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SEPTEMBER 2023

Interviews with
Aerial Manufacturers:

DEMAND UPTICK

Aerial
manufacturers
talk about
growing
demand, electric
equipment,
supply chain
improvements,
and more.





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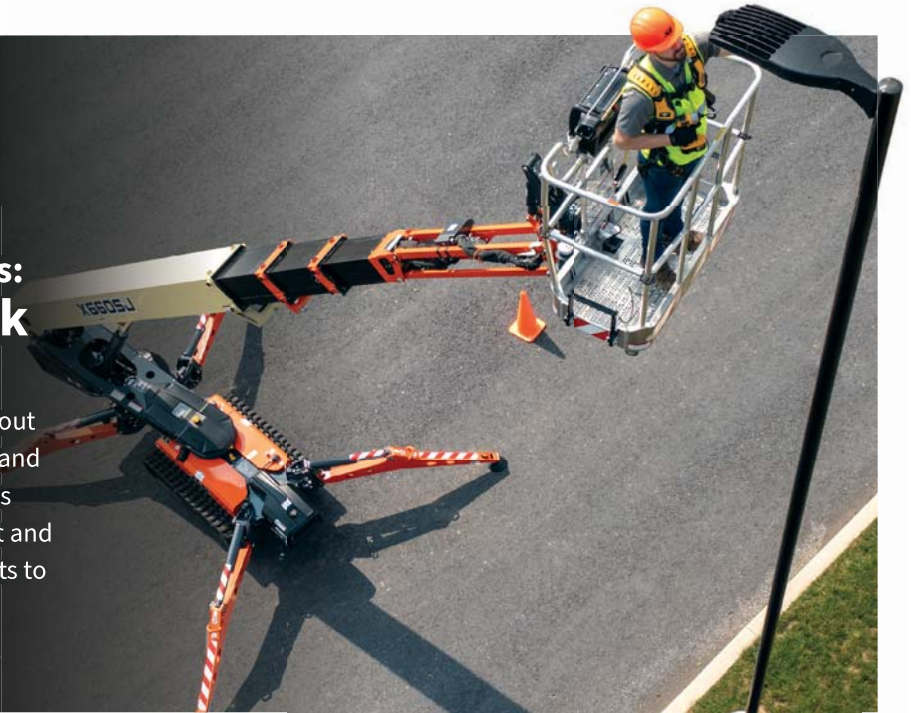
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Interviews with Aerial Manufacturers: Demand Uptick

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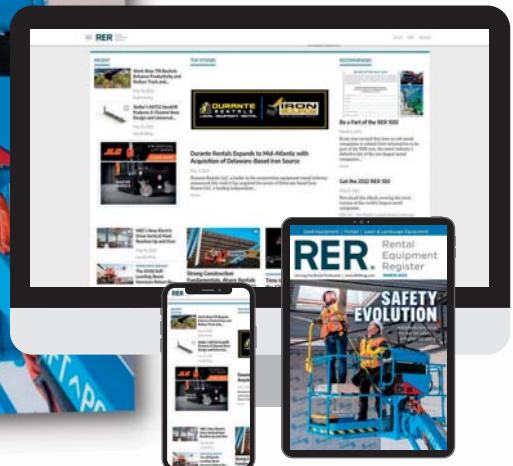
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An Optimistic Vision for the Aerial and Rental Industries

I hope you enjoy this month's lead feature "Interviews with Aerial Manufacturers." A special thanks to those that responded to the questions, in some cases sandwiched between shows, business travels and other commitments.

What stood out to me in this collection of comments is a strong sense of optimism that the manufacturers seem to be feeling about the economy, about the rental industry, and where the equipment is going.

To begin with, all of the manufacturers are continuing to expand their product ranges.

JLG is expanding its electric vertical mast series capable for indoor and outdoor use. It's also re-designing and adding functionality to its SkyTrak series of telehandlers and introduced its first straight-jib compact crawler boom. It is also expanding its IoT capabilities to help rental companies manage their fleets.

Haulotte's newly updated Compact scissor range has completely redesigned several scissor lift models. Skyjack launched a new range of DC electric scissors, featuring AC brushless electric drive motors. The company continues to develop its advanced telematics capabilities.

Snorkel has developed its smaller, lightweight scissorlifts, and Xtreme's XR50100 tracked telehandler offers a maximum fork height of 100 feet and a maximum lifting capacity of 50,000 pounds. The company has made multiple improvements to existing products, such as electric traction drives and increased platform capacities on various models.

Hy-Brid Lifts has launched a pipe rack to improve safety by providing an option to bring up to 100 pounds of pipe up to the working area. It has also

introduced lithium batteries with an estimated lifespan of 10 years.

Genie has introduced a lithium-ion battery option for slab scissor lifts. It recently introduced its GTH-1256 telehandler and new electrified FE telescopic boom lifts.

The manufacturers are finding more acceptance of electric machines, and some of their customers have worked hard to create and build new markets where electric machines have advantages. Using the same machine for indoor as well as outdoor work has advantages on the jobsite. Government-sponsored projects and specialty operations such as mining, underground work and food processing are leading adopters. They are also finding that hybrid units are big fuel savers, with a single tank lasting a full, standard work week in hybrid mode.

Manufacturers are expressing strong optimism about the state of the business. Demand seems strong and increased infrastructure spending in the U.S. and multiple countries creates need for aerial equipment. In the U.S., the onshoring trend is driving the momentum for large construction projects and with infrastructure legislation, many projects are likely to come to fruition. Plants to produce batteries, semiconductor chips, new refineries and industrial facilities, warehouses and the repurposing of existing buildings are all positive trends for the aerial business. Many rental companies aged their fleet during the pandemic and the difficulty of obtaining equipment. However, now with improvements in the supply chain, lead times are shortening somewhat.

The supply chain issue is more complex than that. Everything isn't all solved by any stretch of the imagination, but the trend appears to be positive. I suggest you read what

the aerial manufacturers themselves have to say about it and read their insights about the aerial market going forward.

I'd also like to call your attention to the Industry News lead story on page 8 where the American Rental Association's forecasting analytics team has revised its forecast for this year and next in terms of rental revenue in the construction and industrial segment. The association has significantly revised its predictions for this segment, having previously forecasted \$45.5 billion in revenue for 2023 and \$46.7 billion next year. Now it predicts the construction and industrial equipment rental industry to reach \$56 billion this year and \$59 billion next year, a roughly 25-percent increase. ARA noted that economists at the Federal Reserve Board said data previously produced by the U.S. Census Bureau underestimated non-residential construction spending by at least 20 percent since the second quarter of 2021.

ARA also said that its partners at S&P Global did an ongoing study of specialty rental and came to the conclusion that it has underestimated it as well. Incorporating data from multiple sources helped ARA to come up with a far higher expectation of the likely growth in this area, and therefore forecast much stronger growth in rental this year and next, and in the years after that as well.

That's another reason for a more optimistic vision for the rental industry in the foreseeable future. **RER**

Michael Roth, mroth@rermag.com

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Increased Non-Residential and Specialty Rental Boosts ARA Quarterly Economic Forecast on Rental Revenues

MOLINE, Ill. – The American Rental Association estimated the construction and industrial equipment (CIE) rental industry will reach \$56 billion this year and total \$59 billion in 2024. The new estimate updates the association's previous forecast of \$45.5 billion this year and \$46.7 billion next year.

The ARA said two factors are responsible for this revised view. The first is the data on non-residential construction spending used in the model and the second is the increasing importance of 'specialty rental' to overall rental revenues.

Economists at the Federal Reserve Board suggested that data for non-residential construction spending produced by the U.S. Census Bureau has underestimated non-residential construction spending by at least 20 percent since the second quarter of 2021.

The dramatic growth of "specialty rentals" has inspired ARA to raise its forecast for construction and industrial rentals for 2023 and 2024 by more than 25 percent.

Photo by Sunbelt Rentals



"The Fed economists' analysis is both well-reasoned and analytically sound and we believe that this new information needs to be included in our revised forecast," said John McClelland Ph.D., ARA vice president for government affairs and chief economist. "The second change in our forecast is the inclusion of information about specialty rentals which has been a growing trend. Recent work by our partners at S&P Global has constructed a 10-year time series of specialty rental from multiple data sources. Incorporating this new information into our model now gives specialty rentals a larger share among the variables that forecast CIE revenues."

Canadian revenues rise as well

With current CIE forecasts including both traditional and specialty rental as the new industry measure, Canadian CIE rental revenues are expected to reach \$4.4 billion in 2023 as opposed to previous forecasts totaling \$3.7 billion. In 2024, Canadian CIE rental revenue is predicted to total \$4.4 billion, an increase from the previous forecast of \$3.8 billion.

