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# What a difference a year makes

In our last telehandler feature a year ago we reported on the enormous market expansion, growth of the compact machines and developments within the sector. Companies were claiming record sales and market leadership in almost a 'chest beating' fashion and all was sweetness and light. My, how times have changed. Mark Darwin takes a look at a sector a decimated by the current market conditions. Or is it?

**The telehandler sector appears to have gone from boom to bust within six months with sales to the construction sector in several major markets evaporating almost overnight.**

Rough estimates suggest that last year around 7,000 telehandlers were sold in the UK. About 3,000 of these were sold into the agriculture sector (which has been growing along with food prices) leaving in the region of 4,000 units going to the construction/industrial sector. The problem for the market-leading manufacturers such as JCB and Manitou, is that the vast majority of these (around 3,000) are employed in the house-building sector which has almost completely dried up. In stark figures this is a 43 percent fall in total sales or more than a 90 percent drop in that sector. However, as always, there is some hope in the form of the remaining

sales. Telehandler manufacturers offering specialist niche products such as higher reach, larger capacity, compact and 360 degree models are fairing quite well, with buyers looking for a telehandler to do a job rather than mass market, rental machines.

It is also apt that we feature self erecting cranes in this issue. Looked at logically, the self erector and telehandler should be in direct competition on low to medium level housing developments. In fact there should be many more self erector and small city tower cranes used in the UK than at present but the main advantage of the telehandler is its vast availability, low rental rate, (even more so at the moment), its ability to place and move materials inside a building and its ease of mobility. Unfortunately for the self erector, its many advantages are all too often dismissed or overlooked by UK

*Liebherr has concentrated on growing its rental fleet.*



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telehandlers

A 30 metre  
Manitou

contractors content to continue doing things "the way we always do it" or by looking at the low initial outlay rather than the space and productivity benefits. (See self erectors page 32).

## Still developing

Despite the global problems, manufacturers have continued to develop and improve their telehandlers and this includes several new entrants finally making it to market. Two relatively new machines trying to gain a foothold in the UK market a year ago were Haulotte and Liebherr. The Liebherr product was never intended or priced to be a big seller, and the company in the UK has concentrated on growing its rental fleet making it available to rental companies on a rehire basis. Haulotte after some initial success with its 14 and 17 metre machines is currently resigned to selling in small numbers and is

consolidating its operations to maximise sales when the market returns.

In the same way as a traffic jam equalises the performance of a supercar and banger - a recession hits all manufacturers - even market leaders. And both market leading telehandler companies - JCB and Manitou - have had their own set of problems recently.

## Troubled times

Manitou is going through a sticky time renegotiating the financing of North American telehandler, skid steer and mini excavator manufacturer Gehl that it acquired last September. The purchase, which looked expensive even at the time, is inevitably impacting on the whole company. Manitou had looked long and hard at ways to increase its market share in North America, however the market was already falling in September and has fallen drastically since as



*While being well received, Haulotte's 14 and 17 metre telehandlers have not yet achieved major sales.*

residential and some commercial construction has dried up. Six months after the purchase, and with a predicted 40 percent fall in revenues, Gehl was in serious trouble and in breach of its bank covenants. The company has currently entered into a forbearance agreement with its lenders while a deal is finalised, avoiding Manitou's threat to seek Chapter 11 protection. It has also repaid a portion of the outstanding credit line using cash generated from operations.

The collapse of the housing market in both the USA and UK has presented JCB with its own problems and it has made several sizeable headcount reductions in the UK as it slashed output. The company said that production in the first quarter of 2009 was 75 percent lower than the first quarter of 2008, and the anticipated upturn in the second quarter was showing no sign of materialising blaming the poor sales primarily on the lack of credit facilities from banks to fund machine purchases along with low levels of business confidence.

"Back in November we forecast a moderate second quarter recovery in 2009 based on the fact that Governments around the world had pumped a huge amount of money into recapitalising financial institutions and had committed to stimulus packages which included significant spending on public construction projects," said chief executive Matthew Taylor. "Two months later, despite the recapitalisation, customers are still struggling to buy machines because of a lack of available credit. And with Government-funded construction projects not moving forward quickly enough, this means the anticipated second quarter recovery simply won't happen."

