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# Spider sector moving up



C&A

spider lifts

Over the past few years the tracked spider lift has gradually become more of a mainstream rental product as well as an essential tool for many specialist trades such as tree work and building maintenance. However, the individual model volumes and geographic spread has still not reached a point where a mainstream aerial lift manufacturer has been tempted to develop its own machines.

Italian manufacturer Hinowa remains the market leader, at least in terms of units sold, delivering around 1,000 spider lifts a year - bolstered the JLG branded models that it produces. Most other manufacturers build between 200 and 500 machines a year, with working heights of between 13 and 23 metres making up almost 80 percent of the total and around 70 percent sold to rental companies.

This year's Cranes & Access Top 30 UK and Ireland Rental Company Guide revealed another year of expansion for spider lifts with the number of machines in leading rental company fleets growing more than eight percent. This rise in popularity is also reflected in an increasing number of European markets as well as North America and Australia.

However, unlike other aerial lift sectors such as truck mounts, spider lift development does not appear to be driven by striving for the greatest working height, but by more general features such as alternative power sources - including lithium ion batteries and hybrid power packs - while improving performance such as outreach and platform capacity at the same time as making them easier to transport by being lighter and more compact. There has also been a move to make them simpler to operate, an issue that dogged many of the earlier products.

## The 50 metre spider lift vs truck mount

The current range of the largest machines - 50/52 metres - have been around for more than a decade with three manufacturers participating in the market: Falcon - the 'descendant' of Falck Schmidt the inventor of the spider lift - Teupen and Palazzani. While the other manufacturers have all added larger machines to their product ranges, there appears to be little appetite to take the title of



The 50 metre Teupen Leo 50 GTX was launched in 2005

'manufacturer of the biggest spider lift' - markedly different to the truck mount market which battles persistently to build the largest lift on a 3.5 tonne chassis, the largest on a two axle truck, a three axle truck and so on.

While there is some demand for big spider lifts with 50 metres or more working height, it is limited. Big spider lifts are relatively expensive, require bigger transport vehicles given that they can top 14 tonnes GVW, and have in the past been

relatively complicated to operate, all of which makes them less attractive to many rental companies. For many applications the 50 metre truck mounted lift - no longer considered a big beast of a machine - is considered a better bet, given that it can be quickly and easily driven to site, users expect to hire it with operator and it is able to carry out several jobs in a day. However, the 50 metre spider lift scores when it comes to reaching some areas, with the ability to pass through standard

Italian manufacturer Hinowa remains the market leader, delivering around 1,000 spider lifts a year





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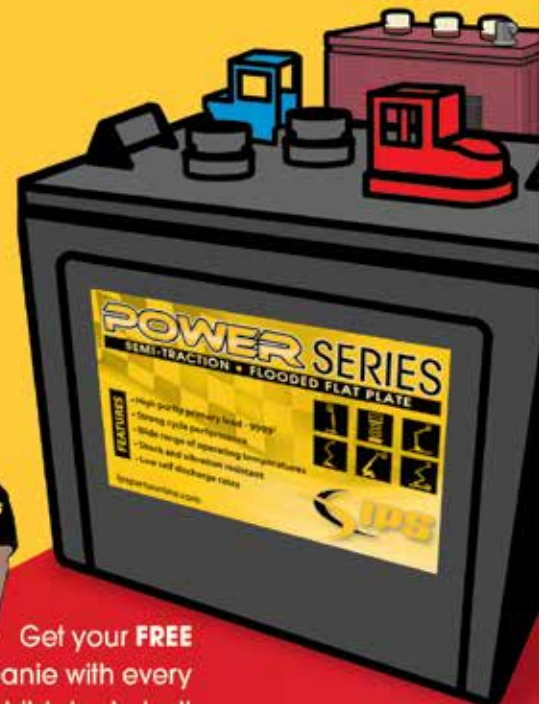
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The 48 metre Palazzani XTJ48 was first launched on wheels with a tracked version following later in the year

