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The changing van mounted landscape

C&A

van mounts

Three years ago the European van mounted landscape was subjected to a number of changes with a split and emergence of a new manufacturer as some smaller players dropped out. The longer-term effect appears positive with the market growing, both in terms of expanding fleets and new users switching to vans mounted lifts from other forms of access equipment including ladders and towers. The latest C&A Top 30 survey of UK and Ireland rental fleets indicates a 13 percent growth in the number of van mounted lifts operated by larger rental companies. The biggest van mounted markets are France and the UK, although uptake is growing in other markets.

When a new player enters a market and makes an immediate impact there will always be collateral damage. The European van mounted sector entered a new phase in the summer of 2015 with a number of events. The first and relatively minor one came from Aldercote, a small UK manufacturer which agreed a sales and assembly partnership with sales, parts and service group IAPS, with the aim to give the product a boost. At the time it looked as if it might transform Aldercote into a more mainstream player, but this has not transpired, as IAPS struggled to find significant sales in a market dominated by Versalift. Aldercote

however is still active and recently made a few sales, but these are little more than crumbs from under the top table and have little impact on the market leaders which continue to win the major orders.

One such order for 12 van mounts - six 14 metre VZ140P-T on Ford Transit vans and six 18 metre VZX180 mounted on Ivecos - worth £700,000 was placed this month by McCann - a civil and electrical engineering company working in the UK on road, rail and airport infrastructure projects. The new vans will be used on street lighting contracts in Grimsby and London.

A far more significant development came at the start of 2016 when



Time Versalift's French dealer and installation partner Time France, decided to produce its own van mounted platforms, forming a new company called Klubb. As if that was not bad enough it also set its sights on becoming the market leader. At that time it was selling around 500 van mounted lifts a year, all in France.

In a very short space of time Klubb transformed itself, lifting sales to somewhere in the region of 1,200 lifts a year. In early 2017 it acquired the assets of bankrupt French aerial lift manufacturer Comilev, having previously hired some of its engineers and set up an office in the region. The deal included the Comilev brands and intellectual property, including the new Xtenso range of truck mounted lifts for the utility market. Shortly after forming Klubb it appointed Kettering based CPL (Cumberland Platforms Ltd) as its UK dealer which had been looking to expand in the van mounted platform market, after a fair amount of success with its 4x4 pickup platforms. A year later Klubb acquired a majority stake in CPL, converting it into a UK subsidiary.

Meanwhile Versalift responded rapidly to the sudden and surprising

loss of its largest distributor, exasperated by its conversion into a major competitor. It formed Time Versalift France early in 2017 and in its first year of trading delivered more than 100 platforms from an all-new production facility in Morlaàs, Southern France, while quickly setting up a national product support group to look after the thousands of Versalift van mounted lifts in the country. Last year it increased production by at least 50 percent as the new facility gathered momentum. Klubb now claims to be not only market leader in France with sales of 550 van mounted platforms but market leader in the whole of Europe.

More recently Klubb acquired French manufacturer EGI, which produced firefighting and fully insulated platforms up to 65 metres. (See interview with Klubb's Julien Bourrellis page 20). While Versalift is facing significantly greater competition this - as we have often seen in the past - can cause the overall market to expand. The lifting world is littered with examples of a dominant player actually doing better after the arrival of new competitors as increased activity



Civil and electrical engineering company McCann ordered 12 Aldercote van mounts last month

draws in new users - spider cranes are a case in point.

Record year for Versalift

Versalift says 2018 was a record year in Europe, in terms of order input. "The natural five to seven year replacement programmes of the larger buyers has kept the market buoyant over the past year," says Versalift UK's Andy Bray, "Other factors may also have contributed to a general upsurge in business such as low interest rates etc. Orders have come from a broad cross section of the market including end users, large and medium sized contractors serving the signage, highways, security and telecoms sectors etc and this in turn fuels the rental market. One of the big differences has been the increase in sales for the LAT-135-H pick-up mounted platforms we launched in 2018, giving us a good product to compete in this sector."

The company carried out an in-depth customer survey after the launch of its E6 van mount in 2016 and has several new products in development as a result.

The first machines in the new VTL - Versalift Telescopic Light - range built in Denmark were delivered to UK lighting contractor Sparkx. The order included six VTL-145-F van mounts on 3.5 and five tonne Mercedes Sprinter vans, with 14.6 metre working heights and 9.2 metres of outreach. The range also includes the 13.8 metre VTL-135-F which offers 8.4 metres outreach, with 265kg capacity on five tonne vans. Options include secondary guarding and working area cut outs which allows full reach over the rear of the vehicle without stabilisers being deployed, but limits slew over the side until the platform is within the permitted radius or the stabilisers are set.