Canadian general tool equipment rental revenue is down slightly from the last forecast at \$991 million. However, stronger growth is expected in 2024 and beyond as the forecast indicated 2024 revenue at \$1 billion.

In the United States general tool market, rental revenue growth will slow through 2023, totaling \$14.9 billion this year. This is driven by weakness in residential construction markets. Growth in 2024 is predicted to slow as well, with revenues equaling \$15.7 billion in 2024.

Herc Rentals Acquires Houston-based Quality Rentals

HOUSTON – Herc Rentals has acquired Houston-area rental company Quality Rentals. Founded by rental industry veterans Nathan and Edwin Faltysek in 2002, Quality has served the fast-growing southwest Houston suburbs including Fort Bend, Lavaca and Brazoria counties. Quality offers a broad range of construction equipment to construction trades, industrial plants and manufacturing operations, landscapers, nurseries and farm/ranch operations. The company's main branch is in Rosenberg, Texas.



According to Nathan and Kera Faltysek, the day-to-day managers of the Quality business, the combination with Herc offers its customers the opportunity to access a broader line of equipment while maintaining the small business feel that has been a trademark of Quality Rentals.

Terms of the transaction were not disclosed. The Stansberry Firm (thestansberryfirm.com) represented Quality Rentals in the transaction. Herc Rentals, headquartered in Bonita Springs, Fla., is No. 3 on the RER 100 with 373 locations in North America.

H&E Equipment Services Opens Branch in Kings Mountain, N.C.

KINGS MOUNTAIN, N.C. – Effective August 14, 2023, H&E Equipment Services Inc. announces the opening of its Kings Mountain branch, its ninth rental location in the state of North Carolina and its fourth in the greater Charlotte vicinity. Since the beginning of the second quarter of 2023, H&E has opened eight new branches across the country, with two of those in the Tar Heel State.

“The Charlotte metropolitan area is one of the fastest growing regions in the country, and we are bringing additional fleet and resources to serve customers there,” said branch manager Rob Kendrick. “Our existing North Charlotte, Charlotte and Statesville branches blanket the eastern and northern portions of the area, so we’ve strategically placed our new branch in Kings Mountain to reach farther west and southwest, including into upstate South Carolina. Our proximity to I-85 and Hwy. 74 is ideal and allows us to deliver equipment to job sites across the metro area quickly and efficiently.”

The Kings Mountain branch specializes in the rental of aerial lifts, earthmoving equipment, telescopic forklifts, compaction equipment, generators, light towers, compressors, and more and represents the following manufacturers: Allmand, Atlas Copco, Bomag, Case, Club Car, Cushman, Doosan, Gehl, Generac Mobile, Genie, Hamm, Hilti, Husqvarna, JCB, JLG, John Deere, Kobelco, Kubo-



ta, LayMor, Ledwell, Lincoln Electric, Link-Belt Excavators, MEC, Miller, Multiquip, Polaris, Sany, Skyjack, SkyTrak, Sullair, Sullivan-Palatek, Tag, Towmaster, Unicarriers, Wacker Neuson, Yanmar, and others.

Founded in 1961, H&E Equipment Services is one of the largest equipment rental companies in the nation, providing the higher standard in equipment rentals, sales, parts, and service. Branches are located throughout the Pacific Northwest, West Coast, Intermountain, Southwest, Gulf Coast, Southeast, Midwest, and Mid-Atlantic regions. H&E Equipment Services, based in Baton Rouge, La., is No. 5 on the *RER* 100.

The Kings Mountain, N.C., branch is the company's ninth in the Tar Heel state and fourth in the greater Charlotte area.

Photo by H&E Equipment Services

SitePro Rentals Enters Tennessee with Memphis Branch Opening

MEMPHIS, Tenn. – Fast-growing SitePro Rentals opened a new branch in Memphis, Tenn. The 30,000-square-foot facility on five acres will service customers in the greater Memphis area along with Eastern Arkansas and Northern Mississippi. The new location will be managed by Michael Alexander.

“This branch will help us connect our branch network in Texas and Louisiana with our branches in Georgia, allowing us to share fleet more efficiently and better serve our customers with projects in Tennessee,” said John Hiatt, co-founder and chief operating officer of SitePro.

Memphis will be the 14th location opened by SitePro since its founding in 2021.

“By the end of 2023 we plan to open locations in Denton, Texas; Haltom City, Texas; and Shreveport, Louisiana. We’re very excited to enter the great



state of Tennessee and plan to open a branch in Nashville in 2024,” said Tim Rule, SitePro co-founder and president.

SitePro Rentals—a wholly-owned subsidiary of Sammons Industrial and part of the Sammons Enterprises family of employee-owned companies—specializes in rental of construction and industrial equipment. SitePro serves a broad variety of customers, including construction and industrial. Founded in 2021, SitePro is No. 64 on the *RER* 100.

The 30,000-square-foot facility on five acres will service customers in the greater Memphis area along with Eastern Arkansas and Northern Mississippi.

Photo by SitePro Rentals

CES Power Acquires Infinite Power, Expanding in Mid-Atlantic Region

MEMPHIS, Tenn. and BELTSVILLE, Md. – CES Power LLC, a global provider of sustainable mobile power generation, distribution, and temperature control solutions for large events, has acquired Infinite Power, a provider of temporary mobile power and climate control solutions. This strategic acquisition will provide CES Power with a new hub in the Washington, D.C.-Baltimore area, strengthening its capabilities in the mid-Atlantic region. CES Power is backed by industrial-focused private equity firm Allied Industrial Partners. Terms of the transaction were not disclosed.

Beltsville, Md.-based Infinite Power provides portable generators and HVAC systems for festivals, concerts, sports venues, and government, corporate, and non-profit events. The company also handles permitting and emergency response and has strong relationships with local licensed electrical contractors. General manager Jay Collins and the Infinite Power management team will remain with the company.

Greg Landa, CEO of CES Power, said, “We are very excited to add Infinite Power to the CES family. Their reputation for superior service and quality equipment will strengthen our position throughout the mid-Atlantic region. Jay and his team offer significant know-how that boosts CES Power and our affiliate CES Technologies’ growth potential, and we look forward to working together.”

“We are thrilled to join the CES Power team,” said Collins. “Their expertise and broad footprint offer Infinite Power the resources and support to continue growing while providing our customers exceptional service and new product offerings.”

Ajay Patil, principal of Infinite Power, Showcall, MHA Audio, and Checkmate Global, said, “We are excited at the synergy and geographical reach that the CES Power acquisition of Infinite Power will provide our collective companies. Our brands are committed to superior customer service and quality, and we look forward to a mutually beneficial productive relationship.”

Infinite Power represents CES Power’s seventh acquisition since being acquired by Allied in June 2021, and the company will continue to seek further add-on acquisitions in areas of strategic interest.

“The acquisition of Infinite Power is the next step in CES Power’s strategic expansion plan,” said Bradford Rossi and Philip Wright, co-founders and managing partners at Allied. “Live events and entertainment services is an ever-expanding market. CES Power is building upon its broad services base to deliver reliable, seamless infrastructure solutions to event promoters nationwide.”

Founded in 2000 and headquartered in Memphis, Tenn., CES Power has a track record of providing reliable and safe power solutions to its blue-chip customer base, including at the world’s most complex and highest-profile events. The company offers a full range of technology-driven power services

to the broadcasting, entertainment, and industrial sectors. For more information, visit cespower.com and cestechologies.com.

Infinite Power offers temporary power and climate control solutions for various events. Primarily serving the mid-Atlantic states, the company has powered a variety of high-profile nationwide events, including presidential inaugurations, Pope Francis’ mass at Catholic University, the Preakness Stakes, the Star Spangled 200th Anniversary, and the grand opening of the National Museum of African American History and Culture.

Founded in 2019, Allied Industrial Partners LLC is a lower and middle-market private equity firm that invests in high-growth companies within various industrial subsectors, including industrial rentals, manufacturing, distribution, environmental services, and critical infrastructure. Visit alliedindustrialpartners.com.



CES Power units powering the Super Bowl. Photo by CES Power

Maxim Crane Works Prices Bond Offering

WILDER, Ky. – Maxim Crane Works Holdings Capital LLC announced the pricing of \$500 million aggregate principal amount of 11.50 percent Second-Priority Senior Secured Notes due 2028. In advance of the notes offering, the company received an upgraded corporate credit rating from Moody's, from B3 to B2.

The company intends to use the proceeds of the offering to redeem the company's outstanding 10.125-percent Second-Priority Senior Secured Notes due 2024, to partially repay borrowings under its ABL Facility and to pay related fees and expenses. The offering was expected to close on or about August 31, 2023, subject to customary closing conditions.

