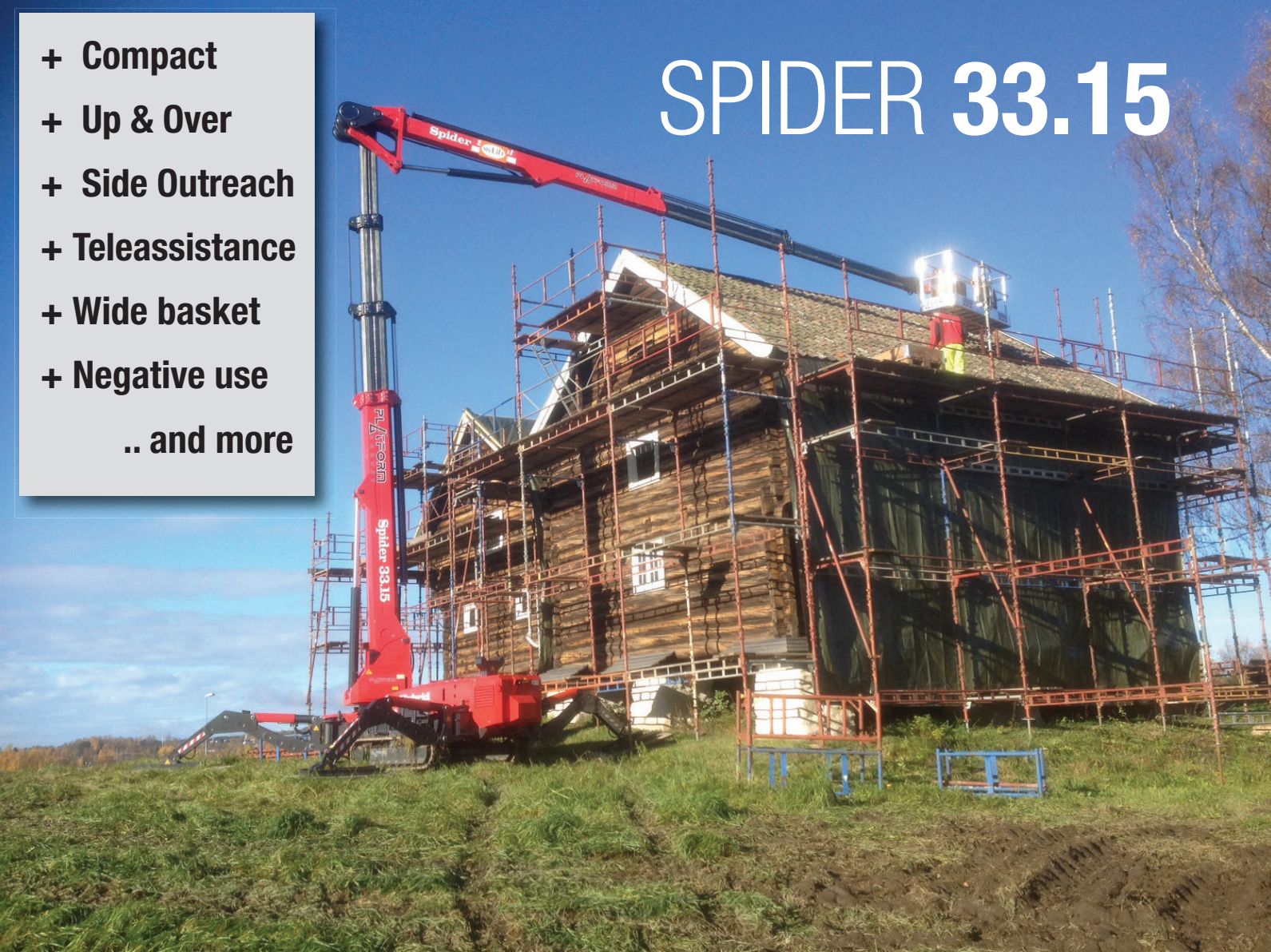
■ IPAF Webinar: Are You Prepared for Litigation

5 – 7 August
Expo Proteção, São Paulo, Brazil

6 August
IPAF North American Regional Council Meeting (members only), by web conference

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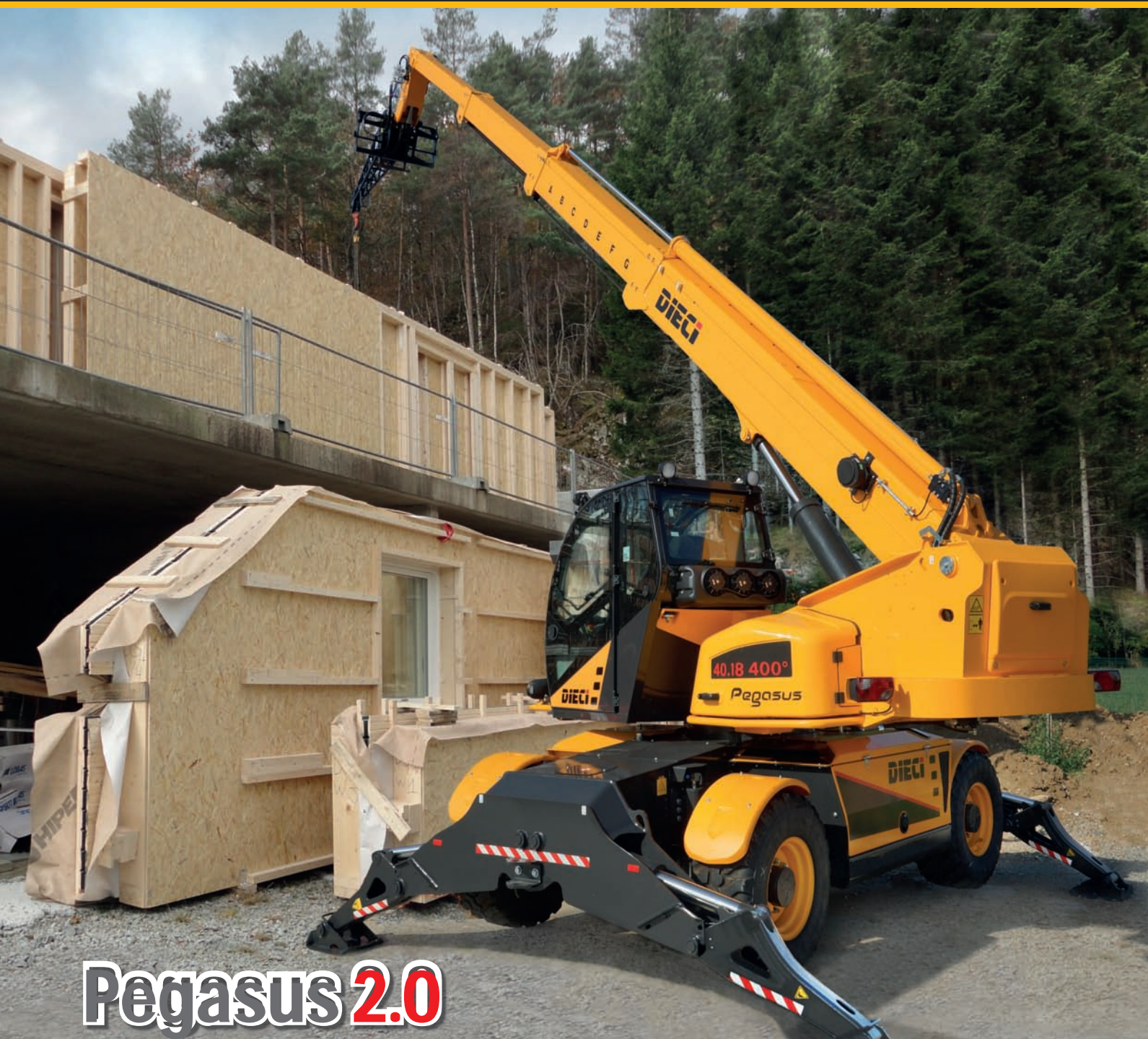
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Allow to operate in any position, automatically adapting the workspace according to the outriggers configuration

Galmon has opened a world class training centre in Singapore set to influence safety awareness and the AWP industry across the region.

