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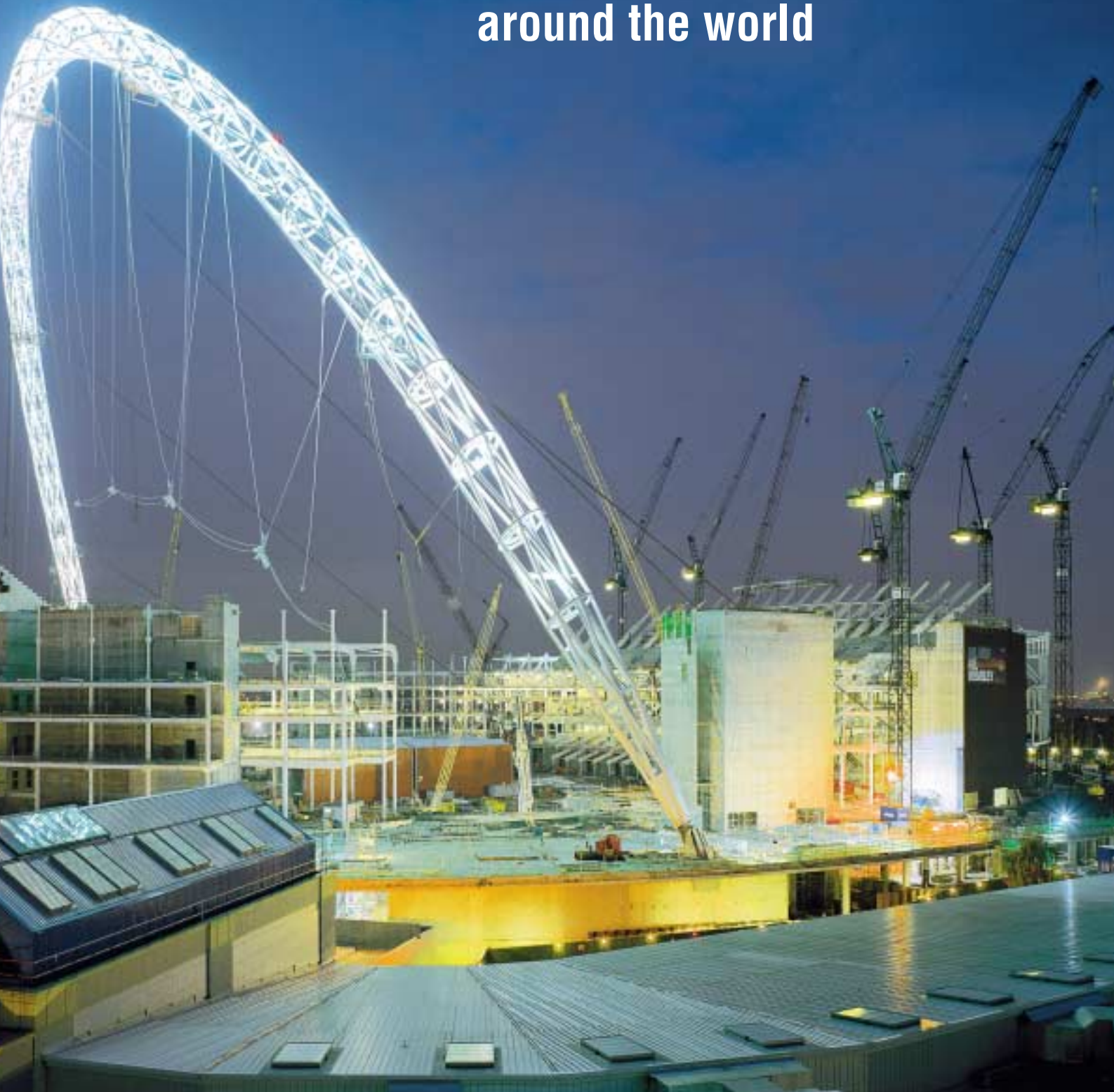


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Rising towers

Phil Bishop takes a look at the changing market for tower cranes in the UK and Ireland and talks to some of the movers and shakers.