double doors, cross delicate flooring and even climb stairs, making it indispensable for a certain type of work such as atrium cleaning and maintenance. However, in these applications the user often buys the machine so that they have it to hand. With only a few of them in rental fleets, the sector lacks the sales and marketing that might go with other products such as self propelled boom lifts over 50 metres. The first 50 metre spider lift - the Teupen Leo 50GT made its debut in 2004 with the first units delivered in Germany and the Benelux region. The Leo 50GTX arrived in late 2005. The first unit in the UK was ordered in 2006 and delivered the following year, not to a rental company but to Gladedale Capital for large office, retail and residential development. In those days there was also a good deal of interest from the electrical transmission market for work on pylons. However, it appears that truck mounted lifts have taken this market, with all wheel drive chassis and the greater use of easy to lay trackway.

In comparison the first unit of the 52

metre Falcon - then known as Falck Schmidt - was purchased by Irish international rental company Height for Hire which encouraged and supported the development of the new model launched in 2009 and delivered six months later in 2010.

In between those two events Palazzani launched the 48 metre XTJ48 in 2006, originally on wheels, with the first crawler mounted unit shipping at the end of the same year. Then five year's ago the company launched the new XTJ 52, the latest unit was recently delivered to French rental company Mediaco, complete with bi-energy power pack.

#### Manufacturers add bigger machines

While the race to build the biggest spider lift has been laid back, there has been a strong trend in recent years to build larger mainstream products, particularly among the many Italian manufacturers that dominate the industry. Most of these early manufacturers - including Oil&Steel, Hinowa, Heila/Italmec, Lionlift, RAM, Socage and Basket, now Platform Basket - began with 10 to 13 metre models followed by 15 to 16 metre versions, usually on the same chassis, but with dual sigma type riser, to gain the additional height. As a result, many buyers traded up to the larger models, given that the cost differential was outweighed by the perceived additional



Danish manufacturer Falcon launched its 52 metre Falcon FS520C in 2009, taking over the mantle of the world's largest spider lift

versatility that the additional height offered. The key players in this market then began adding larger models, between 17 and 21/22 metres which could still be transported on a two axle equipment trailer, an important factor given that the competition in many markets included low cost trailer lifts. As the market expanded, new more sophisticated manufacturers joined in, including CTE, JLG - which signed its OEM agreement with Hinowa in 2010 - Multitel Pagliero and Bluelift - now owned by Ruthmann. Bluelift had previously built fabrications for many Italian manufacturers that were assembling truck and spider lifts in the early 2000s.

While this evolution was occurring a few companies such as Teupen, Omme, Falck Schmidt, Palazzani were catering for a growing market for models in the mid 30 metre range, still a small niche sector at this point.

Each time the higher volume smaller spider lift manufactures have moved on to larger models beginning with the 19 to 23 metres range, the market for these models has expanded rapidly, giving many of them a taste to build even larger models, which also tend to be more

profitable to make. In the past few years there has been substantial growth in the 25 metre market and more recently an explosion in the number of models available in the 30 to 33 metre range. Some of these manufacturers have now moved into the 42 metre market, which already might be showing signs of the growth that often goes with an influx of more choice?

#### What volume for bigger models?

However, a question remains over whether the rental market is ready for the largest spider lifts. Historically the largest spider lifts have been purchased by end users specifically for commercial and high rise residential developments. Danish manufacturer Falcon launched its 52 metre Falcon FS520C in 2009, taking over the mantle of the world's largest spider lift. The FS520C was based on the same design philosophy as the company's 42 metre model, including its dual track trunnion mounted undercarriage system and tri-power pack which used AC Electric, DC battery pack and diesel power.

Palazzani is the only other manufacturer with a spider lift over 50 metres. The tracked XTJ 52/C and the wheeled XTJ52/R version have a working height of 52 metres, a 400kg maximum platform capacity and 19 metres of outreach. Overall weight is 14 and 13 tonnes respectively with variable width tracks extending from 1.45 to 1.9 metres, while the wheeled chassis is 1.5 metre wide. A 500kg winch is also available which is interchangeable with the basket, to create a spider crane.