The outside area of the Galmon Academy.

State of the art

Hundreds of customers and supporters, including a prestigious group of special guests, were invited to take part in the grand opening of the Galmon Academy in late May.

As Singapore's biggest AWP rental company, with a fleet of nearly 3000 machines, Galmon wishes to lead the way for training throughout the region and encourage others to follow its example.

The 6700 square metre, two-storey facility, the first of its kind in Asia, has 11 air-conditioned classrooms and an auditorium with room for 300 people. There is also a large outdoor training area.

Galmon has long-established training courses accredited by the Singapore Ministry of Manpower and opened its training academy in 2011. With this new facility it has introduced International Powered Access Federation (IPAF) operator and MEWPS for Managers courses, as well as Towers for Users and Towers for Managers courses from mobile aluminium mobile tower association PASMA. In addition Galmon is working with JLG, which supplies a vast majority of its AWP fleet, to introduce the manufacturer's eLearning platform to Singapore.

Falls from height remain a major cause of workplace fatalities in Singapore. A 2014 report by the Workplace Safety and Health (WSH) institute revealed they accounted for 17% of fatalities at work and 13% of major accidents.

Speaking at the event was guest of honour Hawazi Daipi, senior parliamentary secretary for manpower and education, said, "Earlier this year the Ministry of Manpower initiated an enforcement operation targeting work at height and lifting operations at construction sites. Of the 214 worksites inspected, 191 were found to have violated WSH rules. This shows more can be done to increase WSH standards in the workplace. Enforcement alone cannot be the solution. Employers and employees can and must play their part."

Recently, the ministry launched its Vision Cero initiative to encourage the view that all injuries at work are preventable.

Mr Daipi added, "If we have this mindset then the use of MEWPs, instead of ladders and scaffold to undertake work at height is an obvious choice. First, MEWPs enhance productivity and are quicker to deploy. Second, and more importantly, they are safer to use as they remove the risks of climbing."

Tim Whiteman, IPAF managing director and CEO, and Don Aers, PASMA technical director, were at the event, both signing a document demonstrating their commitment to the partnership.

Frank Nerenhausen, president of JLG industries, was also present to assist in the official opening. He said, "Galmon is a benchmark company for the industry. Companies like Galmon are incredibly important to ensure health and safety is advanced - productivity and safety augment one another," but he added, "there are still thousands of accidents every year and we must challenge ourselves to find more innovative ways to make the industry safer."

Desmond Ong, Galmon's founder and CEO, described how the company started in 1982 with a small fleet of machines. "Back then all work at height activities were done largely with the use of unsafe wooden or steel scaffolding, ladders or other makeshift equipment."

The company pioneered the use of AWP's in Singapore and was the first to introduce the equipment to the film, manufacturing and shipbuilding industries, and has become the biggest distributor in Asia outside of Japan.

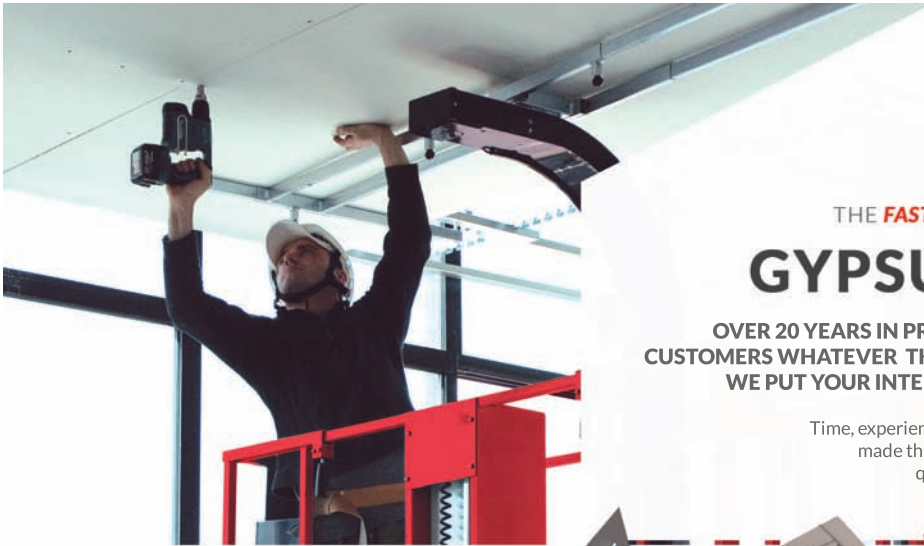
Speaking about the new training centre, he added, "For Galmon this is a very big step. We are doing more than just expanding on our work at height courses and enhancing our training."

In the immediate future Galmon will be partnering with safety associations such as the Singapore Institution of Safety Officers, IPAF, the Access and Scaffold Industry Association and PASMA to hold safety forums with industry stakeholders at its facilities.

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Desmond Ong, CEO of Galmon, gives the welcome address in the academy's 300-seater air-conditioned auditorium.



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The Hong Kong skyline taken from Kowloon, where the conference was held.



The second IPAF Asia Conference took place in Hong Kong during May and highlighted some of major issues affecting the growth of powered access in the continent. Euan Youdale was there.

Setting the pace

HONG KONG CONSTRUCTION

There are many major construction projects in Hong Kong representing \$87 billion between 2013 to 2014, that will increase to \$100 - \$160 billion says Victor Kwong, president of the Hong Federation of Occupational Safety & Health.

Projects include high speed rail, the new Mass Transit Railway (MTR), the Hong Kong - Zhuhai - Macau Bridge and a third airport runway, as well as the renovation of a large number of aging buildings. All this represents 3% to 4% of GDP, says Mr Kwong.

However, Hong Kong is faced with a number of challenges, including a shortage of manpower, amounting to a 16% shortage in 2014. There is also an aging population, with the average worker being over 50 years old. Less than 13% of the workforce is under 30 and there is little migration of workers to the city.

"It is difficult to attract new talent, partly due to safety concerns." Major accidents have had a part to play in all this and resulted in a major drop in young staff recruitment and a lack of sufficient work experience among those who are new on the scene.

According to build asset specialist EC Harris Hong Kong is ranked the sixth most expensive construction market in the world.

All this leads to difficulties in completing projects on time. Coupled with a poor attitude towards safety on worksites and a lack of awareness of the subject from workers, caused by a lack of standardised work procedures, there is some way to go to create a satisfactory construction environment in Hong Kong.

The number of fatal accidents remains high compared to developed nations, says Mr Kwong, around double the rate. The figures have spiked from an all time low of nine recorded fatalities in 2012 to 24 in 2013 and a slightly lower figure of 20 in 2014. Falls from height register as the largest cause of fatalities. In a 2013 study it was calculated that 27% of all falls from height were from a platform or falsework.

An impressive range of speakers provided their insights at the IPAF Asia Conference into where and how the powered access equipment sector will evolve across Asia. The established view being, it's a matter of time before Asian markets catch up with North America and Europe. How soon that will be is another matter, and while the countries of Asia are at different stages, many of them still have a long way to go.