You can tell the tower crane sector is buoyant and dynamic by the presence of five first-time exhibitors showing tower cranes at SED this month: City Lifting, the UK distributor for Comansa of Spain; London Tower Crane Hire & Sales, the new distributor for Saez, also from Spain; Dunham Crane Hire, the distributor of Italian FB self-erectors; Weaving Machinery the importer of Cattaneo self erectors and a joint Midland Crane/Arcomet/Potain stand.

With these new entrants and Arcomet now charging ahead at full steam, it is evident that there is quite a buzz in the UK/Irish tower crane market right now.

Not so long ago, tower cranes were predominantly owned by contractors. Hewden, with its fleet of Wolffs was largely unchallenged as the dominant rental provider. It seems like yesterday that Ray O'Rourke began to stir things up by building up what is now the UK's largest tower crane fleet. But in fact it was back in 1999 that his Select Plant secured the UK distribution rights for Terex Comedil. It took five years for O'Rourke to reach the UK fleet size that he now has approximately 280 units.

Falcon Crane Hire has the UK's second largest fleet of tower cranes, Two thirds of them Jaso.



Irish concreters

O'Rourke appears to have started a trend for concrete contractors to develop their own rental fleets, rather than hire cranes from outside. The rise of Select as a force in plant hire was aided immeasurably by O'Rourke's acquisition of main contractor Laing Construction, generating significant in-house demand for tower cranes. Select even has a further 70 cranes working on Laing projects in the Middle East and India, according to director Mike Studd.

Following O'Rourke's lead, fellow Irishman Pat Harrington moved into the game in 2002 by acquiring Hewden's tower crane division along with the Wolff distribution rights. Harrington Tower Cranes (HTC) has a fleet of approximately 200 cranes. As with Select and Laing O'Rourke, HTC has significant ready-made demand from its parent company, PC Harrington, which - like O'Rourke is a concrete specialist moving into general contracting.

Alex Lowe is unconcerned that the Wolff fleet is no longer the country's largest. "I have no ambitions to make this company the biggest," he says. Instead he is focusing on

technically challenging work, rather than 'mixing it with everyone in the market place'. It seems to be working, business is good. "We are doing very well," he says. There was a further boost for HTC last year when MAN finally sold Wolffkran, having had it on the block for some years. The private investors that now own Wolffkran have cranked up production and are working three shifts. "They are churning out cranes and have delivery down to 'just six weeks', says Lowe. "It was like a ghost town 18 months ago but now there is a real buzz about the factory".

At least two other concrete specialists of Irish origins have also entered the tower crane hire market. London Tower Crane Hire & Sales was set up in 2004 as a separate division of J Reddington Ltd, which had begun buying cranes two years previously. London Tower Crane now has 80 cranes, says director Kevin Keegan. Many of them are Terex Comedil or Peiner models from Select, but it also has a few new Liebherr TTR, self-erector cranes on a crawler undercarriage. Keegan says "We will follow demand. We've not set any targets. We don't want to let any customers down. If an existing customer needs a crane, we'll get one."

Last year London Tower Crane was approached by Spanish manufacturer Saez, little known outside of Spain, but now starting an export programme on the back of a booming home market. A distribution deal was agreed in October and London already has 15 Saez cranes in its fleet. Of these, nine are flat-tops, two are city cranes and four are self-erectors. At SED this month

will be an H32 self-erector (32 metre jib) and an S60B flat-top that can lift 2.15 tonnes at 60 metres.

