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A shift in the market?

The past year or two may have seen a fundamental shift in medium to large truck mounted platforms with the dominance of the two largest truck mount producers - German-based Palfinger and Finland-based Bronto - under pressure from Germany's other major truck mounted platform producer Ruthmann, which has increased its working height range to 72 metres. But it is the growth of the number of mid to large Italian-built truck mounted platforms that may change the market over the longer term. **Cranes & Access investigates...**

The larger truck mounted platform market has been led by Bronto and Wumag (now Palfinger) for many years, and both these companies are still at the forefront of design and innovation particularly above 70 metres as they continue to introduce new models. It is also well documented that Italian manufacturers now dominate the 3.5 tonne market, with a winning spread of products with good performance at the right price.

This North - South split in terms of market dominance may well be set

to change. We have often asked the question why Italian manufacturers are so popular on the smaller truck mounted platforms yet don't really feature when customers look for larger platforms. Indications suggest that actual product design and build quality is no longer the main issue, however when making a large single investment the stereotype of Italian manufacturers being unreliable remains.

In automotive terms, those old enough will remember the Lancia Delta rust fiasco of the 1970s which had a knock on effect on



C&A

truck mounts

The top end

other Italian products and was reinforced in some cases by poor parts and service backup. There are many anecdotal stories of Italian machines being stood waiting for parts or technical support. That is bad enough on a small machine, but way too risky on larger, pricier units. Staying with the automotive sector, Skoda had a similar problem - perceived as being unreliable and 'cheap', even after Volkswagen had completely revamped it. It has taken more than a decade to change ingrained attitudes to the brand.

Unfortunately the larger Italian truck mounted platforms are generally only just setting out on the road to conversion. And compared to the smaller units the price advantage is nowhere near big enough to tempt most northern European buyers away from the tried and tested German and Scandinavian competition. Even when customers are persuaded by a company's quality, reliability and product support lower residual values will also be a deterrent and this will not improve until the brand image gets stronger which in turn means consistent quality, parts and service back-up build up over many years.

However as the market for larger truck mounted lifts continues to grow - particularly in less developed areas such as Eastern Europe, Russia, the Middle East, Africa and Asia - demand for simpler/less sophisticated equipment at more attractive prices will begin to provide Italian manufacturers with significant business.

Looking at the companies producing the largest platforms - 80 metres plus - there really are only two manufacturers. Palfinger and Bronto have both been busy, particularly in the middle range where the Italian producers are adding product.

Bronto's smallest model is currently the 36 metre S36-XDT, while Palfinger, struggling to compete in the 3.5 tonne market with its range of German-built machines, acquired Italian manufacturer Sky Aces and formed Palfinger Italia to build simpler, lower cost platforms. Three models have been introduced so far, the 14 metre P140T, the 20 metre P200A and the recently announced 24 metre P240A. The first model, the P200A is apparently already selling well. Whether these Italian sourced platforms have the same quality and long term reliability as the company's German-built products remains to be seen. There is also some speculation that 'cheaper' Palfingers might affect the reputation of the larger machines, but for the moment they offer the Palfinger name at Italian prices.

Palfinger is better known for its larger ex Wumag/Bison machines topped out by its 102.5 metre WT1000 on a five axle Faun crane carrier, which has sold well. However using the All Terrain crane chassis has both good and bad points, while offering excellent off road capability and great manoeuvrability, the specifically designed chassis, is expensive and carries the higher parts and



This 39 metre CTE B-Lift 390 HR is using its 26.3 metre outreach to carry out a bridge inspection

maintenance costs all too familiar to crane rental companies. Its latest big platform - the 90 metre P900 is therefore mounted on a commercial chassis and is clearly aimed at the popular Bronto S-90HLA.

90 metre Palfinger

The new Palfinger P900 is mounted on a five-axle 48 tonne Scania truck and is its largest lift mounted on a standard commercial chassis. Bronto also has a 90 metre Bronto mounted on similar commercial chassis from MAN, Scania or Volvo and the two have very similar performance. (See comparison table.) The Bronto S-90HLA also offers a working height of 90 metres and compares well to the P900. Its maximum outreach is slightly more but with less (400kg) in the platform. Up and over height is two metres more but outreach at this height is two metres less. When set up the Bronto has a seven metre outrigger width – one metre less than the P900 and overall length is 600mm shorter and has less front overhang.

concealed under the equipment box. A dummy tank is fitted to the vehicle with the aim to prevent the theft of diesel.