Paul McDonnell, Maxim's CEO, said:

"We are excited to announce the pricing of our bond offering and are highly encouraged by investors' support of the company. We have continued to deliver improved results, as highlighted in our 2Q press release, in which we noted our record financial results for the quarter and 12 months ended June 30, 2023. We are also encouraged by our ratings upgrade from Moody's, which reflects the positive momentum in the business.

"As the only coast-to-coast lifting solutions provider, we believe that Maxim is uniquely positioned to capture the potential growth across key customer verticals throughout our footprint, specifically in infrastructure, industrial manufacturing, and renewable energy."



Maxim Crane Works specializes in the rental of heavy-lift equipment (with or without operating crews), including hydraulic truck cranes, rough terrain cranes, crawler cranes, tower cranes, all-terrain cranes, boom trucks and hoists. Customer verticals served include the non-residential construction, infrastructure, and industrial sectors. With 57 locations across the United States, each branch can provide management, rigging, engineering, transportation, and outsourcing.

Maxim Crane Rental Corp., headquartered in Wilder, Ky., is No. 6 on the RER 100.

Takeuchi Adds Three Additional Anderson Equipment Branches to its Dealer Network

ATLANTA – Takeuchi's dealer network continues to grow with the addition of Anderson Equipment branches in Bridgeville and Somerset, Pa., and Bridgeport, West Va. Anderson Equipment already carries Takeuchi's compact excavators, track loaders and wheel loaders at 12 of its locations across West Virginia, New Hampshire, New York, Maine and Vermont.

Headquartered in Bridgeville, Pa., Anderson Equipment Co. was founded in 1935 by H.W. Anderson and his partner C.K. Burson. Over the years, the company has continuously expanded its sales and service territories in Western Pennsylvania, eventually acquiring other equipment sales and rental businesses, allowing the company to offer products and services to a broader geographic region. Today, Anderson Equipment offers new and used equipment sales, rentals, rent-to-buy and leasing along with authorized OEM parts and service at 19 branch locations in the Northeastern U.S.



Anderson Equipment, which also has a strong rental program, is a long-time Takeuchi dealer and is adding three additional branches to its Takeuchi network. Photo by Takeuchi

"We've been representing Takeuchi at many of our branches for more than a decade now, and our customers have come to recognize and value their quality equipment," said Bill Gex, CEO of Anderson Equipment. "Now, we're excited to introduce customers in Bridgeville, Somerset and Bridgeport to the difference that Takeuchi compact excavators, track loaders and wheel loaders can have on their productivity and profitability."

Each of the three newly added Anderson Equipment branches will have Takeuchi equipment and parts in stock, a dedicated and fully trained Takeuchi sales staff and an in-house, factory-trained technician to provide professional equipment services.

"Anderson Equipment has been an outstanding dealer for Takeuchi since 2010," said John Vranches, division sales manager for Takeuchi-US. "We're very pleased to have three more of their locations now offering Takeuchi equipment. The staff at Anderson does a great job of understanding the features and capabilities of each machine and applying them to a customer's unique situation for the best possible outcome. We thank Anderson Equipment for putting even more faith and trust in Takeuchi, and we look forward to continuing our successful relationship with them in the years ahead."

Learn more about Anderson Equipment at www.andersonequip.com.

Xylem's Revenue Jumps 26.2 Percent in Second Quarter

WASHINGTON, D.C. – Xylem, which manufactures and rents a wide variety of dewatering pumps and is dedicated to solving challenging water issues, reported \$1.722 billion in revenue for the second quarter of 2023, compared to \$1.364 billion in the second quarter of 2022, a 26.2-percent increase. The quarter included the May 24 acquisition of Evoqua Water Technologies Corp.

Organic growth for the quarter was 15 percent, surpassing previous guidance, on strong commercial and op-

erational execution. Orders increased 10 percent on a reported basis and dropped 2 percent organically, while backlog grew to \$5.3 billion, a 7-percent organic increase that included \$1.3 billion from Evoqua. The company cited resilient underlying demand.

"This past quarter, we took another transformative step as a leading water solutions company to help our communities and customers solve the greatest water challenges facing our society and economies: water scarcity, resil-

ience of our infrastructure to climate change, and the need to address these challenges affordably with the power of technology and innovation," said Patrick Decker, Xylem president and CEO. "These challenges are intensifying every day and our powerful portfolio is now even more strongly positioned to deliver solutions at scale.

"We are already seeing the momentum created by integrating two strong companies. On the strength of the market's continuing underlying demand and our team's disciplined execution, we are further raising our full-year guidance on revenues, margins and earnings per share."

Second quarter adjusted EBITDA margin was 19.1 percent, reflecting a year-over-year increase of 250 basis points. Excluding the Evoqua results, adjusted EBITDA margin was 18.6 percent, a 200-basis-point hike compared to the same period in 2022. Strong price realization more than offset inflation and, coupled with productivity savings and higher volume, drove the margin expansion, exceeding the impact of strategic investments.

For the first six months of 2023, Xylem's revenue totaled \$3.170 billion compared to \$2.636 billion in the first six months of 2022, a 20.3-percent increase.

Xylem Inc. is headquartered in Washington, D.C.



Kirby-Smith Machinery staff is known for long-term product support and repair capabilities.

Photo by Kirby-Smith Machinery

Kirby-Smith Machinery Becomes a Dealer for Morbark's Product Lines

WINN, Mich. – Morbark LLC, a leading manufacturer of equipment for the tree care, forestry, and wood recycling industries, has selected Kirby-Smith Machinery Inc. as an authorized dealer for all Morbark, Rayco, Denis Cimaf, and Boxer equipment product lines in Oklahoma, Kansas, Missouri, and Western Illinois. This collaboration brings together two industry leaders committed to providing exceptional customer service and top-of-the-line equipment solutions to the market.

Kirby-Smith has served the construction, mining, and industrial markets since 1983 as a full-service dealer. Its branch locations in Oklahoma City, Tulsa and McAlester, Okla.; St. Louis, and Kansas City, will provide customers in the region with greater accessibility to all Morbark product lines, as well as top-of-the-line service and support from Kirby-Smith's team of experienced sales and service professionals.

"We are excited to partner with Morbark," said Sam Schneider, general

manager of Kirby-Smith's industrial equipment. "Their complete equipment line offering and industry-leading product support perfectly align with our business. We look forward to growing our business in the tree care industry, offering professional sales, service, and parts support across many of our locations. Kirby-Smith Machinery and Morbark will do great things together."

"We are thrilled to welcome Kirby-Smith to our family of authorized dealers," said Brad Boehler, CEO and



Kirby-Smith Machinery staff is known for long-term product support and repair capabilities.

Photo by Kirby-Smith Machinery

president of Morbark and its affiliated brands. “Their dedication to customer success and a long-standing reputation

for providing prompt and quality service aligns with our mission to provide the best experience possible for our custom-

ers. With Kirby-Smith onboard, we are confident that customers will experience enhanced support and access to the Morbark, Rayco, Denis Cimaf, and Boxer product lines.”

Morbark LLC produces a full line of brush chippers, stump cutters, mini skid steers and articulated wheel loaders, forestry mulchers, whole tree drum and disc chippers, flails, horizontal and tub grinders, and mulcher attachments for excavators and skid steers under the Morbark, Rayco, Denis Cimaf, and Boxer equipment brands. For more information, visit www.morbark.com.

Kirby-Smith Machinery was established in 1983 and has 12 branch locations in Oklahoma, Texas, Kansas, and Missouri. Long a leading player in equipment rental, Kirby-Smith Machinery is No. 30 on the RER 100.

For more information about Kirby-Smith Machinery, visit kirby-smith.com.

Case and Team Rubicon Train Volunteers to Assist with Disasters

RACINE, Wis. – Last fall, Case Construction Equipment asked its dealers to help support a new initiative with Team Rubicon: train more volunteers to operate heavy equipment for its veteran-led humanitarian organization that serves global communities before, during and after disasters and crises. Case dealers responded. Earlier this year, the pilot program commenced with two of the

interested Case dealers: RPM Machinery, out of its Franklin, Ind., location; and Lawrence Equipment, at its Roanoke, Va., store. On a monthly basis, these dealers provide machines for Team Rubicon volunteers to train on, an indoor classroom and outdoor operating space.

“As soon as we heard about the need to help train more heavy equipment operators, we raised our

hand,” said Dustin Cole, executive vice president of Lawrence Equipment.

“We’re very active in our local communities and want to ensure Virginia is prepared if disaster strikes, as well as help train volunteers to deploy wherever they are needed throughout the U.S. and Canada.”

Case and its parent company’s foundation, CNH Industrial Foundation, have been long-time supporters of Team Rubicon. Case deploys machinery through its dealer network to numerous disaster response and community service projects across North America, while the Foundation has supported efforts with monetary support.