Keynote speaker Andy Studdert, president of USA-based NES Rentals.

All the usual factors must come in to play first, like safety regulations, cost of labour, awareness of the product and a well-established rental model, among others.

One of the speakers included Alan Chan, vice chairman, Hong Kong Occupational Safety & Health Council (OSH), who said the number of construction workers in Hong Kong had seen 50% growth to 80000 in 2014.

In 2013 OSH set up a sponsorship scheme to subsidise companies using AWP in Hong Kong's thriving construction sector. "It is hoped that ladders and substandard platforms will slowly be eliminated," said Mr Chan. So far the scheme has seen 17000 applications. "It doesn't matter if you are an employer or employee we all share the same responsibility in safeguarding lives."

Keynote Speaker Andy Studdert used his experience as COO of United Airlines and now as president of USA-based access specialist NES Rentals to show how rental companies can be successful and safe. He compared the global airline industry with the AWP sector and explained how pilots lose their licence through improper use but that



Alan Chan, vice chairman, Hong Kong Occupational Safety & Health Council speaks at the IPAF Asia Conference 2015.

HOW SAFE?

Mike Davis, vice president and managing director, Terex AWP Asia Pacific posed the question: 'how safe are MEWPs now?'. He ran over some of the main safety features that can be found on lifts and pointed out that technology must be combined with the ability to mass produce those features and incorporate them into standard machines effectively.

Mr Davis began by sharing three significant elements leading to a usable AWP: Analysis, prevention and training. "Training really is the most important thing with everyone understanding their role and the correct procedures."

He said the ideal solution was to eliminate all hazards, "but in the case of working at height that is virtually impossible. So, training really is important and not just operator training but service training and manufacturing training."

He said AWP design and testing had come a long way over the last 50 years and encourages technology enhances, but warned that all new ideas had to be ready for the market. "The technology needs to be mature. It's easy to think about but unless it is technologically possible it can cause more problems."

He gave the example of early issue car airbags which stayed inflated and trapped people in the car. "Adding complexity raises the stakes. Once you have it, then you have to regulate it and know how to service it."

was not the case for platform operators, who in many parts of the world do not need a licence. "We are trying to encourage more licences like the PAL Card around the world."

"You can rent a 150 ft boom without a licence but you cannot drive on the road without a driver's licence – it makes no sense."

At NES safety improvements were achieved through creating a comprehensive chart of everything the company did - the chart was 20 ft long. Then the management looked at how to improve it. "If you write it down, then you know what you do and you are able to improve."

ROUND TABLE

Geoffrey Lee, general manager of Hong Kong's biggest AWP rental company and scaffolding specialist, sat on one of the conference's two round tables. He confirmed rental is increasing around 30% yearly in China.

He said seven years ago there were 200 to 300 machines in rental and believes at a conservative estimate that figure has risen to around 10000 machines. And the numbers will continue to grow in the future.

"It's not difficult to find a rental customer but it's difficult to find a good customer. If they rent it, they think they can get away without paying for it or they can run away with your machine."

"We have to change the mindset and behaviour. Yes, supply is important but the quality of the customer is important too and rental companies are trying to find ways to protect their assets."

The scheme includes an internal health and safety audit carried out by each branch every year.

The company also now has a crises communication plan at all its locations outlining what to do if there were to be an accident. The document is held in hard copy form, so that it is always readable should electronic systems fail. It includes examples of how to write a press release and what to do in the first couple of days when people are in a state of panic and perhaps not thinking rationally.

"A safe company is a more cost effective company; anyone who tells you safety costs money is wrong."

Mr Studdert also spoke about how to improve a company's value and referred to two levers. Lever One being EBITA - this can be improved through efficiency and effectiveness through relatively short term goals over a one to two year period. They include crises preparation, repeatable processes, pricing and sales technology. Lever two is referred to as 'Multiple' and is based on a longer three to



From left: Geoffrey Lee, general manager, Modern Hong Kong; John Murray general manager, Hertz China; Tim Whiteman IPAF CEO and conference chair; Desmond Soh, president, Oshkosh Asia & JLG Graeter China; and Desmond Ong, CEO, Galmon.

five year plan. It includes a safety intervention culture, talent selection and retention and people practices. When you multiply Lever 1 by Lever 2 you end up with the purchase price or value of the company, says Mr Studdert.

In Lever 2 - talent selection - is NES's interview policy; if a manager wished to fill a vacancy or create a new one, the preferred candidates must be interviewed by that manager's boss, who visits the branch to carry out the interview. In this way a second vetting process takes place. Another factor - people practices - refers to NES' policy of making all employees feel they are working for a small company.

Mr Studdert also spoke about 'survival of

CHINA FOCUS

Bai Ri, IPAF China representative, provided some key facts about the population of aerial work platforms in China, compared to the rest of the world and said there were around 80 manufacturers in China, all in the eastern to central region.

There are around 150 - 200 rental companies, he said and this latter figure is increasing quite rapidly. They are distributed further afield than the manufacturers and cover the south side of China, the North west and north east.

He said the official estimate is that there are around 10000 AWP's in China at the moment, but Mr Ri thinks that figure is a little higher.

Mr Ri shares the general view that AWP usage is in its infancy. If you compare the number of units being used per capita in Europe compared to China the number is quite striking. In Europe it amounts to one unit per 3200 people, while in China that drops to 1 unit per 130000 people. In Singapore there is an incredible one unit to 600 people.

Talking about manufacturers, he said while domestic manufacturers are not that strong outside China, they have a good hold of the market in their country, so it makes it difficult for other manufacturers to come in.



A site visit to Hong Kong rental company Modern (International) Access & Scaffolding, which also has a dedicated IPAF training centre, took place the day before the conference on 25 May.



SETTING THE STANDARD SCENE

Chris Wraith, IPAF technical & safety executive, said, "Standards support legislation and provide guidance and are there thanks to the policies and principles of government. They drive, good, safe and reliable equipment, and they encourage good commerce between different companies and reduce business risk and they improve performance.

"We all want a machine that is safe to use and we all have that goal of zero accidents. So, surely we should have the same set of standards? The reason we have so many is that each country/region is unique and wants to keep their own identities. They know what is relevant to their country and they don't want others imposing rules on them.

"Some countries have more highly evolved standards and safety principles than others. For example, if you take the standards Singapore is making, the region can benefit a lot from that. The standard they have set there would be way too high for countries that are just starting to develop.

"If you do not consider others in creating your standard you can end up with a standard that is very prescriptive and overly prescriptive standards can stifle development and initiatives that improve safety and don't take into account new technology. You have to think of all the standards that are out there and cherry pick the right ones. It's a case of understanding all the standards – some of them cause conflict."

the quickest' and the importance of being able to learn from experience and react quickly to changes in market conditions. During the recent financial crises in North America, NES immediately reduced its headcount by 30%. "Lots of competitors thought they could make it but some found they were in trouble and closed down." Now the company is stronger than it was in 2008 when the crises struck. Of the 500 employees laid off, just 50 have been employed since to replace them. "We learned how to operate more efficiently."

EMERGING PRACTICES

Speaking during one of the two panels Desmond Ong, owner of Singapore's largest rental company, talked about AWP growth in emerging nations. "We have to put in a lot of effort when it comes to education."

"Adoption is slow; it is inevitable but it is slow. Also, the safety culture is important, without that it's also very slow. In Singapore in 2006, we had a scaffolding disaster and the government changed working at height policy which helped drive the sector. Once a regulation is in place it makes it much easier."