Bronto XRs

Bronto which boasts the largest truck mount at 112 metres, has concentrated more in the 50 to 70 metre range, this year with the introduction of the completely new Bronto XR models which a replacement for the company's best-selling XDT range, including the 50 metre S-50 XDT-J. Two models were launched at Bauma, the 56 metre S 56 XR and the 65 metre S 65 XR. The S65 XR features a five section main boom, long two section jib and short articulating 'sky jib' which features more than 160 degrees of articulation. Mounted on a 26 tonne, three axle truck, it offers up to 40 metres of outreach and

How does the new Palfinger P900 stack up?

Models	Palfinger P900	Bronto S-90HLA
Working height	90m	90m
Max platform capacity	700kg*	700kg
Max outreach	32.3m with 530kg	33m with 400kg
Below ground reach	-8m	-9.5m
Max up & over height	58m with 29m outreach	60m with 27m outreach
Max outrigger width	8m	7m
Platform closed	2.15m x 0.95m	2.5m x 0.9m
Extended platform	3.45m x 0.95m	3.7m x 0.9m
Platform rotation	168 degrees	180 degrees
Overall length	16.15m	15.5m
Overall height	4.0m	3.95m

*With special heavy duty platform

The new Palfinger P900 offers up to 32.3 metres of outreach at heights of up to 46 metres while the maximum up and over height is 58 metres, the unit also has eight metres of reach below ground level. Maximum platform capacity is 700kg when using a special heavy duty platform although this is limited to 530kg at full outreach. Gross vehicle weight is said to be well under the 48 tonne capability of the chassis.

The P900 can hydraulically extend its front axle to provide extra stability without the need for a front jack. It also has a sleeper cab and an extra-large fuel tank which is

700kg of platform capacity, although this is reduced to 600kg with the hydraulically telescoping platform option. It also offers a 40 metre up and over height at which the outreach is around 15 metres. The S56XR is similar to the S65XR but utilises one less main boom section, reducing the maximum working height to 56 metres, maximum outreach however is 40 metres with 120kg platform capacity - three metres more than the S65.

Bronto says that when it first decided to develop a replacement for the XDT it took on board all of the feedback - both internal and external - in an effort to design a platform



Palfinger's latest is the 90 metre P900 mounted on a five axle, 48 tonne Scania commercial chassis



One of the new Bronto XR - the 56 metre S 56 XR



Palfinger P900



Ruthann TTS1000



Socage has a full range of platforms up to 70 metres with seven new models or variations between 51 and 70 metres. This is the 54 metre Forste 54TJJ



Ruthmann's latest addition - the Steiger T630 - gives it five models between 38 and 72 metres

which included lower running costs, a greater working envelope per tonne of Gross Vehicle Weight, greater productivity and reliability, along with a standardised design with more commonality between models and easier servicing.

The new models have up to 20 percent more working height for their weight, 15 percent more outreach and a significantly better working envelope. The two new units also offer an overall length of less than 12 metres, low axle weights, rear wheel steer, all-wheel drive with Hydro-Drive, 180 degrees of platform rotation, Bronto B+ Geometric Control System, longer outrigger jacks for levelling on slopes of up to 10 degrees, faster auto levelling (30 seconds set-up time), fully variable jacking

widths, a 2,000kg lifting eye on the main boom and a 300kg platform mounted winch or 1,300kg boom mounted winch. Other items include a sleeper cab, more spare payload and an electronic RPM optimiser for lower noise levels and reduced fuel consumption.

High performance Steigers

Probably the busiest platform manufacturer over the past year or two has been Ruthmann. It recently added the Steiger T630 and T380 units to its Height Performance series that now extends to five models, with working heights of 38, 46, 54, 63, and 72 metres all introduced since April 2012. And according to Ruthmann, two more models will follow next year - possibly on a two and a four axle chassis.

The 63 metre T630 is mounted on a four axle, 32 tonne chassis and boasts 39 metres of outreach and can be driven throughout Europe without special permits or exemptions. Features include a 20 metre top boom plus a 180 degree articulating jib, four locations from which to control the outriggers and the company's optional Lift-Up material handling system.

