

# access

## INTERNATIONAL

A KHL Group publication |  
[www.khl.com/ai](http://www.khl.com/ai)

Volume Twenty Five | Issue Five  
August-September 2018

access  
**50**  
RENTAL FLEETS

# Southeast Asia



Official magazine of IPAF

NORTH AMERICA | VERTICAL MASTS | SCAFFOLDING INTERNATIONAL



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*Access International* is published seven times a year (Jan-Feb, March-April, May, June-July, August-September, October, November-December) and has a worldwide circulation of more than 8000. *Access International* is only available to subscribers (IPAF members receive a free copy, details available on request). Annual airmail subscription rate £130, US\$210, €155.



# Making a move

**T**he buying, and selling, spree continues. This issue's News pages are packed with the latest acquisitions, notably in the rental sector.

In *AI*'s interview with Loxam's powered access CEO Don Kenny (see *AI* June/July), he was clear there would be no rest on the buying front. He doesn't disappoint; in the last few weeks the company has added Haulotte's Italian rental business to its portfolio and bought UK Platforms from HSS Hire.

On the subject of Europe, there is another new player on the continent, in the form of the mighty United Rentals. Yes, US-based United has taken its first step into Europe with BakerCorp, which has 11 depots there. Not a vast number for such a large company, and BakerCorp has no powered access equipment. Nevertheless, in his interview on page 11, United's CEO Michael Kneeland says though the European depots were not a make or break part of the BakerCorp investment, they do represent an 'ideal' step into the continent.

The 'will they, won't they?' theme of rental giants in Europe and North America pondering a move across the Atlantic Ocean, is covered quite extensively in this issue. For Don Ahern, owner of another US rental major Ahern Rentals, it's a definite, "No". His answer is tied up to some extent with plans for his global OEM business. In the North America feature, Kenny expands on his view that any European rental company wanting to enter America would need a cheque for at least \$1 billion. It seems moving across the ocean is a risky business and, in some cases, isn't even worth considering.

Perhaps it is not surprising, then, that emerging access nations present a similar dilemma for established rental companies. The Southeast Asia feature covers the whole region but pays special attention to Malaysia, which after Singapore, is the next big market.

The largest rental companies in Southeast Asia have all been founded in the region. And, although TVH Group is present through a distributorship partnership with JLG, there are no plans for it to expand its rental division for now. It seems the European rental giants may want to see companies based in the region grow before they decide to invest.

All the companies mentioned above, and of course many more, appear in the *Access50* listing of the world's largest rental companies, starting on page 20. There are a few new entries in this edition too, reflecting rental growth in emerging regions, while a couple of well-known names have disappeared from the list, following, you guessed it, their acquisition.

Thankfully, the changes in the *Access50* reflect, in the main, a vibrant and growing global access rental market.

**Euan Youdale**  
Editor

**ACCESS PORTFOLIO**

The paper in this magazine originates from timber that is sourced from sustainable forests, managed to strict environmental, social, and economic standards. The manufacturing mill has both FSC & PEFC certification, and also ISO9001 and ISO14001 accreditation.

“ **The Access50 reflects a vibrant and growing global access rental markets.** ”



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**NEWS**

Loxam group buys Haulotte Italy rental business and UK Platforms, Fassi acquires ATN, Ruthmann sets up in North America, Klubb acquires EGI, Sinoboom powers up, CTE group sells Effer, Sunbelt buys Above and Beyond.



**NEWS REPORT**

**11**

As United Rentals makes an entry into Europe through the acquisition of BakerCorp, *Joe Malone* asked its CEO *Michael Kneeland* about the company's long-term plans for this market. He says BakerCorp's 11 depots represent an ideal first move.



**VERTICAL MASTS**

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Mast lifts are becoming more popular, not in the sense of taking market share from other products, more they are finding greater acceptance in their core areas.



**ACCESS50**

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Find out who are the movers and shakers of the access equipment rental sector, in *AI*'s annual round up of the world's largest fleet sizes. The *Access50* is the only global listing of its kind and compares how the biggest players grow year-on-year, by fleet size.



**SOUTHEAST ASIA**

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Southeast Asia undeniably fits into the emerging market category. The potential, however, is not even across the region, with Singapore already a mature market and others, like Malaysia on the cusp of major growth. *AI* reports.

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**IPAF RAISING THE STANDARD**

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MEWP safety film launched at IPAF Asia Conference, Programme confirmed for UK's inaugural IPAF Elevation, Major construction driving Nordic PAL Card, Rising demand for Quebec French-language training, Save the date for the IPAF Summit and the International Awards for Powered Access (IAPAs).

**NORTH AMERICA 39**

Apart from being big, the North American market is growing, which is good news for established companies and others hoping to make an entrance into the continent. *AI* rounds-up the latest news and views from the region.



**INTERVIEW**

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*Don Ahern* talks to *AI* about the global expansion of his OEM Snorkel and Xtreme business and explains why he won't consider it for US-based Ahern Rentals.

**SCAFFOLDING INTERNATIONAL**

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The latest news and project reports from the global scaffolding industry, including a focus on how BIM is playing an important role.

**ACCESS IN ACTION**

**50**

*AI* rounds up some of the best application stories from the pages of *www.khl.com/ai* over recent weeks. If you have carried out an amazing project recently, let us know here at *AI*.



**ON THE COVER**

Part of the fleet of Malaysia's biggest access equipment rental company TH Tong Heng Machinery. See the Southeast Asia feature, starting page 27.

MEMBER OF



*Access International*, ISSN:1352-7517, is published monthly by KHL Group c/o SPP, Emigsville, PA and additional entries. Periodicals postage paid at Emigsville, PA. Postmaster: send address corrections to *Access International* c/o SPP, PO Box 437, Emigsville, PA 14318.

Printed by: Warners Midlands PLC, UK.

ISSN No: 1352-7517  
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IN BRIEF

■ The Netherlands-based **Fontexx Cranes & Access** has signed an exclusive distribution agreement with MEWP manufacturer Eastman Heavy Machinery (EHM). Under the agreement Fontexx will provide sales and after sales service for EHM's electric and hybrid-powered vertical masts and electric scissors in all European countries except France and Turkey. It will also permit Fontedx to rent the units. Other product types will be added soon.

■ **JLG** has launched a BIM (building information modelling) library on its website. The major benefit of JLG BIM models is that it lets architects anticipate challenges, manage risk and eliminate guesswork in the build environment. Relevant machine data can be accessed easily to make informed decisions.

■ **Rival** has sold the world's first 43m all-electric boom lift to Steiness Liftcenter, in Denmark. As previously reported, the machine was launched during a customer event on 15 June, celebrating the company's 50th anniversary. Rival's technical team, led by Nico den Ouden, converted the JLG 1350SJP from diesel to 100% electric. The converted machines will be added to Rival's rental fleet and will be sold to other rental companies and end users. The first machine was delivered to Steiness Liftcenter, a forklift specialist based in Denmark.

■ US-based **Dana** has signed an agreement to purchase the Drive Systems segment of Oerlikon, a manufacturer of high-precision gears, planetary hub drives and products that support vehicle electrification, based in Switzerland.

# Further Loxam buyouts

Haulotte has sold its Italian rental subsidiary No.Ve. srl (Nove) to Loxam, while the rental giant's UK subsidiary Nationwide Platforms has acquired UK platforms (UKP) from HSS Hire.

Power access specialist Nove has been owned by Haulotte since 2006. Founded in 1998, it is headquartered in Rome and operates from six locations with 45 employees.

Alexandre Saubot, Deputy CEO of Haulotte, said, "The divestment of Nove is in line with Haulotte's strategic targets and will allow the group to focus on its core business in Europe. With this operation, Haulotte reinforces the close relationship built for several years with Loxam."

For Loxam the deal adds to the Nacanco business it acquired last year. Gérard Déprez, president

of Loxam, said, "Nove is a long-established player in Italy and operates an equipment range very well known to the Loxam Group and we will be able to share our mutual expertise."

Haulotte owns several rental businesses around the world, with total rental revenues of 28.6 million last year, equivalent to 5.6% of total revenues. It said that it owns rental businesses for two reasons: to help develop new markets and to understand better the needs of equipment buyers.

With a fleet of around 3,000 powered access products, UKP had been part of HSS Hire since 2013. It employs approximately 130 people.

As part of this transaction, Nationwide has entered into a commercial agreement with HSS to

provide powered access equipment to complement HSS' existing fleet. The closing of the transaction is subject to the approval by HSS' shareholders and the confirmation it will not be referred to the Competition and Mergers Authority. The transaction is expected to close before year-end 2018. Don Kenny, CEO, Loxam powered access division, said, "The acquisition of UKP will further reinforce NWP's position as the leading powered access specialist in the UK."

## SUNBELT ACQUIRES

US-based access and telehandler rental company Above and Beyond Equipment Rentals has been acquired by Sunbelt Rentals.

Above and Beyond is based in Madison, Connecticut, with branches in Durham and Stratford, Connecticut. Sunbelt Rentals acquired the company for an initial cash consideration of \$21 million, according to reports, with an additional \$500,000 payable over the next year depending on revenue meeting or exceeding certain thresholds. Above and Beyond is a privately owned and operated equipment rental, sales, service and parts provider, specialising in boom lifts, scissor lifts, fork lifts, among others.

It also represents JLG, Genie, Snorkel and Skyjack, developed a relationship with Craft Partners over a number of years, well before I was ready to sell," said Joseph Hill, president of Above and Beyond president. "When the time did come to sell they were the obvious and logical choice for me. We were very satisfied with the process and the result."

# APEX Asia dates confirmed for 2019

Dates have been confirmed for the second APEX Asia exhibition, the biennial Asian showcase for all types of access equipment. It will be held on 23-26

October 2019 in Shanghai, China, at the Shanghai New International Exhibition Centre (SNEIC), co-located with the CeMAT ASIA exhibition.

A new feature of the show will be an outside exhibition area. This will allow suppliers to display and demonstrate their largest machines and widen the selection of equipment on show.

APEX Asia is organised by KHL Group and B.V. Industrial Promotions International (IPI), in cooperation with Deutsche Messe AG, the organiser of CeMAT ASIA. Co-locating with CeMAT ASIA – the leading regional show for intralogistics and supply chain management – means that



access equipment will be exposed to more than 98,000 visitors, many of whom are in the factory and industrial maintenance sector.

The show will be staged in Hall N1 at CeMAT ASIA 2019 and there will be free movement of visitors between the two shows.

"The first APEX Asia in 2017 was a great success, attracting more than 5,000 visitors, with 90,000 visitors to CeMAT ASIA also able to visit the show. Feedback from the exhibitors was amazingly positive," said Tony Kenter, managing director of IPI.

Access International and the International Powered Access Federation (IPAF) are APEX Asia supporters.

For more information on the show, visit [www.apexasiashow.com](http://www.apexasiashow.com)

# Klubb investment continues

France-based Klubb has acquired firefighting and insulated platform manufacturer EGI, located near Charleville-Mézières in the east of the country.

EGI employs 35 people and produces 18m - 65m working height platforms for firefighting and

high voltage power line applications.

EGI exports most of its products to areas that are difficult to access, for example in Qatar, China and Chile to clean insulators on high voltage lines.

Julien Bourrellis, president of Klubb, says EGI has unique expertise recognised around the world. "This

acquisition will enable us to rapidly develop high voltage insulated platforms, which are in great demand in many international markets," said Bourrellis. "We will be able to position ourselves in countries where we are not yet present and gain export market share."

An EGI fire service truck





# Fassi to reverse ATN fortunes

Italy-based Fassi group has become the new owner of ATN Platforms, through its French subsidiary CTELM, which it acquired last year.

The articulating loader crane manufacturer officially became the new owner of the France-based

access equipment manufacturer on 6 August, and said it wanted to give ATN the 'energy and resources' to become a major manufacturer in the MEWP sector.

In a letter to customers and suppliers, Roger Boutonnet, chairman of CTELM and the new chairman of ATN Platforms, said there were two main goals in the first stages of the new ownership. Firstly, to restart production and communicate reliable lead times to its customers, while

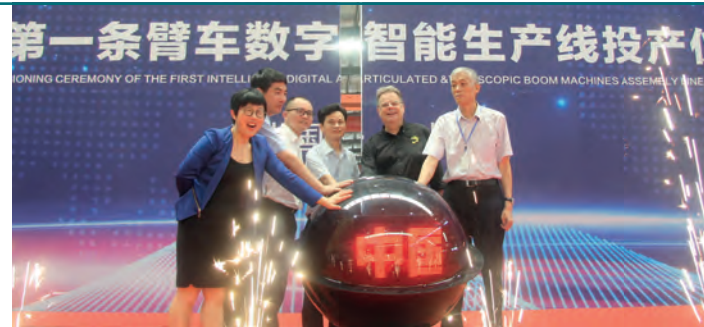
keeping the same performance and quality levels of its products. Secondly, to quickly strengthen the product support department to guarantee a better level of service.

ATN was founded in 2000 to produce the PIAF vertical mast machines. In 2009 it began to produce diesel articulated booms and scissors followed in 2011. Chairman of the company since early 2016 was Daniel Duclos, former head of rental company Acces Industry.

## IN BRIEF

■ **Easy Lift** has achieved the certification of compliance with the Australia and New Zealand AS/NZS 1418.10 regulation for its R130, R150, R160 and R180 tracked platforms. The Italian manufacturer has also entered the New Zealand market for the first time with its new distributor in the country Easy Lift New Zealand. The next step will be to certify the other models in its tracked range of MEWPs and enter the Australian market with a new distributor, which is yet to be confirmed.

■ **Herc Rentals** has announced it will expand its brand across its North American operations, resulting in a change of name for Hertz Equipment Rental in Canada. The company has approximately 40 locations and employs approximately 700 people across Canada. Overall, the company has approximately 275 locations, principally in North America, and employs approximately 4,900 people. Larry Silber, president and CEO, said, "While it will take some time to fully convert our signage, fleet and showrooms, we are excited to begin the transition to using Herc s our main brand across our operations Canada."



# Sinoboom powers up

Sinoboom has officially started production on its new state-of-the-art boom lift production line in Ningxiang, China. Representatives from IPAF, the China Construction Machinery Industry Association, local Ningxiang Government leaders, and leading Chinese rental companies attended the launch on 28 July.

During the ceremony, Sinoboom chairman Liu Guoliang outlined how the company will continue to improve its boom lift product range. The telescopic series will range from 12m-56m platform height, and the articulating series from 12m-46m, while an 'environmental' upgrade will accompany the launch of new Lithium battery-powered products.

At present, the monthly capacity of

the new production line is 300 units. The manufacturer said the new line had greatly improved all areas of production, thanks to a K3 production management system, MES intelligent control system and LCD status display.

Sinoboom is the first IPAF training centre in China, with the facilities to train large numbers of operators.

Other distinguished guests present at the event included Yan Jun, president of China Construction Machinery Industry Association; Feng Zhijun, deputy mayor of Ningxiang City; and Zheng Qi, deputy secretary of the Party Working Committee of Ningxiang High-tech Zone and director of the Management Committee.

The launch event included a product overview and tour.

# CTE group sells Effer

Swedish on-road load handling equipment provider Hiab has entered into an agreement to acquire the Effer loader cranes business from the CTE Group for an enterprise value of EUR 50 million.

The acquisition is part of Hiab's stated strategy to renew and expand its loader cranes portfolio with the aim of becoming market leader.

The acquisition comes on the back

of Hiab's acquisition of Argos loader cranes in Brazil in October 2017 and the renewal of its light range cranes in May 2018.

With the acquisition of Effer, Hiab will complement its loader cranes portfolio and expand its range of heavy cranes. Effer was founded in 1965 and its product range encompasses truck cranes with a lifting capacity between 3 – 300 tonne metres.

## AI NEWSLETTER



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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.

