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European van explosion

The market for van mounted platforms throughout Europe has literally exploded over the past year or two with all the leading manufacturers ramping up production after experiencing a huge increase in demand for all types of van mounted lifts.

This increased demand has not been without its problems. Covid, and in the UK Brexit, have combined to create component shortages - particularly electronics - manufacturing delays and price increases. A significant part of this demand has been created by a huge investment - €750 billion in the EU alone - to improve digital capabilities with the continued implementation of fibre optic broadband as well as 5, 6, 7 and 8G networks. And although the larger truck mounted platforms are being used for the installation of the antennas, there is a positive impact on the demand for van mounts particularly in the main user countries such as France, Germany, the UK, and to a lesser extent, the Nordic countries and Benelux. This combined with telecoms and local authority work has continued through the epidemic.

The main trend over the past year for manufacturers has been the move away from diesel power. This has manifested itself in the form of hybrid rather than full electric van mounted platforms, primarily due to the huge cost differential for all electric chassis - up to four times

that of the diesel equivalent. A full electric vehicle also has issues with the weight of the batteries and therefore a reduced payload. The battery pack can also block the position of the vans outriggers/stabilisers.

From a manufacturing point of view, the market leaders remain Versalift and Klubb both of which have expanded over the past year. France Elevateur - probably the next largest van mounted platform manufacturer - has also made significant strides both through acquisition and organic expansion.

France Elévateur expansion

Last year France Elevateur acquired Spanish vehicle mounted lift manufacturer Talleres Velilla which trades as Movex. Established in 1960 in La Garriga north east of Barcelona, Movex claims to be the truck mounted market leader in Spain producing around 200 vehicle mounts a year with working heights ranging from nine to 24 metres, including 3.5 tonne truck, van and pick up mounted models. At the end of 2020 it moved into a new 6,000 square metre facility allowing it to double its potential production capacity to 400 units a year.

The acquisition provides France



France Elevateur has opened two production lines for its 12m van mount because of demand from the telecoms in France



The France Elevateur 121 FT

Elévateur with a significant increase in production capacity, which it says is now in the region of 1,600 units. It also gains some additional products, design engineers, customer base and geographic coverage.

Organic growth is being realised through the expansion of its plant in Flavigny sur Moselle, to the south of Nancy in Eastern France, which reached full capacity after the addition of an extra production line and a move to double shifts. At the end of last year France Elévateur announced that it was adding a new 1,800 square

metre modular sub-assembly hall which will allow it to double the current production capacity and optimise the two production lines in the current facility. Half of the new building will be dedicated to telescopic boom assembly while the other half will be used to assemble electrical installations and carry out finishing work on other incoming components. The expansion was intended to add 20 units a month of additional capacity, the company now says that once the new building is in service it will be able to produce six of its 12 metre van mounted lifts a day - roughly 100 units a month.

Battle for market leadership

Klubb - a relative newcomer entering the market in 2015 but may now be European market leader - is also seeing huge demand, saying

The new Movex plant near Barcelona



The Movex TLH16 has been developed to cater for ever-increasing restrictions on emissions and pollution within city centres





The Mondia facilities in Liège

that the 'market appears to be growing exponentially'. Last year it says it produced 2,500 vans and forecasts 3,000 this year and 3,500 in 2023. Last summer, in a move to consolidate Klubb's position in the European market, private equity firm Andera Partners acquired a 'significant' but minority stake in the company. With the increased financial support Klubb acquired Belgian distributor, Mondia Wallonie at the end of last year.

Based in Liège, Mondia distributes, rents and services self-erecting tower cranes, from Potain and French manufacturer Speed Crane. More recently it has built up a vehicle mounted lift sales and rental operation, offering Isoli alongside Klubb van and truck mounts. Mondia was one of Klubb's first distributors, and the second distributor that Klubb has acquired, having purchased its UK distributor CPL in 2017. Last year CPL saw an 80 percent growth in van mount sales - due not only to winning market share, but also the huge increase in demand, particularly for hybrid models.