Lancville Construction, another concrete contractor with Irish roots, set up Henry Cranes in 2004. It already has 21 cranes, says operations director Brian Flannery. Initially, Lancville was just looking to avoid hiring cranes from competitors and have some cranes for its own use. This year, however, marks its entry into the open hire market. Flannery says Henry Cranes



Saez produces tower cranes up to 65tm. London Tower Crane Hire & Sales, is now its UK dealer.

is a preferred supplier to Mace and has begun quoting for numerous projects. Inquiries for cranes, he says, have also been leading to Lancville picking up concrete contracts, a reverse on the original expectation that contracting work would drive the crane demand.

Henry's fleet predominantly comprises used Wolff cranes, initially bought from HTC but more recently sourced from mainland Europe. However, it would not be surprising to see it secure its own distribution rights with a manufacturer before long. It is an ambitious and hungry company. Lancville's turnover has grown sevenfold to £35 million in the four years since Mark Henry, who turns 30 this year, took over from his father as managing director.



Spanish manufacturers

While Saez, through Reddington and London Tower Cranes, is a new player in the UK, it is following a path that has been well developed in recent years by its compatriots Comansa and Jaso. That Comansa cranes will be exhibited at SED this year is the result of circumstance, rather than strategy. Its distributor, City Lifting, has stepped in to take the space originally booked by Spierings. City Lifting has worked closely with Spierings, pioneering truck-mounted tower cranes in the UK and has 12 units in its fleet. It has been closely involved in its appearances at SED so when Spierings decided it could not do both Intermat and SED, City Lifting stepped in. The company will exhibit a Comansa LC 5010 (1 tonne at 50 metres), components of a luffing LCL 290, one of which was recently erected in Poole harbour for a water-front development, and a Spierings truck mount. Having become the distributor in 2004, City Lifting has 10 Comansas in a fleet of 70 tower cranes. One of these is temporarily in the Bahamas, helping production of the next James Bond film.

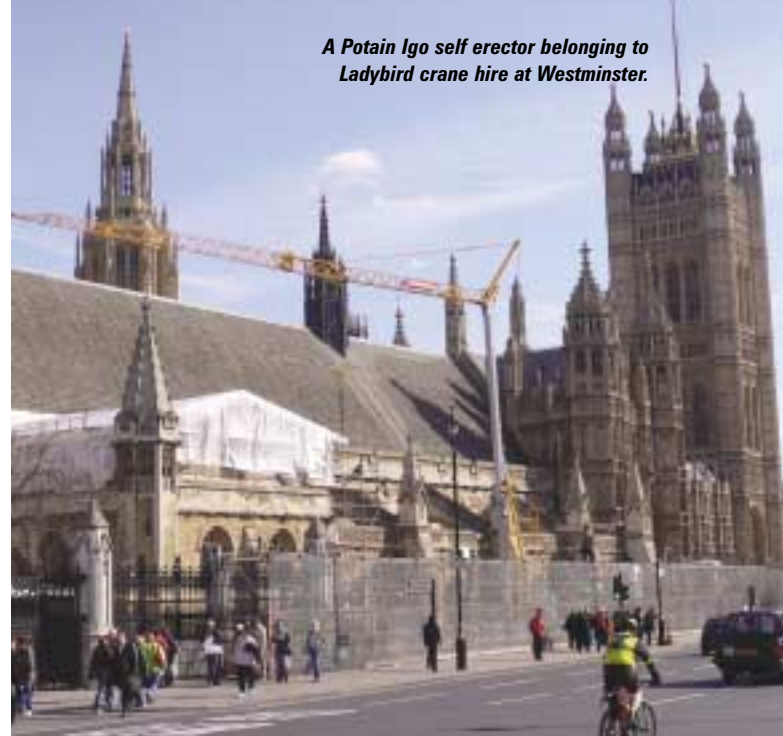
Of all Spanish manufacturers, it is Jaso who has the greatest presence in the UK, thanks to its distributor Falcon Crane Hire. Falcon has grown rapidly in recent years. Ten years ago it had fewer than 40 cranes, within five years it had grown to 120 and today it has 264, including about 30 self-erectors, overtaking HTC as the UK's second largest fleet and challenging Select for pole position.