## DIARY

**2018 Platformers Days**  
Sept 14-15, 2018  
Hohenroda, Germany  
[www.platformers-days.de](http://www.platformers-days.de)

**Europlatform**  
Oct 11, 2018  
Belfast, N. Ireland, UK  
[www.europlatform.info](http://www.europlatform.info)

**Bauma China 2018**  
Nov 27-30, 2018  
Shanghai, China  
[www.bauma-china.com](http://www.bauma-china.com)

**International Rental Conference (IRC)**  
Nov 26, 2018  
Shanghai, China  
[www.khl.com/irc](http://www.khl.com/irc)

**Bauma ConExpo India**  
Dec 11-14, 2018  
Delhi, India  
[www.bcindia.com](http://www.bcindia.com)

**2019 IAPA Awards & IPAF Summit**  
Mar 6, 2019  
Dubai, UAE  
[www.iapa-summit.info](http://www.iapa-summit.info)





# Ruthmann sets up in North America

Germany-based Ruthmann has established its own subsidiary in North America. Ruthmann North America will continue to develop the manufacturer's presence in the continent along with its two long-standing sales and service partners, Time Manufacturing and ReachMaster.

Rolf Kulawik, managing director at Ruthmann, "With this step we want to provide more support and focus to our sales and service partners by being closer to the customers."

Time Manufacturing will continue to be Ruthmann's longstanding partner for larger truck mounts. Together, they have developed the US market

for Ruthmann Steiger products and adapted the Germany-made lifts to conform with ANSI Standards. The Skybird 2151 is a result of these efforts.

For eight years, ReachMaster has been the exclusive importer and distributor in North America of the Ruthmann Bluelift line of compact track-based lifts from Italy, and will continue to do so. Last year ReachMaster expanded its portfolio of specialty lifts to include the Ruthmann Eagle T108A, the first truck-mounted 108ft lift in the US that can be driven without a commercial driver's license. New Eagle models are in the pipeline. ■



## FINANCIAL HIGHLIGHTS

■ Sales at **JLG** increased by 18.4% to \$1.16 billion in the third quarter of its 2018 financial year 2018, while backlog for the three-month period rose dramatically. The increase in sales for Oshkosh Corporation's access division was mainly thanks to increased demand for telehandlers and MEWPs, led by North America. Operating income increased 14.7% to \$149.3 million, or 12.9% of sales.

■ **Terex Corporation's** Terex AWP segment, which includes Genie aerial equipment and Terex light towers, increased sales by 27% in the second quarter of its financial year, to \$158 million. The rise was driven by growth in North America, Western Europe, and China. Income from operations was up 13.5%, compared to the same period last year to \$101.7 million, and the business entered the third quarter with backlog of \$553 million, which is up 11%.

■ The industrial division of **Linamar** has seen considerable growth in the second quarter. Until the recent acquisition of harvesting equipment manufacturer MacDon group, Skyjack made up the significant majority of the industrial division. Thanks to the acquisition the Industrial segment's sales increased 80.2%, or \$289.5 million, to \$650.6 million in the second quarter. There was strong growth from Skyjack with increased sales of booms and telehandlers in North America and Europe.

■ **United Rentals** has posted a revenue increase of 18.4% year-on-year for the second quarter of 2018, reflecting acquisitions made in the last 12 months. The company's second-quarter revenues were US\$1.89 billion (€1.63 billion), while its rental revenues were US\$1.63 billion (€1.4 billion) – up 19.3% on the same period last year. Adjusted EBITDA for United was US\$907 million (€781.74 million), up by US\$160 million (€137.9 million) year-on-year, which represents a margin of 48%.

## PEOPLE NEWS

■ **Tom Goyer** has been appointed vice president of sales and market development at Ruthmann's newly-launched subsidiary Ruthmann North America. Uwe Strotmann, general director of sales at Ruthmann, has been appointed president of the new entity.



■ Terex AWP has appointment **David Haldane** to the newly created position of Genie sales manager, services for the UK and Ireland. Reporting to Matt Skipworth, Genie senior manager, service solutions.



■ **Paul Walker**, formally non-executive chairman of Halma, has become a non-executive director and chairman designate of Ashtead Group. Chris Cole, chairman of Ashtead since 2007, will retire at the annual general meeting on 11 September.



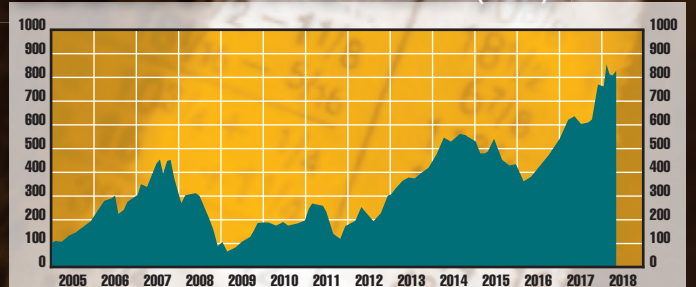
■ Cramo has appointed **Maria Karlsson** as its new vice president, sustainability. Karlsson has been with Cramo for three years, working as a consultant. Karlsson said, "The Cramo Care strategy is an excellent example of how sustainability could, and should, be an integrated."



■ **Harold Dubé**, president and founder of Accès Location+, has retired from the Quebec, Canada, rental company. On July 25, Dubé sold his shares to **Luc Bertrand**, vice president, as well as other shareholders - Fonds régionaux de solidarité FTQ and Yvan Blais. Dubé will mentor and assist Bertrand until the end of the year to "ensure a smooth transition," the company said. In 2019, Dubé will continue on, as needed, in the capacity of advisor to the new president. Luc has been at Accès Location+ since 2006. And after just five years he became a business partner.



## access SHARE INDEX (ASI)



21 June 2002 = 100 base

Company	Currency	Start date	Previous	Current	%
		21/6/02	21/06/18	29/08/18	change
Acces Industrie	€	1.34	—	—	—
Aichi Corporation	YEN(¥)	208	653	630	-3.5
Ashtead Group	UK£	0.47	22.46	23.94	6.6
Kanamoto	YEN(¥)	—	3560	3415	-4.1
Lavendon	£	1.85	—	—	—
Haulotte Group	€	9.00	15.06	11.92	-20.1
Oshkosh Corp	US\$	—	69.85	71.81	2.8
Tanfield Group	UK£	-	0.12	0.11	-8.3
Terex Corp	US\$	23.08	39.76	39.84	0.2
Ramirent	€	15.00	9.02	7.12	-21.1
United Rentals	US\$	21.47	153.18	158.94	3.8
ASI INDEX		100	808.30	827.16	2.3





Stock Code : 603338



### Italian Design

The Dingli European R&D Centre holds more than 10 global patents, for its Smart Range of eight boom lifts with working heights from 16 to 28 metres, featuring:

- New concept structural design,
- Integrated 4x4x4 axle type drive,
- Modular low weight high performance efficient design,
- High degree of parts and component commonality.

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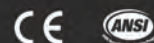
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United Rentals operates over 1,000 depots in North America.



# United in Europe

**As United Rentals makes an entry into Europe through the acquisition of BakerCorp, Joe Malone asked its CEO Michael Kneeland about the company's long-term plans.**

**W**hen the world's biggest equipment rental company makes a significant move, the rest take notice.

There have been sizable acquisitions made by United Rentals over the last 18 months alone, including the purchase of Neff Corp and NES Rentals for around US\$1 billion each.

Now the acquisition of BakerCorp has been announced for approximately US\$715 million (€613 million) in cash.

What is it that makes BakerCorp valuable to United? Well, the company already has a thriving specialty segment that rents solutions for fluid handling, power and HVAC, trench safety and tools for a broad range of industrial and construction applications.

And notably, there's the European footprint that BakerCorp – and now United – possesses. Though only small-scale in terms of its overall picture, the 11 locations across Europe that United will now own will be its first outside of North America.

While the deal does not add any MEWPs to United's fleet, the idea of it expanding with any significance in Europe without investing in access, is as an unlikely one.

United's sheer size was underlined in *AI* sister magazine *International Rental News'* recent IRN100 league table, published in the June issue, which showed United Rentals taking top spot with 2017 revenues of €5.28 billion – over €1 billion more than its closest competitor, Ashted Group. Its revenues also accounted for more than 12% of the top 100's revenues combined.

United has teased the rental world with

hints of its new-market desire in recent times. The company's now-departing chief financial officer William Plummer said at last year's IRC conference in Shanghai that United was considering new markets.

## Testing the water

So why BakerCorp, why Europe and why now?

Michael Kneeland, United's CEO, said the main pull towards BakerCorp was its North American presence, but the entrance into Europe was still a factor in the decision.

"The main appeal for us from the standpoint of geography is North America. That's where the majority of our customers operate and where our brand capital is concentrated. It's also where the bulk of the synergies lie. The 15% of Baker's revenue that comes from Europe will shift only about 1% of our combined revenue outside of North America.

"That being said, we're very impressed with the European operations. It's a chance for us to test the waters through established locations in four more countries with developed rental markets. Would we have done the deal if Baker had been strictly North America? Sure. But, in many ways, this level of entry into Europe is ideal for us."

The four countries BakerCorp has a presence in in Europe are France, Germany, the UK and the Netherlands. United is keen to

learn all about Europe, and Kneeland said the company would take its time in settling in.

"It's a small but opportunistic entry that's part of a bigger strategic investment. We've always been open to all possibilities in growing the company, but we're also very thoughtful when it comes to mergers and acquisitions.

"A deal has to fit strategically, financially



**Michael Kneeland,**  
CEO, United Rentals.



## NEWS REPORT

and culturally. In this case, after a lot of due diligence, we came to the conclusion that Baker fits our criteria. That includes their European operations.

“And by the way, we’re not going overseas thinking we have all the answers. When I say ‘cultural fit’ I’m talking about things like safety and a customer service mindset. We share an operating philosophy – that’s what’s most important. Our people have met the teams in Europe and we respect their business cultures. We’re excited to begin the process of listening and learning.”

With new markets comes new opportunities for United, but the company insists it will continue to follow its strategy that has got it to where it is today. Kneeland said specifically its strategy was about balancing growth with returns. He said that geography was one of many levers the company used to get there.



**United Rentals will add another 900-plus employees to its 15,000 members of staff.**



**United Rentals was founded in 1997.**

The CEO added that United was still a long way from saturation in North America – the company has just over 1,000 branches and around an 11% share.

North America will continue to be its number one engine for value creation for the time being, but Kneeland said that if the company decided to establish a larger presence in Europe at some point, it would most likely look at mergers and acquisitions to do that.

“Our decision to acquire Baker is less about adding fleet or branches and more about differentiating our solutions with the addition of storage and treatment capabilities,” said Kneeland.

So, now the company has dealt its first card in Europe, could there be potential for United to make an entrance into Asia?

Though Kneeland remains coy in his approach

### Exploring potential

To this, he says it is good for the global rental economy to have nascent rental industries in Asia take root.

So, with 11 depots in operation across Western Europe, and a chance to feel its way into a new continent, United will be keeping its eyes open for other opportunities within the continent.

“We closed the transaction on schedule at the end of July. Now we’re diving into the integration.

“As I mentioned, we see this entry as a learning opportunity and a chance to explore the European potential, be it in specialty or general construction rentals. Whether that learning period lasts months or years – and where we come out at the end of it – remains to be seen.”

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EQUIPMENT



A Skyjack SJ16 performing in a classic mast application.

# Wider scope

**Vertical masts are becoming more popular, not in the sense that they are taking market share from other powered access equipment, rather they are finding greater acceptance in their core areas of work.**

In many cases vertical masts fall into the low level access category and are therefore garnering greater interest, as is low level access generally, as it replaces ladders and mobile scaffolding towers, in some areas.

They are also seeing greater acceptance in the construction sector, as well as expanding in their core industrial applications. There have been other rumblings too, hinting at growth and increased competition in the sector. We often hear about competition coming from China for scissors and booms, well, the same is true for mast lifts.

Eastman Heavy Machinery (EHM) is a

## The new Snorkel TM16E.

US-based company, with its manufacturing facilities in China. The company has just signed an exclusive distribution agreement with the Netherlands-based Fontexx Cranes & Access. Under the agreement Fontexx will provide sales and after sales service for EHM's electric and hybrid-powered vertical masts and electric scissors in all European countries except France and Turkey. It will also permit Fontexx to rent the units.

Fontexx has specialised in access and tower crane rental and sales for more than 30 years and the company said it decided to work with EHM, following more than three years of negotiation and product trials.

Another manufacturer from China, Sinoboom, has launched its first vertical mast lift, the 10.3m working height 10PJ. Next up from the manufacturer will be a 3.8m platform height single-mast lift. The benefits for both, says the manufacturer is their compact design, easy operation and transportation, as well as low maintenance.

While the company is expanding into all

**Bravi has delivered another 50 Leonardo HDs to Boels.**

mast lift product areas, June Zhu, from Hunan Sinoboom Heavy Industry, has a warning for the sector, "Vertical masts have to move in another direction, because there now more compact scissors in the market to replace them, due to the high cost of vertical masts. Higher vertical masts, with longer outreach capability and easy operation for indoor and outdoor use will lead to a new demand."

## Compact benefit

Kristopher Schmidt, product manager at Skyjack, on the other hand, believes the compact footprint and superior manoeuvrability of mast lifts is their fundamental benefit. "Due to their stature and lightweight these vertical masts can also go into elevators, which adds further benefit to multi-level job sites.

"Vertical masts have always had an advantage when it comes to working in enclosed spaces compared to traditional scissor lifts and other comparable products."

Skyjack says its masts are the only ones on the market with a traversing platform, which enables operators to get up and over.

Skyjack offers two vertical mast lifts with working heights ranging from 5.65m to 6.75m. The zero-emission compact machines offer low floor loading. Driveable at full height the SJ12 and SJ16 provide a zero inside turning radius for maximum manoeuvrability, 30% gradeability, and rated load lift times from 16 to 20 seconds, respectively. They uniquely keep the mast at the rear of the platform, providing maximum visibility. The CE compliant SJ16





## VERTICAL MASTS

### One of the JLG LiftPod range carrying out maintenance.

also has a wind rating feature which, once lifted over 3.7m, alerts the operator.

As previously mentioned, the expansion of the low level access sector is helping vertical mast sales. In this area, Bravi Platforms is working on expanding its range of products for light picking. Marina Torres, sales manager at Bravi, says the new model will feature a set of accessories to grow the use of powered access into several new applications within industrial and retail environments. "The first launch will involve an accessory to lift and handle tyres, but more optional attachments will be released in the coming months."



### New order

Another example of the expanding retail market for vertical masts comes with a further order from Boels for 50 Bravi Leonardo HD masts, due for delivery in September. The order will bring Boel's fleet of Leonardo HDs to more than 450 units

The scope of low-level access is also expanding outside its maintenance,

industrial, and facility work roots.

Matthew Elvin, CEO, Snorkel, says, "As we continue to see trends in low level access products replacing more traditional methods, such as scaffolding towers and ladders, we expect to see growth in both sales and rentals of mast lifts within the construction industry."

In February 2018, Snorkel launched the TM16E, the third model in Snorkel's line. Offering a working height of up to 6.87m, it is designed for contractors and facilities maintenance professionals. The line consists of the original Snorkel TM12 hydraulic drive mast lift, which is now offered as the TM12E and TM16E with a new electric drive system for increased efficiency.

The TM16E weighs in at 1,070kg, while the TM12E has a working height of up to 5.65m and can lift up to 227kg. Weighing in at 884kg, it features a 0.45m roll-out extension as standard, for additional reach indoors and out.

"Products, such as the Snorkel TM12, continue to be more widely accepted by contractors, replacing more traditional methods, and therefore we are seeing a greater number of hire companies investing in these lifts." Demand for push-around mast lifts, such as the Snorkel UL series, also remain steady in facilities maintenance applications.



The 100 VJR has joined Manitou's mast line-up.

## MAKING NEGATIVE A POSITIVE

Hematec Arbeitsbühnen's latest product is the Helix 1205 rental edition, launched at the end of 2017.

Michael Schapperth, at Hematec, says customers want to overcome obstacles and access hard-to-reach areas with two people in the basket, plus tools. In that regard, the direction for new mast products is towards higher capacity products. With this in mind Hematec will launch new products at Bauma, in Munich, Germany next year.

Beyond that the company is also seeing demand in the negative working area and for battery power that will last an eight-hour shift. "Working negative means working up-and-over free-standing walls or inside a trough container and even below zero. Space is always getting smaller inside industrial plants. It means the machine has to be compact and be able to work inside the shape of narrow ways, without overhang of the counterweight."

