



Dubai and Doha remain pockets of growth for the tower crane sector in the GCC, with the Potain brand, supplied by its dealer NFT, one of the favourites.



TOWER POWER

DEALERS AND MANUFACTURERS OF THE GCC REGION'S UBIQUITOUS TOWER CRANES DISCUSS THE UPS AND DOWNS OF THE SECTOR AND TELL **CMME** ABOUT THEIR PRODUCTS AND PLANS

At the peak of the construction boom in the GCC region in around 2007, it was rumoured that the region was host to more than 30% of the entire global supply of tower cranes. While the veracity of those numbers could never be established, what is definite is that those numbers, whether true or trumped up, have since fallen off drastically. Tower cranes still remain ubiquitous in the region, however, as the most visible construction equipment, standing sentinel to either activity or stasis in the region's highrise projects.

One of the biggest players in the region's tower crane market today is Manitowoc's Potain, supported by its Middle East dealer NFT Specialised in Tower Cranes. Nawar Al Zahlawi, business development manager at the Abu Dhabi-based company feels that even though the market is not at its previous high levels in the current global slowdown, things have started picking up.

"The GCC is actually one of the bright spots in the global tower crane sector," says the executive from NFT, which also has operations outside of the Middle East in markets such as the UK. "We are doing reasonably well in the European markets and have cranes spread out over the continent in France and Denmark. But closer home, the market is more fragmented."

Dubai and Doha are driving the regional market, he says, while Abu Dhabi seems to have suddenly lost appetite for big construction projects and consequently for tower cranes.

"We had almost 50 cranes in the Al Ruwais area of the UAE capital when we got the deal in 2014 for a project to build industrial accommodation. Those cranes were dismantled in 2015. Other than that, you can count the projects and cranes on your hands. We have some projects on Sadiyat Island, but we were supposed to have large projects such as the Guggenheim Abu Dhabi and the Sheikh Zayed National Museum, which have been pushed back. Now work is on

RISING IN STYLE

COMANSA'S FIRST LUFFING-JIB CRANE



Comansa CM launched its first luffing-jib tower crane, the CML190 at Bauma China in December last year. The crane is the first in its CML Series of luffing-jib cranes, which will be completed in the following months with more cranes.

The CML190 crane comes in two versions of maximum load capacity – 12t and 18t - both with maximum reach of 60m and different jib configurations every five metres. Both versions offer maximum jib-end loads of 1.5t and rise up to a maximum free-standing height of 64.4m.

This luffer, as well as the upcoming models of the CML Series, have been designed under Linden Comansa's modular system. Therefore, every component of the crane is light and compact to allow easy transportation and fast erection. Furthermore, the hoisting and luffing cables come preinstalled from the factory for a faster installation of the crane.

Among the main technical features of the new cranes are the forward placing of the hoist mechanism, in the front of the slewing part, which allows more drum capacity and a reduced counter-jib radius. There are also different hoist winch options to achieve maximum hoist speeds of up to 178m per minute and drum capacity for up to 1,280m of wire rope. All hoisting, slewing and luffing movements are frequency controlled for smooth and precise manoeuvres.

The new CML cranes feature a control system, popularly known as "Level Luffing", which allows electronic coordination between the luffing and hoisting mechanisms. A hydraulic push and retention system allows a smooth luffing movement of the jib. The speed of the luffing movement changes depending on the jib angle to ensure a fine approach of the load. Both hoist and luffing movements allow 'microspeed' mode for optimal positioning control while the luffing drive includes a double brake system to boost safety.

Both versions of the new model will be available for customers in Asia, Middle East and Oceania, from 2017.

only on the Louvre," Al Zahlawi says.

"We put cranes on the Louvre and we were expecting a lot of other projects in Abu Dhabi, but it seems all their funds have been allocated elsewhere."