The Falcon FS520C follows a slightly



Manufacturers are focusing on smaller spider lifts again - this is an 11m Bluelift SA11



With a working height of 52m the tracked Palazzani XTJ 52/C matches the Falcon as the world's largest spider lift



The Falcon FS290 will clean and maintain the inside of the 137,000 square metre Oceania Shopping mall in Moscow, Russia



A Palazzani XTJ52/C

different design philosophy and has been particularly successful for high atrium applications, with models designed for narrow indoor applications as well as for rough terrain. Over the years most FS520C have been delivered directly to specific projects, usually on completion. Occasionally they are delivered early to help with fit out work as well, before staying in situ for maintaining and cleaning the windows and domes in shopping malls, airports, museums, hotels and prestige residential developments where its working height, low ground bearing pressure and double jib versatility are particularly useful as are its 1.25 metre stowed overall width and

multiple outrigger set up.

Last year China's Chongqing Jiangbei International Airport purchased an FS520C to clean and maintain the inside and outside of the airport buildings. Mounted on twin sets of rubber tracks, the FS520C features an eight section telescopic boom and six metre two part folding jib, providing up to 17 metres of outreach. It is equipped with the new Falcon 'Service Tool' which allows remote monitoring of the unit for easy trouble shooting and diagnostics while gathering full operating and tracking records.

A smaller 29 metre Falcon FS290 was recently delivered to Russia's Oceania Shopping Mall to clean and maintain the inside of the 137,000

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*Palfinger unveiled its new 21 metre P 210 AJTK spider at Intermat*

square metre mall in Moscow. The FS290 features a five section telescopic boom and dual arm articulated jib, providing 14 metres of outreach with an unrestricted platform capacity of 100kg, or around 13 metres with 200kg.

#### The calm before Bauma?

Over the past few years there has been a flurry of activity in the spider lift sector however this year has been a little more subdued possibly as the industry catches its breath as it ramps up production of the new models or building up for more launches at Bauma next year. Palfinger surprised many with the launch of its first spider lift - the P150 AJTK at Bauma 2016 - although the move was logical given that Palfinger Italia's aim was to produce more cost effective and simpler smaller platforms. Last year it launched the 17.7 metre P180 AJTK and earlier this year quietly unveiled the 21 metre P210 AJTK at Intermat. Managing director

Paolo Balugani says he wants a four model range including a 25 metre model - the P250 AJTK? - which will probably be unveiled fairly soon. Two years ago, Palfinger signed a technical/sales agreement with Palazzani to provide it with Palfinger branded spider lifts from 27 to 52 metres, with the intention to provide a wider spider lift range for its distribution network.

#### JLG/Hinowa

JLG is entering the ninth year of its partnership with Hinowa which provides it with modified and badged versions of Hinowa's lifts. The latest JLG model launched last month is the European version of its 33 metre X33J Plus CCB spider lift, following the launch of the US X100AJ version in prototype format at the Rental Show earlier this year. Hinowa publicly launched its own version - the 32.6 metre Lightlift 33.17 Performance IIS slightly later. Both versions have an outreach of 16.5 metres at an up and over



*The latest JLG model launched last month is the European version of its 33 metre X33J Plus CCB*



*The 32.6 metre Lightlift 33.17 Performance IIS*



*A 36 metre Easy Lift R360 at Shanghai airport*

height of 17 metres, with an unrestricted platform capacity of 230kg. The lift mechanism features a four section telescopic lower boom which elevates to almost 90 degrees, plus a three section telescopic top boom topped by an articulating jib.

Hinowa has also added a wider 1.6 metre platform rather than the 1.4 metres on its smaller models with standard 180 degrees platform rotation. The machine has an overall height of just under two metres, an overall length of six metres - with the basket removed, and a stowed overall width of 1.2 metres, although the extendable tracks increase this to 1.7 metres for improved stability when travelling on uneven ground.



*The LL33.17 is also equipped with Hinowa's RAHM control and remote diagnostics system with a full telematics suite.*

The unit has a choice of outrigger footprint, the normal setup being 4.6 x 5.1 metres and the narrow being three by 6.5 metres.