### Agriculture saviour

For certain manufacturers, the impact of the decline has been partially offset by the buoyancy in the agricultural sector which after several hard years is replacing and adding new machines for feed and materials handling.

JCB has strong links in the agricultural side as does Merlo with more than half of its UK sales in the agriculture sector along with a strong range of specialist products including its market leading Roto models. The company says that "while the



*The collapse of the housing market has meant a production reduction of 75 percent for JCB.*



*The Super Compact P25.6 takes Merlo back into the compact sector which it pioneered back in the early 1990's.*

market is still tough it is fairing a lot better than most". It recently introduced two new models at the SIMA agricultural show, intended for 2010 production.

The Super-Compact P25.6 will take Merlo back into the compact sector which it pioneered with the P20.6 SC of the early 1990's. It says the most obvious feature of the new machine is the massive cab which has "fantastic visibility". At 995mm wide, the cab is identical to that of the larger Merlo models, even though the machine is just 1,800mm wide and 1,920mm high. With 2,500kg lift capacity and six metre lift height, the P25.6 uses Merlo's normal permanent four wheel drive hydrostatic driveline concept, albeit with a single speed central drop box, permitting a maximum road speed of 30 kph. The P25.6 was shown with its optional three point 2,500kg rear linkage and hydraulic Power Take Off.

The second new Merlo model was the Multifarmer 40.9 CS - the third line of Merlo tractor/telehandler products. Heavy duty axles from the P55.9 CS telehandler, gives this four tonne capacity machine a purposeful look. The Category 3,

rear mounted three point linkage will lift seven tonnes and has a standard 540/1000 rpm mechanical Power Take Off. The three section boom reaches 8.8 metres and Merlo says it will be making a two-section seven metre version available.

Another new feature on the Multifarmer is the 40.9 CS cab module - incorporating hydro-pneumatic cab suspension. Inside the cab, there is a completely new layout which will look very familiar to tractor drivers.

A 103kW diesel drives the permanent four wheel drive at up to 40 km per hour through a hydrostatic transmission and a three-speed drop box with oil-immersed clutch for 'on the go' range changes. Like the P25.6 this new Multifarmer will be homologated for use on the road as a farm tractor in many European countries.

Merlo UK, recently delivered its 7,000th telehandler - a 25 metre Roto 40.25 MCSS - to GT Lifting solutions of Lancing West Sussex, 15 years after it began importing the Italian-built machines.

GT's managing director, Graham Trundell said: "This brings our fleet to eight, 25 metre Rotos and demand

is continuing to grow, in comparison to the general house building market. The Roto offers spectacular performance and can often replace several machines on-site."

Trundell was one of the early converts to the Roto concept, buying his first unit in 1997 when he was special projects manager for Gamble Jarvis. GT Lifting Solutions now has several heavy-lift Merlo six and 10 tonne capacity telehandlers as well as the 18-strong Roto fleet with 16, 21 and 25 metre lift heights.

Merlo UK says that the specialised telehandler market remains strong, and believes the manufacturer is well placed to weather the current economic conditions with no borrowings, a very high percentage of its products manufactured 'in-house' and an unusually high level of automation.



*One of the 18 Strong Merlo Roto machines in the GT Plant fleet.*

## Attachment success

The combination of compact dimensions, loader-like performance and wide range of attachments has, says Bobcat, helped boost sales of its T2250. Now a new factory-installed second auxiliary line option and several more attachments extend its versatility further.

The second auxiliary line allows the machine to operate attachments requiring two hydraulic lines such as the angle broom attachment. It also allows the use of attachments with the hydraulic Quick-Tach system without having to disconnect the couplers.

Another feature on the latest version is the Speed Management System - a form of creep control - which is now standard. It allows the operator to decrease the forward speed at any engine speed and gives precise control on auxiliary flow when using attachments. Two new jib attachments are also available for



*The new Bobcat baler with tines attachment.*

the construction market. The first is a crane jib with hook. Bobcat is also offering a new extension jib, which like the crane jib, is Quick-Tach mounted.