“The work that Team Rubicon does aligns with the company’s sustainability goals and the CNH Industrial Foundation’s priorities,” said Michelle Javaherian, community impact manager, CNH Industrial. “We’ve made many donations over the years. Last year, the CNH Industrial Foundation gave \$600,000 USD to support Team Rubicon’s Ready Reserve



Greyshirts in training on a Case skid-steer loader. Team Rubicon has grown to 160,000 volunteers across the U.S. Photo by Case Construction Equipment

Fund and heavy equipment operator training in the U.S. and Canada.” Team Rubicon’s volunteers, which go by “Greyshirts,” register for the monthly training and learn how to operate compact track loaders and excavators.

“One of the most critical tasks after disasters strike is getting much-needed resources to that area. Our Greyshirts, including sawyers and heavy equipment operators, help clear trees and debris from roads, allowing first responders and survivors to regain access to the community,” said William Porter, director of operations support, Team Rubicon.

For example, mere hours after Hurricane Ian hit Florida in 2022, Team Rubicon — with the help of heavy equipment — conducted 37 route clearance events, removing about 660 dump trucks’ worth of debris and a total of 131 obstructions. “Having more trained heavy equipment operators increases the capacity of Team Rubicon to provide this essential assistance for communities, allowing survivors to move toward the path to recovery,” added Porter. “One of RPM’s core values is doing the right thing. Supporting Team Rubicon by preparing their Greyshirts to safely and effectively operate machinery is the right thing to do,” said Fred Rohlman, president at RPM Machinery. “We signed up right away when Case shared this opportunity.”

Greyshirts must undergo a background check and complete a brief online Team Rubicon training course. If within 450 miles of a participating Case dealer location, they receive a notice through the Team Rubicon newsletter and social media channels, encouraging their participation in heavy equipment training.

“Case’s purpose is to build communities and — when disaster strikes — rebuild them,” said Rebecca Bortner, marketing director, Case Construction Equipment. “Our dealers help amplify that purpose every day, by wholeheartedly participating in opportunities like this, as well as supporting their local communities through myriad ways, including edu-



A volunteer practices on a Case track loader.

Photo by Case Construction Equipment

cating the next generation of tradespeople and raising funds for charities.”

This training has been put to use by Team Rubicon in all phases of the disaster cycle across the United States, including wildfire mitigation, hurricane response and long-term storm recovery. Case and Team Rubicon plan to expand the number of dealers participating in this heavy equipment operator training program in 2024.

Founded following the Haiti earthquake in 2010, Team Rubicon has grown to more than 160,000 volunteers across the United States and has launched more than 1,100 operations domestically and internationally. To become a Greyshirt and pursue a path of heavy equipment certification for their missions, view this step-by-step roadmap. To sign up as a volunteer, go to <https://teamrubiconusa.org/>.

Cummins’ Revenue Surges 31.2 Percent in Second Quarter

COLUMBUS, Ind. – Cummins Inc. posted \$8.638 billion in net sales in the second quarter of 2023, compared to \$6.586 billion in the second quarter of 2022, a 31.2-percent year-over-year increase. Sales in North America increased 31 percent and international revenues increased 32 percent because of the addition of Meritor and strong demand across most global markets.

Net income attributable to Cummins in the second quarter was \$720 million, or \$5.05 per diluted share compared to \$702 million, or \$4.94 per diluted share in 2022. Results included costs associated with the separation of Atmus of \$23 million, or \$0.13 per diluted share, in the second quarter of 2023, and \$29 million, or \$0.16 per diluted share, in the second quarter of 2022. The second quarter of 2022 also in-

cluded \$47 million, or \$0.33 per diluted share, of benefit from adjusting the reserves related to the indefinite suspension of Cummins’ operations in Russia.

“Strong demand across most of our key markets and regions resulted in record revenues and solid profitability for the company in the second quarter of 2023,” said Jennifer Rumsey, Chair and CEO. “We are committed to delivering cycle-over-cycle improvement in financial performance, returning cash to our shareholders and prioritizing investments to continue building our product portfolio to power our customers’ success around the world. I want to thank our Cummins employees who continue to work tirelessly to meet customer needs and respond to the strong demand levels by ensuring quality products, strengthening

our customer relationships, and navigating continued supply chain constraints.

“While we see demand remaining strong through 2023 and we are maintaining our guidance on revenue and profitability, we continue to closely monitor global economic indicators. Should economic momentum slow, Cummins will remain in a strong position to keep investing in future growth, bringing new technologies to customers as we advance our Destination Zero strategy, and returning cash to shareholders.”

On April 3rd, United States President Joe Biden visited company facilities in Fridley, Minn., to tour Accelera by Cummins’ first U.S. manufacturing location for electrolyzers, a key technology to produce low- and no-carbon hydrogen. The official ribbon cutting on May 19th marked the start of electrolyzer production in the United States. Accelera is initially dedicating 89,000 square feet of the existing Cummins power generation facility in Fridley to electrolyzer production.

In the second quarter, Accelera reached a milestone of backlog electrolyzer orders totaling over \$500 million. The Fridley facility will help address that growing demand along with other capacity being added globally.

Cummins signed a definitive agreement with Tata Motors Limited (TML), to manufacture a range of low- to zero-emissions technology products in India over the next few years. As a part of this agreement, Cummins and TML have set up a new business entity called TCPL Green Energy Solutions Private Limited (GES), a wholly owned subsidiary under the existing joint venture with a focus on the development and manufacturing of sustainable technology products that will include hydrogen-powered internal combustion engines, fuel delivery systems, and battery electric powertrains and fuel cell electric systems through the Accelera by Cummins brand.

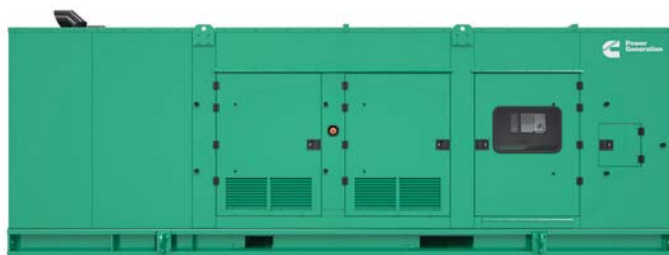
All segments rising

In Cummins’ Components segment, sales totaled \$3.4 billion, up 76 percent compared to the second quarter of 2022. Revenues in North America increased by 70 percent and

international sales increased by 84 percent because of the addition of Meritor and increased global demand.

In Cummins’ Engines segment, sales increased 8 percent to \$3 billion. On-highway revenues increased 7 percent, driven by strong demand in the North American truck market and pricing actions. Sales increased 7 percent in North America and 10 percent in international markets.

In its Distribution segment, Cummins jumped 15 percent to \$2.6 billion. Revenues in North America increased 20 percent. Higher revenues were driven by increased demand for whole goods, especially power generation products. In the Power Systems segment, sales jumped 21 percent to \$1.5 billion. Power generation revenues increased 30 percent driven by increased global demand.



Sales in North American increased 31 percent in the second quarter.

Photo by Cummins

In the Acelera segment, sales hiked \$85 million, up 102 percent.

On April 3, 2023, Cummins acquired Teksid Hierro de Mexico, S.A. de C.V. (Teksid MX) business for approximately \$150 million, subject to working capital and other customary adjustments. Teksid MX operates a cast iron foundry located in Monclova, Mexico, which primarily forges blocks and heads used in engines. Teksid Inc. facilitates the commercialization of Teksid MX products in North America.

For the first six months of 2023, net sales totaled \$17.091 billion, compared to \$12.971 billion in the first six months of 2022, a 31.8-percent increase.

Tsurumi Pump Boosts Inventory to Aid Disaster-Stricken Regions

GLENDAL HEIGHTS, Ill. – Tsurumi America monitors tropical storms and weather anomalies throughout the United States, ensuring that distributors near vulnerable areas have ready access to pumps before heavy rains hit. The company offers a wide range of dependable equipment to meet various needs in flood-prone areas, including engine-driven and electric submersible pumps.

Preparing for and handling severe rains in North America is becoming increasingly challenging. Storms have become stronger, and residents in vulnerable areas are experiencing more frequent flooding and wind damage. Water pumps are

essential tools in mitigating the effects of yard, basement, or neighborhood floods. Yet, maintaining inventory in disaster-prone areas can be difficult because of sudden increases in demand.

Over the past few years, Tsurumi America has made meaningful efforts to provide customers with speedy access to pumps when they are most needed. The company monitors developing weather patterns and strategically supplies distributors near the most susceptible areas to help with recovery efforts following a storm.

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Interviews with Aerial Manufacturers: DEMAND UPTICK



JLG is redesigning its SkyTrak telehandler line, used for handling, loading and unloading bulk materials on residential, commercial, urban and suburban jobsites. Photo by JLG

Many of the aerial industry's leading manufacturers talk about what's causing increased demand for aerial equipment, as well as progress in electric equipment and jobsite charging, improvements to the supply chain, and more.