Nearly two-thirds of Falcon's fleet are from Jaso, the balance being Potain and Peiner and Munster self erectors. Falcon also has crawler mounted self-erectors including the 202, which is a Benazatto crane on Munster tracks. Falcon has been with Jaso for seven years. "People have underestimated the Spanish," says Falcon managing director and owner Doug Genge. "Both Jaso and Comansa are top notch. The Spanish excel at customer service. They want to help technical queries and they are like lighting. There is just no need now to buy more expensive cranes. The only problem is delivery because Jaso faces so much demand" he adds. Jaso produces around 1,000 cranes a year.

Comansa has attempted to address its delivery problems by relocating to a new purpose-built plant in September 2005, increasing its production capacity from 600 units to 1,500. According to managing director Alberto Munarriz it will take a couple of years to get up a full head of steam in the new plant. This year it expects to produce around 800 units.

The Belgians

Arcomet is a Belgian company that rents cranes to partner rental companies around the world. With more than 1,460 tower cranes it boasts the world's largest tower crane fleet. It has been in the UK for several years, leasing cranes to Kier Plant. In 2003 it set up Airtek Cranes, a 50/50 joint venture with Airtek managing director Colin Hutchinson to rent out self-erectors, with a fleet of approximately 100 units, it is the UK market leader. This January, however, saw Arcomet arrive in the UK under its own banner, complete with exclusive Potain distribution rights. Arcomet now has three separate operations, each operating from different locations. Arcomet Tower Cranes Ltd rents and sells Potain top-slewing cranes and is headed by industry veteran Graham Baukham. Midland Cranes,



A Potain Igo self erector belonging to Ladybird crane hire at Westminster.

managed by Jerry Welford, operates a rental fleet of Potain self-erectors and is also the distributor for these products. Both Arcomet Tower Cranes and Midland Cranes are 51% owned by Arcomet and 49% by Airtek. Airtek will continue to run its own self erector fleet, predominantly Arcomet cable erected cranes with telescoping jibs, but also including some larger Potain self-erectors. Airtek and Midland Cranes share a common blue and orange livery, while Arcomet Tower Cranes top slewers have yellow towers with red and white jibs. Airtek provides the administrative and financial management functions for all three operations.

According to Arcomet managing director Dirk Theyskens, the plan is for Airtek to grow to 150 units by next year while Midland will have 100 Potain self-erectors by 2008, which will be available to a network of sub-dealers for local rentals. Arcomet Tower Cranes plans to have 80 to 100 Potain top-slewing tower cranes by 2008. By the middle of this year, it will increase to 25 to 30; however, as of the start of April, Arcomet Tower Cranes had nine top-slewing cranes, of which fewer than half are Potains. This is partly due to "Potain's delivery schedule" says Baukham, but also because Potain has yet to develop a new luffing jib crane that meets the needs of the UK market.

Baukham knows that to compete fully in the UK requires a fleet approximately 30 percent of which are luffers. Falcon has about 90 of them and Select has 80, but they are big units - up to 700tm - making it, according to Studd, "the biggest luffing fleet in the world". The problem for Arcomet is that Potain's luffers still have RCS winches - unbeatable in their day but now inverter drives are preferred. With the collapse of demand in Asia



Mantis Cranes of Ireland manufactures tower cranes in Donegal, based on designs by Masol of Italy.

in the 90s and little from the UK - the two main markets for this type of crane - there has been no pressure on Potain to update its luffers. Consequently Arcomet has been buying Comedil luffers, which is not ideal for either party. This should change soon, however says Baukham: "With the demand we will create, there will be pressure to develop the luffing fleet and thus demand for improvements all the way up the line."