The first of the new agricultural attachments is the Bob-Tach mounted pallet frame with bale spikes designed for transporting compacted hay or straw bales using two small-diameter forks.

With the new tubular bale squeeze handler, the T2250 telehandler can be used to transport straw bales with diameters from 1.0 to 1.3 metres. The handler is provided with two hydraulically operated tubular arms which retract to firmly grip the bale. The tubular bale squeeze handler is available with both Bob-Tach and Quick-Tach mounting systems.

## JLG manufacturing

JLG - with its Gradall, Lull and Skytrak as well as the JLG branded European and North American ranges - has by far the widest portfolio of any manufacturer in both product and brand terms, although only the JLG brand is marketed in Europe.

Late last year JLG announced that it is to drop the Gradall brand name re-badging the products as JLG but retaining the grey/blue colour scheme which will continue to be applied to the distinctive rear pivot steer models.

A much smaller player outside of its home market of North America, JLG also produces a range of ag machines for sale under its own name as well as building a version for Deutz-Fahr.

Three new JLG models at the SIMA show, the L2906H and 2906H both offer 5.8 metres lift height and 2,900 kg maximum lift capacity with the L model featuring a two metre overall height, while the 3507H has a 6.9 metre lift height and 3,500kg lift capacity.

Developed and produced at the JLG production facility in Maasmechelen, Belgium, all three feature Tier III Deutz engines and high-torque hydrostatic transmissions. Other enhancements include improved hydraulics with increased flow for smoother boom operation

*The new JLG 3507H*



*JLG launched three compact ag telehandlers including this 3507H model*

and a faster response for the bucket attachment. Optional automatic wheel alignment allows the operator to change more rapidly between the three different steering modes. Improvements also include a tighter turning radius, increased fuel capacity and enhanced access to service areas.

Robert Monteban, director of marketing for Europe, Middle-East and Africa, said: "The compact range of JLG telehandlers was developed to be a highly reliable and complementary work-tool on the farm. We see many business opportunities with the launch of this compact range of telehandlers."

In total there are eight JLG agricultural telehandler models with lift heights ranging from 5.6 to nine metres and lift capacities from 2,500 to 4,000kg.



*The new Deutz-Fahr Agrovector telehandler built by JLG*

JLG also manufactures machines for Deutz-Fahr which has shown two new models at the UK agricultural show - LAMMA. The Agrovector 40.8 and Agrovector 40.9 have lift heights of

eight and nine metres respectively with a 4,000kg maximum lift capacity.

The telehandlers are based on JLG's European model range, as such they have a slightly longer wheel base than some other purpose built ag telehandlers which, says Deutz-Fahr, helps provide a more stable base for heavier loads.

The new models include a new load-sensing high volume hydraulic system, powershift transmission with four forward and three reverse gears providing a top speed of 40 km per hour. The cab is equipped with air-conditioning and a high quality pneumatic seat as standard, while chassis levelling is optional.

## Telehandlers at Intermat

The recent Intermat show in Paris saw the launch of several new telehandlers including the first from a Chinese manufacturer, Sunward.

After showing its prototype at Bauma in 2007, Sunward is now ready to market the machine although it has still to appoint dealers or finalise a pricing structure for Europe. The Sunward SWTH3514 is a 3,500kg capacity, 13.65 metre lift height machine powered by a 75kW Perkins engine. Its two speed forward and reverse hydrostatic transmission claims a top speed of 35 km per hour and 60 percent gradeability.

The boom is stowed in a low position allowing the operator good visibility and the chassis - made from 22mm thick plate to reduce

twisting and deflection - can level on slopes up to plus or minus eight degrees and offers the usual three steering modes. This is not a compact machine (less than two metres high), the unit has a width and height of about 2.5 metres.

Compact telehandler manufacturer Bourgoin - based in Bournezeau, France displayed two of its three model compact telehandler range. Smallest is the 1,400kg, 4.80 metre CT1250 which weighing just 2,650kg, can be transported to site on a trailer behind a 4x4. The five metre CT1865 has an 1,800kg lift capacity and the CT2280 is capable of 2,200kg and 5.2 metres. Bourgoin is currently looking for dealers.