BY MICHAEL ROTH

RER: What new equipment enhancements or developments has your company come up with in the past year?

Bhatia: Understanding the demands and challenges rental customers face on work sites day after day, JLG recently introduced its E18 vertical mast lifts, the SkyTrak 6034 and 6042 telehandlers, as well as the X660SJ compact crawler boom lift to the North American rental market. These new products are equipped with features and capabilities directly inspired by the needs of those who use them.

Here's a little bit more about how rental customers can benefit from these new products:

The all-new JLG vertical mast lift series includes the E18MCL and E18MML models. The E18MCL is well-suited for construction and industrial applications that require outdoor and indoor capable machines. The E18MML model is ideal for indoor finish work and general maintenance work. The "E" in these models' nomenclature stands for "Electric" for these machines' modern DC electric

drive system. Both E18 models are equipped with long-running batteries, which offer two times more duty cycles than the market-leading competitive machines.

JLG is in the process of redesigning its popular SkyTrak telehandler line, starting with the all-new 6034 and 6042 models. Featuring a redesigned build, reworked functionality, reimagined technology and refocused serviceability, these 6,000-pound maximum lift capacity telehandlers are ideal for pick-and-place applications, such as handling, loading and unloading bulk materials on demanding residential, commercial, urban and suburban job sites across America.

JLG's first straight-jib (SJ) compact crawler boom lift, the X660SJ, has 65 feet, 7 inches of platform height, 500 pounds of capacity for up to two workers, and 39 feet of horizontal reach and indoor/outdoor versatility. This model is ideal for a wide range of applications, including arboriculture, painting, general maintenance, electrical, HVAC, and window washing on a variety of job sites such as auditoriums, arenas, atriums, and outdoor structures.

We also just introduced our new ClearSky Smart Fleet IoT (Internet of Things) platform to help rental companies manage their fleets by digitizing daily processes, streamlining logistics, and gaining actionable, on-demand machine insights. This breakthrough IoT technology launches with 25 unique features, including analyzers, telematics and productivity applications into a single connectivity beacon on JLG machines for seamless back-and-forth interaction through a comprehensive mobile app, a user-friendly web

portal or an advanced API. Equipment owners and operators can send a prompt to the beacon to identify a machine's status or perform diagnostics wirelessly through the mobile app.

Jensen: Haulotte introduced the newly updated Compact scissor range to the North American market at the 2023 ARA show in Orlando. The five scissors in the range, with platform heights from 20 to 39 feet, have been completely redesigned from the ground up with rear mounted AC direct drive motors protected by an integrated counterweight, standard folding guardrails, as well as the Haulotte Activ'Screen for industry leading onboard troubleshooting and parameter controls. Also standard is the Haulotte Activ'Energy Management smart charging system that features optimized

One advantage to electric machines will be savings on lifetime costs such as engine maintenance.

Photo by Skyjack



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charging curves, operator charging reminders, a deep-discharge waking cycle to prevent lasting damage, and a de-sulfation cycle to extend battery lifetime.

McDougall: Skyjack recently announced the launch of a new range of DC electric scissors, featuring AC brushless electric drive motors among other significant design changes. Launching globally with availability in all regions throughout 2024, the “simply electric” range will be replacing the current hydraulic drive models.

Providing exceptional duty cycles and fully proportional controls, the innovative drive system offers a superior drive experience. The new range offers improved efficiency, controllability and torque, with up to 20 percent more runtime per charge when compared to previous models. Excellent all-around job site performance is achieved with consistent power, traction, and torque, with over 25 percent gradeability.

With the next year, infrastructure spending will increase, providing a lot of opportunities for the aerial industry.
Photo by Haulotte



Earlier this year Skyjack also updated our award-winning ELEVATE Live telematics system with the launch of ELEVATE Live 2.0. Originally launched in 2018, the mobile-first solution provides operators straightforward access to key machine information such as the machine’s current state of health, pre-use inspection guides, and familiarization materials. Accessed through a simple QR code, ELEVATE Live 2.0 allows straightforward access to features, including live metrics as they pertain to the machines, such as battery details, engine faults, and controller alarms. The updated user interface also includes an additional two screens so that live metrics, documentation, and technical information feeds are available.

Rosencranse: Xtreme and Snorkel design groups have been busy this year working on projects from small, lightweight scissors, with our S3013Mini, S3220Mini, and S3219Plus models, which focus on reliability, low cost of ownership, maneuverability, and capacity, to large, industry-leading products such as our Xtreme XR50100 tracked telehandler. The XR50100 is the most capable telehandler ever built, allowing for a maximum fork height of 100 feet and a max lifting capacity of 50,000 pounds. Along with new, market-leading models, there have been many improvements to existing products, such as electric traction drives and increased platform capacities on various models.

Kissinger: We have launched a pipe rack, confined access platform, and lithium batteries for our lifts to increase operator safety, productivity, and return on investment. The pipe rack helps improve safety and productivity by providing a manufacture-tested option to bring up to 100 pounds of pipe up to their working area. It was designed to sit on top of the side guardrail to minimize the amount of working space consumed from the option. We also developed a confined access solution which provides an additional 18.5 inches of access above the top of guardrails to safely access restricted areas. When not in use the confined access collapses down to the guardrail height so the lift can fit through standard doors.

Another option we introduced was lithium batteries to address one of the biggest industry issues of battery maintenance and life. Lithium batteries charge faster, run longer, require no maintenance, and have an estimated lifespan of

“In addition to new construction, there is a large number of existing buildings that are being repurposed and MEWPs will play a big role in those renovations.” Paul Jensen, Haulotte

over 10 years which significantly increases the lifts' return on investment over the life of the lift.

Meester: Our newest model is the GTH-1256 telehandler, which we launched in January and debuted at ARA in February. Prior to that, late in 2022, we introduced our new electrified S-60 DC and S-60 FE telescopic boom lifts, as well as a Lithium-Ion battery option for slab scissor lifts.

These introductions all have a few things in common and are indicative of Genie's commitment to quality, and to delivering value to our customers — they were purposefully designed to meet the needs of modern-day jobsites; they were rigorously tested to ensure reliability and durability; and they require less maintenance and offer a lower total cost of ownership.

Obviously, the trend towards electrification of equipment has accelerated in the past year. Are you finding greater interest and acceptance among your rental company customers? How about among end users?

Bhatia: The technology and cost of components involved in the electrification of equipment have advanced in a positive direction in recent years, leading to greater interest and acceptance within the entire ecosystem — from the end users and rental companies through to manufacturers and suppliers.

For end users, demand for electrified machines is accelerating due to two major benefits of this type of equipment: Zero emissions and low noise operation.

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As end users are more frequently requesting electric models for projects, this has grown the demand within the market for more electrified products in rental fleets.

For rental company customers, in addition to meeting the customers' preferences for electric machines, the benefits of having electrified equipment in their fleets are simplified machine servicing due to fewer components to maintain and the socio-economic responsibility of attaining ESG (environmental, social and corporate governance) targets.

Jensen: We are finding that some of our customers have worked hard to create and build new markets where electric machines have big advantages. We see reports that some government jobs have preferences for electric machines and are willing to pay a premium for the feature. We are beginning to see an increase in green construction projects that are striving to minimize their environmental impact. Also, the Haulotte HS 5390 E rough terrain electric

Manufacturers hope that onshoring will help ease supply chain issues.

Photo by Snorkel



scissor has become a popular indoor machine. Its 1,650-pound platform capacity and double extension platforms provides a large work surface for jobs that have previously been done from smaller boom lift baskets.

End users are enjoying the flexibility our electric machines bring to a jobsite. Using the same machine for indoor and outdoor work increases their productivity. Also, electric machines are nearly silent and transmit less vibration to operators compared to internal combustion engines. Both factors reduce stress on workers while improving job site conditions.

McDougall: Interest is certainly rising and the trend towards sustainability is undeniable. We have found interest is particularly high in Europe, although engagement in North America is also starting to increase as of late.

The drivers originate at a government level through policies in reaction to environmental and sustainability concerns. As governments are often the major sponsor of construction projects, they can use this leverage as sponsors to enforce these policies that contractors are obliged to conform to. Thus, rental companies with contractors as their main customer group are similarly obliged to offer machines that meet these sustainability demands.

Rosencranse: We are seeing increased interest in electrification primarily from larger rental customers, and some end users. The end users seem to be more tailored to specialty operations, such as mining, underground, food processing, and clean-room work.