The rise of self-erectors

Arcomet's Midland Cranes operation is run by Jerry Welford, who was

City Lifting represents Comansa in the UK and will be at SED



recruited from Ladybird Crane Hire, previously Potain's number one customer for self-erectors. Ladybird has built up a fleet of approximately 60 cranes over the past couple of years, all of them Potain, with a further 15 on order for this year. Ladybird and Airtek are the two companies that have shown the greatest commitment to self-erectors in the UK, although other significant players have also emerged. As mentioned, Falcon has had a fleet for several years, and Trevor Vanson of Vanson Cranes has added Vicario self-erectors to its fleet of Raimondi top-slewers. Masol of Ireland has 25 self-erectors working on contracts in the UK, and earlier this year, Lancashire-based builder, Dunham Brothers began importing self-erectors made by the

regulations," he says.

Ladybird also has 15 Potain MC86 city cranes in its fleet, to keep customers who need something slightly larger than a self-erector. "They're very good," says commercial sales manager Lee Clarke, who joined in January. "People are starting to love self-erectors more and more but once you get past the Igo 50 there is nothing to use that they like."

Distribution strategies

In recruiting Arcomet as its distributor, Potain has effectively teamed up with its best customer's greatest rival. However, the bigger picture is that aside from Ladybird (which will continue to buy direct from Potain, and a few top-slewers to Sir Robert McAlpine, Potain has not had the kind of sales in the UK that a company



Luffers are well suited to inner city reconstruction.

long-established FB Gru of Italy. Dunham has used self-erectors on its own projects and is now promoting the benefits to others, for hire or sale. Dunham's FB cranes range in size from the GA517, with 500kg at 17 metres, to the GA133, lifting 1,000kg to 33 metres. Self-erector use has finally gained some momentum in the UK and finally seems to be grabbing the attention of building contractors. That said, there is a view that the top slewing city crane, operated at ground level by remote control, is a better solution for many applications. London Tower Cranes and City Lifting are among those promoting this concept. City Lifting's Trevor Jepson says that the great thing about the Comansa LC 5010 is that the jib can be as short as 20 metres or as long as 50 metres, and any length in between, in 2.5 metre increments. "It's useful where there are air space

of its size expects. It has watched Italian and Spanish manufacturers blaze ahead through indirect distribution with rental company partners. Whether it is Select, HTC, Falcon, City Lifting or Vanson, there are plenty of examples that demonstrate that, for the UK market, these partnerships work well for the manufacturers concerned.

Worldwide, Potain and Liebherr are the biggest tower crane companies by a clear margin. But you wouldn't think so looking at the UK skyline. Potain has switched policy. Will Liebherr change tack too? Maybe young Mark Henry should be knocking on a few doors in Biberach?.

Arcomet's Dirk Theyskens believes that he has an advantage in the UK in that so much of the market is dominated by contractor-owned rental fleets. Other contractors are reluctant to make Ray O'Rourke or Pat Harrington even richer, so there is a sentiment in favour of the

independents that helps explain the recent growth of Falcon. "I think that's the big thing," says Doug Genge. "We've deliberately stayed clear of the concrete boys. It's been a good ploy that's worked well over the years."

At the end of the day, however, price remains king. Spanish and, more particularly, Italian tower cranes are less expensive than Liebherr and Potain, although the significant population of 20 year old Wolff and Liebherr cranes in the UK is testament to German build-quality and longevity. However, Arcomet's unrivalled purchasing power means that it can compete on price, whatever marque it buys.

A strong rental market

Everyone agrees that it's a good market for tower cranes right now.

"Our order book is over target for the whole of 2006," says Doug Genge.

"We are still very buoyant," says Mike Studd.

Graham Baukham agrees: "Everybody would tell you its buoyant and I'd say it's leading into busier times as well."

The question is, with all these new entrants, will anyone actually manage to make any more money, or will rates take a beating?

"I can't work out the tower crane market," says Trevor Jepson, "because I'm not a millionaire. It's a dangerous business, it's



A number of hire companies operate crawler mounted self erecting cranes.

hard work, and you don't make any money out of it. Why would anybody want to do it?"