Other new Versalift platforms include a new hybrid model - a

sector that looks set to dominate as users begin to appreciate the benefits, cutaway van versions and all electric models for city centres. An all-electric lift and van without stabilisers has also been developed.

Brexit

"Rental companies are concerned about increasing costs post Brexit," says Bray. "With the uncertainty of a 'no deal' Brexit, we are seeing buying cycles come forward with customers ordering earlier and stocking up. We are also working on several initiatives to manage the possible impact, such as increased parts and component inventory - now around £6 million - for both production and aftersales to ensure continuity should a 'no deal' become a reality."

"Since Time Versalift was acquired by The Sterling Group in early 2017, there has been an integrated approach between Denmark, France and the UK. A number of innovative additions are due in the coming months and new models will be released at Bauma and Vertikal Days. Our French facility is regaining market share, with most platforms currently mounted on 3.5t Renault Masters - usually with fixed jibs and no stabilisers. Versalift celebrates 25 years in the UK and Ireland this year, with more than 7,000 units delivered during that time. We are planning customer events for later in the year."

Custers

Dutch manufacturer Custers has been producing the 12 metre articulated Taurus 230-12ML and the 14 metre telescopic 230-14ML van mounted lifts for many years, largely for streetlight maintenance work in the Benelux region. Mounted on 3.5 or five tonne vans are available with no stabilisers



The Versalift LAT-135H



All-electric Klubb K20



Custers 12 metre articulated Taurus 230-12ML and the 14 metre telescopic 230-14ML



The cut away Klubb K38p inner city van mount for street lighting maintenance and installation

or with inboard jacking. Platforms - either truck or van mounted - can be all electric - both chassis and platform - or hybrid with the platform powered by batteries and the chassis by diesel.



Klubb's boom assembly area at its Croissy-Beaubourg site

The company has also changed the stabilisers on its larger 17 metre van mount, so that they set within the vehicle's overall width. Look out for a new range of Custers van mounts later this year.

CPL Cutaway K38p

UK Klubb subsidiary CPL is promoting the K38p inner city van mount for street lighting maintenance and installation.

Available with 'cutaway' bodywork, it offers an improved payload and is easier to manoeuvre in urban areas. The full van model has a working height of 13.7 metres and an outreach of 7.9 metres with 120kg unrestricted platform capacity or 200kg up to six metres outreach. The cutaway version has the same working height, but outreach is slightly better at 8.2 and 6.8 metres respectively. 1kV boom and basket



The new Versalift VTL-135-F



Versalift has developed an all-electric van without stabilisers

protection is standard while a 'key out' system allows the vehicle to be locked while the engine runs so the operator can work in the platform without risk of disruption from below. An optional Green Pack hybrid version with battery powered upper is also available.

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Klubb plans further expansion

The rapid rise of French aerial work platform manufacturer Klubb owes a great deal to its owner and chief executive Julien Bourrellis. C&A editor Mark Darwin managed to catch up with him at Charles de Gaulle airport in Paris just before he hopped onto a flight to Asia.

Bourrellis has been very busy the past three years, ever since he set up Klubb after ending Time France's distributor agreement with Time Versalift. However he points out that he has been busy for 20 years, building the van mounted platform market in France from almost zero to more than 500 units a year.

"Klubb has a much higher profile than Time France did as the Versalift distributor for France," says Bourrellis. "Previously we could only sell in France, but we were no less busy."

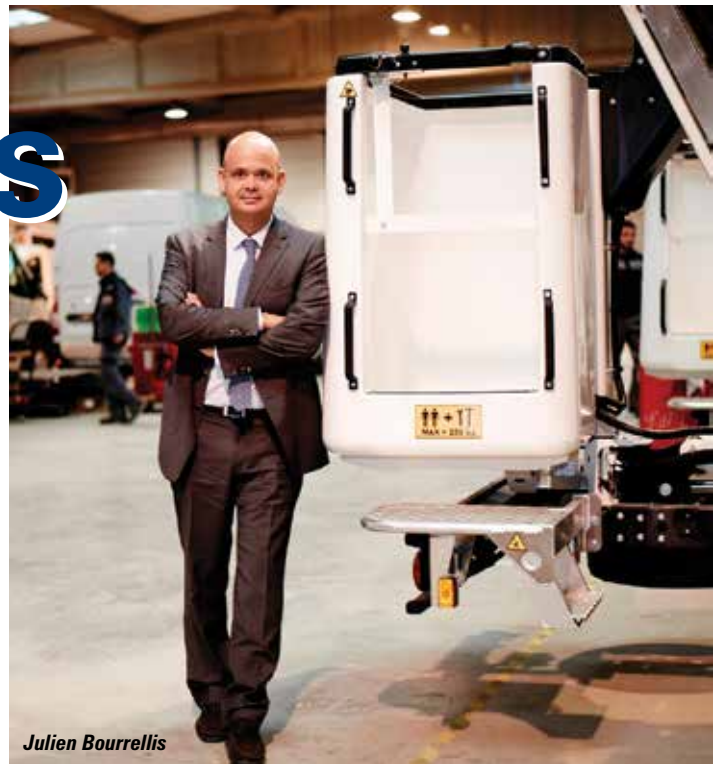
So why the change from distributor to manufacturer?