The 1205 offers negative capability and has a 12m working height and 5.15m lateral outreach, with 300kg in the basket across the working envelope. Transport and working width is 0.98m without overhang. Up-and-over-height is 7m. Power comes from one huge trough battery, and there are no battery packs.



Sinoboom's 10.3m working height 10PJ.

Over the last 18 months, Elvin says the increase in demand from the rental sector has become notable. "Most rental operators are reporting increased demand from job sites and end users for these machines."

Elvin adds, "Small volumes will be purchased outright by facilities for maintenance applications. Contractors who require volume have been known to purchase or lease, but this may alter as more low-level access becomes available through the rental channel," adds Elvin.

Terex AWP offers a complete line of masts in the Genie Runabout family. The Genie GR-20J and GR-26J units being the most recent additions, with the GR-26J the latest.

The Genie GR, GRC and QS products all have a zero-degree turning radius and compact base size, for access into tight and narrow areas including many elevators. The proportional controls are designed for easy manoeuvring and positioning in finished spaces.

### Rental return

Mike Flanagan, Genie product manager, Terex AWP, says, "As jobsites evolve and continue to replace ladders with lifts, the Genie GRJ products offer access into areas that were previously unreachable

"Vertical masts are often more compact and lower weight than a comparable scissor. Additionally, lower platform heights provide for a better match between machine capabilities and jobsite demands, improving rental return on invested capital for rental dealers.

Flanagan adds, "With their compact size, more machines can fit within the same jobsite area, and with new technology in construction materials and processes, larger platforms, extension decks and capacities found on scissor lifts





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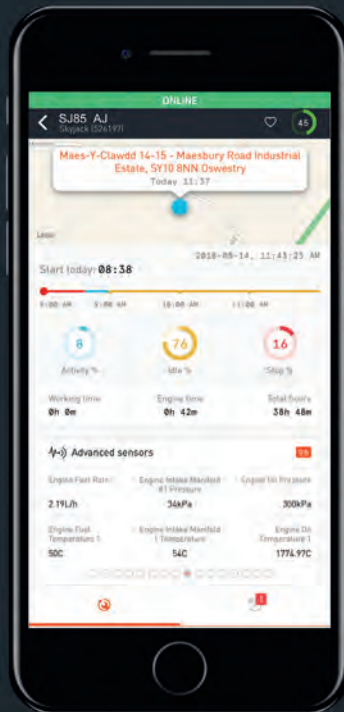
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## VERTICAL MASTS

### The ATN PIAF 12E-D is an evolution of the Piaf 12E.

are not necessary for what are increasingly becoming one-person tasks.”

Aaron Haynes, product marketing manager for low-level access products at JLG Industries, which also owns low level specialist Power Towers, agrees low-level access is becoming increasingly popular in finished work applications, where ladders and scaffolding have traditionally been used.

“For JLG, we have seen an uptick in customers interested in finding ladder alternatives. Many companies are beginning to adopt policies that either prohibit or drastically restrict the use of ladders on their premises. This development has sent facility managers on a journey for a suitable replacement. Products like the JLG 830P push-around mast lift and our EcoLift products are intended to make that journey a short one.”

Haulotte’s Maxime Girard, product manager – Americas, confirms this view. “With more general contractors banning ladders on jobsites to prevent injuries from falls, we are seeing a greater need for small footprint access platforms to work in traditionally heavy-duty construction sites.

“Even the smallest scissor lifts are sometimes too large to fit around tight corners or too heavy for some floor loading requirements.”

Girard says the vertical mast is one of the company’s largest growing sectors. “This is mainly due to its small footprint,” Girard explains. “For maintenance, stock picking, and finishing applications that only require one worker.”

At Intermat, the Paris exhibition which



took place during April this year, Haulotte was launching into a new area of mast lifts for the manufacturer.

Its Star range was enhanced by the addition of Haulotte’s first tracked mast, the Star 6 Crawler. It has a lifting height of 6m and adds new applications, including industrial and building maintenance and finishing work like plumbing, electricity and air conditioning.

Features of the new crawler include high precision, smooth driving with zero turning radius and a 40cm platform extension. Ease of transport is available thanks to a dedicated fork, while the machine has direct electric drive with brushless AC motors and ActivScreen on-board diagnostic. It will be available starting September.

It was joined by the new 8m working height wheel mounted Star 8S, adding to the manufacturer’s Star series.

Manitou also had a new mast lift on its stand at Intermat. Joining its booms was a newly-launched and updated model, the AWP 100 VJR. The 10m working height mast lift has newly-designed counterweight and turret and is now easily transportable using a forklift. The 200kg capacity machine offers improved lifting cycles thanks to a new lifting pump.

At the show, ATN was also extending its electric vertical mast range. The PIAF 12E-D is an evolution of the Piaf 12E. It offers a 12.65m working height, a 352 degree structure rotation, zero tail swing, a 200kg capacity in the platform and a 30% gradeability. The main feature of the 12E-D is its significant 6.05m horizontal outreach and a platform rotation of 2 x 90°.

### Sector challenges

There are a few challenges facing the vertical mast product segment including the new US ANSI updates coming into effect soon.

Flanagan adds, For, example, the new standards will now distinguish between indoor and outdoor capable machines. This has not been the case in the past and will require collaboration between the manufacturer, rental

businesses and end users to fully understand the change.

Low-level access machines, along with all MEWPS, will need to change slightly to meet new requirements set forth in the new ANSI/CSA standards. Changes may include operational restrictions when exposed to wind, load sense, and slightly heavier and/or wider machine dimensions.

Apart for the rental companies’ concerns over initial potential to increase the number of service calls with the new ANSI standards, Elvin adds another challenge, “is meeting the customer’s desired lift heights while keeping the overall dimensions of the machine intact. Our vertical mast lifts are designed to fit into common elevators and pass through standard doorways from all dimensions – stowed height, overall length, and overall width.”

Schmidt concludes, “As previously mentioned, more companies are seeing a benefit for these machines due to their small on-site footprint and superior manoeuvrability. Due to their stature and lightweight these vertical masts can also go onto elevators, which adds further benefit to multi-level job sites.”

AI

### LIFTING A LOT

Doug Jeurissen, sales manager for Lift-A-Loft, says the company has seen more vertical mast units being purchased for manufacturing applications and that they have sold its Vertex units specifically for high-level cleaning in pharmaceutical operations.

“The vertical mast category provides a more compact option than scissor lifts [in certain applications.]” Jeurissen says. “This can also translate to an ability to fit in tighter areas. Customers also like the low step in height.”



A Genie GRJ vertical mast demonstrates its outdoor capabilities.



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# Flying high in 2018

**There are few ways to gauge the state of the rental sector. AI's unique listing is one of them.**



**T**he access rental industry is in a very comfortable position thanks to thriving markets across the world. North America is looking particularly strong at the moment, and Europe is pretty close behind, especially as countries like Italy and Spain are starting to pick up.

This renewed confidence in markets that were, until very recently, in recession, is reflected in the activities of some of the world's biggest rental companies. Loxam stands out as a good example, following its acquisition of Spain-based Hune and Italy-based Nacanco last year. Nacanco appeared in last year's **access50**, as the deal had not yet been confirmed. Based on that 2017 listing, it had a fleet size of 2,300 MEWPs, while Hune had reported a fleet of just over 5,000 units the last time it appeared in the **access50**, in 2016.

They represent another two very substantial buyouts for Loxam, following its even more significant investment in the Lavendon Group at the beginning of last year, which took the company from 12th place in the 2016

**access50** to third place in 2017.

Speaking of Hune and Nacanco, Don Kenny, CEO of Loxam's Powered Access Division (PAD), told *AI*, the opportunity to buy the companies came just at the right time, as both those countries were now on the up, economically. Notably, Lavendon had a Spain-based business that it closed back in 2010/11, so its recent move back is a good indicator of the country's fortunes. And, in the last few weeks, Loxam added Haulotte's rental business in Italy to its portfolio, as well buying UK Platforms, and its 3,000-strong fleet, from HSS Hire. Further north, it bought Cramo's Danish business too.

### Key countries

These recent deals reflect something else - a desire by the big rental companies to be dominant in each country they are in. When Loxam bought Lavendon, it almost immediately sold off its Germany division Gardemann to TVH Group, which already had the biggest rental company in the country

### TOP 50 FLEET SIZES

	2018	% change	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
<b>Top 5</b>	<b>324855</b>	<b>11.6</b>	291170	222165	214325	220192	204624	196656	165556	164237	173792	189850	179880
<b>Top 10</b>	<b>433352</b>	<b>10.6</b>	523157	428443	298383	295334	271576	265888	240113	238181	254424	270510	251700
<b>Top 50</b>	<b>705882</b>	<b>9.4</b>	645461	577377	527514	523767	481490	460758	434358	424853	449250	446956	402900

2018	COMPANY	MEWP FLEET 2018	2017	%	TELEHANDLER FLEET 2018	2017	%	FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
1	<b>United Rentals</b> <small>(includes NES Rentals/NEFF Corp)</small>	<b>129677</b>	122708	5.7%	<b>25695</b>	22481	14.3%	S, B, T	1002	USA, Canada,	USA
2	<b>Sunbelt</b>	<b>96500</b>	76500	26.1%	<b>17250</b>	14400	19.8%	S,B, M, H	440	USA	USA
3	<b>Loxam Group</b> <small>(includes Lavendon/Hune/Nacanco)</small>	<b>48250</b>	44232	9.1%	<b>6500</b>	4100	58.5%	S,B,T,M	750	Europe, Middle East, Morroco, Brazil, Columbia	France, UK
4	<b>HERC</b> <sup>(est)</sup> <small>(Hertz Equipment Rental Co)</small>	<b>25979</b>	25222	3%	<b>5358</b>	5203	3%	S, B	280	US, Canada, China, Saudi Arabia, UK	USA
5	<b>Ahern Rentals</b>	<b>24499</b>	22071	11%	<b>4587</b>	5710	-19.7%	S,B	86	USA	USA
6	<b>Nikken Corp</b>	<b>24194</b>	22397	8%	<b>2</b>	0	-	S, B, T	241	Japan, USA, Southeast Asia, UAE	Japan
7	<b>Mateco</b> <small>(rental business unit of TVH Group)</small>	<b>22438</b>	20667	8.6%	<b>989</b>	865	14.3%	S,B,T	119	Europe, Malaysia, Mexico	Belgium
8	<b>Nishio Rent All</b> <small>(includes Skyreach Group)</small>	<b>21479</b>	20491	4.8%	<b>140</b>	133	5.3%	S,B,T,M	386	Japan, Singapore, Southeast Asia, Australia	Japan
9	<b>H&amp;E Equipment Services</b> <sup>(est)</sup>	<b>20286</b>	19320	5%	<b>2735</b>	2607	4.9%	S,B,T,H,M	65	USA	USA
10	<b>Sunstate Equipment Co LLC</b>	<b>20100</b>	18200	10.4%	<b>4100</b>	3700	10.8%	S,B	65	USA	USA
11	<b>Aktio Corp</b> <sup>(est)</sup>	<b>18361</b>	18001	2%	<b>0</b>	0	-	S,B,T	650	Japan, Taiwan, Banglades, South East Asia	Japan
12	<b>Blue Line Rental</b>	<b>18012</b>	15870	13.5%	<b>4392</b>	3360	30.7%	S,B	114	USA, Canada	USA
13	<b>SystemLift</b>	<b>15678</b>	12363	26.8%	<b>1430</b>	1130	26.5%	S,B,T,M,H	81	Germany, Netherland, Austria, Italy, Swiss, Turkey	Germany
14	<b>Riwal</b>	<b>15646</b>	13934	12.3%	<b>854</b>	837	2%	S,B,T,M	70	Europe, Middle East, India, Kazakhstan	Netherlands
15	<b>Cramo</b> <sup>(est)</sup>	<b>14278</b>	14278	0%	<b>488</b>	488	0%	S,B,T,M,H	412	Europe, inc. Eastern Europe & Russia	Finland



## TOP 15 TELEHANDLER FLEETS

COMPANY	FLEET SIZE 2018	FLEET SIZE 2017	CHANGE %
<b>1 United Rentals</b>	<b>25695</b>	<b>22481</b>	14.3%
<b>2 Sunbelt</b>	<b>17250</b>	<b>14400</b>	19.8%
<b>3 Loxam Group</b>	<b>6500</b>	<b>4100</b>	58.5%
<b>4 HERC</b>	<b>5358</b>	<b>5203</b>	3.0%
<b>5 Ahern Rentals</b>	<b>4587</b>	<b>5710</b>	-19.7%
<b>6 Blue Line Rental</b>	<b>4392</b>	<b>3360</b>	30.7%
<b>7 Sunstate Equipment Co LLC</b>	<b>4100</b>	<b>3700</b>	10.8%
<b>8 Kiloutou</b>	<b>3400</b>	<b>2700</b>	25.9%
<b>9 H&amp;E Equipment Services</b>	<b>2735</b>	<b>2607</b>	4.9%
<b>10 A-Plant</b>	<b>2000</b>	<b>1700</b>	17.6%
<b>11 SystemLift</b>	<b>1430</b>	<b>1130</b>	26.5%
<b>12 Salti</b>	<b>1182</b>	<b>1079</b>	9.5%
<b>13 Acces Industrie</b>	<b>1100</b>	<b>1100</b>	0%
<b>14 Mateco</b>	<b>989</b>	<b>865</b>	14.3%
<b>15 PartnerLift</b>	<b>924</b>	<b>1004</b>	-8.0%

in the form of Mateco. Combining those two fleets TVH has 10,000 units in Germany. It shows how big companies want their brands to be the strongest in any given nation and don't see to any benefit in battling with another big player.

It's worth noting that since last year, TVH Group's rental business unit is now known as Mateco. This demonstrates how brand awareness is becoming increasingly significant in the global marketplace, and reflects TVH's respect for the Mateco name. Other companies will say locally-recognised brand names are more effective than changing the name of a newly-acquired company to that of the parent company. Don Kenny shares this view; for example Loxam's highly-regarded Nationwide >