As for the new entrants, Jepson says: "They're all trying to get in on the market. They are going for numbers. The only way you can do that is by undercutting others."

Doug Genge is more optimistic. He does not see any scope for undercutting. "No one out there is ripping anyone off, getting rich and making a fortune. People are charging a half-decent rate and making a half-decent margin," he says. "I really don't think prices will come down. The three major players - Select, Falcon and HTC are all serious players. We try and do everything safely and professionally and we don't use subcontractors. You can't afford to do it cheaply. If you do it cheaply, you're out of business."



Something completely different the Cobra tower crane

Dam builders

A Potain MD 900B and two Potain MD 2200 special application tower cranes have played a key role in the construction of the Se San Number 3 dam in Vietnam. The country's largest contractor, Song Da Corporation, started the project two years ago and has so far completed the dam's body and power house. The project is due to be finished within the next two months.

The MD 2200 cranes were installed at the end of 2003 and worked on the body of the hydroelectric dam, while the 50 tonne MD 900B was delivered in January 2004 and handled the construction of the dam's power house.

Both MD 2200 cranes worked with maximum main jibs of 80 metres at a height under hook of 75.6 metres. One of the cranes also worked with a below-jib Nippon Topbelt concrete conveyor system, helping to pour some of the 700,000 cubic metres of concrete necessary for the build. The other MD 2200 crane used a seven metre bucket to pour concrete, while the 373 kW (500 hp) winch enabled it to carry out a variety of other lifting duties, including handling formwork.



Three Potain special tower cranes have poured over 700,000m³ on the Se San dam

The MD 900B worked with a 60 metre jib, which provided 13.1 tonnes lift capacity at its tip. It was equipped with a six metre bucket allowing the crane to pour between of 80 and 100 cubic metres of concrete an hour.

Se San Number 3 is one of eight dam projects underway in Vietnam. The client, state-owned power corporation, Electricity of Vietnam, has 20 other generating projects currently under construction. The dam spans Gia Lai and Kon Tum - two of Vietnam's Central Highland provinces and will use recycled water from the nearby Yaly plant, creating a 17 km/10 mile long reservoir with an annual power output of 1.2 billion kWh.

New City Cranes for Belfast centre



The Raimondi/Raivan Eye Vis cab

Vanson cranes has supplied three new Raivan MR108+3 flat top city tower cranes for use on the Victoria Square regeneration programme in Belfast. The cranes are being employed on the underground car park and area above.

The Raivan MR180, built by Raimondi, is the latest addition

to the company's flat top range, designed for multi crane sites. It offers fast erection, low operating costs and includes Raimondi's new Eye-Vis operators cab. The cab provides the operator unobstructed visibility both overhead and below his feet with pistol grip type controllers with built-in dead-man function.

The cranes offer 8,000kgs capacity at just under 16 metres radius and 2,200kgs at the tip of the 50 metre jib. Maximum free standing height under hook is 46.5 metres on a 4.5 metre base.

The Victoria Square redevelopment is one of the largest urban redevelopment projects in Europe with a contract value of £300 million. The completed retail centre, which combines traditional buildings and public spaces with modern architecture, aims to give Belfast a new landmark and includes a 35 metre diameter glass dome.

Luffing flat top a success

In November 2005 Jost cranes, the Munich based tower crane producer, introduced its JTL 108 and 158 topless luffing jib cranes. The company labels the new range as a third generation tower crane, offering the versatility of a luffing jib and a topless crane in a single unit.



A Jost 108 luffing flat top crane

The company has already sold 28 units, including some in the UK. The larger of the two, the 158 offers 2,400 kgs at 50 metres radius and a maximum under hook height with horizontal jib, of 42 metres. Maximum jib angle is 75 degrees above horizontal, providing 8.3 metres length from counterweight to jib tip.

Jost cranes also offers its crane tops for mounting to other manufacturers towers, allowing a contractor or rental company to maximise existing tower inventory.