Another compact telehandler shown in prototype form at Bauma 2007 and now ready for sale following significant changes is the MZ 2706 from Imer. The compact, 2,030mm high, 1,860mm wide machine has a 2,500 kg maximum lift capacity and can lift 1,200kg to its maximum lift height of six metres. Powered by a Kubota 50kW, four cylinder engine

tradition of launching several new products at almost every show it attends. The largest machine on its stand was the new 10 tonne capacity Hercules 210.10. Two smaller models the 160.10 and 120.10 were shown at SAIE but the range has undergone several technical improvements including improved ground clearance.



The new larger T276H behind the T204H at Intermat.

The Icarus 40.17 will have a new cabin for next year and the Dedalus 26.8 - basically a 26.6 with an eight metre boom - will also be introduced. Dieci said that the Spanish market continues to be 'really bad', and that the UK was not much better. "We can see it being very quiet up to September after that maybe it will improve".

A few years ago its 14 metre Icarus 40.14 was a very popular model selling 4-500 per year. Now it is just four! Taking its place is the 17 metre Icarus 40.17 with man basket or jib, which will have a new cabin for next year. The company's current best seller is the 50.21 - a 360 degree, 21 metre machine - with the seven tonne capacity.

In 2007 it opened its new factory and produced 2,200 units, this would have grown to 2,500 last year, however production in the last two months of the year dropped considerably - running about 40 percent below 2007 levels.

### New Cats

The JLG/Caterpillar telehandler alliance has been rather quiet since the Cat TH255 was launched almost two years ago, however it has just introduced the new Cat TH514.

Aimed at tough applications, the TH514 has a load capacity of just



The smallest Bourgoin telehandler in the range - the 1,400kg capacity CT1250 is light enough to be trailered behind a 4x4.

under five tonnes, lift height of 13.7 metres and forward reach of 9.2 metres.

Load-sensing, flow-sharing hydraulics allow for all three boom functions to be operated simultaneously and proportionally.

The unit is powered by a 74.5 kW (101 hp) Cat C4.4 DITAAC mechanical control, turbo charged engine as standard and certified to Stage IIIA (Tier3) emission regulations. Also standard is a limited slip differential fitted in the front axle.

A range of Cat work tools extends



Another telehandler that was seen as a prototype at Bauma is the 2,500kg capacity MZ Imer.



The largest Dieci machine is its new 10 tonne capacity Hercules 210.10.

the versatility. A high visibility manual IT coupler comes as standard, with the option of a hydraulic quick coupler to allow work tool changes

Cat says the new cab has good visibility and features a new heating and ventilation system with optional air conditioning. The single lever

joystick with roller switches is easy to use, and all controls, including auxiliary hydraulics, are fully proportional. An in-cab LCD displays a wide range of information, and the keypad can be used to select various operating modes, including the three steering modes.



The 5 tonne capacity TH514 is aimed at more demanding applications



Two years after the first prototype, Sunward unveiled its SWTH3514 telehandler at the Intermat show.

with hydrostatic drive, it has a maximum speed of 25 km per hour.

Spanish producer AUSA unveiled its new Taurullift T276H which features a 6.1 metre lift height and a maximum capacity of 2.7 tonnes. A big brother to the two tonne capacity, 4.2 metre lift height T204H launched at Conexpo, it features permanent four wheel hydrostatic drive and Kubota power.

Italian telescopic manufacturer Farasin did not add to its range but said that its 4.5 tonne to 18 metre Roto 1845 Storm is the next telehandler to be updated. It also indicated that there may be a new 3.5 tonne capacity, 10 metre model ready for next year's Bauma.

With one of the most impressive outdoor stands, Dieci continued its

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Specialist telehandler sales are holding up relatively well.

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**Niche rules**

Looking at the current telehandler sales figures it would appear the sector is having a torrid time. For some this is true, however by offering specialist machines not used by the housing sector, sales are holding up relatively well. However, with more and more users experiencing specialist equipment, the 'run of the mill' telehandler may not have it all its own way when the market picks up. Contractors are now seeing

the benefits of the 360 degree, compact and large capacity telehandler models, while at the same time there appears to be a growing acceptance of the self erector and small city tower cranes for residential development. It will be interesting to see what sort of effect this will have on mid-range fixed frame telehandler sales when rental companies begin renewing their fleets.