Another Singaporean speaker included Liew Wan Sein Principal Specialist, OSH Specialists Department, Occupational Safety and Health Division, Ministry of Manpower. She spoke about Singapore's well developed regulations leading to heavy penalties for companies that flout their responsibilities as far as safety management and performance is concerned.

As of 2013 Singapore had a population of 5.47 million and a GDP of \$370 billion. In 2014 there were 13595 workplace injuries and 60 fatalities; that equates to 405 injuries per 100000 employed and 1.8 fatalities among the same number.

It represents a steady decrease in workplace

fatalities since 2006 when The Workplace Safety and Health Act (WSHA) came into effect.

In 2013 there were 73 fatalities in the workplace, amounting to 2.4 fatalities every 100000 workers. Injuries, however, are on the rise. In 2014 reported injuries increased by 9.2% compared to 2013.

Under the act a 'Lifting Machine' is defined as any work platform or suspended scaffold capable of being raised or lowered by climbers, winches or other powered device.

WSH focuses on reducing risk through regular risk assessment and a better defined liability system in which each stakeholder: manufacturer and suppliers, equipment owners and operators are all held specifically accountable.

WSHA holds managers and directors of companies personally accountable for safety and health practices at their workplace. There are heavy penalties for poor safety." **AI**



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"The market in Asia offers huge potential for the powered access industry," Mr Boehler told delegates at the IPAF Asia Conference. "If you look at AWP use per capita in this region, versus that in the more developed markets of North America and Europe, then it's easy to see the potential there is here. However, it's also clear that growth will be driven by a combination of several factors and will not be linked solely to economic growth. Nor should we expect growth to happen overnight."

Although Skyjack has established customers in Asia, the past two years have seen the company intensify its efforts in the region.

"For us at Skyjack, we've identified seven key areas that we believe will affect the rate of growth of the access industry in Asia," Mr Boehler says. "Those are: the development of the rental concept and an associated acceptance of the aerial work platform as a prime rental product; addressing the imbalance of aerial work platforms use in construction; the advance of health and safety legislation and it's policing; the role of OEM's in developing the market; the role of global rental companies; the continued role of internationally recognised projects with the involvement of global construction companies and associated construction techniques; the development of regionally specific rental business models – supported by product specific modifications."

Each one of those areas has the potential to positively or, indeed, negatively impact the growth of the access industry in Asia, according to Mr Boehler.

Brad Boehler, president of Skyjack, outlines seven challenges in the Asia AWP market.

Seven stages

Brad Boehler, president of Skyjack, outlines seven key areas that could determine growth of the powered access industry in Asia. He was speaking at the IPAF Asia Conference in Hong Kong, in May.

Education is key. In areas where ownership is the norm there is a need to inform the business community of the opportunities and benefits that the rental concept offers potential entrepreneurs and the economy as a whole.

Looking at market statistics one trend is noticeable – Asian markets, when compared to mature markets, tend to use aerial work platforms in industrial and maintenance applications, but not so much in construction. For example, rough terrain scissors are mostly absent from Asian jobsites. While boom lifts, if present in the market, tend to be larger models that are used in shipbuilding.

"As I walked around Shanghai last October, I was struck by the lack of slab scissors on construction sites. Back home [in North America] a high rise building would have a number of machines on each floor and a large quantity on the site as a whole,"

Health and safety legislation, will naturally vary country-to-country and, indeed, a number of countries in the region, such as Singapore, Japan

and South Korea, already have regulations in place promoting safer work practices, where the advantage of powered access over more traditional alternatives can be highlighted.

Potential challenges

Mr Boehler adds, "If you are an international rental company it may seem a contradiction for me to suggest that more competing companies in these markets the better. I say this not because it allows OEM's to sell more in the region, but because the more companies that operate here the more the acceptance of the rental concept will prevail."

Rental companies may face some challenges in terms of their business models. In mature markets, rentals that provide operators with the machines, are usually offered for more complicated machines such as cranes. But in the Asian market, take India for example, there is evidence of demand for AWP rental with an operator. This poses a challenge since rental companies are not only responsible for renting and maintaining AWP's, but also for securing certified operators. The upside is the market has a demand for used equipment and this may prove useful as international rental companies use the region to dispose of used AWP's previously used in mature markets.

OEM's need to support international and domestic rental companies, Mr Boehler adds. First through education then by providing products that are suitable to nuances in applications and techniques.

High profile international projects are a growth driver Skyjack has identified and Mr Boehler explains how the increasing scale of modern construction projects combined with their associated high profile nature will naturally shift attention to more reliable equipment and reputable working practices. And closely related to this was the fourth growth driver, modern building styles:

"While we've looked at markets of North America and Europe to give us some clues as to where the Asian access market might lead, we're also very aware that Asia, and the countries within it, are unique," Boehler says. "The size and the direction of the access industry here will be driven by our customers. It is our job to anticipate and react to our customers' needs."

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Malaysia is a fascinating market when it comes to AWP, with truck mounts dominant in the country for now, but booms are starting to show their metal. AI spoke to two representatives from the industry there.

Flourishing in the south

In one respect, Malaysia sums up the South East Asian market for AWP, in that it is predominantly a used market. In another respect it bucks the trend of most other countries thanks to its reliance on truck mounts over self propelled booms, a cultural phenomenon that seems likely to continue in the short term but it may find it hard to resist the more mainstream boom in the future. AI spoke to two pioneers of the AWP sector, one with a truck mount background and the other with booms and scissors experience.

Johnson Lai

Johnson Lai is the assistant manager at truck mount specialist Keng Guan Skylift, based in Malaysia. The business was started by his father, originally as a crane rental and repair company, then some 20 years ago he saw an opportunity for aerial work platform in the country. "Nobody was providing lifts for rental, instead a lot of people were modifying cranes with a bucket and sending that out for rental," explains Mr Lai, "but if you got caught doing that you would get a fine."

Keng Guan Skylift started with a 20 m Aichi truck mount, and then moved up to a 39 m working height machine, which was the biggest truck mount in the country at the time. Now the company has a 72 m Bronto Skylift S72 HLA, with a majority of the fleet being from Aichi, Tadano, Bronto Skylift and South Korean brand Horyong. The latter produces a comprehensive range of telescopic truck mounts up to 70 m and is dominant in the South Korean market but exports very few, particularly outside of Asia.

According to Mr Lai, there are many small truck mount rental companies with one or two machines, but less than 10 larger rental companies and less than five with up to 30 units.

Mr Lai says the country's government Department of Occupational Safety and Health (DOSH), calculated in June 2014 there was 5322 MEWPS registered in Malaysia. This includes truck mounts, scissor lifts and booms. At a guess Mr Lai puts the number of truck mounts in the country at roughly 3000 units.

Up to 99% of those machines, across all types, are brought into the country as used equipment, with many of the truck mounts being 15 years old. "This is one of the opportunities for our company. Three years ago we brought in the first brand new truck mount



Johnson Lai is the assistant manager at truck mount specialist Keng Guan Skylift.

in Malaysia for the rental industry. So we have the advantage over other companies because we are the first to offer brand new," says Mr Lai - that being a 27 m Aichi SKY27A introduced in 2012. "Now we are increasing our fleet of brand new equipment as there is more demand, as regulation is getting tight."

Keng Guan Skylift now has 10 new units in its fleet, those being 27 m machines from Aichi and 45 m units from Horyong, and plans to increase that number in the near future.