However, next-door Dubai is a bright spot, and Al Zahlawi says: "Dubai has enough work to keep everyone in the Emirates busy. The city's growth is making up for the losses elsewhere such as in Abu Dhabi and Saudi Arabia. We are really looking forward to the new developments and we've already started working there, having supplied a couple of cranes for projects related to the Expo 2020, where the Al Futtaim Group recently won a major construction contract and they have three years to build the project."

Although work related to the Expo is starting later than the industry expected it to, there is hope that the renewed activity will bring in more investment, which will keep the construction sector busy and, in turn, require the supply of tower cranes, he adds.

Historically, NFT has had a stranglehold on the Abu Dhabi market, and al Zahlawi claims around 70% of the tower cranes in the UAE capital are Potains that it has supplied. Dubai, however, is a different story.

"Dubai is more competitive. As one of the earliest to enter the market, we are still competing well, but our market share now is lower than it used to be 10 years ago. There is more work and so there are more players vying for a slice of the pie. At the moment that pie is large enough to support many players."

Raimondi aims high

One of those players vying for a slice of the pie is Raimondi. The Italian brand is now owned by Dubai-based KBW Investments, which has given it synergies within the KBW group to fall back on.

"We've been making strong progress in the Middle East in recent months, and we're working on some highly prestigious projects in the region," says Domenico Ciano, technical director at Raimondi Cranes. "Our parent company, KBW Investments, continues to support us through cross-portfolio engagement. For example, Klampfer Middle East, a KBW Investments company that was founded jointly with Sharjah's Basma Group and Klampfer GmbH of Austria, contracted us to erect a Raimondi MRT152 crane at an onsite project for a period of 24 months. We look forward to building on our recent success."

In order to do that, however, Raimondi first needs to deal with what Ciano thinks are some of the traditional aspects of the GCC market – lack of awareness, price-sensitivity