"An electric powered boom with a diesel chassis allows the operator to travel any distance but reduces emissions and fuel consumption by powering the boom from a battery," says CPL. "The battery can last up to 15 cycles and can be re-charged within a lunch break preventing any obstructions in efficiency. The overall cost of the hybrid compared to full electric is substantially lower making it more affordable for smaller companies subcontracting for the big players."

Klubb's current line-up runs to around 60 models and variants including vans and truck mounted lifts, along with specialist fire and insulated platforms. It has five assembly plants and has added services such as long-term rental and product support. In the past few years it has also acquired the assets

of Comilev and then Egi.

In the UK one of its more popular van mounts was the KL32 electric boom mounted on a 4.5t diesel Renault Master cutaway van, without outriggers. The KL boom is manufactured using lightweight, High Elastic Limit Steel (HLE) which can give an additional 140kg of additional payload allowing the user to carry a fully stocked workshop in the rear of the van where previously they may have sent out a separate backup vehicle.

"Thinking outside the box when designing these platforms has been key to the increase in sales," said CPL. "Designing van mounts without outriggers cuts set up and stow time. The option is available on the full KL range. Educating each sector on the benefits of van mounts and taking care of the in-life maintenance of the fleet have been key components for market growth."

"Due to these factors, CPL has also seen a sharp rise in sales to rental companies. Some of the larger national customers are predicting more than 35 percent growth this year and the same each year after. The feedback received is based around the many options now. Key features offered include accessories like the ladder locker. Although it seems strange to carry a ladder on a van mount, sometimes it is impossible to reach the area with a vehicle mount or any platform for that matter. Other popular options are as basic as tool trays in the basket allowing the operator to organise their tools neatly. Each of these small touches make work at height more efficient, cost effective, helping make the company more profitable."

Klubb is busy designing new products for additional market sectors. One of the latest releases is the KT18PZ - a 19 metre telescopic, mounted on a seven tonne van chassis and claims the best working height on a van mount in the market.



In the UK one of Klubb's more popular van mounts is the KL32 Hybrid with an electric boom mounted on a 4.5t diesel Renault Master cutaway van without outriggers.



One of Klubb's latest releases is the 19m KT18PZ mounted on a seven tonne van chassis which claims the best working height of any van mount



The K20L can be supplied as a full van or cutaway version. Both with a 10.5 metre working height



The 1,000th Versalift VTL van mounted lift was produced in just over two years after its launch

It has an outreach of 9.5 metres and 420 degrees slew.

For companies looking to completely eliminate emissions, Klubb has designed three new options mounted on the Peugeot E-Expert, which has a range of up to 330km making it ideal for more urban applications. The K20L can be supplied as a full van or cutaway version. Both options have a working height of 10.5 metres and a working outreach of 5.8 metres with no outriggers and 420 degrees slew. The KL21B has a working height

of 11.4 metres and 6.5 metres outreach. This design comes as a full van with no outriggers yet with a substantial payload for a mobile workshop.

Versalift on the move

Versalift is seeing substantial demand for its lightweight VTL (Versalift Telescopic Light) van mounted platforms. Launched in 2019 the VTL-41-145-F the company has already sold more than 1,000 units. Since then, production in Denmark has grown beyond all expectations with the VTL product

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Versalift UK's facility is very busy at the moment producing about 600 van and 4x4 mounted platforms over the past year

aimed at the changing demands of the European market and to cope with increasing van weights for each new engine Stage.

The VTL was followed by the VTM van mount in mid-2019 with the new VDTL van mount coming later that year. The growth in production has generated more than 50 new jobs at the company's Danish plant in Farsø - between Aalborg and Aarhus. Production in France and UK where the units are mounted, has also helped increase capacity.

Versalift has been involved in several acquisitions, last year parent Time Manufacturing/Versalift acquired German truck and spider lift manufacturer Ruthmann. A month later it launched the first, CE versions of its US-built Aspen underbridge inspection platforms, which Time acquired in 2018. Last year the company acquired its Canadian distributor Calco Equipment which it rebranded as Versalift Canada.