2018	COMPANY	MEWP FLEET 2018	MEWP FLEET 2017	%	TELEHANDLER FLEET 2018	TELEHANDLER FLEET 2017	%	FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
16 <sup>18</sup>	<b>Kiloutou</b>	<b>13900</b>	11200	24.1%	<b>3400</b>	2700	25.9%	S,B,T,M	500	France, Germany, Spain, Italy	France
17 <sup>15</sup>	<b>AJ Networks</b>	<b>13550</b>	13150	3%	<b>150</b>	0	-	S,B	13	Korea, Japan, Vietnam, Saudi Arabia	South Korea
18 <sup>17</sup>	<b>Ramirent (est)</b>	<b>11563</b>	11200	3.2%	<b>515</b>	500	3%	S,B,M,T,H	40	Slovakia, Ukraine, Russia	Sweden
19 <sup>22</sup>	<b>Boels Rental</b>	<b>11293</b>	9294	21.5%	<b>556</b>	600	-7.3%	S,B,T,M	400	Europe	Netherlands
20 <sup>20</sup>	<b>Kanamoto (est)</b>	<b>10477</b>	10272	2%	<b>30</b>	30	0%	S,B,T,M	180	Japan	Japan
21 <sup>21</sup>	<b>PartnerLift</b>	<b>10004</b>	9363	6.8%	<b>924</b>	1004	-8%	S,B,T	159	Europe	Germany
22 <sup>23</sup>	<b>HSS Hire Group (includes UK Platforms)</b>	<b>9300</b>	9040	2.9%	<b>50</b>	49	2%	S,B	292	UK, Ireland	UK
23 <sup>NEW</sup>	<b>Korea rental</b>	<b>9000</b>	NA	-	<b>8</b>	NA	-	S,B,T	1000	Korea, Vietnam, China, India, Saudi Arabia	Korea
24 <sup>19</sup>	<b>Coates Hire (including Force Access)</b>	<b>8170</b>	10970	-25.5%	<b>835</b>	605	38%	S,B,H	162	Australia, Indonesia	Australia
25 <sup>27</sup>	<b>Shanghai Horizon Equipment &amp; Engineering Co.</b>	<b>7474</b>	5027	48.7%	<b>0</b>	0	-	S,B	28	China	China
26 <sup>24</sup>	<b>AFI-Uplift</b>	<b>7363</b>	7132	3.2%	<b>75</b>	87	-13.8%	S,B,T	35	UK, Middle East	UK
27 <sup>26</sup>	<b>Pekkaniska</b>	<b>6500</b>	6000	8.3%	<b>0</b>	0	-	S,B	29	Finland, Russia, Ukraine	Finland
28 <sup>25</sup>	<b>Mills Estruturas e Srvicos de Engenharia</b>	<b>5723</b>	6834	-16.3%	<b>71</b>	292	-75.7%	S,B,M	30	Brazil	Brazil
29 <sup>33</sup>	<b>Collé Rental &amp; Sales</b>	<b>5185</b>	3926	32.1%	<b>890</b>	852	4.5%	S,B,T,M	14	Europe	Netherlands
30 <sup>30</sup>	<b>Modern (International) Access &amp; Scaffolding</b>	<b>4700</b>	4220	11.4%	<b>3</b>	10	-70%	S,B	3	Hong Kong, Macau, Singapore	Hong Kong
31 <sup>32</sup>	<b>Salti</b>	<b>4439</b>	4149	7%	<b>1182</b>	1079	9.5%	S,B,T,M	34	France	France
32 <sup>28</sup>	<b>Acces Industrie</b>	<b>4400</b>	4400	0%	<b>1100</b>	1100	0%	S,B,T,M	30	France, Morocco	France
33 <sup>35</sup>	<b>A-Plant</b>	<b>4400</b>	3500	25.7%	<b>2000</b>	1700	17.6%	S,B	135	UK	UK
34 <sup>31</sup>	<b>Gerken</b>	<b>4200</b>	4200	0%	<b>441</b>	441	0%	S,B,T	15	Europe	Dusseldorf, Germany
35 <sup>38</sup>	<b>Kranpunkten</b>	<b>3167</b>	2961	7%	<b>70</b>	55	27.3%	S,B,T, M,H	7	Sweden	Sweden
36 <sup>40</sup>	<b>Aver Asia</b>	<b>3059</b>	2816	%	<b>50</b>	36	38.8%	S,B	15	Singapore, Malaysia, Indonesia, Myanmar, China, Cambodia	Singapore
37 <sup>37</sup>	<b>Galmon</b>	<b>3000</b>	3000	0%	<b>0</b>	0	-	S,B	1	Singapore	Singapore
38 <sup>36</sup>	<b>Gruppo Venpa3 (GV3) (Including Venpa)</b>	<b>2907</b>	3400	-14.5%	<b>370</b>	500	-26.0%	S,B,T,M	32	Italy, Europe	Italy
39 <sup>41</sup>	<b>Height for Hire</b>	<b>2693</b>	2615	3%	<b>0</b>	0	-	S,B,T,H	28	UK, Ireland, Slovakia, Hungary	Ireland
40 <sup>34</sup>	<b>Solaris Brazil</b>	<b>2680</b>	3500	-23.4%	<b>102</b>	140	-27.1%	S,B	19	Brazil	Brazil
41 <sup>44</sup>	<b>Prangl Gesellschaft</b>	<b>2600</b>	2350	10.6%	<b>556</b>	303	83.5%	S,B,T	16	Austria, Europe	Austria
42 <sup>52</sup>	<b>High Reach</b>	<b>2448</b>	1525	60.5%	<b>465</b>	426	9.2%	S,B	5	USA	USA
43 <sup>43</sup>	<b>Brand Energy &amp; Infrastructure Services (est)</b>	<b>2400</b>	2400	0%	<b>0</b>	0	-	S,B,M	50	France, Holland, UK	USA
44 <sup>NEW</sup>	<b>Zeppelin Rental</b>	<b>2292</b>	NA	-	<b>450</b>	NA	-	S,B,T,M,H	135	Germany, Austria, Czech Republic, Slovakia	Germany
45 <sup>47</sup>	<b>Maquinza</b>	<b>2124</b>	2108	0.8%	<b>237</b>	208	13.9%	S,B,M	16	Spain, Columbia	Spain
46 <sup>48</sup>	<b>All Erection (All-Aerials)</b>	<b>2100</b>	2100	0%	<b>385</b>	350	10%	S,B	35	USA, Canada	USA



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Platforms business in the UK is set to keep its name. On the other hand, Kenny says the company is proud of the Loxam name and the strength it holds. Therefore it will likely be used alongside its local brands, for example: Nationwide Platforms, a Loxam company. It seems, you can have the best of both worlds.

### Top spots

This year, Loxam group remains comfortably in third place with 48,250 units. However, it sits a considerable distance behind the top two. Sunbelt with its more than 96,000 units, is nearly 20,000 up on last year and is, again, thanks to a series of acquisitions. Taking the top spot, as always, is United Rentals with a staggering 130,000 units in its fleet. (Its total fleet size, including all the other equipment types, is 573,000, which, by the way, is slightly

less than the number of MEWPs in the US for 2017 - it's now more than 600,000). This time last year United had bought NES Rental's fleet of just over 20,000 units and was well on its way to signing the deal to buy Neff Corp, with its 2,800 MEWPs.

United has remained on the acquisition trail and bought BakerCorp in July, which has 11 depots in Europe. Michael Kneeland, CEO, United, explains, (see News report), how the depots are a way to test the water in Europe.

A bit further down the table, there has been plenty of activity too. For example, France-based Kiloutou's fleet has jumped up nearly 2,500 units, following recent investments. Other companies to note in Europe are Collé, Boels and A-Plant, all with more than 20% fleet increases. Access specialist Riwal also presents very healthy figures, with a 12.3% rise.

### LARGEST % GROWTH

COMPANY	PERCENTAGE GROWTH
<b>Shanghai Horizon Equipment &amp; Engineering Co.</b>	<b>48.7%</b>
<b>Collé Rental &amp; Sales</b>	<b>32.1%</b>
<b>Rent Rise</b>	<b>29.6%</b>
<b>Alo Rental</b>	<b>27.5%</b>
<b>SystemLift</b>	<b>26.8%</b>
<b>Sunbelt</b>	<b>26.1%</b>
<b>A-Plant</b>	<b>25.7%</b>
<b>Kiloutou</b>	<b>24.1%</b>
<b>Boels Rental</b>	<b>21.5%</b>
<b>Tayeou Kao Kong Enterprise (est)</b>	<b>20.0%</b>
<b>Blue Line Rental</b>	<b>13.5%</b>
<b>Riwal</b>	<b>12.3%</b>
<b>Modern (International) Access &amp; Scaffolding</b>	<b>11.4%</b>
<b>Ahern Rentals</b>	<b>11.0%</b>
<b>Prangl Gesellschaft</b>	<b>10.6%</b>

Not including estimated entries

2018	COMPANY	MEWP FLEET		%	TELEHANDLER FLEET		%	FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
		2018	2017		2018	2017					
47	<sup>49</sup> <b>Location d'outils Simplex</b>	1944	1870	4%	119	114	4.4%	S,B	35	Canada	Canada
48	<sup>42</sup> <b>Alfasi Hire (est)</b>	1900	1800	5.6%	70	60	16.7%	S,B	4	Australia	Australia
49	<sup>50</sup> <b>Chicardo Investment</b>	1800	1800	0%	2	2	0%	S,B	2	Hong Kong, Macau	Hong Kong
50	<sup>54</sup> <b>Tayeou Kao Kong Enterprise (est)</b>	1800	1500	20%	0	0	-	S,B	6	Taiwan	Taiwan, China
51	<sup>51</sup> <b>Voisin's Equipment Rental (est)</b>	1747	1680	4%	91	87	4.6%	S,B	1	Canada	Canada
52	<sup>58</sup> <b>Alo Rental</b>	1533	1202	27.5%	96	71	35.2%	S,B,T	18	Chile, Peru, Panama, Argentina	Chile
53	<sup>55</sup> <b>AGF Access (est)</b>	1508	1450	4%	10	8	25%	S, B	8	Canada, USA	Canada

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**Asia growth**

Shanghai Horizon grew its fleet again this year, by just over 1,500 units to 7,465. The fast-moving Chinese market is well documented and promises to continue in this vein.

Southeast Asia has become a key new market for MEWPs in recent times. It is worth noting that Singapore has been a mature market in the region for many years, but outside its borders, it is a different story. Aver Asia is now one of the biggest rental companies in the region, with depots across the area.

Malaysia is generally seen as the next big market and has many rental companies, the largest being Th Tong Heng Machinery. It has 1,000 MEWPs and is new to the **access50** this year. It won't be long before it is joined by others from the region.

Turkey is another interesting country, thanks to its growing access market and historical links to Europe, the Middle East and Northern Africa. Both the country's biggest rental companies Faith Vinc and Rent Rise have edged over the 1,000 MEWP mark.

**THE SURVEY**

This survey was carried out via an e-mail and e-cast campaign in the two months leading up to the publication of this list. Companies with MEWP fleet sizes above 500 units were asked to provide quantities of each platform type in their fleet, along with the other details shown in this listing. This year, for the fourth time, we have also shown the number of telehandlers in each company's fleet. Where figures have not been available we have made an estimate.

2018	COMPANY	MEWP FLEET			TELEHANDLER FLEET			FLEET (see key)	BRANCHES	AREAS OF OPERATION	HEADQUARTERS
		2018	2017	%	2018	2017	%				
54	<b>GT Access</b> (est)	1500	1500	0%	0	0	-	S,B,T	5	UK	UK
55	<b>Chi Shing Machinery Rental</b>	1430	NA	-	0	NA	-	S,B,M	3	Hong Kong	Hong Kong
56	<b>Rom Israel</b>	1410	1200	17.5%	0	7	-	S,B	2	Israel	Israel
57	<b>Fortrent</b>	1405	1225	14.7%	90	80	12.5%	S,B,M,H	18	Russia, Ukraine	Russia
58	<b>Estaf Equipamentos</b> (est)	1349	1349	0%	0	0	-	S,B	9	Brazil	Brazil
59	<b>Lifterz</b>	1330	1083	22.8%	10	0	-	S,B	5	UK	UK
60	<b>Rent Rise</b>	1155	891	29.6%	3	3	0%	S,B,M,H	5	Turkey, Georgia, Azerbaijan, Turkhmenisthan, Iraq	Turkey
61	<b>Faith Vinc</b>	1120	739	65%	6	2	200%	S,B,T	7	Turkey	Turkey
62	<b>Instant Access</b>	1100	1070	2.8%	0	0	-	S,B,M	10	Australia, New Zealand	Australia
63	<b>Ton Heng Machinery</b>	1000	NA	-	0	NA	-	S,B	6	Malaysia	Malaysia
64	<b>LH Construction and Machinery Leasing</b>	956	928	3%	155	155	0%	S,B,T	4	Singapore	Singapore
65	<b>Goscor Access Equipment</b>	948	867	9.3%	54	49	10.2%	S,B	9	South Africa, Namibia, Botswana, Mozambique	South Africa
66	<b>Mitandt Rentals</b>	762	526	38%	4	3	25%	S,B,T,M,H	5	India, Srilanka, UAE	India, Shrilanka
67	<b>Alimak Group</b> (est)	740	740	0%	0	0	0%	M,H	9	Australia, Germany, Benelux, France	Sweden
68	<b>Belaruslift</b>	740	690	7.2%	32	30	6.7%	S,B,T,M,H	6	Belarus, Russia, Kazakhstan	Belarus
69	<b>WS-Skyworker</b>	616	587	4.9%	25	30	-16.7%	S,B,T	7	Switzerland	Switzerland
70	<b>Sudhir Power</b>	500	NA	-	0	NA	-	S,B	3	India, Middle East, Saudi Arabia	India

(est) – estimated NA – not applicable

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



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# Brimming with potential

**The Southeast Asian market for MEWPs is becoming one of the biggest talking points in the industry. AI finds out why.**

**W**hile China still has plenty of challenges for those seeking to expand in the country, it has developed enough to be a recognised and established MEWP market. Now, the access industry is looking around for the next step. Undeniably, Southeast Asia fits that category.

Demonstrating the importance of the region outside the mature market of Singapore, IPAF held its Asia Conference and Showcase in Kuala Lumpur, Malaysia, during July. It is the first time such an event has been held in the country and some 300 delegates, mostly from around Asia, gathered to see a wide range of presentations touching on key aspects of the industry.

The day kicked off with the launch of Malaysia's guidelines for Safe Use of Mobile Elevating Work Platforms. The comprehensive guidelines were produced by IPAF, The Master Builders Association of Malaysia (MBAM), CIDB Malaysia, and the Malaysia Department of Occupational Safety and Health (DOSH). The guidelines are a first step towards the introduction of working at height safety regulation.

It was swiftly followed by a Memorandum

of Understanding (MOU), signed by IPAF and MBAM, with the aim of developing quality training for MEWPs in Malaysia. It was witnessed by the conference's guest of honour the government's deputy director general off occupational safety at DOSH, Haiji Kormain bin Haji Mohd Noir.

The event was accompanied by a two-day exhibition of MEWP manufacturers and other related suppliers, and a gala dinner that took place on the evening of the 18 July.

## **Aver Asia**

Rental companies in Southeast Asia tend to have been founded in the region, rather than being expansions of established players based outside the region. None more so than Aver Asia. It was founded by Ang Poh Kiang in Singapore in 1999 and became a Genie dealer in 2006 with less than 10 Genie machines in its ownership. Over 12 years, the company has grown its rental fleet size to about 3,000, of which 90% are Genies. Aver Asia also partners with brands like Airman, Doosan and Hercules to provide a range of other products.

In 2016, Aver Asia received accreditation as an IPAF approved training centre and signed



**Ben Koh,**  
COO of Aver Asia

a memorandum with Institute of Technical Education (ITE) to set up a training facility in ITE College West in Singapore.

The company has always kept an eye on Southeast Asia, and today has expanded its footprint outside its Singapore headquarters to include 15 depots in Malaysia, Indonesia, Myanmar, Thailand and Cambodia.

Ben Koh, COO of Aver Asia, is a veteran of the sector, having spent more than a decade promoting aerial platforms across the region. "If you grew up in Asia like I did, seeing workers scale towering timber scaffolding and later metal cages on construction, marine, oil & gas or power plants was a common sight."

Not anymore, "MEWPs have slowly replaced these rickety structures and continue



to gain popularity across Southeast Asia.”

The change has come from a growing demand for safer working at height, more efficient equipment and increased productivity over the last 15 years. It was Singapore that kick-started the MEWP evolution, says Koh, with the construction of Suntec City in 1992, a mall in the Marina Bay precinct that houses the iconic Fountain of Wealth and more than 380 retailers.

Singapore continues to lead the way in the use and development of MEWPs, and sits among the developed MEWP nations, but its neighbours are following closely on its heels.

It is being led by cultural change, and apart from construction sector, Asia is seeing an increase in the cost of living, a demand

### **Aver Asia strengthens its presence in Myanmar at the Yangon International Airport terminal project, using one of its Genies.**

for infrastructure and the ongoing social development in its countries.

“When the industry grows, it brings foreign investment and with that comes a culture of safety and efficiency, rather than using conventional methods such as timber or bamboo scaffolding,” explains Koh.

On the subject of rental, he adds, “Contractors are engaging more with the rental houses for their projects. Competitiveness of the total project cost, high labour costs, shorter project timelines and land rent has resulted in contractors renting



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equipment rather than owning it.”

“I would say Malaysia, Indonesia and Vietnam are currently some of the fastest paced when it comes to MEWP development.

“There are also bright spots, one of which is Myanmar. This is a country with a lot of potential now. It is not the fastest in terms of MEWP development but with the change of Government and a transition period, I think the pace will pick up.”

One of the challenges currently facing the region, and the rest of the world is the lack of skilled field service staff to support MEWPs. “The standard of living in the region has gradually increased and fewer people want to work under the sun. The language issue also means field technicians may not understand the manuals or procedures.”

In Singapore Aver Asia is working with the Institute of Technical Education (ITE) to provide a three-year programme to final year students.

“I have a 10-year vision for Southeast Asia. We know that there is a lot of room for development in some of the countries, which have huge geographical areas. So, our vision is to ‘think global, act local.’”