Kissinger: In the slab scissor lift segment, electrification of has been happening for a long time and is commonplace. When Hy-Brid Lifts was launched in 2004, we used electric drive and steering for our scissor lifts when other manufactures were focused on hydraulic systems. This reduced the amount of hydraulic oil needed and provided greater efficiency. A few years ago, we showed an all-electric scissor lift at The ARA Show to completely remove hydraulics. While there was customer interest, the pricing was a sticking point but with all new technology the price will eventually come down to an acceptable level to drive customer adoption.

Meester: By now, many equipment owners and operators have had experience with the

newer generations of electrified equipment; which, when I say “electrified,” I’m talking about both hybrid and electric machines. When implemented correctly, both hybrid and electric machines perform as well as, or in many cases better than, their diesel counterparts. They also use energy more efficiently and require less maintenance.

Here in North America, our FE hybrid booms have been available and on jobsites for more than six years now, and we think that will continue to be the best solution for our customers for the near future. They not only offer the rugged performance needed for demanding outdoor jobsites, they use less fuel — a single tank can last a full, standard work week in hybrid mode — and have reduced emissions. In electric mode, FE hybrid booms offer all the benefits of an electric boom and can work a full, standard workday on a single charge.

Continuing on the topic of electrification and battery-powered equipment, there is still a perception among many that they don’t perform as well as diesel-powered machines. Any thoughts on that?

Bhatia: With the advances in battery technology over the years, today’s battery-powered electric equipment has the torque and power needed to meet the same functional requirements, like drive



speed and lift speed at similar platform capacities, that diesel-powered machines today do.

That said, this lingering perception in the industry is likely being driven by the runtime of the machines and the state of the charging infrastructure. Electric equipment requires both a) access to electricity for charging due to its limited runtime and b) sufficient charging time between work shifts to reach a full state of charge.

Jensen: Haulotte does extensive performance comparison testing between electric and internal combustion machines while developing our electric solutions. We make sure that operators won’t notice a difference in drive speed, elevation

Further enhancements in lithium-ion battery technology and other battery chemistries will give the opportunity to integrate longer-lasting, quick-charging batteries into rental equipment, which will help to balance the limitations of the charging infrastructure.

Photo by Genie



With electrification there will be more lithium batteries to reduce maintenance costs and more connectivity with telematics to increase productivity and service.

Photo by Hy-Brid Lifts

“Lithium batteries charge faster, run longer, require no maintenance, and have an estimated lifespan of over 10 years which significantly increases the lifts’ return on investment over the life of the lift.” **Justin Kissinger, Hy-Brid Lifts**

speed, or obstacle climbing capability. But we do make sure that you notice a difference in other areas. Electric machines require less maintenance and have fewer mechanical failure points. Haulotte’s SHERPAL telematics system gives owners instant access to machine health status, critical alerts, and recommended preventative maintenance to increase machine up time.

Pairing SHERPAL with Haulotte’s Activ’Energy Management smart charging system increases your battery lifespan with an automatic watering system and instant alerts when a machine needs to be charged to prevent battery abuse. Haulotte electric machines not only perform as well as internal combustion machines, they outperform them in uptime and total cost of ownership as well.

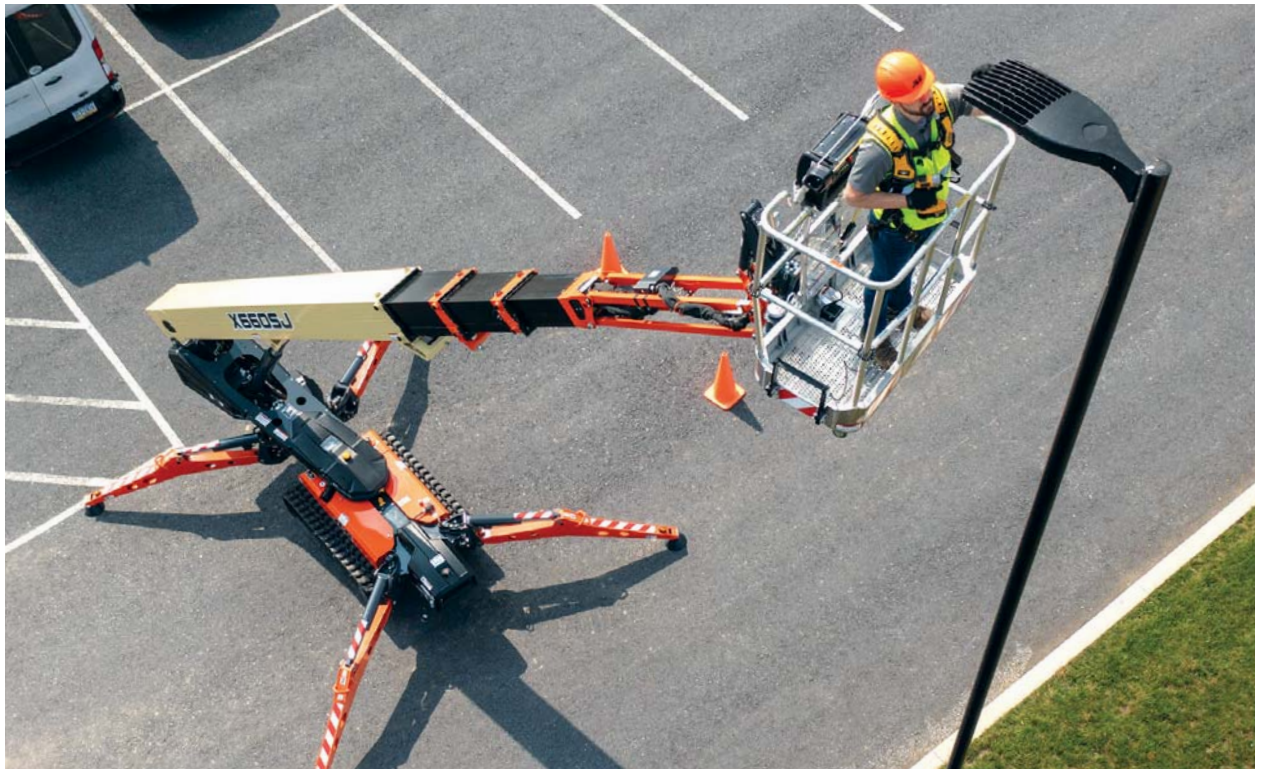
McDougall: In many senses, the rental industry is faced with some of the same questions that face the electric car buyer – charging opportunities, range anxiety, etc. Speak to any electric car owner

and they will tell you have to change the way you drive. So, the question is, “how does the rental industry best change the way it does things to take full advantage of the technology?” The industry may have to change some of the ways they work with their fleet, and some expectations may have to change along with that. However, there are operational benefits to be explored and here rental companies are the experts. At a glance, you will see savings on resources that are escalating in cost. There will be savings on lifetime costs such as engine maintenance.

Rosencranse: As with any technology that is being introduced, there is always resistance. Battery-powered equipment still carries a perception of decreased performance. In some situations, a battery-powered machine will do the same work faster, cleaner, and more efficiently than an internal combustion powered machine. But, in other areas where machines must be driven long distances with heavy loads, work

JLG, like other manufacturers, is seeing positive momentum in supply chains, with lead times improving as materials and components become more readily available.

Photo by JLG





with ground-engaging tasks, or require heavy drawbar and tractive work, battery machines are still at a noticeable disadvantage. As battery and charging technologies, and infrastructure improve, hopefully these issues will have less impact on the perception.

Has the charging infrastructure improved for electric equipment on job sites?

Bhatia: As battery technology has advanced, so has the charging infrastructure and it continues to improve as manufacturers leverage developments in other industries, like automotive, to bring solutions to the rental industry. This crossover will be more evident in higher-voltage equipment (> 350V) where the charging infrastructure and fast-charging capabilities solve the longer charging time concerns.

For lower-voltage equipment, like in some of the MEWPs (mobile elevating work

platforms like boom lifts, scissor lifts, etc.), the requirements for charging the equipment will be around leveraging the existing single-phase/3-phase power at 110V architecture (because it's the most developed), along with other solutions like improving the battery management systems and developing portable energy power solutions (e-generators) that can be brought to the equipment to charge it.

Other than this, further enhancements in lithium-ion battery technology and other battery chemistries will give the opportunity to integrate longer-lasting, quick-charging batteries into rental equipment, which will help to balance the limitations of the charging infrastructure.

Jensen: Electrical infrastructure on job sites has always been a challenge. There never seems to be enough outlets and it's not uncommon for extension cords to be unplugged for a quick job and then that cord is forgotten, leaving machines uncharged overnight and not ready for work

Haulotte's Compact scissor range, with platform heights from 20 to 39 feet, have been completely redesigned from the ground up.

Photo by Haulotte

in the morning. With more electric machines and tools entering job sites, the challenge is increasing.