The new Cat TH514



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White Waltham, Berkshire, SL6 3LW  
T: +44 (0)1628 828000  
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# The largest assembly kit in the world?

What is possibly the largest assembly kit in the world - a 600 acre oil refinery in Milford Haven - is being moved to Pakistan by industrial process plant dismantling and erection specialist company, Ailsbury.

Built in 1964 the refinery now belongs to Dutch oil group Petroplus but has not been producing for the last 12 years. Grant Thomas, Ailsbury's logistics manager explains: "Many developing countries need to increase their processing output quickly. To design and build a plant like this would take 10 years and probably cost £10 billion. It seems an enormous undertaking, but dismantling a previously-used facility and re-assembling it on a new site can take a third of the time and have a similar cost saving."

Thomas has been on-site for two years and the project is now in the final dismantling stage. The scale of the work is staggering and has required 1,000 tonne cranes and

This kind of work can't be attempted without the right equipment and Thomas claims that the job would have been impossible without his fleet of 12 Merlo telehandlers.

"The Merlos have been fantastic," he says. "We currently have six of the largest Rotos, three 17 metre lift Panoramics and three 13 metre units."

## Specialist rental

All are rented from Scarborough based specialist Greenwood Hire, which with 140 units boasts the UK's largest Merlo fleet. He says that the attraction of the Roto is its ability to quickly and safely access difficult and tight spots and complete the lift far more rapidly than if he had to bring a mobile crane in.

"With many of the lifting jobs being pipe work, these four tonne capacity machines are seldom stretched for capacity. The Rotos are terrific for loading the containers and for dismantling within the confines of the refinery structures," adds Thomas.

Each Roto 40.25 MCSS is equipped with a four tonne intelligent winch attachment. The load control system of the MCSS machines was designed and built in-house by Merlo. Unlike off-the-shelf systems, it allows the maximum safe capacity to be used at all times, adjusting automatically to asymmetrically outrigger extension and the like, very useful in tight quarters.

So important are the Rotos to this operation claims Thomas, that Ailsbury has trained and certified 30 operators as 360 degree telehandler drivers.



Each part has to be individually tagged for identification.

twenty axle, self-powered, remote control hydraulic trailers. Five ship loads of the larger dismantled plant items have already been sent to the client, Bosicor Oil, along with some 400 shipping containers. In all, about 80,000 tonnes of parts have been carefully catalogued and bar-coded for 'easy' identification at the point of reassembly.

C&a

telehandlers

A four tonne capacity, 25 metre lift Roto 40.25 MCSS with 4 tonne winch attachment



## Versatility the key

Thirteen JCB Loadall telescopic handlers originally purchased for winter road maintenance duties are proving productive summer performers for highways maintenance specialist Ringway.

Horsham-based Ringway is responsible for the ongoing maintenance of large sections of the country's road network under long-term service contracts with several local authorities. The company purchased the JCB 531-70 models earlier this year to load salt-spreading vehicles at each of its county depots. However, as weather conditions improve, the machines are proving equally adept loading aggregates into the company's ongoing highway maintenance vehicle fleet.

"We are committed to providing services to highway authorities throughout the year so these machines are in regular operation," says Ringway group plant and fleet manager Gary Condon.

"To maximise our investment it is important they are permanently employed with material handling duties irrespective of seasonal weather changes, so versatility was a key consideration."

Supplied by dealer Holt JCB and purpose specified for the role, the JCB Loadalls - decked out in Ringway's white livery - feature an extensive list of features to ensure safe and efficient operation in the high pressure and confined depot environments.

Ringway Infrastructure Services offers a series of long-term maintenance, highway reconstruction and related services to highway authorities. These range from network management, asphalt surfacing, and specialist road treatments to routine highway maintenance to winter activities including snow clearance, salt-spreading and then a 24-7 service for all highway related incidents.



Originally purchased for winter road maintenance duties, 13 JCB Loadall telescopic handlers are proving productive summer performers for highways maintenance specialist Ringway.