Comparing the 12,000 access platforms in Singapore, Malaysia, has around 4,000-5,000, and a much lower proportion of those are new. However, Malaysia is seen by many as the next big MEWP market, following the rise of



**Kang Han Fei, managing director of TVH Group's Aerial Lift & Equipment.**





Singapore, also helped by its central location in Southeast Asia.

### Aerial Lift

It is a view strongly echoed by Kang Han Fei, who has been working for International parts specialist TVH since 2000 when he started up TVH Malaysia. Then, in 2007, he moved to TVH Singapore when TVH took over a parts company there. He is now back in Malaysia, as the managing director of TVH Group's new Malaysia subsidiary Aerial Lift & Equipment.

The difference is that, while TVH Group is a parts company, with a large MEWP rental division (now known as Mateco), Aerial Lift's primary goal is equipment sales to rental companies as an official JLG distributor. Although it does have a re-rent division with a fleet of about 100 units.

"We started talking about opening an equipment division for MEWPs in 2015 and then in 2016 we opened our premises. TVH was already offering spare parts for MEWPs so we had good knowledge of it," Kang adds, "This is a different approach. We are a bridge between JLG and the rental companies. Our plan was to copy what we have done in Mexico, which was a big success."

Kang believes there are 34-40 rental companies in Malaysia, with a total of around 4,600 units. Including the much smaller rental companies, there may be about 5,000 – 5,500 units in the country, a vast majority of which are used.

"Over the next five years TVH Malaysia plans to sell about 1,000 units each year into the country. In about five years' time we can easily be at 10,000 machines. That excludes truck mounts."

Traditionally, Malaysia is a truck mount market, and these product types still amount to about 50% of the aerial platforms in the market. That is set to change as scissors and booms become widely adopted and the country takes on a more familiar MEWP model.

The trend is similar with self propelled booms versus scissors. The company carried out a survey in 2015, in which booms outsold

scissors. In April 2018 it repeated the process and found it had switched to 45% booms, 55% scissors.

The reality is the market in Malaysia is mainly a used one. "We came here more on the potential. It is still a very small market but the potential is there.

"There are too many used machines in the market and this is pushing the price down. That will change, people will start to realise that the price cannot come down anymore."

Another significant opportunity comes from the current used market, much of which is made up of machines bought from Australia. "Australia has a 10-year ruling, then they sell their equipment offshore - Malaysia is one of the dumping grounds." >



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## SOUTHEAST ASIA

“By next year it will be difficult to get 10-year-old machines because of the 2009 financial crises in the US. They don’t have many machines from that time, as the manufacturers didn’t produce many. They will have to buy 2011 or 2012 machines, which will be more expensive and less difference in cost to new machines.”

The company will then offer its service and after sales support to make that cost difference seem even less. “We are not coming in with the objective of making a lot of money. We are trying to create good habits.

### Tong Heng

TH Tong Heng Machinery’s 1,000-strong aerial platform rental fleet, puts the company in the top three operators in the country.

Chan Jia Yuan, is executive director at the family owned company, started by Chan’s father in 1994. It is about to open a state-of-the-art specialist depot on a 0.5-acre site in Johor Bahru, a city in the far south of the country, separated from Singapore by a road bridge. The new site is opposite the existing 1-acre depot which will be used for smaller rental products, such as generators, welding

### PAL CARD FIRST

Shee Shu Leng has become the first female MEWP operator in Malaysia to gain IPAF’s Class 3A and 3B Category certification.

Shu Leng received her PAL Card earlier this year after completing the scissor and boom lift categories. Shu Leng is sales manager at Aerial Lift & Equipment, part of the TVH Group and a JLG distributor based in Kuala Lumpur.

“I have been working with Aerial Lift & Equipment for eight months now. I am glad that my company gave me the opportunity to get the IPAF operator license although I had just joined the MEWP industry, for about two months, at the time.”

The target for the first quarter, after receiving its training licence is 48 PAL Cards, followed by 72 in the next quarter.



Tong Heng's new MEWP centre

machines, lighting towers and air compressors.

Beyond that there is a two-acre crane depot and another six-acre site in Central Asia, which exclusively caters for MEWPs.

The company started out in 1994 supplying earth moving machines, then moved into cranes and power generators, then MEWPs in 2012 - Chan believes this was the year the Malaysian MEWP industry truly began.

The new premises will have complete service provision for platforms, including sales, service and spare parts. “It is not only for our use, it is a walk-in centre for customers who own JLG’s or any type of MEWP. It’s a one stop solution for rental, parts, training and sales.”

Tong Heng is also a JLG distributor. The difference to Aerial Lift’s JLG distributorship, is the focus is on sales to end users, like contractors or hotels, for example, not, in the main, rental companies.

But the main source of revenue is from rental, with 1,000 MEWPs in the fleet, that’s 60% boom lift and 30% scissor. “When we entered the MEWP industry, we realised people start with scissors rather than boom lifts. So, we thought we would do it differently with boom lifts in the main and scissors as a support.”

Three years ago the company had 300 machines in its fleet. “Every year we aim to purchase 150-200 units. To make sure we have significant growth. I would say we need to have 20-25% growth each year in our fleet.

Nevertheless, rental rates are getting lower due to growing competition, again particularly from rental companies in the mature market of Singapore. “We have a lot of projects coming up so they tend to bring more machines into the country.”

The latest MRT and LRT projects are on track. “But everyone is on observation mode, because of our recent change in government. We do not know if projects will continue or if they will be cancelled.” A couple of projects like the high-speed rail line between Singapore and Malaysia have already been put on hold.

Tong Heng covers the whole of West Malaysia, with the three previously mentioned



Chan Jia Yuan, executive director at TH Tong Heng Machinery.

depots for Johor, Kuala Lumpur and Penang. Another is likely to be on the east coast of West Malaysia in Kuantan.

But there are no depots in East Malaysia. “The East is a very different market and we don’t have depots there yet. Our strategy is to cover the whole of Malaysia before we go out of the country.”

### Partnership potential

As we have heard, the majority of the machines in the company’s fleet are used. They come from the US, Australia and some from Europe but not from the mature market of Singapore. “Competition with Singapore rental companies is high.”

In turn, Tong Heng then sells on its used equipment to places like India and other Southeast Asia markets like Vietnam and Philippines, which are ‘used-used markets’.

These standards will help develop the market towards more new machines. Currently Tong Heng’s fleet is made up of about 20% new machines. By 2024, the company hopes to have 3000 units its fleet with 40% of them new.

On the subject of consolidation. “A few years back, there were companies that looked to buy us but my boss refused to sell because he thought we were still too young. But now, from my point of view, I would not reject the idea of partnerships with companies that want to invest in Malaysia.

AI




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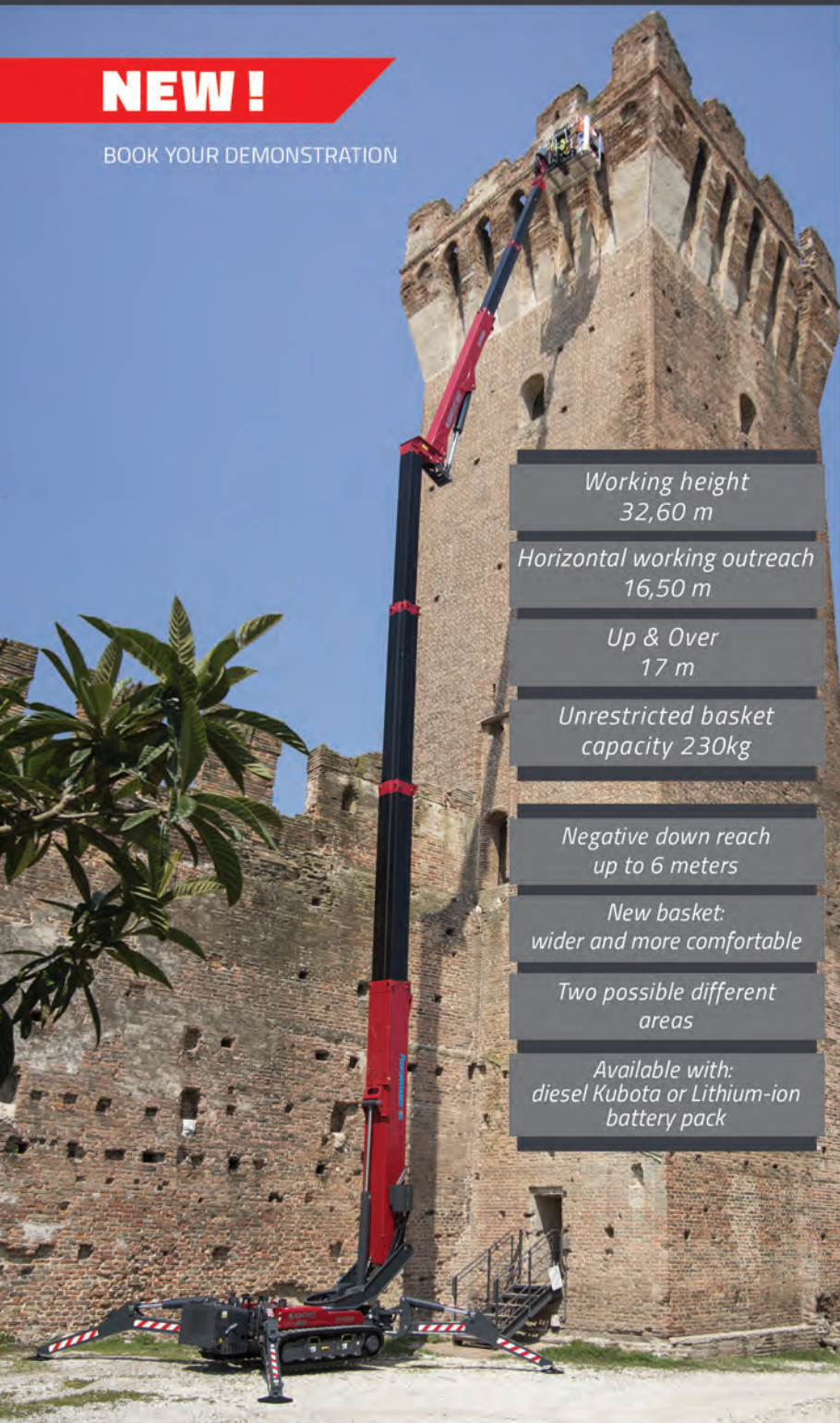
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# RAISING the standard

news from **IPAF** supporting the world of powered access

Autumn 2018 Issue No. 35

[www.ipaf.org](http://www.ipaf.org)

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## MEWP safety film launch at best-attended IPAF Asia



The International Powered Access Federation (IPAF) has premiered a short film warning people not to cut corners when using Mobile Elevating Work Platforms (MEWPs) to conduct temporary work at height at its Asia Conference & Showcase in Kuala Lumpur, Malaysia.

The hard-hitting film depicts an employee who complains to his boss about a faulty light, who follows two very different scenarios: In one the man is given a scissor lift in very poor condition and told to get on with the job without any training; in the other the man's boss engages a reputable rental company and offers his employee IPAF operator training.

The film can be viewed on IPAF's YouTube channel at [youtu.be/cksuj5uvu4](https://youtu.be/cksuj5uvu4) and is aimed at spreading IPAF's global MEWP safety and training message clearly and simply. It was developed by IPAF's Malaysia members and launched officially at the 2018 IPAF Asia Conference & Showcase, the best-attended edition of the event held to date, with around 350 delegates hearing a stellar line-up of speakers.

In addition to the excellent line-up of speakers, including Kang Han Fei (Aerial Lift & Equipment), Janne Haapalainen

(Scan-Rent), Johnson Lai (Keng Guan Skylift) and Tan Kee Chong (OSH Specialist Department, Ministry of Manpower, Singapore), IPAF demonstrated a sophisticated virtual reality (VR) MEWP simulator to delegates as part of its ongoing global industry-wide consultation on new technology and its place in powered access ([www.ipaf.org/VRconsultation](http://www.ipaf.org/VRconsultation)), with the deadline for contributions being extended to 30 September 2018.

Tim Whiteman, IPAF CEO & MD, comments: "This was another excellent occasion in IPAF's global events calendar and is now established alongside the IPAF Summit and IAPAs, Europlatform, ElevAÇÃO in Brazil and the IPAF Middle East Convention."

The location for the IPAF Asia Conference & Showcase 2019, set for 17-18 July next year, was revealed as Hangzhou, Zhejiang province, which sees the event return to mainland China, following its debut in the country in 2017 in Changsha, Hunan.

[www.ipaf.org](http://www.ipaf.org)



## Annual refresher for German PAL Card

IPAF has introduced an annual online instruction element to its IPAF PAL Card training programme to allow MEWP operators to meet a specific legal requirement in Germany. The new "refresher" module provides relevant information and interactive elements and is aimed at providing IPAF PAL Card holders with a means of compliance with Germany's Industrial Health & Safety laws.

The module is available online and PAL Card holders in Germany should subsequently find the five-yearly renewal process easier.

For more information contact your IPAF Training Centre or contact IPAF Germany at [Germany@ipaf.org](mailto:Germany@ipaf.org)

## Rising demand for French-language training in Quebec

Powered Access operator training delivered by IPAF members in French has seen heightened demand in Quebec following the introduction of new design, safe-use and training standards in Canada that became effective in May this year.

Currently there are two IPAF Training Centres in the French-speaking province – Accès Location and Location Ideal have both been delivering French-language IPAF-approved instruction in the region since the early part of 2018.

Christine Lell, IPAF's Representative for Quebec, comments: "Since May 2018 the updated CSA standards have been in effect, generating a great deal of interest in IPAF's training programme as it complies with international standards adopted by CSA B354 in Canada." For more details

Visit [www.ipaf.org/contact](http://www.ipaf.org/contact) or [www.ipaf.org/training](http://www.ipaf.org/training)

# Programme confirmed for inaugural Elevation

The full programme for the inaugural IPAF Elevation conference, networking and gala dinner event on 25 September is confirmed, with places filling fast for the event at the DoubleTree by Hilton Hotel, Coventry, UK.

The afternoon will be given over to a condensed conference with each speaker giving a 20-minute presentation. The full programme is as follows:

- **Mark Noonan**, Industry Relations Director, CITB: CITB Update – Engagement and future plans;
- **Jo Fautley**, Deputy CEO, Build UK: Catalyst for change: Transforming construction;
- **Malcolm Bowers**, Director, Lifterz: The changing dynamics of platform rental;
- **Nigel Taylor**, European Director, Serious Labs: VR today, tomorrow and the future;
- **Angel Ibañez**, IPAF's Global Representative for MCWP & Related Products: New IPAF hoist course.
- **Paul Lindup**, Network Rail's head of Infrastructure, Construction and Engineering Air Operations: MEWPs vs drones;
- **Jan-Willem van Weir**, AWP Product Manager, JLG: JLG site of the future;
- **Ray Cooke**, Construction Sector Safety Unit, HSE: Work at height – the importance of planning it right;
- **Giles Council**, IPAF's Director of Operations: IPAF Update; and
- **Richard Whiting**, IPAF's UK Market General Manager: Closing remarks and general Q&A session.



Richard Whiting

In the morning IPAF will host a meeting of the Access Link group, as well as IPAF's UK Country Council and MCWP Committee. A workshop to help IPAF rental members in the UK making the mandatory

transition to IPAF Rental+ minimum standards will run concurrently. From 1pm to 1:45pm IPAF will hold a UK Open Meeting ahead of the afternoon conference.

There will be a gala dinner in the evening and the whole event will be a chance for attendees to meet and network, as well as to try their hand on a state-of-the-art MEWP simulator machine as part of IPAF's virtual reality consultation ([www.ipaf.org/VRconsultation](http://www.ipaf.org/VRconsultation)), which has been extended until 30 September.

The person who completes a specific MEWP challenge with the fewest faults and closest to the target time will win IPAF's "Smooth Operator 2018" award.

The evening entertainment is headlined by comedian **Rob Deering**, and there will also be a competition to choose the best marketing video for IPAF training, with attendees at the event able to vote for their favourite from a showreel of shortlisted finalists.

Richard Whiting, IPAF's UK Market General Manager, comments: "IPAF's inaugural Elevation event boasts a diverse and engaging line-up of speakers and a fascinating range of activities and entertainment that will appeal to anyone working in the UK powered access industry."