"There were three major reasons. First, the exchange rate when the Euro dropped by more than 30 percent against the dollar - from \$1.6 to \$1.1 - seriously affecting our profit margins. This meant taking drastic action, such as firing 100 of our people or deciding to produce a van mounted boom myself. Secondly I did not like the new range of machines from

Versalift which made increasing use of electronics. During my time as a distributor I sold 7,000 Versalifts, but increased complexity meant it was becoming more difficult to give a good backup service, if my engineers didn't have the right equipment/computers etc... And third, I had reached the age of 40, was the van mounted platform market leader in France, and I needed another challenge."

"We sold Versalift van mounts but Versalift just supplied the booms. We did all the work preparing the van including fabricating sub frames and mounting the boom as well as providing the backup, spares and service which is critical to building market share. The reason we are now number one in France is because the whole group - which includes Klubb and several other companies - provides the full sales and product support functions for its products to its customers."

Klubb designs and produces its own booms and has three manufacturing facilities - two to



Julien Bourrellis



EGI makes aerial lifts for firefighting and insulated booms with working heights from 18 to 65 metres

the east of Paris and another that came with the EGI acquisition in Charleville-Mézières, North East France. The group also includes distributor Klubb France and Mobitec a specialist bodywork company which adds custom-built items such as tool boxes etc to the platforms.

"Last year we did two crazy things, adding two new companies to the organisation. We bought our UK dealer CPL right in the middle of the Brexit uncertainty. Both my bank

and advisors told me I was crazy, however just a few months later they secured a large order with BT for 130 machines. I had been looking at an acquisition for two years in order to grow the business which had reached its limit in France. Although the UK market is one of the best for van mounts I did not think of approaching CPL but we found out they were also thinking of selling - it was a perfect match."

"The second crazy thing was when we had an opportunity to



Klubb France workshops



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purchase firefighting and insulated boom manufacturer EGI after its parent company Gimaex went into administration. EGI is a small company with just 35 people but has a large 12,000 square metre factory on six acres of land. This was a lucky break for us because we were expanding so quickly, that I was already in the process of looking for a third production facility. Having a large factory with the expertise and 20 years experience building specialist platforms was invaluable. It also meant that we could add firefighting machines and insulated platforms to our product range. In France when a company is in Chapter 11 you can choose who you want to hire but in this case we took on everyone working at the company, to make sure we could do the deal and also because finding skilled labour is very difficult in France."

"These two acquisitions were huge for our company and they will form a major part in our future growth. EGI was a small company that was breaking even so not in bad shape financially. Now we have a new strategy to expand to become a prominent player in both the fire fighting and insulated platform market over the next few years. One

problem we face is that EGI's main products are turntable type ladder trucks for firefighting, or special machines rather than truck mounted platforms."

"We now have two export managers - Xavier Moreau, who was previously the export manager of EGI for special lifts such as firefighting and insulated lifts and my brother Henri for the Klubb platform lifts. Our initial aim was to be market leader for van mounts in Europe and last year I think we achieved that on sales numbers and revenues, selling 1,200 van mounts. Versalift may have sold 300 to 450 in the UK and 150 in France, but we sold 550 in France, 80 in Germany, 100 in Northern Europe and about 80 in the UK, including the BT order. We think we are now ahead of them." We should point out Versalift does of course also sell in Germany, Benelux, the Nordic region and other European markets.