"Some projects, particularly government projects, now require machines less than 10 years old. Private projects can be less strict but it depends on the company; if they are from Japan or South Korea, for example, they have very strict safety regulations, so require a newer machine," explains Mr Lai.

A major project, requiring many truck mounts, is the 40 km Mass Rapid Transit



Two of Keng Guan Skylift's truck mounts fit glass facades on a building in Kuala Lumpur.

(MRT) system being built in the capital city of Kuala Lumpur.

There are a number of reasons why the truck mount is dominant in Malaysia, says Mr Lai. Firstly, there are relatively great distances between the cities, accompanied by high transportation costs, along with the fact a culture has grown up over the years meaning customers have got used to using them.

Mr Lai does see increased competition from other forms of AWP, namely boom lifts but doesn't feel too much pressure. "I think the number of booms and scissors are increasing. Before, no companies were bringing in these machines, and they did not know about them.

But now we have the choice, but I feel that people will still choose the truck mount.

“We are finding competition with the boom lift but we still have the advantage because of the culture of this country; it is used to truck mounts because it comes with an operator. With a boom lift they have to do it themselves and they are a bit scared of that.”

Certainly the company has no plans to introduce boom lifts in the immediate future, although it could happen a little further off, says Mr Lai. “On the rental side we know that the truck mounted machine will be used safely because we supply an operator.”

As a whole the situation in Malaysia is positive with rental rates at a good level thanks to the MRT and light rail transit (LRT) projects underway at the moment. “The demand is very high and so the rates are good this year. The project will last for three years and is using a great number of our platforms.

“When the work finishes it will be a major problem for all the rental companies. I think the rental rates will come down – I don’t want to think about it.” That said, it’s possible other MRT projects will follow in the country.

Nevertheless, investment is part of the company’s future, with the bigger truck mounts set to be introduced into the fleet. One of those will be a Bronto in the region of 90 or 100 m working, although it won’t be a new machine this time. **AI**

Several Keng Guan Skylift truck mounts at a building in Kuala Lumpur.



Alex Tan is a pioneer of the scissor, boom and training sectors in Malaysia.

Alex Tan

Alex Tan is also based in Malaysia but his experience is scissors and booms. Mr Tan has been in the industry since 1999, starting with a JLG distributor, before moving onto a Genie distributor, followed by Haulotte. In 2004 he founded PMB Access, which started as an aluminium scaffold manufacturer for local and overseas markets, then got involved with AWP’s in 2008.

“We manufactured aluminium scaffolding in 2004 and expanded the sales network throughout South East Asia and in 2008 we started investing in powered access. After that we started with a rental fleet of 10 units increasing to about 115 units in four years to 2012.”

They were scissors to start with and at that time we were the only ones buying brand new machines for the fleet. Most of the players purchased used equipment from Europe. My opinion is a little different and I started with brand new machines.”

Mr Tan left the company last year at which point it had 115 new machines and an IPAF training centre set up by him in 2011.

Concerning the rental market for booms and scissors in Malaysia, Mr Tan confirms it is a predominantly used market. “If you base it on statistics from USA customs, it shows that every year about 100-110 brand new units go into Malaysia. If you compare that to used units, there could be three to four times more.”

Right now in the country there are a handful of big players with 300 to 350 units in their fleets. “But we have a lot of small companies with less than 100 units.”

A scissor lift is used during a training session.



The proportion of scissors in the market is about 85% to 90%, says Mr Tan, with the rest being booms. One of the reasons there are so few booms is that, as we have heard, Malaysia is a truck mount market.

How does Mr Tan see the future of booms in Malaysia? “I feel very positive about the growth of the boom lift, together with scissors as well.

“Between 2008 and 2014, the Malaysia





An articulated Haulotte boom in a railway maintenance facility.

Kuantan, Kuala Lumpur International Airport 2 in Sepang, the Hershey chocolate factory in Johor and a HINO Motors factory in Seremban, among others.

“If you look at data from the government it really shows that the quantity of booms are increasing because more and more local investors start to think about moving from cranes into the booms or scissor industry, to bring down the operator costs. For them it looks to be a good business.”

Mr Tan adds, “So, a lot of crane companies are starting to invest in 20 or 30 units of used

AWPs. Also, when the numbers of boom lifts and scissors increases, the rates go down and this produces a very good environment for the end user to have more cost effective use of equipment. When this happens and the quantity increases in a short period of time, a lot of new players come in to the industry and a lot of new end users will have their first trial of booms and scissors. Now here comes the compromise: safety, because there are no trained operators of AWP’s.”

Despite this, Mr Tan says safety has improved greatly in the last three to four years thanks to big government projects, like the ongoing MRT, which insist on a certain amount of safety criteria being met.” **AI**

scissors and booms rental industry has increased its rental fleet tremendously, and reached more than double figures since 2008.”

There are even some new players in the market which have diversified their business from general rental, including cranes, to truck mounted platforms.

“Quality of the machine and service will become a major concern of the contractor and end user. Malaysia authorities will start taking precautions to reduce the accident rate on work sites, which will increase due to the rising number of scissors and booms in the market.”

Mr Tan adds the implementation of new rules and regulations in the country could take some time, he believes with the assistant from existing bodies and co-operation from all parties, the era of scissors and booms will begin relatively soon.

“Right now in Malaysia there is an operator shortage generally and so it’s difficult to control or handle the operators because there is no training. Therefore Mr Tan adds, “Nowadays a lot of the players investing in booms are from crane companies. Singapore, the USA and Europe sell their fleets after six to seven years and they go to the Southeast Asia market and the crane companies are now turning their attention to AWP’s because they want to cut down on operators.”

As we have learned, there is no requirement for training in Malaysia. The only regulation in existence is a government policy stating all lifting equipment must be inspected every 15 months.

Having a used equipment market, adds Mr Tan, means the rates are naturally lower. “With used units from Europe and the USA they can provide cheaper rental, which does help increase demand due to the lower rate.” Projects for booms include Petronas BASF in

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Niftylift opened its new headquarters in June, marking its 30th anniversary year. The facility will drive increased production and new product design.

AI was there.



Roger Bowden, Niftylift chairman, during the opening event at Shenley Wood.

New era

Based in the UK, Niftylift celebrated the opening of its new world headquarters in Shenley Wood, Milton Keynes with an open day at the facility.

Held at the beginning of June, the grand event was attended by suppliers and customers from around the world and marked the manufacturer's 30th anniversary year.

The state-of-the-art plant covers 12000 square metres and is based on a 28000 square metre site. It is home to Niftylift's sales & marketing, finance, research & development and machine production departments. Two further outside spaces have been earmarked for a future R&D centre and visitor/training centre.

Service, spare parts and refurbishment remain at Niftylift's former manufacturing plant Stonebridge.

Construction on the site began in March 2014, with completion in November. Niftylift has occupied the site since December and set up its first production line in January for the HR28 Hybrid boom. Its complete range will be in during the next few months.

The manufacturer employs 245 people in Milton Keynes, soon rising to 335, in addition to those working at Stonebridge.

Visitors to the open day were able to view and operate models from Niftylift's entire product range, including its Hybrid range. There was also an indoor exhibition where visitors could learn about the history of

Niftylift, its innovations, global presence and relationship with the local community.

Roger Bowden, chairman and founder of Niftylift told *AI*, "The facility has given us a lot more space and fits with the future we have in mind.

"Environment and design are very important factors and now everyone can work together, which is very important when innovating new products. It's a lot more efficient and we have a happy workforce.

Mr Bowden added, "The market seems to be better, so the timing is right, and we bought the land at a very reasonable price when land value was poor in 2010.