At the end of last year Versalift

opened a company store in Sweden to distribute its vehicle mounted lifts as well as Ruthmann. The company says the reason for moving from an independent distribution to a wholly-owned subsidiary is a desire to move closer to its customers. However, it may also be related to the damage caused when its dealer in France decided in 2015 to go its own way, transitioning to Klubb, now its biggest competitor.

And just a few months ago the Time/Versalift group itself was acquired from private equity owners the Sterling Group by private equity firm H.I.G. Capital. While it is still early days, the signs suggest that the new owners are looking to invest and expand the brand and product ranges.

Versalift UK expansion

"In the UK production is flat out and we have produced about 600 van and 4x4 mounts over the past year," says Versalift UK managing director Andy Bray. "Yes, it is very busy at the moment, however we have achieved a 25 percent increase in revenues every year since 2017 and now consistently make 500 to 600 units a year and employ around 130 staff. We managed to increase manufacturing productivity for the 13.5 metre van mounts by about 20 percent using specialist teams and cell production. We also see between 25 to 30 productivity improvements when building the more



Unimog mounted platforms are also very popular for Versalift

modern and easier designed VT rather than older EH models. The VTL is very popular - last year we produced 350 VTLs on Transits out of a total of more than 500 units." "Because there are several issues with fitting an access platform onto a full electric chassis - weight and position of the battery pack - I think we are about five years away from getting the best range, performance and payload package from all-electric van mounted platforms. The hybrid machine however is an increasingly popular option. We get 20 complete platform cycles on a full battery charge - enough for a day's work. Also, the 3.5 tonne mounted hybrid is only around eight percent more expensive and the hybrid technology can be retrofitted. On top of the kit the cost of fitting is about £1,500."

"Obtaining chassis is very difficult at the moment with lead times up to 12 months. We continually have 250 chassis on order but supplying customers can be difficult as we never know when a particular chassis will arrive. Unfortunately van prices have also increased, up to 30 percent in past two years particularly with Mercedes products."

Seven tonne vans

One surprising demand point is for the larger seven tonne chassis vans, as some clients switch from truck mounted platforms due to the need

for more storage capacity and a cheaper vehicle. While not dramatic it shows a trend that may grow with companies looking to save between £12-15,000 per vehicle as long as a 17 metre working height is sufficient.

Another popular area is the Unimog mounted market which has grown from less than 10 to 30 to 40 machines a year. Versalift has landed a contract with Irish state owned electrical supplier ESB, for 119 insulated 4x4 platforms on 7.5 tonne 4x4 Mitsubishi Canters, plus a few on Unimogs. The key 4x4 markets are UK, Ireland, Spain and Germany.

"There are now around 9,000 Versalift platforms in the UK and Ireland," said Bray. "In the future we are looking to increase turnover from £30 to £60 million, with contracts such as the five year ESB deal."

Another smaller UK company doing well at the moment is Aldercote. The company is one of three suppliers to the UK's largest van mounted platform rental company Access Hire Nationwide (see page 22). The company produces a wide range of vehicle mounted platforms - including small truck mounts, vans, 4x4 pickups, trucks and Unimogs - from 8.55 to 19 metre working heights including tracked vehicles as well as being the Altec insulated platform distributor for the UK.



Hybrid van mounted platforms are becoming increasingly popular - this Versalift e Tech unit can complete 20 complete platform cycles on a full battery charge



Aldercote produces a wide range of vehicle mounted platforms from 8.55 to 19 metre working heights including tracked vehicles. These are VZ145 E drive platforms on a five tonne Iveco with 14.5 metre working height, 9.1 metres outreach and 250kg basket capacity

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Flying under the radar

In business there are companies that like to shout about everything they do while others just go quietly about their business. Access Hire Nationwide (AHN) - a division of Kelling Group - is in the latter category, and over the past 15 years has 'flown under the radar', building the company to the point where it is almost certainly the largest specialist van mounted platform rental company in Europe. Mark Darwin visited the company at its head office near Normanton in West Yorkshire to find out more.

Unless you operate in the van mounted platform rental sector, Access Hire Nationwide is probably just another rental company name; however as a specialist provider focused on core infrastructure sectors, the company has demonstrated strong, uninterrupted growth since its foundation.