Visit [www.ipaf.org/elevation](http://www.ipaf.org/elevation) to reserve your place. Anyone booking a place will receive a reduction in the price of the 2018 IPAF Global Powered Access Rental Market Report, compiled by Ducker Worldwide.



Rob Deering

## Reserve your place at interactive

IPAF's new event for North American members is called Innovate, and invites representatives of manufacturers, rental companies, contractors, service companies – drivers, mechanics, managers, salespersons, operators or supervisor – to share their views and opinions at the Houston Area Safety Council facility in Texas, 16-17 October.

Registration is now open on the IPAF website [www.ipaf.org/innovate](http://www.ipaf.org/innovate), where attendees can pre-select their choices of discussion group where they will work towards a solution or means to address

a particular issue with other like-minded experts in a workshop on the first day, and the following day each group will present its ideas to the entire group.

Unlike other "static" seminars where delegates sit in an auditorium listening to designated speakers, it is much more interactive and will mean that every attendee will share key insights.

All will vote for what they consider to be the most enlightening presentation, and a winner will be crowned. An evening networking event will also take place at a NASA facility in Houston.





## IPAF Summit/ IAPAs 2019 - save the date

The location and date of the next IPAF Summit and IAPAs has been confirmed as the Radisson Blu Dubai Deira Creek Hotel, Dubai, UAE, on 6 March 2019 – the first time the global event will be hosted in the Middle East.

The event regularly attracts 450 delegates who benefit from an outstanding set of presentations and networking opportunities.

Booking opens soon, with special early-bird rates available and discounts on multiple IPAF event bookings and the latest edition of IPAF's Global Powered Access Rental Market Report. Norty Turner, CEO of Riwal, says of the award-winning reports: "For Riwal, the IPAF Rental Market Reports are a prime source of information about the outlook of the powered access rental market. We highly value the reports because they cover many of the countries in which Riwal has operations. The reports are a valuable source of information for our country business reviews."

IAPAs category information and nomination forms will also soon be available for the International Awards for Powered Access (IAPAs), so keep an eye on [www.iapa-summit.info](http://www.iapa-summit.info) for information and news about how to reserve your place at this key industry event.

## Innovate



# Construction projects drive Nordic boom

Major construction projects are driving accelerated uptake of MEWP operator training in countries such as Denmark, where international contractors are insisting that all powered access users hold an IPAF PAL Card.

IPAF member firm Riwal opened its first training centre near Odense, Denmark, at the end of 2017 in response to demand for IPAF-trained operators to work on a major data centre project.

The project's lead contractor MACE Group requires all powered access workers to hold a PAL Card or PAL+ qualification.

Kent Boström, IPAF's Representative in the Nordic & Baltic region, comments: "Mace Group standards stipulate that all operators of MEWPs on its sites must hold a PAL Card, so in response to this IPAF member firm Riwal opened the first approved IPAF training centre in Denmark at the end of 2017, and has trained a total of 588



Kurt Bostrom

operators, with 467 of those PAL cards being issued since the turn of the year. On the back of this demand for the PAL Card across the region, further IPAF training centres are set to open in Denmark and Finland during autumn 2018."

Iain Gardner, Mace's Senior Health, Safety & Wellbeing Manager and

Campus HS&W Lead, says: "Our collaboration with IPAF and Riwal has been very successful since arriving in Denmark in 2016. 'Safety First. No Compromise' is one of Mace's core values and along with the 'Four Steps to Safety' Mace group strives to ensure every person on our projects goes home safe and well every day."



## IPAF members can claim free Middle East Convention places

The fourth IPAF Middle East Convention will be held on 7 November 2018 at the Meydan Hotel, Dubai, UAE, and full IPAF members are eligible for two free places and associate members are eligible for one free place.

Additional delegate places are US\$50 for the event, which brings together key industry professionals, providing them with the opportunity to hear from international speakers on developments across the region and beyond.

A range of current topics, technical, best practice advice, and safety guidance

will be discussed throughout the event by a variety of speakers. See [www.ipaf.org/meconvention](http://www.ipaf.org/meconvention) for more details and to reserve your place now.

IPAF's CEO and MD **Tim Whiteman**, (on the right).





# New members

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

## CONTRACTOR/INDUSTRIAL USER

Janel Contracting Ltd, Kenora, ON P9N3X8, Canada

## DEALER/DISTRIBUTOR/HIRER/RENTAL

SEGAMAC SA DE CV, 66350 Nuevo Leon, Mexico

## DEALER/DISTRIBUTOR/TRAINING

Nijland Service BV, 7497 MR Bentelo, Netherlands

## HIRER/RENTAL

J Chin Equipment Sdn Bhd, 79150 Johor, Malaysia  
Pfeifer Rentals BV, 7141 JE Groenlo, Netherlands  
Access Hire Middle East LLC, Dubai, United Arab Emirates

## HIRER/RENTAL/DEALER/DISTRIBUTOR/ SERVICE/COMPONENT SUPPLIER

ESKALA MEXICO S DE RL DE CV, 76240 El Marques, Querétaro, Mexico

## HIRER/RENTAL/DEALER/DISTRIBUTOR/ TRAINING

Sudhir Power Limited, Haryana, India

## HIRER/RENTAL/DEALER/DISTRIBUTOR/ SERVICE/COMPONENT SUPPLIER/TRAINING

Leavitt Machinery, Surrey, BC, V2N 4C4, Canada

## HIRER/RENTAL/TRAINING (GROUP)

Butsch und Meier, 76534 Baden-Baden, Germany

## INSTRUCTORS

Martin Germann, 9444 Diepoldsau, Switzerland  
Michael McPhillips, Cavan, Ireland  
Robert Jamieson, Ashford Middx, Surrey, UK  
Martin Hastie, Airdrie, Scotland  
Barnaba Della Torre, I-23013 Cosio Valtellino (SO), Italy  
Paul Devlin, Liverpool, Merseyside, UK  
Bernd Mölls-Hüfing, 46499 Hamminkeln, Germany

## MANUFACTURER

Zoomlion Heavy Industry Science & Technology Co. Ltd, Aerial Work Platform Machinery Branch, 410200 Changsha, Hunan, China  
Magni Telescopic Handlers Srl, I-41013 Castelfranco Emilia (MO), Italy

## MANUFACTURER (GROUP)

Ruthmann Schweiz AG, 8302 Kloten, Switzerland  
Snorkel Middle East, Bahrain

## SERVICE

O'Reilly MEWP Services Ltd, Mulgannon, County Wexford, Ireland  
ZTR Control Systems, London, Ontario N6N 1E4, Canada

## TEST CENTRES

Sielke Arbeitsbühnen GmbH & Co KG, 27232 Sulingen, Germany  
Sanders GmbH & Co KG, 34474 Diemelstadt, Germany  
Basan GmbH, 08606 Oelsnitz, Germany

## TRAINING

Frank Thornton Health & Safety Ltd, Kanturk, County Cork, Ireland  
Salus Training Services, Rathcoole, County Dublin, Ireland  
Your Equipment Properties Ltd, Falkirk, Scotland



# Europlatform 2018 places booking quickly

Places are booking up fast for Europlatform 2018, jointly hosted by IPAF and Access International magazine at the Europa Hotel in Belfast, Northern Ireland, on 11 October.

Don Kenny, CEO of Loxam Powered Access Division (formerly the Lavendon Group), gives the keynote address, with other confirmed speakers including: Nina Aasland, Naboen; Brad Boehler, Skyjack; Ian Cameron, Diesel Progress International; Andrew Delahunt, IPAF; Julie Smyth, Highway Plant Co & Chair, IPAF Irish Council; Tim Whiteman, IPAF; and Euan Youdale, Access International.



Donny Kenny

The earlybird rate ends 11 October. Book your place at [www.europlatform.info](http://www.europlatform.info)

## Global auxiliary control decal update

IPAF has confirmed it has updated one of its most widely used global safety stickers for use on MEWPs – launching a redesign of the decal that is applied to machines to indicate where the auxiliary lowering controls are located.

Andrew Delahunt, IPAF's Technical & Safety Director, says: "The new design has been developed in consultation with IPAF members via its technical committees, and provides an easy-to-comprehend and clearly visible reminder to operators, managers

or supervisors of MEWP operations as to where the auxiliary lowering controls are on the machine.

"Wurge manufacturers, dealers, distributors, rental companies and owners of MEWP equipment to update the machines in their fleets with the new decal at their earliest convenience."

Visit [www.ipaf.org/contact](http://www.ipaf.org/contact) or check [www.ipaf.org/safety](http://www.ipaf.org/safety) for the full range of stickers and safety messages.



ST-448-111751

## IPAF Diary 2018

IPAF will be at the following events:

**14–15 September 2018**

**Platformers' Days**

Hohenroda, Germany

**23–25 September 2018**

**FM Expo**

Dubai World Trade Centre,  
Dubai, UAE

**25 September 2018**

**Elevation – UK open event  
and gala dinner**

DoubleTree by Hilton Hotel,  
Coventry, UK

[www.ipaf.org/elevation](http://www.ipaf.org/elevation)

**11 October 2018**

**Europlatform 2018**

Europa Hotel, Belfast,  
Northern Ireland, UK

[www.europlatform.info](http://www.europlatform.info)

**6–8 November 2018**

**Verticaaldagen Benelux**

Gorinchem, Netherlands

**7 November 2018**

**IPAF Middle East Convention**

Meydan Hotel, Dubai, UAE

[www.ipaf.org/meconvention](http://www.ipaf.org/meconvention)

**26 November 2018**

**International Rental Conference**

Shanghai, China

**27–30 November 2018**

**Bauma China**

Shanghai, China

**29–30 November 2018**

**OSH India**

Bombay Exhibition Centre,  
Mumbai, India

ALL IPAF EVENTS ARE LISTED AT: [www.ipaf.org/events](http://www.ipaf.org/events)





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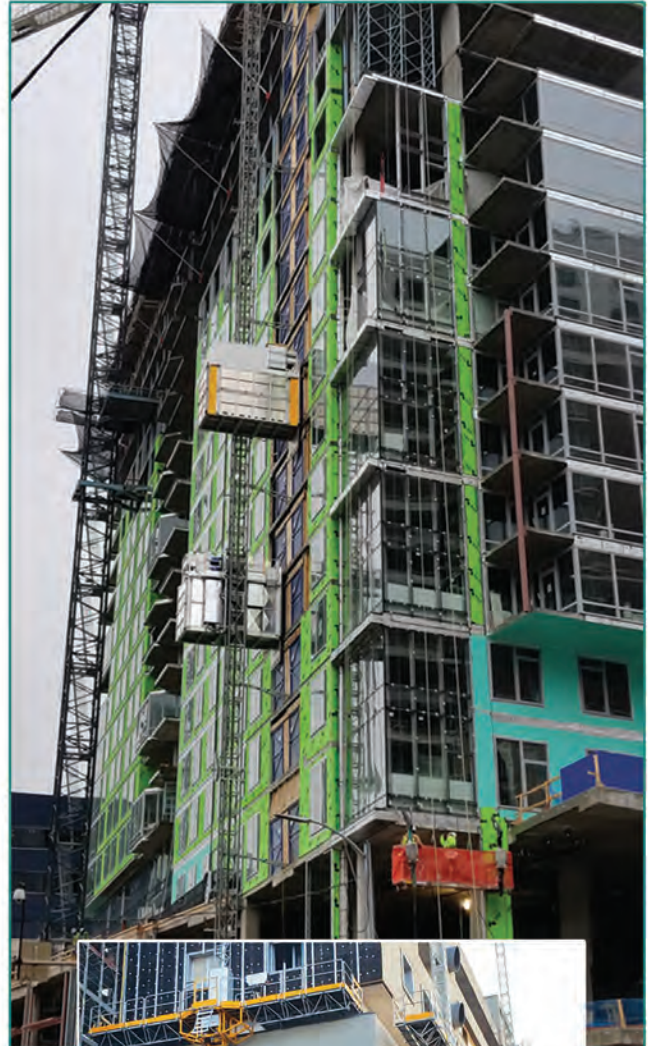
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# Good vibrations

**Apart from being big, the North American market is growing, which is good news for established companies on the continent and others hoping to make an entrance. *AI* reports.**

**N**orth America is the biggest access equipment market on the planet and for that reason the world is always interested to know how it is changing and growing – both those words are as relevant as they have ever have been.

United Rentals, which has the biggest MEWP fleet in the world, posted a revenue increase of 18.4% to \$1.89 billion year-on-year for the second quarter of 2018. The growth reflected acquisitions made in the previous 12 months but it also represented organic growth in the US and Canada.

The company's latest acquisition is BakerCorp, which also signifies its entrance into the European market. (See what CEO Michael Kneeland has to say on the subject in News report, in this issue).

Backing up the positive rental outlook is the American Rental Association (ARA). Its forecasts show rental revenues in the US are set to reach \$60 billion by 2021. Growth this year is expected to be 4.5% up, meaning the market will reach \$51.5 billion. Further increases will come in 2019 (5.6%), 2020 (5%) and 2021 (4.4%), it says.

The ARA explains that this forecast for 2018 is the same as its report in November last year, but growth from 2019 to 2021 has been re-forecast, increasing the percentage growth year-on-year. In Canada, meanwhile, rental revenues are forecast to reach CA\$6.13 billion

## **Haulotte continues its drive into North America**



**China-based Dingli has taken part ownership of MEC.**

by 2021. It says growth should be 4.1% in 2019, 5% in 2020 and 4.7% in 2021.

## **Major consolidation**

With consolidation in full swing and with United making its first move into Europe, it begs the question whether a Europe-based company might make the first steps into North America. At first glance, Loxam might seem a likely candidate considering its continued spending spree, including Haulotte's rental

business in Italy a couple of months ago.

*AI* interviewed the CEO of Loxam's new Powered Access Division (PAD) division Don Kenny, previously CEO of Lavendon Group, earlier this year. He explains there were big challenges for established European rental companies thinking of coming to America.

"If you were talking to me with my previous hat on at Lavendon, I would say I am very happy to go and open up in America, I just need an investor to give me a £1 billion to do it," explains Kenny.

"The one company in the US that was comparable in size to Lavendon was NES Rentals, which was bought by United Rentals last year for \$1 billion. That's the entry ticket.

"I can't comment on what Gérard's thoughts about it are. When I was at Lavendon, I did have shareholders ask me about it and that was my response."

As Kenny says, there are now more than 600,000 MEWPS in the US and United Rentals has got near-on 130,000 of them. Pro-rata, that is about the same size as Nationwide Platforms, which has a fleet of around 10,000 and is the UK's biggest access rental company.

"It's a vastly different market, and scale is huge. To go in to one state with three or five depots would be ridiculous. You are up against a thousand depots and even then, they haven't saturated the market."

The three biggest manufacturers in the world are also based in North America. JLG, Genie and Skyjack all reported considerable growth in the first stages of 2018. JLG increased its revenue by 18.4% to \$1.16 billion in the third quarter of its 2017/2018 financial year.

Terex Corporation's AWP segment, which includes Genie and Terex light towers, increased sales by 27% in the second quarter of >



## NORTH AMERICA

its financial year, to \$158 million. Matt Fearon, Genie president, Terex AWP commented, "Rental fleets are growing, they have high utilisation and their outlook for the second half of 2018 and 2019 remains positive."

The industrial division of Linamar saw considerable growth in the second quarter. Until the recent acquisition of the MacDon group, a Canada-based agriculture harvesting equipment manufacturer and service provider, Skyjack made up the significant majority of Linamar's industrial division.

Thanks to the acquisition the Industrial segment's sales increased 80.2%, or \$289.5 million, to \$650.6 million in the second quarter, compared to the same period in 2017. Nevertheless, there was strong growth from Skyjack with increased sales of booms and telehandlers in North America and market share gains for booms on the continent.

The fourth biggest company by sales revenue, Haulotte, based in France has been trying to expand its presence in North America for some time. Total revenues in the quarter were €139.7 million, up 9% on last year. It said sales of aerial lifts continued to improve in North America, with 5% growth, offset by shrinking scaffold sales, which interestingly dropped 10% leaving the region down 1% in total for the company.