Power options include a bi-energy Kubota diesel, AC electric motor, or a 76 volt/150 AH lithium-ion battery pack. The LL33.17 is also equipped with Hinowa's RAHM control and remote diagnostics system with a full telematics suite and switches off completely if left unattended for more than two hours, preserving battery life. The company's Sky-Guard secondary guarding/anti entrapment system is standard equipment.



## Italian domination

These are just two of several new spider lifts in the 30/33 metre range which also includes the Bluelift SA31, the Platform Basket 30T and Teupen Leo 30GT Plus.

The fact is that Italian manufacturers already dominate the sub 26 metre spider lift market and are looking to extend their hold in the 30 to 33 metre market. Ruthmann Italia/Bluelift and Hinowa will be joining fellow Italians Platform Basket, Palazzani, CMC, Easy Lift and Multitel Pagliero which are already active in the 30 metre market and all will be looking to apply pressure on the current big players in the sector - Teupen, Ommelift and Falcon.

## Bluelift 31 metre

Now part of Ruthmann, Bluelift unveiled the new SA31 earlier this year at Intermat, it was also shown at Vertikal Days on the Snorkel UK stand - its distributor for the UK and Ireland. The compact lift has a 31 metre working height and up to a 17.5 metres outreach with 120kg

platform capacity, 14.5 metres with the maximum capacity of 250kg and 15.5 metres with 200kg. Stowed width is just over a metre, extending to 1.99 metres. This combined with a stowed height of less than two metres means that it can pass through a single industrial door. Overall length is 6.45 metres with basket and 5.75 metres when removed. The unit offers two outrigger widths, 4.53 metres or narrow three metre spread, with the standard intelligent Ruthmann control technology provide the optimal safe setup and a relatively low overall weight of 4,700kg.

## Platform Basket 30T

In the past year or two Platform Basket has been particularly active in the larger spider lift market, launching several models including its latest, the 30T telescopic as well



The Bluelift SA31 has a 31m working height and up to a 17.5m outreach



Hinowa LL33.17



Promax's modified Platform Basket 27.14 undercarriage specifically for UK rental company Easy Reach Access Hire

as the 27.14 and the 33.17. It is also set to launch a new 43 metre model in the next few months.

One of the main features of the 30T is its overall stowed travel width of just 890mm making it the narrowest spider lift in its class. The unit has a five section straight telescopic boom, topped by an articulating jib giving a 30.3 metre maximum working height, 14.2 metre maximum outreach and 230kg platform capacity with fully automatic working envelope monitoring. The variable position outriggers include asymmetric set-up, automatic levelling and stowage. When set in the narrow position, the unit still offers up to 18.5 metres of outreach over the front or rear of the machine with 136kg capacity. The outriggers are also capable of lifting the machine 1.21 metres clear of

the ground, allowing it to self-load/unload onto a truck as well as level on slopes.

The tracks can be extended from 890 mm to 1.29 metres for extra stability when travelling. It has an overall height of 1.96 metres and length of 6.52 metres. Standard features include the quick detach basket which has outlets for air, water and 110v/230v electrics. Given its performance the 30T is also relatively lightweight at 4,250kg. The 30T hybrid version features a lithium ion battery pack and Kubota diesel.

## High clearance undercarriage

UK distributor Promax Access which sold the first 30T in the UK to MBS has also developed a new undercarriage for the 27 metre Platform Basket 27.14 for Scottish rental company Easy Reach Access.