"It all ties in with new machines we have in the system - new models will follow in the near future."

The new facility allows for around three times the current production levels and will allow the company to provide its more than 40 distributors, in the same number of countries worldwide, quickly and efficiently - some 75% of Niftylift sales are exported.

The Shenley Wood facility includes a number of environmentally-friendly solutions to match its production ethic, including an office heating system driven by solar energy. In addition, there will be a number of initiatives to help employees like an onsite cash machine and post box.

A company spokesman concluded, "The new Shenley Wood headquarters is the very embodiment of Niftylift's business ethos. It will open the doors to new employment opportunities within the region and give Niftylift the room to grow that it needs to continue to develop its reputation as a successful, sustainable British manufacturing company and compete on the world stage." **AI**

In production at Shenley Wood.

NIFTYLIFT'S 30TH ANNIVERSARY TIMELINE:

- 1976 – 1979:** Roger Bowden, now Niftylift chairman, sets up FRB Platforms, specialising in machine sales.
- 1985:** Niftylift established in a garden shed in Bedfordshire, UK.
- 1985:** First product launched, the 12 m Nifty 120 trailer mount.
- 1988:** First self propelled machine launched, the Height Rider 10.
- 1989:** John Keely, managing director, joins the company.
- 1991:** Niftylift celebrates the sale of its 500th machine.
- 1994:** Company moves to purpose-built site in Stonebridge, Milton Keynes, UK.
- 1995:** Worldwide dealer network established.
- 2002:** The first HR15 4x4 and HR17 4x4 booms are launched with 12 other products.
- 2006:** Niftylift moves into its office in Greer, South Carolina, USA.
- 2006:** Steel fabrication facility established in the UK, Niftylift Hoyland.
- 2009:** Patented SiOPS safety system and hybrid drive system launched.
- 2012:** First HR28 and HR17 hybrid booms launched.
- 2013:** Niftylift receives two Queen's Awards for innovation for the HR17 Hybrid and international trade.
- 2014:** Niftylift opens an office in Germany.
- 2014:** First machine comes off the line at its new Shenley Wood headquarters.
- 2015:** Official opening of Shenley Wood headquarters in Milton Keynes during Niftylift's 30th anniversary year.

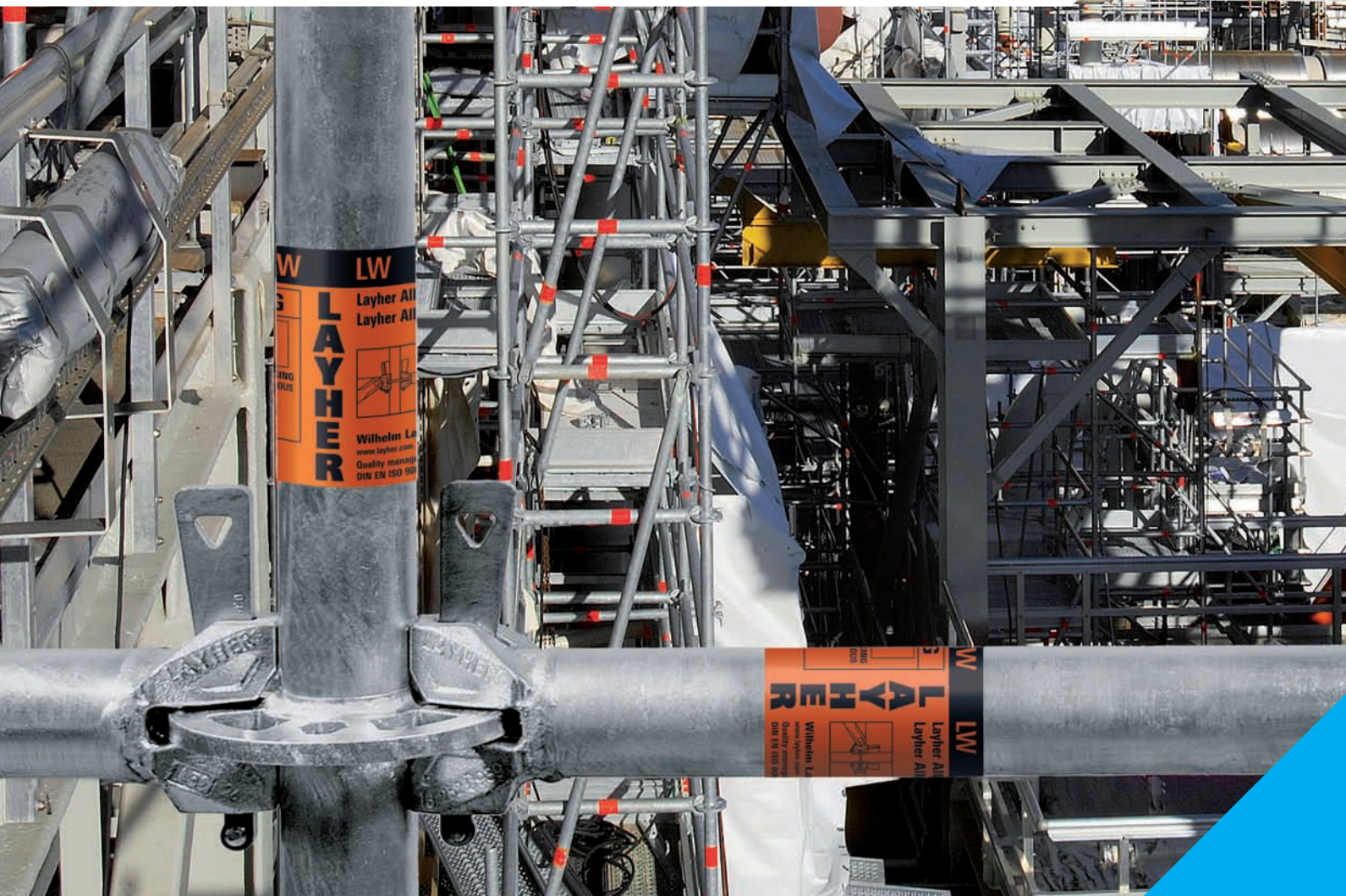


The new Niftylift Shenley Wood headquarters.



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Changing with the times

Geoffrey Lee, **general manager of Modern Access & Scaffolding in Hong Kong**, spoke to Euan Youdale **about the changes in scaffolding use there from bamboo to steel and then aluminium.**

Hong Kong is a scene of massive construction development and is one of the most expensive places to build in the world. While it has been adopting many modern approaches to scaffolding, the use of bamboo scaffolding is still a very common site.

Modern Access & Scaffolding is one of Hong Kong's biggest providers of steel and aluminium scaffolding, amounting to a total resource of 15000 tonnes, as well as being a major provider of AWP's. The scaffolding side of the business was started in 1980, in the year after the company was founded.

According to Geoffrey Lee, Modern's general manager, these were the pioneering times for the use of steel scaffolding.

"During that time, we just focused on the rental of steel scaffolding as a shoring system, not for access use. There were very few players in the market and hence not much competition in these days. Since our company was established and positioned to bring in advanced construction equipment to Hong Kong and China, we saw the potential of shoring systems, so we moved in."



Geoffrey Lee, general manager of Modern Access & Scaffolding.



Scaffolding at Modern's yard in Kowloon, Hong Kong.

Outside Hong Kong the company supplies its scaffolding products to Singapore, Japan, Middle East, Australia, New Zealand and some European countries.

Shifting trend

Major competition comes from traditional bamboo scaffolding, which is still a common site in Hong Kong, however, according to Mr Lee the market share between metal and bamboo has been shifting over the last 15 years.