The 38 metre T380 is mounted

on a two-axle 18 tonne chassis, offering an outreach of 31 metres, a 180 degree articulating jib and a maximum platform capacity of 600kg. With a range of 4x2 and 4x4 chassis available, overall length is typically less than 9.8 metres. Ruthmann has been producing platforms under its 'Steiger' brand for almost 60 years having launched its first unit in 1954 and first telescopic unit two years later. During this time it has introduced several innovative products including the TTS 590 - a 60 metre unit on a Faun chassis in 1985 and the 100 metre working



Largest of Bronto's new XR range of machines is the 65 metre S 65 XR with two section jib and up to 40 metres outreach



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Ruthmann Steiger T300



CTE B-Lift 320 HR



Multitel MJ685



CTE B-Lift 510 HR

height TTS 1000 launched in 2001 which has a 40 metre outreach at 60 metres up and over height. Only two TTS 1000s have ever been built - one sold to Gerken and the other to Gardemann. The Gerken platform was bought by Abilene High Lift Aerials of Abilene, Texas and is working in the wind turbine maintenance sector

While there are now several models with a working height of 100 metres or more, the Ruthmann, mounted on a six axle trailer with a three axle tractor, still has the most outreach for this size of lift. The largest model in Ruthmann's current standard range is the 72 metre T720 (It also shows a TTS 1000 and TTS 840 in its literature). Launched at Bauma the T720 has a five section main boom and three section top boom capped by an articulating jib. The working envelope includes up to 38 metres of outreach with 100kg platform capacity, or 30 metres with its maximum 600kg. It can also work up to 12 metres below ground level and operate safely on slopes of up to two degrees.

The platform can be extended hydraulically from 2.42 metres to 3.82 metres. Overall chassis length is a relatively compact 13.7 metres. All major truck chassis can be used with drives including 8x2, 8x4, 8x6 or 8x8 and customers can choose between standard and sleeper cabs. Ruthmann also launched the 30 metre straight telescopic T300.1 at Bauma completing its three model series along with the 28.5

metre T285 and 33 metre T330. The new lift will be mounted on a 7.5 tonne truck and offer up to 21 metres of outreach and a 320kg maximum platform capacity. It has 185 degrees of jib articulation, while platform rotation is a full 180 degrees. Outrigger jacking is fully variable and unit can level on slopes of up to five degrees.

Italian growth

But 2013 has also seen several other manufacturers (mainly Italian) entering or increasing their presence in the mid to large truck mounted sector, including Oil & Steel, Multitel, Socage, Isoli, CTE, CMC and GSR mainly offering products in the 30 to 40 metre sector.

New range topper for CMC

Based in Modugno in south east Italy, CMC's range of aerial lifts includes spiders and truck mounted platforms up to 36 metres. Its three model PLJ truck mounted range includes the 25 metre PLJ 250, 29 metre PLJ 290 and 36 metre PLJ360 all of which feature jibs. The PLJ360 is the latest and largest in the range and features a three section boom topped by a three section telescopic jib/top boom. The working envelope includes 360 degree continuous slew, an up and over height of 24 metres and a maximum outreach of 24 metres with 280kg or 22 metres with the maximum 400kg platform capacity. It can reach almost 10 metres below ground level and operate with its outrigger jacks deployed within the chassis width. The three axle chassis has an all

Bronto S 50 XDT



up weight of 26 tonnes. Controls are located both in the platform and the superstructure cab with digital display indicating working height and safe outreach.

Isoli re-enters mid-range

Isoli is not new to larger aerial lift production and claims to have been one of the first Italian companies to produce larger truck mounted lifts offering units up to 60 metres in the past. However in recent years it has focussed on models under 27 metres but at Bauma it unveiled the 36 metre PTJJ 36.27, the first and smallest of a three model family which will include 48 and 60 metre machines. The PTJJ36.27 is mounted on an 18 tonne, two axle truck with an overall length of 8.6 metres and 3.7 metres overall height. The lift

employs a three section telescopic boom, two section telescopic top boom and short articulated jib with 155 degrees of articulation. Maximum platform capacity is 400kg at an outreach of 23 metres, while maximum outreach is 27 metres with 120kg. Since launch the company has up-graded it to the PTJJ 36.29 - increasing the maximum outreach from 27 to 29 metres.