The new 30 metre hybrid Platform Basket 30T

## How do the new 30 - 33m spider lifts compare

Make	Hinowa	JLG	Bluelift	Platform Basket	Teupen	CMC
Model	Lightlift LL33.17	X33J Plus CBB	SA31	30T	Leo 31GT Plus	S32
Working height	32.6m	32.6m	31m	30.3m	30m	32m
Max capacity	230kg	230kg	250kg	230kg	400kg	220kg
Max outreach	16.5m	16.5m	17.3m 120kg	14.2m	17m with 80kg	15.5m
Outreach max cap	16.5m	16.5m	14.5m	13m	12.7m	14m
Length (with/ without basket)	6.5/5.8m	6.5/5.8m	6.45/5.75m	6.52m	7.7/7.5m	7.8/6.98m
Width	1.2-1.7m	1.2-1.7m	1.01m	0.89 - 1.29m	1.58m	1.56m
Height	1.99m	1.99m	1.99m	1.96	1.99m	1.97m
Weight	7,616kg	7,616kg	4,700kg	4,250kg	4,500kg	7,280kg
Outrigger footprint	4.6m x 5.14m	4.6m x 5.14m	4.53m x 4.82m	4.53m x 6.55m	5.5m x 5.6m	5.4m x 5.14m
Narrow footprint	6.3 x 3.3m	6.3 x 3.3m	5.99 x 3m	6.55m x 2.7m	7.6 x 2.99m	6.52m x 3.58m
Power	D/H/E	D//H/E	D/H/E	D/H/E Elec 230V AC Elec 24V DC	D/H/E	D/H/E



CMC's latest spiders includes the 21.6 metre S22HD.



The Platform Basket 30T has a narrow 890mm width



Teupen's latest 30 metre Leo 30T Plus spider lift has up to 17 metres outreach with 80kg platform capacity

Designed and fabricated inhouse the tracked undercarriage features an additional row of idlers giving increased clearance which is particularly appreciated for tree care work.

#### Teupen Leo 30T Plus

Teupen's latest 30 metre Leo 30T Plus spider lift has up to 17 metres outreach with 80kg platform capacity, or 14 metres with 300kg or 12.7 metres with the maximum 400kg. Overall weight is 4,500kg, but its overall length of 7.7 metres can only be reduced by 200mm with the 1.2 metre long 800mm wide standard basket removed. Three alternative platform widths are available - 900mm, 1.5 metres or two metres. German access rental company Gerken has taken delivery of the first Leo 30T plus spider lift, with another on order.

These new models join an already extensive choice of 30 to 33 metre spider lifts, including the heavy duty Falcon FS330Z Vario with an overall width of 1.25 metres, a 250kg maximum platform capacity and up to 16 metres of outreach and 6,300kg overall weight. And a very similar look alike product from Palazzani, the 32 metre TZ330, the company's first articulated model. And finally, the twin aluminium telescopic boomed 30 metre Multitel SMX 300HD with 270kg maximum capacity, up to 14.7 metres of outreach and overall weight of 5,600kg.

#### CMC concentrates on bigger platforms

CMC is unusual for an Italian access manufacturer in that it is based in Bari in the south of the country. It

exports three quarters of its products with most going to the USA, where it claims to be market leader in the 25 metre sector having sold more than 400 machines mainly for tree work. Other significant markets include Australia and China. Only 15 percent of its 300 machine annual production are sold to rental companies and this is an area that it aims to increase in the future with a new range of 'rental' units.

Its two latest spider lifts just launched include the 21.6 metre S22HD and the 23 metre S23. The S22HD has a single parallelogram riser, three section telescopic boom and articulated jib, maximum platform capacity is 230kg with an outreach of 9.9 metres, while 12.5 metres outreach is possible with 80kg.

The S23 features a dual sigma type riser, telescopic boom and jib with an outreach of 12.4 metres, with its maximum platform capacity of 200kg. Both spider lifts are available with hybrid power packs and feature CMC's anti-collision secondary guarding system and wireless remote controls. A new 19 metre S19HD, is also expected to be launched soon. CMC's most popular machine - the 25 metre S25 - is currently being updated after five years in production. Structurally it will remain largely unchanged but will feature various electronic improvements.

About 70 percent of its production is currently made up of the 25 and 32 metre machines with only a few of its largest machine - the 41 metre S41 sold. The company says its next machine will be a 38 metre spider.



Multitel's 30m Multitel SMX 300HD, has 270kg capacity, up to 14.7m of outreach and overall weight of 5,600kg

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