### Greater competition

Understandably, most companies in the access market would like to be part of the action in the US. Traditionally, it also hasn't been an easy task for manufacturers based outside the continent to make their presence felt.

But, with a greater number of scissor and boom manufacturers springing up outside North America, notably in China, competition is increasing globally and there are serious attempts to make headway in the market. For example, in December last year, China-based MEWP manufacturer Dingli announced it had acquired 25% of US-based MEC's shares, valued at \$20 million. It followed the \$20 million deal with Magni in 2016, in which Dingli took a 25% stake in the Italian company.

A Dingli spokesman said, "With huge demand for replacement and growth expected, the US is a market with tense competition both technologically and commercially for AWP brands. As the place where AWP's first originated, and which is home to world class AWP manufacturers, it is understandably difficult for brands from elsewhere to access it."

The plan for Dingli is to expand its sales channels through dealers and direct sales to rental companies with the help of MEC, which has been in the domestic market for 40 years.

It's not just the Chinese manufacturers showing interest in the evolving US market, European producers of more niche products are seeing the potential too.

Indeed, the realisation that tracked platforms, compact low level access lifts, along with a wider range of truck mounted platforms, can offer greater flexibility in North America is



Acme Lift Company reaches out.

increasingly being felt in the market.

Leader of the niche market in North America is ReachMaster, which is the US distributor and service provider for a range of European manufacturers, including Ruthmann's truck mount and Bluelift crawler range, PB Lift and Almac.

Ebbe Christensen, president of ReachMaster, comments, "Although we are more maintenance-related so less worried about infrastructure than the mainstream people. We have been going up for the last five years and we are still going up."

As mentioned this is due to an increased interest in products like track mounted lifts. Teupen North America, for example, has experienced a robust 12 months, according to its president, David Kesser.

"Since opening the subsidiary here in 2009, the last two years have been the largest revenue increases for us year-on-year and 2018 looks to be more of the same," Kesser says. "Like all sectors, Teupen North America is seeing double digit increases in revenue." The company will be opening an office on the West Coast within the next 12 months, which will provide local



A Teupen, owned by United Rentals.

product support and parts distribution centre.

And, despite the increased competition in the sector, Teupen North America has seen a massive change from rental in its attitude toward compact, crawler lifts.

"The understanding of the size of the potential marketplace, tremendous ROI and that Teupen's lifts will be rented by their existing customer base, has started to take hold not only with national accounts but also with regional and local rental companies as well," Kesser says.

### Standards change

In the next few months, the industry will see substantial changes to the ANSI A92 standard for mobile elevating work platforms (MEWPs) that will focus on machine design, safe use and training. The Canadian CSA version has already been implemented.

It's been more than 12 years since the last overhaul of the standard, so many are bracing for a significant impact. While the manufacturing sector has been in preparation for years, there may be some considerable adjustment for rental companies and end users, particularly the smaller ones that are not set up to embrace the changes immediately.

On the manufacturing side, companies have been used to providing load and tilt sensors, for European markets, among many others, and are ready for the change.

"Many OEMs have already begun making changes to their RT scissors in anticipation of the impending ANSI standards," says Kristopher Schmidt, product manager for Skyjack. "The compliance deadline isn't until Spring 2019 however, modified machines have already been making their way onto rental yards.

ANSI 92.20 changes will move MEWPs toward global standardisation. The ANSI and CE standards will be more consistent, which is beneficial in the ever-evolving global marketplace.

"One example is the capacity limit load sensors that will be required on MEWP platforms, which are already required in many countries."



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**AI spoke to Don Ahern, owner of the Ahern family of companies, about the fast-changing global rental and manufacturing scene.**

# Breaking the mould

**T**he name Ahern is instantly recognisable in the US rental sector, and thanks to a growing number of OEM distributorships outside the country's borders, its influence is now being felt on a global scale.

Heading it all up is the man himself, Don Ahern. Armed with the rare ability to harness success where others only see failure, Ahern has fought his way out of some tight spots. Notably, instigating Chapter 11 bankruptcy proceedings to see off a takeover attempt of Ahern Rentals, then almost doubling its US footprint while others scaled back in the financial crises and reversing the fortunes of a global MEWP manufacturer that almost ground to a halt – namely Snorkel.

There is a notable difference between the rental and distributorship branches in the Ahern family of companies. As its name would suggest Ahern Rentals, which makes up about 70% of the total business, is strictly a rental company dedicated to the US market, with no plans to stretch beyond those borders.

The global side to the company was kick-started by the majority acquisition of Snorkel some five years ago. It is represented by Snorkel manufacturing facilities in the US, UK, New Zealand and China and the Ahern distributorships, which are designed to offer



**Snorkel is releasing the 14.2m working height 400S and the 16m working height 460SJ (pictured), mid-size telescopic boom lifts during 2018.**

a complete sales and service package for the group's manufacturing wing, incorporating Snorkel and Xtreme.

## All-time high

Ahern Rentals' 24,500-strong MEWP fleet, with close to an additional 4,600 telehandlers, make up what the company calls its high reach offering. It represents a significant proportion of Ahern's total 51,000 unit rental fleet.

"The North American rental market is as good as it's ever been," says Ahern.

"We have statistics that we have tracked for decades, and one of the primary statistics is the average rental rate and it's at an all-time high. Utilisation is very good too," says Ahern, before qualifying it with a more cautious statement. "I feel like we are on the front side of the bell curve but we do feel that we are on the top, or towards the top.

"I don't think we are going to have a downturn but 2019 could possibly become the top of that curve. Things will level out."

Ahern points out that he has been around long enough to learn that cycles are a part of life. "My father started the company the year I was born and never in those 65 years has there not been a cycle. To expect things to be different is a kind of insanity.

"We had a very slow recovery after the last

downturn, which from Ahern Rentals' point of view was the middle part of 2010. It was tripping along the bottom of the ocean through 2011 and 2012. Once it started taking off after 2012, the measurable improvements were felt day-after-day, rather than month-after-month."

Between 2009-2010 Ahern Rentals opened 35 major depots, moving the company beyond its traditional central/west base. "We came back with a national footprint," says Ahern. "In a way that was one of the real diamonds in the rough. You could cut the US into four segments from east to west, we now have an equal amount of revenue in each quadrant."

That come-back was made bitter-sweet with the ensuing Chapter 11 drama that befell the company. Ahern filed for Chapter 11 bankruptcy proceedings during a difficult financial period, in which the company received an unwelcomed takeover bid and saw bankruptcy as the only option to keep ownership of the company. "We were forced into Chapter 11 by a hostile takeover," says Ahern. "We were actually never bankrupt, in fact, we had \$51 million of liquidity, which is substantial."

Ahern is also keen to remind the industry that he honoured all debts, "100% of debtors, including unsecured creditors, were paid.

"Usually, in bankruptcy there are losers and there were no losers with us. That is very important to me. There is a certain amount of shame that comes with the word bankruptcy, but you can do it right and honourably. And

**John Gill, CMO, Snorkel/Xtreme; Don Ahern, owner of the Ahern family of companies, and Matthew Elvin, CEO Snorkel/Xtreme.**





### The 3,000 square metre production facility in Jintan, outside Chanzhou, China.

because we had lots of money, we paid every invoice we could find. Everyone got paid.” Ahern Rentals finally exited the Chapter 11 process in June 2013.

In a fitting testament to that integrity, the Ahern family of companies flew past the \$1 billion revenue mark, in the last 12 months (LTM) previous to the interview carried out in mid-May and is on course to hit \$1.1 billion.

### Zero acquisitions

It may be a surprise to learn that Ahern Rentals is neither interested in acquisitions nor moving outside the borders of the US. “From the rental point of view, we will continue to grow at a very steady moderate growth, exactly as we always have, and it will be organic, with certain types of debt instruments.”

He adds, “There is absolutely no opportunity for us to do rental outside the US, and we would not look at a rental company in any foreign country at all.”

One of the reasons being, as the OEM side of business grows internationally, Ahern doesn't want to muddy the waters with an international rental company. “Our customers are predominantly rental customers. We don't want to compete with them.”

Although, that isn't the primary reason. “Sales are different to rentals, it's cultural. Rental is done in a local language with local traditions, and relationships that spawn from childhood, all the way through adulthood.

“I think it's very challenging for large rental companies being involved internationally - to be effective when they are not dealing in their native languages. I know others think differently, particularly in Europe.”

As Matthew Elvin, CEO of Xtreme Manufacturing and Snorkel, adds, “One reason European companies are cross border is because countries are smaller. The US is such a large marketplace you can be more than happy in the US without going anywhere else. Ahern has 92 branches and has still got a lot of room for opportunity just in North America.”

On the subject of OEMs and Ahern's majority acquisition of Snorkel in 2013, has the company become everything he expected it to be? “Almost,” he replies, “We are very pleased with it. We have taken a company that was distressed and was barely operating and was probably within a very short time of not operating.

“You could call it ground zero, and now we are annualising around \$300 million.”

Apart from heavy financial investments, there have been substantial changes to make production leaner and meaner. For example, the company recently created the new role of chief manufacturing officer (CMO) and promoted John Gill, who joined the company in 2016, to the role. He reports directly to Elvin.

As Elvin explains, “It has gone from a



company that didn't really respond to the market to one that now puts its money where its mouth is. We have customers returning to the business that left the brand during that period. There is an opportunity and desire for other choices in the market place, like us.”

Among the growing number of distributorships are Ahern Australia, Ahern Japan, Ahern Deutschland, Ahern Canada and Ahern Chile. Where applicable they also distribute products from other manufacturers, like Ruthmann's Bluelift brand of tracked platforms in Australia and the UK. There are 11 of these outfits so far, with the 12th about to be opened. Ahern would like to have 100 of them in the next 10 to 15 years.

Taking the arrangement to the next level, Ahern also employs independent dealers to sell its products, either through its distributorships or directly from OEM level.

“It's important to be clear about the difference between dealers and distributors. Our model is to create distributors with our name: Ahern Deutschland, Ahern Australia. Then we sign dealerships that spawn out of those; a lot of those are rental companies.

Will the heavy-duty Xtreme Manufacturing telehandler products have a future outside of North America where they have traditionally been sold? “Absolutely,” says Ahern, “We have already pushed some of those outside of the US, particularly in mining and heavy industry.”

As with many manufacturers, Ahern is watching the emerging access nations too, and calculating the right time to make a move. One of the regions on the radar is Southeast Asia. “That's just one of the open territories for us. We have dealers that work directly in those areas. There is nothing to say we couldn't put a

distributorship there so that we have local time zone, language and spare parts - so you can have same day events, that's our model.”

### Good connections

Towards the end of last year, Snorkel officially opened its factory in China, to primarily establish and support the Chinese market. The plan is to produce for the local market, rather than it being an international production facility. As Elvin explains, “To be brutally honest we are not in a hurry, we want to get bedded down and get it right. We are very much listening to our customer base as to what should be the next model.”

One thing, among others, that connects the OEM side of the business to Ahern Rentals is the concentration on sales to Tier 2, or independent rental companies.

“We consider ourselves independently-owned and we certainly prefer and target the independently-owned folks,” says Ahern.

“The independents are the majority of the market. The real dominant people in the rental industry are the independents, so, we would rather go where the winners are.”

Looking at the US as an example, Ahern believes the rental market stands in the lower to mid-\$40 billion-dollar revenue bracket. Adding up the rental revenue from the mighty players like United Rentals, Herc and Sunbelt, Ahern calculates it comes to just over a fifth of the total annual market, with independents being in the vast majority.

“So, for Snorkel and Xtreme it is logical to go where the majority of the business is, where there are thousands of people who make decisions and not just one where it is win or lose. For those reasons we stay away from the top five rental companies.”

One thing is clear, some of the biggest rental companies in Europe and North America are focused on acquisition. For Ahern it's a gift.

“We absolutely love it. There isn't anything that can happen better for us than United Rentals buying somebody. The flushing out of fabulous employees we can embrace, love and cherish. It is not only good for employees but for customers.”

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“ The independents are the majority. We would rather go where the winners are. ”



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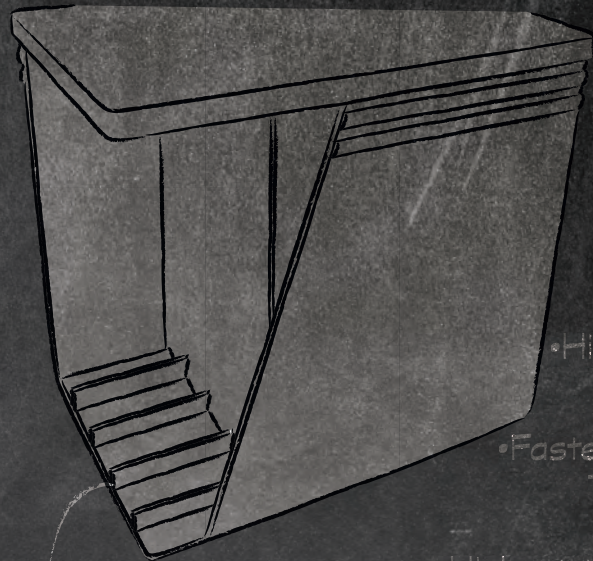
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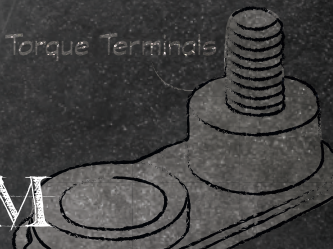


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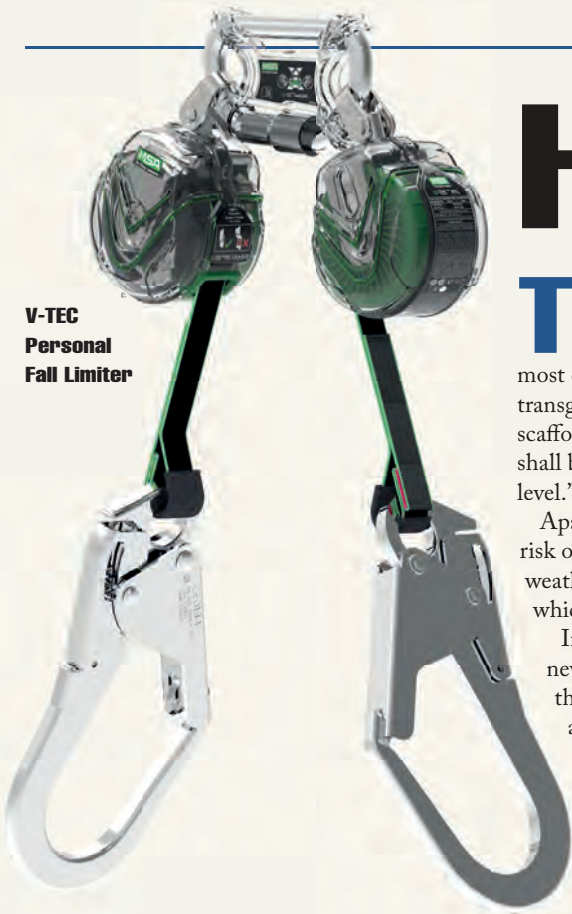
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# Hooking up

**V-TEC  
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**T**he scaffolding industry remains in the top three of the US Occupational Safety and Health Administration's (OSHA) most cited violations, with its most frequent transgression relating to, "Each employee on a scaffold more than 10 feet above a lower level shall be protected from falling to that lower level."

Apart from being exposed to the everyday risk of a fall, scaffolders often work in adverse weather conditions – rain, high winds and ice, which can significantly increase that risk.

In response, MSA has produced a new personal fall protection solution, the V-TEC Personal Fall Limiter. Its aluminium scaffold hook is designed to be quick and easy to use, and comfortable to wear thanks to a lightweight construction.

The idea behind the product is backed by UK's National Access and Scaffolding Safety Confederation

with its guidance SG4:15 Preventing Falls in Scaffolding Operations, which includes: "Karabiners that are designed especially for attaching to scaffold standards make an effective and efficient anchor device."

Tim Bissett, MSA's technical manager, says, "In the hierarchy of fall protection the first step is to avoid the risk- which we realise is not practicable for scaffolders much of the time. What the V-TEC scaffold hook solution provides is a fall protection system that enables a scaffolder to carry out their work while secured to either horizontal, vertical, or tube connections between joints."