CTE B-lifts

CTE platform range includes the B-Lift High Range - previously Bizzocchi - which has four models from 39 to 61 metres. The two smaller machines - the 39 metre B-Lift 390 HR and the 42.5 metre B-Lift 430 HR with outreaches of 26.3 and 25.6 metres respectively - are mounted on an 18 tonne

chassis and offer maximum platform capacities of 450kg. The 50.5 metre B-Lift 510 HR has a 35 metre outreach and is mounted on a 26 tonne chassis. The largest B-Lift - the 61 metre 620 HR - also has 35 metres of outreach but is mounted on a 32 tonne chassis.

Socage revamps

It was just over four years ago that Fiorenzo Flisi acquired Socage and much has changed since then. It now offers a full range of platforms up to 70 metres and has seven new models or variations between 51

and 70 metres. At its dealer day at the end of September it unveiled several new and upgraded products as well as a new spare parts catalogue and on-line parts ordering system. One of the new products in the mid-range was the Forste 37DJ (37.2 metre working height, double articulated boom with jib) mounted on a two axle 11 tonne chassis. The platform has a maximum outreach of 23 metres with 80kg in the platform and about 19.5 metres with the maximum 300kg platform capacity. It also revealed details of several new larger truck mounted



CMC's latest and largest - the 36 metre PLJ360



Part of the Socage production facility producing large trucks



The Socage TJ35

platforms under development, including the 57 metre TJ57, TJJ61, TJ62, TJ65, TJJ66, TJJ69 and the 70 metre TJ70.

The company says that it has made more than 100 changes to the existing range including lowering the deck height, making it easier for operators to load tools and gain access to new component covers. Socage is having some success with its larger truck mounted platforms. As well as selling a 70 metre TJJ70 to the USA, it has already sold four, 54 metre TJJ54. The platform has an outreach of 40 metres and a 600kg platform capacity. It is also able to carry out underbridge work.

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Multitel launched its MJ range two years ago with the MJ320

Eagles rise

Oil&Steel has its Eagle truck mounted range including the range-topping 60 metre Eagle 6035 mounted on a four axle - 32 tonne truck with an overall length of 11.5 metres, a width of 2.5 metres and overall height of 3.99 metres. Platform capacity is up to 500kg and outreach 30 metres. Other Eagle models include the 35 metre 3526 and the 52 metre 5227.

Big Multitels go mainstream

Multitel Pagliero is without question the market leader in terms of units produced, and has a long history and some notable success with larger models, although mostly in France and Southern Europe. Its

current line-up is topped by its 75 metre MJ750, while its latest model - the 68.5 metre MJ685 - was launched at Bauma earlier this year. Mounted on a 32 tonne chassis the lift has up to 35.5 metres of outreach up and over height of around 50 metres and which at height it has 18 metres of outreach, and all from a very compact footprint. It also offers up to 16 metres of reach below ground level. The MJ range was launched two years ago with the MJ320 and the MJ420, does not feature Multitel's traditional 300 degree jib rotation gearbox/mechanism and as such is a separate product range rather than a replacement for the J300 series. With an overall chassis length of 10.6 metres and height of four metres the new lift is said to be ideal for inner city working, as well as other high reach applications such as wind turbine work.

GSR adds a notch

GSR moved into the over 30 metres sector two and a half years ago with the 32 metre E320PXJ. Mounted on a 12 tonne chassis the unit has a heavy duty riser four section telescopic boom and articulated jib, providing a maximum outreach of 20 metres and 280kg platform capacity.

As the above demonstrates, when it comes to mid to larger range truck mounted lifts there is more choice than ever, with the Italian producers clearly looking to extend their dominance of the sub 24 metre market up to 35 metres and then above. While they may still have some work to do to convince more sceptical western buyers to invest in their larger models, expect this to change as they continue to introduce new variations and innovations. The net result is likely to be an expansion of the overall market and more innovations for truck mounted lift users. Watch this space.



GSR moved into the 'over 30 metre sector with its 32 metre E320PXJ

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