Group service departments

Klubb also operates a number of service companies, including Delta Services, Nacelle Assistance and Services, TFC and the Design office. Delta offers financing for specialist vehicles, leasing solutions, used equipment, fleet management and



Klubb product ready for delivery to customers



The boom assembly area



Busy service workshops



The control room at Croissy-Beaubourg

sales as well as running a long term rental fleet of around 350 lifts. Nacelle is an after sales company providing maintenance and repair services for platforms of all makes, with national coverage provided by 25 mobile service engineers throughout France. TFC offers specialist transport services while the Design office provides R&D for the various group companies, as well as providing engineering services for external customers.

"When I say I have sold 7,000 Versalifts you have to remember that apart from the boom, all of the work that goes into producing a van mount and supporting it, was carried out by ourselves. To go from a dealer to a manufacturer has its advantages - yes we needed to learn new things but when you

are a customer for 20 years you have a good idea of what is needed from a manufacturer. Our dealers are therefore very important to us and the development of the company. Each company within the group operates as stand-alone company and are independently managed with their own targets and Profit & Loss accounts. The Klubb France strategy for example with its 45 percent market share, is totally different to EGI which has zero market share. Our target is to be a major international aerial lift manufacturer and you cannot do that by being in one sector. We need to expand our product offering."

Main van mount markets?

"In 2001 when I started with Time France/Versalift the van mounted lift market in France was almost zero,



Klubb claims to be market leader for van mounted platforms in Europe

now it is around 600 a year. I like the story about two shoe salesmen - one from Japan the other from France - who travelled to Africa to check the market. The Japanese man returned home and said there was no point setting up in Africa because no one wore shoes. The French salesman however said we must go there, it's a huge untapped market. It is all a matter of attitude and application and we have done it before in France so we can do it elsewhere."

"The van mounted market is mainly in Europe with very few sold in Asia - but that can change. France is Europe's biggest market, followed

by the UK with around 600 units. Klubb is number one in France and number two in the UK. Germany is the third largest with about 100 van mounted platforms. Versalift is sold in Germany by Ruthmann so the potential is strong. We have sold more than 40 vans in Belgium, so we are number one or two, and have a good partner in Sweden but in other countries numbers are very small at the moment."

"In Germany we sold 10 fully electric van mounted platforms to Mateco through our partner Charterlift but are in the process of looking for another dealer. We currently have 18 dealers around

the world about half of them in Europe. Eastern Europe is where we plan to look next - in colder climates it is better to work from the van rather than a truck mounted platform. Outside Europe we have dealers in Russia, India, Malaysia, Algeria, Uruguay, Peru and Australia. A dealer must have the capacity to demonstrate machines, offer a full after sales service and have bodyshop facilities to mount the booms. However the large specialist and insulated machines - such as a 25 metre, 700kg insulated platform

we produced for an electricity provider in Turkey - will be made in France."

Any Bauma launches?

Klubb will launch a new range of products at Bauma - but all it will say is that they are not van mounted platforms. "We have a full range of van mounted platforms with the smallest on the two tonne baby vans such as the Peugeot Partner. We also have the two tonne K20 which was all electric but is now available on a diesel van. We will



Producing more than 1,200 van mounts a year causes problems finding space to store the completed vehicles before delivery

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show platforms on a 2.2 and 2.8 and 3.5 tonne from nine to 15 metres. The 3.5 tonne 12 metre platform has the biggest market share in France and 13 metres in the UK.

Investment in innovation

A month ago Klubb hired Cédric Magnien as group innovation director. He joins after 20 years with Poclair Hydraulics and heads a department of 18 engineers across all the group companies. "In the

early years the most important thing was to develop products with small advantages over the competition," says Bourrellis. "Now we need to go big on innovation. The new products to be launched at Bauma are very innovative."

Klubb group

Klubb group now employs 250 people with revenues of €80 million and is apparently still growing at a rate of 20 percent. "I think we



Booms ready for assembly



A Klubb K32 Master Van

have at least one more good year in Europe," says Bourrellis. "We are probably at maximum sales demand and therefore we need a big effort to find other markets. We will continue to manufacture in France whatever the sales demand from other parts of the world. We assemble product in our facilities but 80 percent of everything we use is made in France the rest in Europe and everything is designed in-house. We currently produce between 1,200 and 1,400 platforms a year but our capacity is 2,500 to 3,000 units. If we did ramp up production one of the problems would be finding skilled labour."

Long term plan?

"In the next five to 10 years I would like to be number one in the world for lifts. I still own 87 percent of the company with the other 13 percent held by the banks and other private shareholders, so we have the capacity to invest and acquire but at the moment we have a lot of work to get on with at EGI and Klubb and it will take time to integrate our two new acquisitions into the group. The team we have now has arrived from different backgrounds and companies with different skills and products, but we are now ready to move forward to the next stage of development."

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