"I would say about 70% of the access scaffolding market is still occupied by Bamboo [in Hong Kong] but it's shifting towards a better balance with metal scaffolding. In [mainland] China, it is now almost only the Guangdong area, in which the city of Guangzhou is located, where bamboo

scaffolding can still be seen."

The major reasons for the decline in bamboo scaffolding are threefold. Firstly, highly skilled workers are required and very few young people are now willing to commit to it, leading to fewer competent workers. Secondly, it is difficult to provide convincing scientific technical data to prove the safety of bamboo scaffolding. Thirdly, the quality of Bamboo is dropping, including the thickness toughness and durability.

"The danger of bamboo scaffolding always lies in the fact it's too easy to be damaged when workers cut the wall ties, ledgers, and the plastic ties – used instead of couplers – with a knife."

Bamboo is, of course, also more inflammable, making the use of heat treatments while working on it much more hazardous. He adds, "Here in Hong Kong, we have severe hurricanes during the summer season and bamboo scaffolding tends to be less resistant to such heavy wind load, there are normally collapses, big and small, with each typhoon."

"The use of bamboo scaffolding will gradually reduce especially as the majority of existing users in this business will be retired in the next 10 years. But, because bamboo is good in terms of low cost, fast erection and dismantling and is versatile and flexible, it will maintain some support for another few decades."

Modern has a range of scaffolding systems in its fleet to suit different applications. The



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most commonly used is the ring lock modular scaffolding system in both steel or aluminium; the Japanese Beatty frame system is also used as is the Waco heavy duty frame system and the Japanese extra heavy duty Pecco Support system.

In Honk Kong, the Labour Department has published a standard regarding the use of metal scaffolding, which is a general one making reference to Chinese National GB Standards. However, in China the specific GB standards relating to the Cuplock system, frame scaffolding and tube and fittings are not well respected or adopted, says Mr Lee.

As far as Mr Lee is aware, there are no major modifications or new standards in the pipeline and he says it is unlikely there will be any until a major accident forces the issue to be addressed. "Everything is grouped into the same rather simple and general code of practice, that means, a competent person who is qualified to inspect and certify a mobile tower is also qualified to inspect a 20000 square metre façade scaffold easily up to 150 m.

"Like everywhere in the world, the customer tends to look for a cheaper, safer version of mobile towers, and a lot of times, customers would trade off the practicality of the product over a cheaper and safer product."

Moderate expansion

Modern is one of the two biggest scaffolding companies in Hong Kong but is the only one offering the complete service from design, manufacturing of its own branded products, rental, sales, inventory management for customers and labour supply. "Just over the last two years, our scaffolding inventory has increased more than 50% but we will not continue to expand at such a fast rate in the next two years as the back-up service, erection team and technical team need time to catch up with the expansion".

The scaffolding segment of the company now provides 45% of revenue. This will be helped by the improving rental rates. "It has been picking up slowly in recent years and we foresee a steady, flat rate or a slight increase in rental rates on certain infrastructure projects in the coming year."

Mobile towers are widely used in Hong Kong and Modern has produced its own brand. One of the reasons for doing this is because Modern is used to producing its own manufactured products and exports them, so requires a recognisable branding.



Bamboo scaffolding being used on a high rise residential building in Hong Kong.

By producing them itself, it also reduces the lead times, response time and lower cost than bringing in from Europe, as the company did in the past.

For example, the company has a 1.4 m x 1.4 m compact tower design for use in tight working areas and indoor commercial buildings; it is designed to save storage space which suits the congested characteristic of Hong Kong site. Plus it is designed to be user friendly as well as having a low maintenance cost to suit rental customers.

Apart from that, Modern's mobile towers in its sMart series conforms to EN1004 with a platform height range from 2 m to 12m. It includes the sMartie folding tower, with a height of 1.8m; the 4.6 m Green which can be stacked three high. There is also the Step sMart, Mini sMart and Tele-sMart which is a manual elevating platform with winch, conforming to EN280. Stair ladders and trestles with guardrails and toe boards for heights from 0.5m to 1.5m are set to be launched this year.

Mr Lee adds, "I would say a lot of customers now tend to choose AWP's to replace mobile towers if they got enough money to spend, since AWP's do not need competent workers to erect and dismantle for each use, and therefore avoids the timely weekly/monthly scaffolding certification requirements."

Mr Lee said, however, "The mobile tower market can never be completely replaced by AWP's thanks to its flexibility and lightweight characteristics - they go up stairs, through manholes and can be modified to perform different tasks. So I would say the demand for mobile towers is stable but I don't dream there will be a sudden jump of demand overnight.

"As for the popularity and further potential of mobile towers growth, I think it is more or less saturated due to the education and promotion of this product over the last 20 years."



Bamboo scaffolding in Hong Kong.

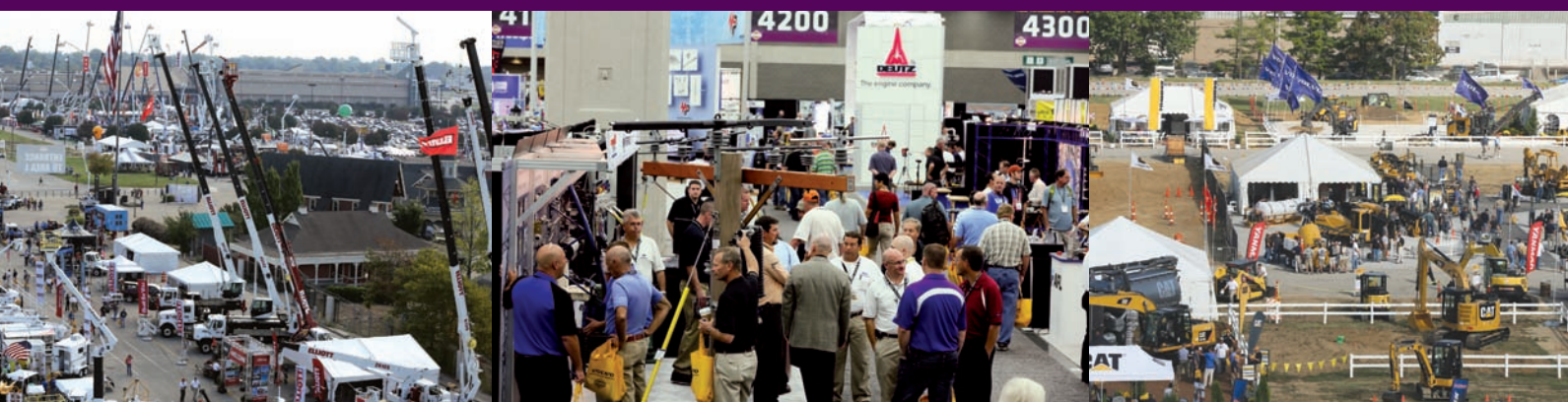
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AI reports on two very different access solutions, one designed to inspect the interior of viaduct piers in Germany, and the other to help prepare Southeast Asia's biggest church for its official opening.

Time challenge



From left: Bronto Skylift S72HLA, Bronto Skylift F68HLA and Horyong SKY450SF.

Malaysia-based Keng Guan Skylift provided truck mounts for cleaning and coating at the new Calvary Church, also known as Calvary Convention Centre (CCC), in Bukit Jalil. It is the largest church in Southeast Asia at 600,000 square feet and boasts a 5,000-seat auditorium.

After the church was built the 11,000 square metres of aluminium panels on its exterior had to be cleaned three times, before being coated with seven layers of Nano treatment. The Nano coating technology stops the panels from being stained.