Haulotte is approaching the charging infrastructure challenge by minimizing the need to rely on it. The Pulseo family of electric machines features a detachable range extender that charges machine batteries independent of the grid. Machines equipped with the range extender can choose from three modes of battery-powered electric operation.

Battery-only mode is the lowest emissions way to work. Perfect for quiet zones and work indoors. Range Extender mode turns

With hybrid units, a single tank can last a full, standard work week in hybrid mode — and have reduced emissions.

Photo by Genie



on the range extender to charge the battery pack, even while operators continue to work, increasing productivity and reducing downtime. Automatic mode senses a low battery pack and automatically turns on the range extender to charge the machine. Once the battery pack is charged, the range extender shuts down automatically, conserving fuel, lowering emissions, and keeping the machine ready for a full shift of work. Increasing its value even more, the range extender can be quickly removed from one machine and used on any other compatible machine to minimize operating costs and increase flexibility.

McDougall: I am reminded of a social media post of guys excitedly around an all-electric mini excavator that has completed its duty cycle with no emissions. Great! Except that the charge cable is shown winding across site to a diesel generator that is more than making up for the machines' lack of emissions.

While improving, progress has arguably been slow. That is part of the reason for the two approaches with Battery Electric (BEV) and Hybrid Electric Vehicles (HEV). The way this type of mix will play out is largely dependent on site infrastructure and improvements in battery technology that may allow longer (daily or weekly) operational capacity.

Rosencranse: With the demand for our electric machines, we must expect that this infrastructure is improving all the time. Speaking with various customers, it seems as if we still get answers that are still across the board here. Some areas of the world have rapidly improved infrastructure to manage this new generation of equipment, while others are slower to adopt.

Kissinger: By the time our lifts come on the jobsite there usually is adequate power to the site.

Meester: As more and more equipment owners and operators have exposure to today's electrified machines, they're finding that they can perform as well or better than diesel machines.

In fact, one feature that operators in particular appreciate about our FE hybrid machines is that, in hybrid mode, the machine actually charges the battery. So, even if the battery is depleted, the machine can still start and run. Which means there isn't any downtime on the jobsite if the battery is dead.

It appears that the coming year should be strong for aerial equipment sales. Do you expect to see a lot of opportunities in infrastructure spending? Increased industrial and/or non-residential work? An onshoring trend in North America?

Bhatia: Across the board, the industry continues to be very healthy, and specific to the rental market, there is a significant demand globally for access equipment right now, largely due to the recent uptick in infrastructure spending around the world and ongoing fleet replacement activities.

In the U.S. specifically, the onshoring trend is driving the momentum for mega-construction projects (\$5+ billion investments each). Thanks to the three different infrastructure bills passed by Congress, significant capital expenditures are being made right now to build plants to produce batteries, semiconductor chips and LNG, as well as to construct new refineries and industrial facilities.

Jensen: Next year should be the right time to see the infrastructure spending affect our sector of the industry. Architects and designers are finishing their work and a lot of the ground and foundation work is underway. We'll see the need for MEWPs on job sites soon as those projects continue to progress. In addition to infrastructure, we have seen an increase in mega projects as warehousing and manufacturing continue to grow both in number as well as in size of the projects. In addition to new construction, there is a large number of existing buildings that are being repurposed and MEWPs will play a big role in those renovations.

McDougall: Like in many industries, COVID and other



geopolitical events have created unprecedented supply chain issues and increased costs. Global fleet aging has increased during the COVID years and the rental industry is keen to improve that situation. In North America, the recent tariff changes exacerbated supply chain issues and decreased rental company choice in a time of high demand. They also increased North American prices. While the market grew in 2022 there were some supply constraints that held back that fleet age improvement objective. In

Interest in electric products is rising, particularly in Europe, although engagement in North America is increasing.
Photo by Skyjack

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2023 and 2024 we expect those constraints to lessen and for the fleet age renewal progress to grow the market.

Rosencranse: We are also expecting the coming year to be strong in equipment sales. There seem to be opportunities in each market in which we are involved. The key will be to fill that demand with product with a supply chain that is still stressed. Onshoring is definitely an important strategy, as the world realized just how crippling a pandemic can be.

Kissinger: Next year demand for aerial equipment will continue to be strong as the COVID-19 pandemic significantly disrupted the industry. At the start of the pandemic, companies delayed purchases which increased their fleet ages. Then when the industry started opening up

The ability to work indoors in narrow spaces is an advantage with battery-electric units.
Photo by Hy-Brid Lifts



again, demand skyrocketed, and manufacturers encountered supply chain issues that delayed deliveries, keeping the fleets aged. Additionally, the infrastructure spending and onshoring will continue to increase equipment demands in all segments.

Meester: We are optimistic about the market outlook in North America. Utilization rates remain strong, and customers are optimistic. Infrastructure spending is one area that we believe will continue to propel demand. Additionally, demand is strong in other industries as well. On top of this, our customers are in the replacement cycle and we're still seeing pent up demand as a result of the supply chain challenges that started in 2021.

Are the supply chain issues still a major problem for your company and are lead times still long or are things more normal?

Bhatia: We continue to see positive momentum with the ongoing supply chain constraints. Lead times are improving as materials and components become more readily available.

To balance the challenges JLG has experienced due to shortages, we have worked diligently internally to maintain supply and satisfy the market demand, while also creating many new efficiencies across our operations to minimize the impact on our customers.

Jensen: We are seeing a little bit of both sides of this equation as we transition away from the major supply chain problems. We have a healthy backlog as we continue to grow our business, and this has helped us time our purchasing and [ability to] plan ahead with our suppliers. We are also lucky enough to have some equipment on hand for quick responses to customers that need to take advantage of their own new opportunities. We are still working through occasional supply challenges, we aren't out of the woods yet, but we have seen significant recent improvements.

McDougall: Apart from occasional surprises, it has been relatively quiet as of late in terms of supply chain issues. However, part of that solution is changes that we are making in our operational approach to support an "in market for the market" strategy. Taking the number of manufacturing plants worldwide from two in

“Thanks to the three different infrastructure bills passed by Congress, significant capital expenditures are being made right now to build plants to produce batteries, semiconductor chips and LNG, as well as to construct new refineries and industrial facilities.” **Shashank Bhatia, JLG**

Canada to five globally with additional plants in Hungary, Mexico and China, will bring our potential global unit capacity up 235 percent when compared to 2022.

Rosencranse: Depending on the type of components, we have not seen lead-times improve to pre-pandemic levels, but our supply chain is starting to recover, and we are seeing things trend in positive directions.

Kissinger: Supply chain issues have significantly improved for us. Suppliers are still cautious and not all of them have returned to full capacity, which has increased lead times for some components but all of that can easily be managed by operations to keep production on schedule. The supply chain improvements have allowed the lead times for our range of equipment to return close to normal.

Meester: We started to see improvements in the supply chain earlier this year, with some regions and some component categories improving faster than others. Those improvements have continued, and although we still have a strong backlog, we're seeing some improvements in terms of lead times and we're optimistic that things are trending in the right direction.

Any there other trends in aerial equipment you expect to see in the near future?

Bhatia: As demand continues to grow for electrified equipment on job sites, one of the biggest trends we'll see soon is more electric MEWP and telehandler models introduced in the market. This will also drive the development of charging infrastructure solutions, like portable charging solutions for lower-voltage equipment. We also anticipate that sustainable, eco-friendly options will become more readily available.

Another trend we expect is telehandler lines continuing to expand in the sub-compact size

class as there continues to be more need in the market for models under 5,000 pounds.

Connectivity, software as a service (SaaS), and digital products are also growing at a rapid pace. Historically, the construction industry has lagged behind other industries in adopting these technologies, but it is starting to catch up, and particularly in the aerial market, we see evidence that adoption is accelerating significantly faster and will continue to do so.

McDougall: Over the last few years, AWP's have changed substantially. Even veteran operators have something to learn, particularly as advancements such as electrification and telematics become more commonplace. As a direct result of this, training will continue to be important. We saw that many of the questions and issues our service and support teams are fielding could have been prevented with training and/or familiarity with the manual. Our recent campaign with Manny the Manual and the development of our QuickStart guides are examples of this.

Furthermore, we see an increased use of mobile devices and telematics deliver operational improvements for both rental companies and customers. In the same vein is our ELEVATE Live offering, which is now in its second generation.

Rosencranse: We believe we are going to continue to see a big push in Li-Ion batteries and technology, decreased charging durations, a large focus on sustainability and carbon footprint of the product.

Kissinger: Aerial equipment will continue to be electrified, not just drive systems but full electrification removing all hydraulics from the equipment as the technology matures to allow the cost to be justified. With electrification there will be more lithium batteries to reduce maintenance costs and more connectivity with telematics to increase productivity and service. **RER**

Diamond Mowers' Brush Cutter Pro features an oval blade carrier with two hardened steel blades that maintain a 72-inch cutting width to cut tall or thick grass, clear large-scale brush and small trees, and maintain fence lines.