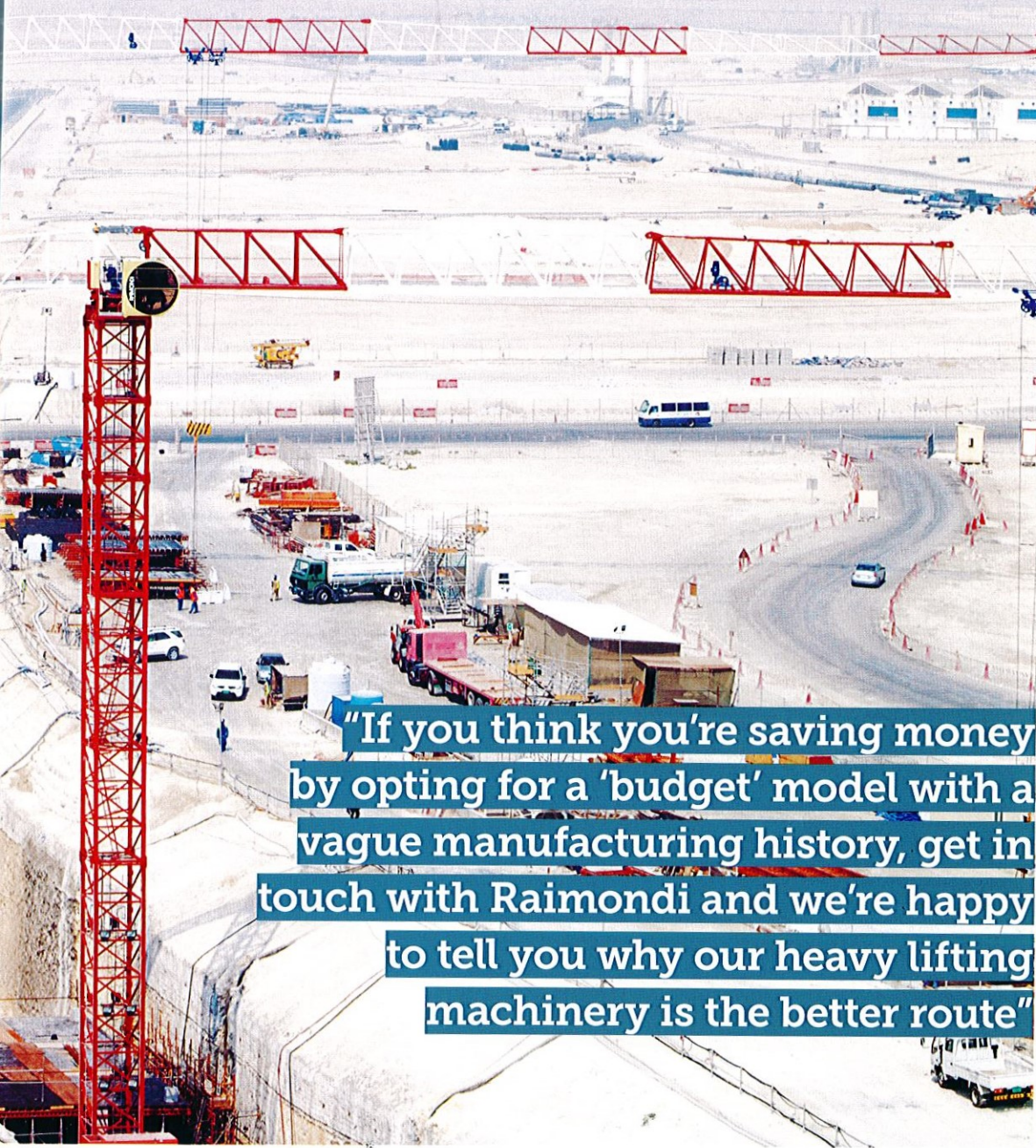


and difficulty of access.

"In the GCC, historically, you could say that the heavy machinery segment was very hard to access for outside players. It was nearly unheard-of to come into this market and make headway without some sort of local footing," he says.

"For Raimondi, specifically, as a European manufacturer, you could say that a challenge is the lack of education about our quality versus that of Chinese manufacturers, for example. For the extremely price-conscious, more education on quality, durability, and real investment value is needed. If you think you're saving money by opting for a 'budget' model with a vague manufacturing history, get in touch with Raimondi and we're happy to tell you why our heavy lifting machinery is the better route."

Going by Raimondi's performance figures and forecasts, many customers also seem to agree with that 'better route'. KBW's understanding of and focus on the Middle East has started paying off for the Italian brand, with significant sales last year. As KBW chairman



"If you think you're saving money by opting for a 'budget' model with a vague manufacturing history, get in touch with Raimondi and we're happy to tell you why our heavy lifting machinery is the better route"

Ahmed Alkhoshaibi revealed to CMME in an exclusive interview last November: "During Q1 and Q2 (2016), 35 cranes were sold in the Middle East. Rounding of the year, we're forecasting 60 cranes – with the bulk of these heading to Qatar and Saudi Arabia. Currently in Algeria, there are eight Raimondi MRT294s installed as part of a large scale project."

For Linden Comansa, agility in the market is the deciding factor behind success. The company trusts its strength in speedy supply of parts and service to compete in a market where it eyes the Chinese presence ominously.

Mariano Echávarri, communications and marketing manager for the company, feels that the tower crane market has been getting tougher in general for the brand in the last few years. While the entry of Chinese brands with their lower prices is a major factor, another cause is the lower rental prices, which makes more difficult to amortise its higher-end equipment in less time.

Echávarri feels that Linden Comansa's edge is the amount of care and attention it gives to providing service and back-up to its customers in the region, which few other manufacturers care about.

Preference for heavy lifters

What all manufacturers do pay a lot of attention to, in fact, is the type of cranes that customers are asking for. Raimondi's Ciano says one of the trends of the GCC market is a preference for cranes with heavier lift capacities, such as Raimondi's MRT294.



RATED FOR SIZE POTAIN DOES A LARGE MD

The new MD 560 B crane from Maniwoc's Potain brand has all the features customers expect with some new additions. With a 550 tonne-metre rating and a choice of either 25t or 40t versions, the crane is well-suited for a broad range of infrastructure development projects, such as dams, bridges and other large construction projects.