The contractor was given three months to complete the contract and initially intended to use scaffolding. But Keng Guan Skylift Sdn Bhd approached the contractor and convinced it to use truck mounts instead.

"Since they only had three months, the use of scaffolding would consume too much time compared to skylifts (truck mounts)," said a company spokesman.

Keng Guan provided two 45 m working height Horyong SKY450SF truck mounts and three manufactured by Bronto Skylift. They included two F68HLA's and one 72 m Bronto Skylift S72HLA.

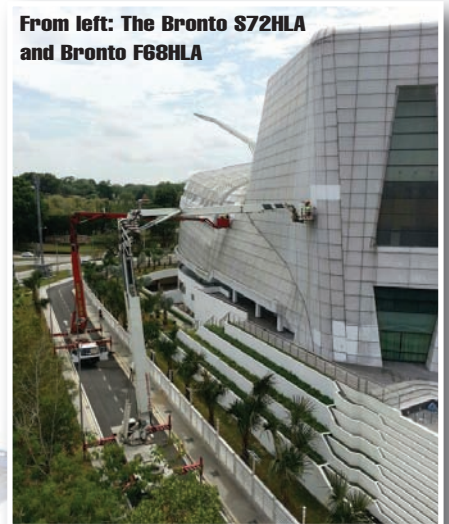
The first challenge was meeting the three month deadline before the church was set to be officially opened. "The second challenge was the complexity of the exterior design of the Church. We understood that we must provide different types and heights of skylifts to tackle it. The building's longest outreach was 30 m and fortunately our 72 m Bronto S72HLA was able to conduct the job successfully," added the spokesman. The work was carried out successfully and on time.

AI



Horyong's and Bronto's carry out the work.

From left: The Bronto S72HLA and Bronto F68HLA



PIER INSPECTION

In June Moog delivered an Inner Pier Inspection Unit MPB 10-0,7/100 to the German railway network.

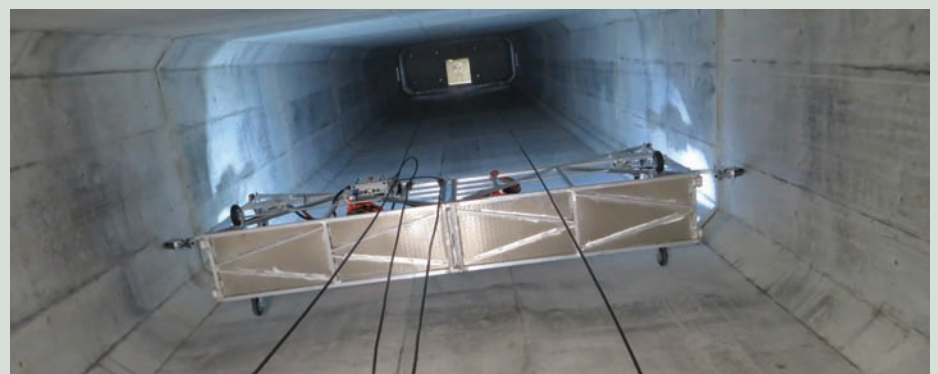
The MPB 10-0,7/100 consists of a winch car and a working platform. The winch car was manufactured specifically for the German railway viaduct piers on the high speed ICE lines.

The platform of the inspection unit is not permanently installed in the piers and can be slid out the door at the pier's ground entrance and into the next pier if necessary. Depending on the bridges the platforms can also be permanently positioned inside the piers. Its length can be adjusted to the piers' width by pulling out the platform manually.

For inspection work the winch car is slid into the box girder of the bridge. It is then positioned above the corresponding pier with the help of an electric drive vehicle. Steel cables are dropped through the girder into the pier guided by three permanently installed pulleys.

At this point the platform is at the base of the pier and the cables are connected to the platform inside the pier. The platform can then be carried up and down by using a control panel connected to the winch car.

For better stability there are support rollers on the platforms' sides, which guide it up and down along the inner wall of the pier. In this way the piers can be inspected from the inside. The working platform measures 0.7 m x 5 m - 10 m and can be lowered down to 100 m, with a 300 kg capacity.





V17119 - Mec 1932ES - 2007
Electric - 7.79 Mtr. - 367 Hrs.
€ 3.750



V17333 - Genie GS2032 - 2007
Electric - 8.10 Mtr. - 245 Hrs.
€ 5.250



V17186 - JLG 2030ES - 2006
Electric - 8.10 Mtr. - 272 Hrs.
€ 5.250 - NEW WHEELS



V17261 - JLG 3369LE - 2005
Electric - 12.06 Mtr. - 300 Hrs.
€ 9.500



V17378 - Iteco IT12122 - 2007
Electric - 13.90 Mtr. - 469 Hrs.
€ 7.950



V17742 - Genie GS3384RT - 2005
Diesel 4x4 - 12.06 Mtr. - 1649 Hrs.
€ 12.500



V17709 - JLG 3394RT - 2006
Diesel 4x4 - 12.06 Mtr. - 1359 Hrs.
€ 14.950



V17287 - Haulotte H15 SX - 2006
Diesel 4x4 - 15 Mtr. - 1222 Hrs.
€ 13.500



V16559 - Liftlux SL153/22 - 2001
Diesel 4x4 - 17.30 Mtr. - 3824 Hrs.
€ 8.500



V15375 - Haulotte H18 SX - 2005
Diesel 4x4 - 18 Mtr. - 2087 Hrs.
€ 14.950



V17519 - Manitou 100VJR - 2011
Electric - 9.90 Mtr. - 148 Hrs.
€ 13.500



V17449 - JLG Toucan 1010 - 2008
Electric - 10.10 Mtr. - 544 Hrs.
€ 12.500



V17817 - Genie Z30/20N - 2000
Electric - 11.14 Mtr. - 1135 Hrs.
€ 9.950 - NEW WHEELS



V16691 - Genie Z34/22N - 2000
Electric - 12.52 Mtr. - 1228 Hrs.
€ 8.750



V17743 - JLG M600JP - 2002
Bi-Energy - 20.39 Mtr. - 1148 Hrs.
€ 17.500



V17626 - Genie Z34/22RT - 2001
Diesel 4x4 - 12.62 Mtr. - 4686 Hrs.
€ 7.950



V17718 - JLG 450AJ - 2001
Diesel 4x4 - 15.72 Mtr. - 4309 Hrs.
€ 11.500



V17441 - Haulotte HA16SPX - 2006
Diesel 4x4 - 16 Mtr. - 1710 Hrs.
€ 16.500



V17695 - Manitou 165ATJ - 2001
Diesel 4x4x4 - 16.50 Mtr. - 4522 Hrs.
€ 10.950



V17237 - Haulotte HA41PX - 2006
Diesel 4x4x4 - 41 Mtr. - 2658 Hrs.
€ 57.500



V16673 - Genie S45 - 2003
Diesel 4x4 - 15.70 Mtr. - 2190 Hrs.
€ 11.500



V15907 - Snorkel TB47J - 2005
Diesel 4x4 - 16.20 Mtr. - 2791 Hrs.
€ 12.750



V15967 - JLG 660SJ - 2007
Diesel 4x4 - 22.32 Mtr. - 2889 Hrs.
€ 36.000



V16180 - Haulotte H23TPX - 2006
Diesel 4x4 - 22.60 Mtr. - 3532 Hrs.
€ 18.500



V16505 - Genie S85 - 2004
Diesel 4x4 - 27.90 Mtr. - 2807 Hrs.
€ 32.500

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