

cranes & access

March 2019 Vol.21 issue 2

Mastclimbers & hoists

Telescopic crawler cranes

Bauma preview 2

Vertikal Days preview

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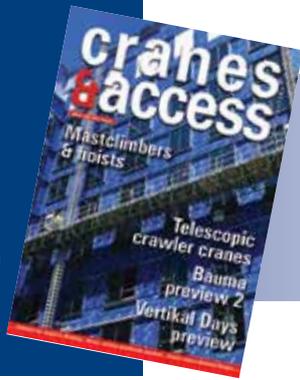
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On the cover:

A Hydro Mobile P series mastclimber owned by crane and access rental contractor Marr on a job in Boston. The twin mast set-up has a platform length up to 25.4 metres and platform capacity of up to 5,000kg.



C&A contents

17 Mastclimbers and hoists



25 Telescopic crawler cranes



33 Bauma final preview



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Comment 5 News 6

Tadano to acquire Demag, Terex to end US crane production, Two new Katos, LGMG opens US operation, Fraco acquires Saltec/Torgar, New Link-Belt RT, Hyva enters platform market, Lithium option for Genie scissors, New MEC booms and scissors, Balloo Hire acquired, IPAF - IAPA award winners, Multitel opens UK operation, BrandSafway acquires Century Elevators and financials roundup.



Mastclimbers and hoists 17

Mastclimbers are still the exception rather than the norm when it comes to the selection of work at height equipment for façade work - despite being the most convenient, safest and efficient access platform for the vast majority of the larger contracts. We take a look at the latest products and developments.



Telescopic crawler cranes 25

Telescopic crawler cranes are becoming increasingly popular and in many places the crawler crane of choice when it comes to cranes under 100 tonnes.

Contractors are increasingly appreciating their quick and easy set-up, ability to retract the boom at night and their pick & carry capability.



In the next C&A

The next issue (April/May) of Cranes & Access scheduled for early May will feature the Vertikal Days show guide, a review of Bauma, Tower cranes and Boom lifts. If you have any contributions or suggestions or are interested in advertising in this issue, please contact our editorial or sales teams.

Bauma final preview 33

With Bauma just weeks away, our second bauma preview covers more of the new products that are due to be launched at the show.



Vertikal Days preview 43

Returning for its second year at Donington Park, Vertikal Days will take place on May 15th and 16th and is set to be bigger than ever. We cover some of the new product launches and a take a look at a good cross section of exhibitors.



ARA show review 55

The ARA Show was held in Anaheim California last month, the first time it has been held on the west coast since 2003. While there were a good number of new products on show, most companies focused on new technology, from advanced telematics to new Apps. We take a look at some of the highlights.



regulars

ALLMI Focus 61

CPA 63

IPAF Focus 65

PASMA Focus 67

Training 69

Books and Models 71

Letters 73

What's on 75

Online directory 78

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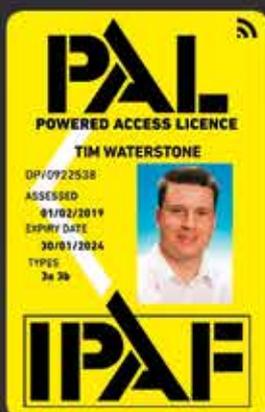
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Consolidation - the good, the bad and the ugly?

The past few years have seen an increasing number of acquisitions - from both manufacturers and rental companies - the latest being Tadano's agreement to acquire the Demag mobile crane business from Terex.

News of such acquisitions can set alarm bells ringing with suppliers and employees for obvious reasons, but also with customers concerned over less choice, the loss of some favoured products, a change of local contacts and higher prices.

The coming together of Demag and Tadano leaves three major European manufacturers of All Terrain cranes and will have a more significant impact on European and North American crane buyers who rarely consider suppliers outside of Europe, the USA or Japan. In other markets buyer have rarely had more choice of crane or aerial work platform manufacturers, given the rapid growth and development of Chinese manufacturers.

The acquisition, however, might just encourage companies such as Kato - which re-entered the European market with three city cranes in 2015 - to step up activities in Europe and the USA. Kato will unveil the new 100 tonne AT KA1000Rx All Terrain at Bauma. Designed for the Asian market, it could do well in Europe as many of its components are European including an EU Stage IV diesel.

The choice of crawler cranes is not affected given there is no overlap between the Tadano and Demag crawler crane lines - in fact they are complementary - but also most crawler cranes are now built in Asia by Kobelco, Hitachi Sumitomo, Sany, XCMG, Zoomlion and others.

At one time it looked as if the global aerial work platform market would be dominated by Genie and JLG, but in recent years companies such as Skyjack, Haulotte and Niftylift have increased their market shares, as have several smaller companies. More recently an increasing number of Chinese producers such as Dingli, Sinoboom, and LGMG have made substantial inroads in Europe and North America.

In the rental market consolidation has always been a factor with the last big wave seeing United Rentals 'roll-up' the US general rental market, while Ainscough Crane Hire was the latest to try and 'consolidate' the UK crane rental market to create a dominant national supplier. As with others before, it has struggled to maintain the position it created through acquisitions. It can also be argued that United only survived the financial crisis through creative accounting that was not discovered until after the market picked up. It has since gone on to become an \$8 billion business, but one that appears to require ever larger acquisitions to maintain its lead.

A reduction in the number of competitors in a market can be a catalyst for start-ups to flourish, while stimulating growth of smaller players as they exploit the confusion and uncertainties typically caused by mergers. Perhaps the Tadano Demag deal will encourage companies such as Link-Belt or Kato to expand their horizons? Far from restricting the market, acquisitions can result in more choice over the longer term.

Mark Darwin

Comment and feedback is most welcome via post, email, fax or phone stating if we may publish them or not: editor@vertikal.net

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