Jean-Pierre Zaffiro, global product director for tower cranes, feels customers will like the crane's jib end lift abilities and its ease of erection.

"Our MD family has cranes suited for a wide variety of applications," he says. "This new crane shares many common design features with the rest of the range. We've worked hard to make this crane easier and the new Potain MD 560 B is the largest in the MD range, faster to erect and more productive once

it's working. We've improved lifting duties, and customers will see a real advantage in the chart, especially lifting at the jib end."

Lift performances, on average, are improved by over 12% with the new crane in comparison to the two cranes it replaces, the MD 550 and the MD 560 A. It also offers better tip loads and better load curves than its competitors in most configurations. When working with an 80m jib, the 25t MD 560 B shows a lift advantage of 26% over the Potain MD 550. This gives the crane an ability to lift 5.4t at 80m. Similarly, when working with a 70m jib, the 40t version of the MD 560 B can lift 34% more than the MD 560 A, picking 7.5t.

The 25t version of the MD 560 B sits on 2.45m x 2.45m K800 mast sections. For the 40t version of the crane, the K850 mast is used, which has the same dimensions as the K800 but has special reinforcement for lifting larger loads.

While the company's range includes cranes with a variety of capacities and of all types - flattops, hammerheads and luffing jibs - with various height and jib length configurations, customers in the Middle East have shown a marked preference for the MRT294.

The popularity of the crane, with a jib length of 76m and maximum lift capacity of 16t up to 30m, is in line with the region's demand for high jib-end capacity and jib reach for larger job sites.

According to Ciano, while Raimondi released the MRT159 topless and LR213 luffing-jib cranes last year, the MRT294 still remains its best seller in the region.

For Linden Comansa, luffing-jibs seem to be where the demand is. The models by definition are ideally suited to tighter spaces and are especially popular for high-rise construction in congested built-up areas within cities.

According to Echávarri the company has seen great interest in its 18t LCL280 luffing-jib model from tower projects of 300m in height. As far as flat tops are concerned, he adds, the 24t or 30t categories are most in demand, with both jib lengths and heights of 70-80m. Linden Comansa's most popular models in this category are the 25t 21LC550 and the 12t 16LC260.

Over at NFT Al Zahlawi says the demand for Potain cranes is across all categories. "We are the Potain dealer for the entire GCC and have



been associated with them for almost 35 years. We are synonymous with the brand and offer all of their products. In the Middle East, where the higher capacity models are more popular, we see a good demand for the 40t MD1100 model. In fact, we have the maximum number of units of this model in the world for any crane supplier. The most popular Potain model in this region, however, remains the MC310 K12 with a 12t maximum capacity, which comes down to 3t at the tip of its 70m jib."

Speaking about the state of the market, Al Zahlawi says: "There was a time when 60% of our business was sales, with rental making up the remaining 40%. After 2009 those figures have flipped. With the uncertainty in the market at present, there is a high level of risk aversion and contractors are preferring to use the tower cranes on a project basis, rather than owning them outright and then having them sit idle when a project is over."

Liebherr, another giant of the sector, has also seen considerable traction in its 12t cranes. Speaking to media outlets in the region, Jens Kotzurek, Middle East sales director for tower cranes, has pointed out that the company has a major share of the region's market with a total of around 700 cranes on the ground. It is most successful in the Qatari market where it claims to control more than 70% of the tower crane sector. Kotzurek explained that some 90% of the company's tower cranes in the region were of the top slewing variety,

RULING THE HEIGHTS RAIMONDI'S HEAVY LIFTERS

With the Middle East's penchant for high-capacity tower cranes, Raimondi's MRT 294 has found special favour in the region.

The Italian manufacturer attributes this to the qualities and features of its MRT series of topless cranes. The models in the series are built with no frames or tie rods, which makes them easier to set up and maintain. The topless feature allows for quicker jib adjustment, which makes it more convenient to attend to the various requirements on a construction site. The series has an extensive line-up of cranes that can be used in all kinds of operations.