In the last C&A rental fleet survey AHN declared just over 1,000 van mounted platforms and expects to have a fleet in excess of 1,400 platforms within the next 12 months, while its total fleet - which also includes eco efficient mobile welfare units and lights - will total in excess of 3,800 units.

The group is continually looking to expand its offerings and has moved into offering lease packages both on standard vehicles but also tailored lease packages on bespoke vehicles.

In the beginning...

AHN was founded in 2007 by John Wood who set about not only building the business into a market leading operation with a fleet of more than 500 units, but was instrumental in transforming the way long-term van mounted rentals were structured.

In 2014, he led the investment and raising of growth capital in AHN by Elysian Capital, a mid-market private equity firm. The deal also included sister company Welfare Hire Nationwide (WHN) which was formed in 2012 to hire eco efficient mobile welfare facilities to core infrastructure markets such as rail and highways. In 2017 the Group went through a secondary buy out and secured investment from US infrastructure fund Alinda, which was attracted by the long-



AHN expects to have a fleet in excess of 1,400 within the next 12 months

term dynamics, robust financial performance and core infrastructure focus of the business.

Current set-up

Given the group's constant growth since foundation, the business has continually invested in its senior team, particularly over recent years. Last October, Wood took a step back from the day to day running of the company becoming Chairman, while Chief Financial Officer Stephen Moore was promoted to CEO and in the last few months Matthew Jowett has joined as CFO.

"There are some important common principles across the Group that have remained consistent since foundation," says Moore. "We have always sought to be focused, specialists in our chosen fields, not generalist hirers. We are very specific in the sectors we want to operate in, which means we can provide the best products and the best support to our customers in these markets. Access equipment is a critical asset so minimising downtime for clients is crucial. We ensure we have the capacity to provide true 24 hours a day, 365 days a year cover, meaning if anything goes wrong, we can sort out the problem very quickly."

"Long term hire is anything from two to four years with the current average being just over three years. The main sectors we supply include telecoms, power distribution, street lighting and

local authorities. This long term commitment by our clients enables us to invest and provide them with the latest equipment and technology available."

Investment

AHN says its average fleet age is currently less than 2.5 years and is decreasing with the continual investment in new products.

"The strength of our offer and solidity in our customer base has enabled us to invest throughout the economic cycle and each year we continue to make significant investments to grow our fleet," says Jowett. "Over the last 12 months we invested over £30 million across



Head office in Normanton, West Yorkshire



A Klubb K38P from CPL

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the Group, and the year before just a few million less - split about 50/50 between access and welfare - all throughout a period where many providers reduced capex or put it on hold altogether. This puts us in a unique position to support our clients' growth and to deliver projects critical to the nation's infrastructure, something we are extremely proud of."

Trusted suppliers

Over the years the company has worked closely with a few preferred suppliers. For the access equipment it currently uses CPL/ Klubb, Versalift and Aldercote which between them supply all of its van mounted and 4x4 pick-up mounted platforms up to 17 metres. AHN says it opts for a high specification as standard for its clients, which for the vans includes ply lining,

roof beacons, Chapter 8 livery, a reversing camera, emergency stop in the basket and pedestal and full functions at ground level with a five metre wander lead.

"We select the best quality, most technologically advanced products at the time of purchase," says Moore, "however if customers prefer a certain specification, then it can usually be accommodated - we like to work with our customers over the long term and work in partnership with them."

Through talking with its customers and suppliers the Group has a planned pipeline, both to replace older units and expand the fleet. Most of its vans are on 3.5 tonne chassis with 13 to 14 metre working height. It also has 5.2 tonne and seven tonne GVW vans which provide maximum working heights



in the region of 17 metres. Although the larger vans need additional driving licence requirements for younger operators, their main advantage is the much larger cargo carrying capacity - up to 2,300kg when mounted on the largest chassis.