Also suited for ladder work, with a single-handed operation, the aluminium scaffold hook has an easy-on, easy-off hook with an automatic closing feature.

**AI**

## RISK PREVENTION



**Patrick Liébus, president of CAPEB, Jean-Jacques Châtelain, treasurer of IRIS-ST and Eric Limasset, president of Layher.**

According to IRIS-ST figures, falls from height account for 17% of work-related accidents. In this context CAPEB, IRIS-ST and scaffolding manufacturer Layher have joined forces to reinforce prevention of occupational risks.

Under the agreement, the France-based Confederation of Crafts and Small Building Enterprises (CAPEB), the Institute for Research and Innovation on Health and Safety at Work (IRIS-ST), and Layher have renewed their partnership to improve the working conditions of builders and their employees working on scaffolding. It is particularly pertinent as 50% of the companies concerned use scaffolding very regularly.

The agreement covers the testing of equipment, telephone assistance and the implementation of risk prevention to better support the management of construction companies.

Thanks to the extension of their collaboration, Layher and CAPEB wants to raise awareness even more among craft companies to the issues related to work at height and the use of scaffolding. One of the benefits will be that employers and employees will receive dedicated telephone assistance on building sites and will also be assisted on the installation of scaffolding, following the delivery on site.

**>**

# BIM height work

Advances in digital technology have been driving a trend towards total site solutions as data is brought together from all corners of a construction site and beyond. Building Information Modelling (BIM) offers a way of co-ordinating information about a new construction, right through from planning and design to production and even maintenance after completion. This holistic approach is having as much of an effect on providers of scaffolding as it is on any other player.

Ulma recently used BIM for the restoration of the Ágora building of the Palace of Sciences

and Arts in Valencia, Spain, which has an unusual elliptical geometry.

The entire building was covered with multidirectional BRIO scaffolding to refurbish more than 4,247m<sup>2</sup> of space, both externally and internally.

BIM technology was used to help the various collaborators interact effectively. It allowed Ulma to plan each section and register them all in a single place that was accessible to all parties.

For the north and south ends of the building, BRIO Perimeter scaffolding with one-metre cantilevered extensions was used to reach 33m and cover a total surface area of 1,000m<sup>2</sup>.

For the four central phases of the building, which stretch to a height of 48m and have a surface area of 2,600m<sup>2</sup>, the same BRIO Perimeter scaffolding was used but with cantilevers that extended up to 3m and push-pull props that were adjusted to adapt the scaffolding to the varied curvature.

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**Palace of Sciences and Arts, Valencia, Spain.**

## NEW PASMA CHAIR



PASMA, the international not-for-profit body dedicated to the mobile access tower industry, has appointed Brian Parker, business development manager, technical support, at access rental company AFI, as the new chairman of its

Training Committee.

A spokesperson said, "Brian has over 20 years' experience in training for the safety sector and holds many credits to his name, including Grad IOSH and MIIRSM, and has served on the BSI Committee for the review of BS 8460:2017 - safe use of MEWPs. His skills and expertise will make a most welcome contribution in developing the future of PASMA training."

Parker has held senior safety roles, including 15 years as a senior IPAF training instructor.



The Metropolitan Opera House undergoes \$56 million restoration.

# Opera venue comes to life

**Superior Scaffold undertook a major project to convert an important concert venue.**

The Metropolitan Opera House, or Met, located at 858 N. Broad Street, Philadelphia, US, is undergoing a \$56 million restoration as a new Live Nation concert venue. The beautiful building has been sitting vacant for years. The 39,200-square foot theatre was built in 1908 by Oscar Hammerstein I and called the Philadelphia Opera House. When it first opened it was home to the Philadelphia Opera Company and sat some 4,000 people as the largest venue of its kind in the world. In 1910 Hammerstein sold it to the Metropolitan Opera of New York and ever since it's been known as the Metropolitan or Met.

The large building that takes up a full city block at Broad and Poplar Streets will be converted into a 3,500 person venue. The main theatre will be transformed for seated and standing-only general-admission concerts; however, the opera house also contains a number of smaller rooms that could be used as additional performance spaces or be converted into lounges.

The building boasts incredible decorative artwork, ceilings, walls, balconies and architecture and will open in all its renovated glory in December 2018.

Superior Scaffold was brought in by GC Domus to provide access to the entire interior and exterior of the building. And what an enormous job it is.

"Let's start with the interior of the theatre itself," says the company. "This gigantic theatre was a real challenge because of the slope elevation where the seats and walkways go. We had to get multiple restoration crews to the

ceiling and all sides of the theatre. To do that we used system scaffold that was 120-foot-wide by 162-foot-long with a deck that sat just below the ceiling at approximately 75-foot-high. We also provided work decks at every 6-foot, 6-inch level to touch the exterior walls. We had two stair towers, one on each side, to give everyone access to their working position."

## Adaptable design

The equipment was loaded in from access doors near the stage and carted into place where crews then erected the scaffold. To assist, Superior Scaffold enlisted the help of a 1,000-pound BetaMax Maxial track or ladder material hoist. The Maxial Track scaffold hoist is the safest, fastest, scaffold delivery system available, according to the company, and is adaptable. You can mount it inside or out and it is flexible enough to work perfectly with this configuration.

This enormous scaffold got painting, masonry, carpenter crews and more up the to the ornate ceiling where they could do their work.

Superior also installed scaffold on three sides of the building and debris netting for safety.

The front of the theatre, Broad Street, has to provide access to the façade, which includes the illustrious balconies and also to the parapet as well. Superior also installed a 245-lineal-foot canopy out front for pedestrian protection. It's 10-ft-wide by 8-ft-high and has parapet walls on the perimeter of the canopy. It's also

anchored to the sidewalk, engineered and rated at 300 pounds.

The lineal scaffold is 245 ft by 4-ft-wide and 65-ft-high with work decks every 6-ft, 6-inches and a top deck approximately 4 ft below top of wall. There is one stair tower for access to the work decks and the BetaMax Maxial track hoist to get material up.

The scaffolding on Poplar Street is 165-lineal-ft by 4-ft-wide with work decks every 6 ft, 6 inches for access and a top deck that sits 4 ft below the top of the wall. There is also a stair tower to access the work decks and black debris netting all the way around.

Superior says. "It's all part of the revitalisation effort the city and developers have embarked on.

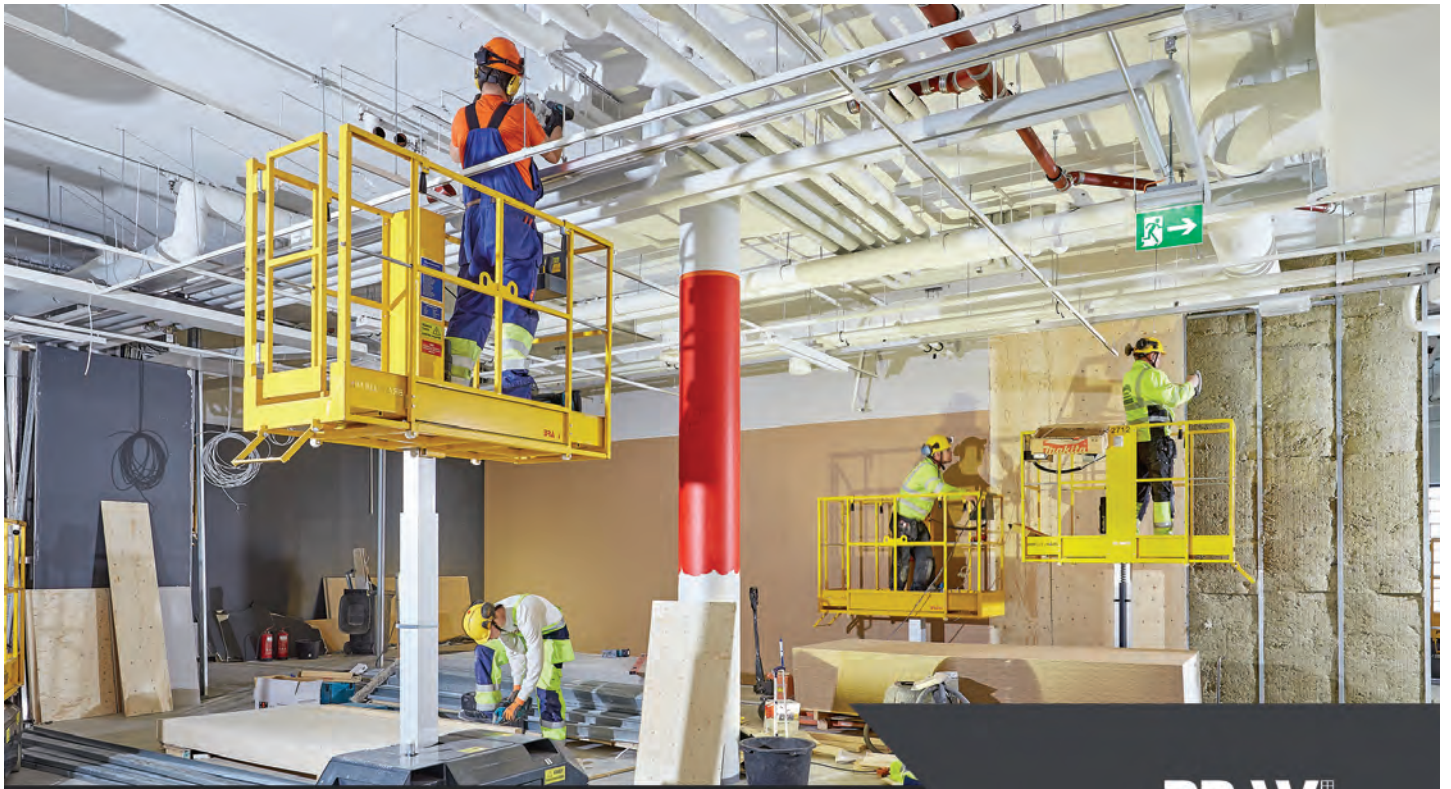
"In its prior life this venue was an opera house, a movie theatre and ballroom and in its last incarnation was a church. The Holy Ghost church congregation still holds stake in the theatre and will continue to hold Sunday services at the theatre when it reopens in December."

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**The building takes up a full city block and will be converted into a 3,500-person venue.**







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# Remote renovations

The scaffolding access installed during the renovation of Lindisfarne Castle in the north east of England is impressive by any measure.

Layher's modular scaffolding system and the skills of contractor John Laidlaw and Sons combined provided the expertise.



**Layer scaffolding, Lindisfarne Castle, Scotland.**

The structure, which in part dates back to the 1400s, sits at the end of a tidal causeway some three miles from the mainland, and there was a need to address a long history of water ingress related issues. With the focus on conservation works to stonework, windows and roofing, the major project is designed to halt further damage and to secure the building's long-term future.

The three-phase programme is scheduled to run over a period of some 18 months. Sitting high on a volcanic extrusion, it is characterised by a steep south-facing cliff-face against the

North Sea with a further slope on its northern side. This variation in terrain had to be reflected by the scaffolding designs.

With tidal issues to accommodate and inclement weather for much of the project, wind speeds could vary by 40mph in excess of 90miles per hour.

"We were unable to tie-in into the cliff-face as this would have caused permanent damage to the rock so we used a combination of buttresses and kentledge," said Allan Laidlaw, managing director at John Laidlaw and Sons, appointed by main contractor Datim Building Contractors, working for The National Trust.

"This allowed us to build a firm base to a height of 24m up to the walls of the castle itself upon which the access lifts could then be erected. On the opposite side, we pushed the scaffold further back from the walls to provide sufficient room for an installation that sloped gradually upwards towards the castle. Again, buttresses were used."

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## CLEANING CONCORDE

UK powered access rental company Star Platforms provided a Skyjack 6826RT diesel scissor lift to support maintenance of a retired Concorde aircraft.

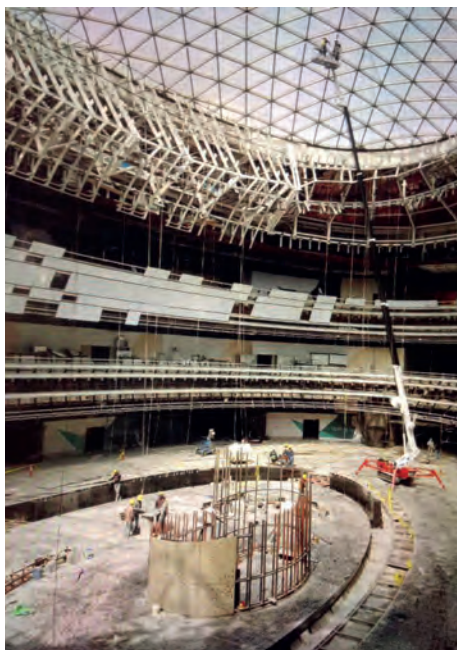
The project at Brooklands Museum, Surrey, was an exterior drywash of the iconic Concorde G-BBDG. After a brief discussion with the hire desk team, a Skyjack 6826RT scissor lift was selected.

With a working height of 9.75m and a lifting capacity of 567kg; the compact scissor is suited to outdoor maintenance tasks and could be positioned alongside the aircraft with precision, said the company.



**Concorde project at Brooklands Museum.**

# Iran's mega-mall



Palazzani has sold a Ragno TSJ 35 to the Iran Mall, based in the northwest suburbs of Tehran, Iran.

It will be one of the world's biggest commercial malls, two and a half times the size of the largest in Dubai.

The unit has been supplied through local dealer Istaboojan Raeen Novin. It has an Eco (Diesel+AC) power option and is already operating inside the mall.

According to Palazzani, 10,000 workers have been responsible for the load-bearing walls, costing around \$2 billion. The mammoth commercial centre will host as many as 1000 shops, two hotels, cinemas, a fairground, offices, a cultural centre and sports complexes including an ice rink. The interior design will emulate the typical Persian culture, while outside there will be large gardens with fountains, trees and cafes.

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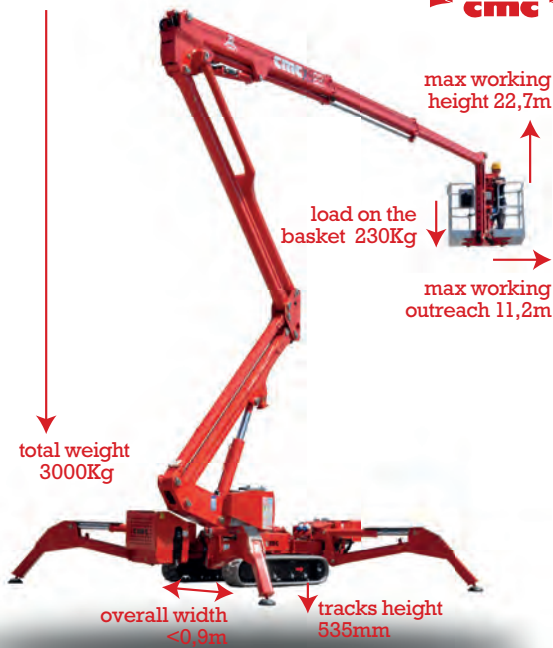
**Palazzani platform at the Iran Mall.**



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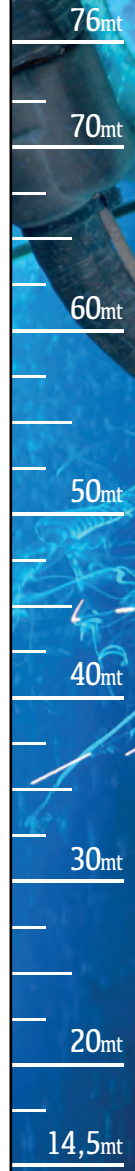
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Harness, Load/Unload,  
Pre-delivery Inspection  
(PDI) and Management



IPAF Approved Training Centres train more than 150,000 operators every year in the safe and effective use of powered access platforms.

The IPAF PAL Card is recognised worldwide across industries as proof that your operators have been trained to the highest safety standards and meet all legal requirements.

Find an IPAF approved training centre at [www.ipaf.org](http://www.ipaf.org)

The IPAF operator training programme is certified by TÜV as conforming to ISO 18878.