Elaborating on the popularity of the model, Domenico Ciano says: "What we've seen here in the Middle East is significant interest in our MRT294 topless crane, especially from general contractors and developers that employ precast systems. The MRT294's popularity stems from the high tip load of 3.5t that it can carry at 70m, as well as the maximum lifting capacity.

"Two other models are close behind: the MRT159 and LR213. We look forward

to introducing two further models from our portfolio, a new luffing crane and a new topless crane, into the Middle East in the near future."

Paying special attention to the operator, Raimondi has also designed the Deluxe R16 cabin, an ergonomic command centre created by the company's R&D arm based on customer and operator feedback and trials.

With more than 80% of its total surface made of glass, the cabin enhances visibility for operators and offers full jobsite views. Thermal and acoustic insulation has been given special attention, while simultaneously reducing glare and reflection. A special two-toned windshield glass was developed for it for maintaining visibility while ensuring interior comfort.

Ergonomic seating with mobility upwards, downwards, forwards and backwards enables operators to find their best positions for optimal control.





Luffing-jib tower cranes are popular on projects where space for the jib to swing and manoeuvre is at a premium, such as in urban and industrial settings.

followed by the luffing-jib units. Some projects with greater use of heavier steel and pre-cast concrete are also using Liebherr's 40t and 50t cranes, he said.

When it comes to the real heavyweights in the tower crane sector, one of the most recognised names to apply to is Sarens. Though rare in the Middle East, projects in several parts of the world demand heavy lifting services from tower cranes and the Belgian company has a long history of crane services and heavy lift operations globally and in the region, including in the tower cranes sphere.

"As a heavy lift solutions provider, we only focus on high-capacity tower cranes," says Philippe Verdeure, Sarens' regional sales manager (projects) – APAC, Middle East & NAF. "Our fleet ranges from lift capacities of 50t to 126t. Some of our cranes are theoretically capable of reaching heights of up to 800m, which would of course require the proper base and for the crane tower to be anchored to the structure it is next to.

Sarens' special services

"Lifting really heavy items with tower cranes is one of the special services that we provide. We have a long and successful track record of such operations in various parts of the world, such as in South Africa, England and Poland."

Verdeure explains that Sarens is the go-to company where heavy industrial lifts are concerned and most of the heavy lift work it has done with tower cranes has been in the industrial and power sector.

"We are busy in South Africa with erecting a super-tall solar tower for energy production, among other global projects. A lot of our projects are in the power and renewable energy sector," he points out.

"While large renewable energy projects are not common in the Middle East, our cranes are best suited for power plants in other geographies where space is at a premium and the area of power plants and installations is narrower and more confined than in similar projects in the Middle East, which means a fixed heavy duty tower crane is greater value for money. Here in the ME, the area allocated to the conventional power projects is so vast and wide that a very tall, high-capacity crawler crane can be quite useful."

Sarens does have several notable lifts to its credit in the Middle East, and Verdeure points out two of them: "Sarens recently successfully performed a heavy lift project in Kuwait where we used a 3,600t capacity gantry crane system for a record heavy lift operation and also used cranes ranging from 50t to 1600t in the same project. We also have an ongoing project in the Jizan, Saudi Arabia, which is the largest air separation unit in the world."

In the event that very heavy loads need to be lifted very high with a fixed crane, Sarens' heavy-lift tower crane services will prove invaluable, he adds.

Looking ahead, most market players believe that in the short-term growth will come in pockets, such as from Doha's World Cup projects and Dubai's Expo 2020.

Al Zahlawi says: "The entire Middle East market is down but with the Expo 2020 and

Dubai's commercial ambitions significant growth is expected in the construction sector for the next few years. Qatar too is progressing apace on must-deliver projects while Kuwait has the fiscal reserves to grow."

For the longer term, the region remains a place with a potential that is enormous enough for the tower crane market to hunker down and weather the present doldrums in order to realise it. ●



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