Product range

Recent fleet additions include the 13.8 metre Klubb K38P mounted on a 3.5 tonne Renault Master or Ford Transit supplied by the manufacturer's UK distributor CPL. The unit has an outreach of 8.2 metres with 120kg in the platform, while its maximum platform capacity of 200kg is available at an outreach of up to 7.5 metres, whilst boasting a working height of 13.8m. It has two, A frame stabilisers, 1kV boom and basket protection and electric emergency decent controls

fitted in the basket and turret.

AHN also has a growing fleet of Versalift VTL135-F van mounted lifts. Mounted on the 3.5 tonne Iveco Daily 35S or Ford Transit chassis, the VTL135-F offers an outreach of 8.4 metres and a platform capacity of 230kg. Features include zero tail swing, an LCD display in the platform and 200kg of cargo payload after driver, passenger and fuel are taken into consideration.

AHN's 3.5 tonne 4x4 pick-up mounted platforms include CPL's 13.2 metre P-130 platform on Isuzu or Toyota chassis, providing up to, 6.5 metres of outreach and a spare load capacity of about 225kg. The fleet also includes the 14 metre Klubb KAT 42 with 6.4 metres of outreach and 200kg platform capacity, mounted on the Isuzu D Max chassis.

AHN is probably the largest specialist van and 4x4 platform rental company in Europe





To augment the van mounted fleet, AHN also offers pole erection units on 7.5 to 18 tonne GVW chassis. These typically can have either a front or rear mounted crane, front and rear gantries with pole dividers and pole grips, a drop-side body, rear facing high density beacons, two rear facing work lights and two high density front facing beacons. The units also have tool lockers mounted on the underside of the body on both sides of the chassis.

AHN also offers electric and hybrid options within the fleet and is happy to discuss options with any customer looking at this product type. It is currently a small proportion of the fleet, but it is growing, and with new manufacturer innovations and improvements is expected to grow further over time.

"The number of enquiries for electric/hybrid vehicles has certainly increased over the past 12 months, but the charging infrastructure is not yet good enough for the current 40-to-50-mile range, and also the current significant costs are a factor in adoption. The hybrid is more of a valid option but still somewhat of a compromise for working requirements compared

to traditional technologies," said Moore.

Key to success

"We are constantly investing in the latest products which include high specification chassis and booms," adds Moore. "We also have very good long-term relationships with our clients, understanding their requirements and working with them as a partnership to help their businesses succeed. Downtime is very costly, so this is minimised as much as possible by ensuring the products are modern and maintained to a very high standard. We take all the headaches away from clients by providing a fully outsourced solution all included in the hire rate, including carrying out any regulatory requirements, servicing, repairs, MOTs and sorting breakdowns and replacement vehicles when required."

Lease offering

The company's long-term lease option - up to seven years - also works like a fully-serviced operational lease, providing the financing with all the backup, regulatory compliance and maintenance included as standard. It apparently suits several clients, who prefer it over the more flexible



Most of AHN's vans are on 3.5t chassis

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long-term rental, appealing to companies who would usually purchase their equipment, or where there is longer term visibility on core asset requirements.

"We can demonstrate cost savings for clients where leasing is an option," says Moore. "Companies can tie up millions of pounds in capital expenditure and then have all the costs to service, maintain and employ additional people to manage all this. The other option is to lease and outsource all this to us, leaving clients able to focus on their core business."

"With regards to availability, we include our customers and their requirements in our long-term planning, and then make the corresponding investment in the supply chain partners with which we have built really strong relationships, so that we have the visibility of assets coming through. Given our fleet size we are also able to accommodate new customers with nearer term needs with reliable and modern equipment. We do not see any reason why we cannot continue to invest in the access market and grow with our supportive banking syndicate and equity investor."

Welfare business

The other half of the Kelling Group is mobile welfare which was formed in 2012 and which has similar key requirements as the company's access business.

"Welfare has had a much bigger focus by all businesses over the past 10 years and especially in the last two or three years. We set out to develop the business

and offer modern, innovative and environmentally friendly products compared to traditional offerings, again to core long-term infrastructure markets such as rail and civils/highways, all delivered nationally using our fleet of low emission ULEZ towing vehicles. We can demonstrate fuel savings of about 15x plus compared to traditional welfare products, and the annual CO2 savings for customers who use our products are significant. From a standing start in 2012 WHN now has about a fleet of over 2,000 units."

ECO units

The company claims to have the largest rental fleet of bespoke, innovative and eco-friendly towable mobile welfare units and welfare vans in the UK.

"Our fleet has always been modern, bespoke, eco-focused and market leading. The latest generation includes innovations such as lithium battery and full solar technology covering 100 percent power requirements for silent running and minimising the need for generator power, rainwater recycling, and an intelligent auto system with onboard and online dashboard for full telemetry to guarantee smart usage of power and services," says Jowett.

"Compared to using standard non-towable static units, using 100 of WHN's bespoke ECO10 units will result in more than 1,200 tons of annual CO2 carbon footprint savings. This is equivalent to keeping 36 HGVs off the road," adds Moore. "Because all of the welfare units are towable and we



have a fleet of ULEZ 4x4 vehicles we can guarantee next day delivery to anywhere in the UK. These units are unique to us and we have a range of sizes to accommodate all requirements."

Growth potential

"Both the access and welfare markets are growing significantly, and given end market dynamics and sector funding, I do not see this changing anytime soon. Equally we have plans for investment in ever more modern and efficient products and will continue to work with our clients to provide the best specialist equipment to meet their requirements."

"If you have a growing telecoms business for example, why would you tie up several million pounds in fixed assets which could alternatively be used to grow your business? The difference between lease and long-term hire are slightly different business models with a pricing differential between the two to take account of the length of commitment. However, the asset is the same, and we are specialists in these assets at providing a fully outsourced proposition. Historically everyone either hired or purchased. With some customers who can commit to the longer term, we are able to demonstrate it may suit their

requirements better, and if so, there can be significant savings. We are happy to discuss from one to one hundred leased assets, and beyond - there is no floor or ceiling on our ability to finance, structure and meet specific asset requirements," said Moore

"For those that go down the purchase route they should remember that in addition to the purchase cost, these are hard working assets and incur additional costs which many may not appreciate as they are hidden in the P&L, these include servicing, breakdowns, replacement parts and downtime, and if you don't have a replacement you may also leave a gang of men unable to work while you struggle to get a replacement vehicle. Those that understand the total costs are much more likely to long-term hire, or if appropriate lease," said Jowett.

Future products?

"Currently we want to make both of our areas of specialisation even better. However, there are new areas we are constantly evaluating, but they must have the same common principles that have been applied to AHN and WHN. The mobile tower lights within Welfare are a good example. Three years ago, we introduced hybrid lighting



An ECO XLi unit with solar panels and lithium battery



WHN now has a fleet of more than 2,000 units



units and two years ago were a first mover in the UK to offer Lithium lighting. The lithium lights can run for over 450 hours before refuelling, offering the most efficient Eco solution in the market with silent running, and a 94 percent reduction in fuel and CO2 emissions compared to standard products. So, if you want the lowest emitting lighting product in the market that really works, they are the 'go to' mobile light, especially for those looking at

fuel savings and CO2 emissions," said Jowett.

"We looked at our existing welfare customers and found that many of them often worked outside of daylight hours, such as in highways and rail, where much of the work is done at night when the network is less busy. It is that kind of thought process that we go through before bringing in any new asset categories. Whilst we have expanded over the past 15

years, we have done it carefully and strategically and we still have a range of focused, specialist products. We don't want to spread ourselves too thinly and lose the premium service and specialist advice aspect of the business. We will look at other products but are very disciplined about keeping to the specialisation principle in our core offering."

Spare capacity

"Ultimately whichever van mount the clients opt for you have to keep the fleet well maintained and available.

We always operate with spare capacity to fulfil breakdowns, swap outs etc. to ensure a high level of service is maintained. We have a fleet size that enables us to do this - in smaller rental fleets this is not always possible," said Moore. "Our aim is to continue to grow the Group's fleet by over 20 percent annually and invest to keep our fleet the youngest, most modern and innovative in the market with a premium service in our areas of specialisation."

All WHN's welfare units are towable using a fleet of ULEZ 4x4 vehicles



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