Fall Revenue-Generating Ideas for Land-Clearing Contractors

There are many ways for equipment to keep working during the fall season. Here are a few for your contractor customers.

STORY AND PHOTOS BY DIAMOND MOWERS

As the days get shorter and the seasons cycle, opportunities for revenue change. While peak growing and mowing season may be winding down, there are numerous ways to keep your skid-steer running and profits coming in. Following are four revenue-generating ideas for fall:

Maintaining Fence Lines

Overgrown fence lines not only look bad, but they can contribute to the spread of invasive

species, and cause damage to or decrease the effectiveness of electric fences.

"Birds constantly land on fences and 'plant' tree seeds, causing them to grow up in the fence. These trees can damage fencing over time and will grow around electrical fence wires if not controlled, making maintenance virtually impossible," said Matt Nelson, director of development at Diamond Mowers, the leading manufacturer of industrial mowing, mulching, and brush cutting equipment for the municipal,

Fusing open drum versatility with depth control precision, Diamond's Drum Mulcher OD Pro X utilizes an optimized infeed system for users requiring power and flexibility for harsh mulching needs that reduces the need for back-dragging and produces a uniform mulch.





Designed for clearing large expanses of land, the Disc Mulcher Pro X's speed and productivity is particularly well-suited for pasture reclamation because it affords contractors control to avoid mulching grass and natural vegetation around the trees being cleared.

skid-steer, and excavator markets. "Similarly, grass and trees that grow up and touch the wires can cause a fence to ground out, reducing the power of the electric fence. Cutting this vegetation often will keep your stock where you want them."

Increase the life of a fence by controlling trees early and managing overgrowth. Diamond Mowers offers several attachments to help get the job done. The Brush Cutter Pro, for instance, features a lower push bar that reaches under most existing fences for quick maintenance, but a drum mulcher may be the best option for jobs involving considerable mulch and brush management or heavy ground engagement. Depth control and open drum mulching attachments are great for agricultural applications and roadside maintenance. Their discharge geometry is specifically designed to send material down toward the ground, limiting the amount of thrown material and making them ideal for preparing fence lines along busy roads or near buildings.

Tree Removal

Fall is an excellent time for tree removal in areas where temperatures drop considerably. Frozen ground does not get torn up by equipment as quickly, and hardened sap in trees provides perfect conditions for cutting and mulching.

"A depth control mulcher can turn trees into fine mulch for quick decomposition, while our open drum unit has an optimized infeed system that produces a smaller end product than conventional open drum models and allows ground contact for maximum productivity," noted Nelson. "Both machines can clear trees up to 9 inches in diameter."

Fall Lawn and Landscape Spotlight

ASV

ASV introduces the VT-100 and VT-100 Forestry Posi-Track compact track loaders. The VT-100 Forestry is suited for mulching, right-of-way clearance, site prep and more. The loaders' large line sizes, hydraulic coolers and direct-drive pumps transfer flow and pressure directly to the attachment, reducing power loss. The VT-100 Forestry includes a 3,700-pound rated operating capacity. The dual-level suspension features suspended wheels and axles, allowing them to manage every type of terrain at faster speeds. The suspended wheels and flexible track conform to the ground, assuring maximum ground contact and traction. The load-sensing system offers improved efficiency and fuel savings. The system regulates the 41-gpm hydraulic pump, so it only produces what's necessary to complete the work rather than using maximum flow all the time.



Fecon

Fecon's Disc Hawk disc mulcher is designed for high-flow skid-steers and compact track loaders. It offers a faster, rougher cut for first-pass vegetation removal or where maximizing material dispersion without fine chip size is required. With a working width of 60 inches, the disc mulcher is purpose-built for 75- to 132-horsepower loaders. It mulches thicker vegetative material at higher speeds than traditional drum mulchers. A low-profile motor and deck configuration reduces material buildup. The open brush chute features a larger throat allowing for higher material intake and faster processing of lighter vegetation-like brush. The hardwood intake chute guides larger trees into the disc, resulting in quicker processing of thick vegetation.



Kioti

Kioti's ZXD Series diesel mowers feature 1.2L Kioti diesel engines with direct drive transaxles. The mowers feature a heavy-duty frame, a shaft-driven reinforced seven-gauge fabricated steel deck and semi-pneumatic front casters to tackle tough terrain. A premium rubber isolated three-inch suspension seat, paired with an articulating front axle, provides smooth operation. The series is equipped with dual fuel tanks with a combined capacity of 17 gallons and top speeds of 11 mph. Sixty-one and 72-inch deck sizes offer top-tier cut quality. With the push of a pedal and turn of a dial, the hydraulic deck lift and height selector dial allow operators to effortlessly change and select the deck height.



Kubota Tractor Corp.



The new ZD1611 from Kubota Tractor is designed for commercial landscapers and residential users, available in three deck configurations: a 72-inch side-discharge mower, and 60- and 72-inch rear-discharge mowers. A 12V

power outlet placed in the cup holder allows for charging of electronic devices. Towing is facilitated by a tiedown point on the front axle. The new F3710, a commercial front-mount mower, is available with side-discharge and rear-discharge pro commercial mower decks in 60 inches and 72 inches. The F3710 handles an array of implements like a grass catcher, snow blower, rotary sweeper and debris blower.

Little Beaver



Little Beaver's Kwik-Trench mini-trencher's two models, the KT 200B and KT2400B, both trench up to 30 feet per minute. The units tackle landscape edging, root pruning, installations of plumbing and drainage lines, low-voltage wiring, silt fences and sprinkler

systems. Featuring carbide-tipped teeth, the mini-trenchers cut through compacted clay, road fill, asphalt and tree roots up to 10 inches thick. Featuring a triple V-belt drive system, the Kwik-Trench achieves rotation speed up to 800 rpm. Precise cutting depth is achieved with a manual crank, while each trencher's locking swivel wheel guides the unit, ensuring straight trenches. The Kwik-Trench is designed to minimize backfill and cleanup time by depositing soil beside the trench.

Loftness



Loftness' stump grinder attachment features a rigid mount making it capable of working faster than articulating stump grinder attachments by repositioning the power unit instead of swinging the cutting

wheel. It has an angled hitch and forward-reaching boom to give the operator visibility and control on the job. The Stump Ax includes the Phantom Wheel with Tomahawk teeth. The Phantom Wheel has cut-outs to create a see-through effect for further improved visibility. A chain deflector provides containment of the wood chips. A 200cc high-torque radial piston motor is compatible with power units that have 30- to 60-gallon-per-minute hydraulic flow ratings. A reversible design allows the motor to be mounted either forward- or rear-facing.



Stump grinders are used to completely eliminate trees from below ground level.

To completely eliminate trees below ground level, use a stump grinder.

Cutting Shooting Lanes

Depending on the timing of hunting seasons in your area, hunters and landowners may be in the market for cutting new shooting lanes or maintaining existing ones. This is a great time to break out your arsenal of skid-steer attachments. A brush cutter can handle everything from clearing sightlines and shooting lanes to maintaining trails and removing overgrown vegetation. It is also ideal for mowing long grass, knocking down and mulching small trees, plowing through dense brush, and cleaning up forest under or overgrowth that perennially propagates over the spring and summer months.

Pasture Maintenance

Post-harvest is a great time to cut down trees and brush surrounding agricultural fields and prepare for the next growing season. Mowing pastures at regular intervals also enhances forage quality, produces a uniform pasture, prevents weeds from sprouting, and reduces grazing patterns. Employing a brush cutter, disc, or drum mulcher for these tasks will allow you to prevent weeds and keep grass in a vegetative or growing state to increase its digestibility and palatability.

"A decrease in temperature doesn't have to mean a decrease in work or revenue," Nelson emphasized. Consider these fall revenue-generating ideas to optimize performance and profits this season. For more information about the attachments mentioned above, visit www.diamondmowers.com. **RER**

A Demolition Dynamo for Digging and Breaking

Crawler skid excavators offer the speed of a CTL and digging capabilities of a mini-excavator.

BY PETER BIGWOOD

With any demolition project, crews need reliable, powerful and efficient equipment to not only tear down structures, but also to clean up and organize debris. It's not uncommon to find compact equipment such as mini excavators and skid steers playing a supporting role on these jobsites because of their compact size, lighter weight and maneuverability.

Another compact equipment option has been developed in recent years to bring a skillset well suited for both large and small demolition jobsites. It harnesses the speed and agility of a CTL and the maneuverability and digging capabilities of a mini excavator. With the addition of exceptional reach and high flow to attachments, the machines are ideal for demolition jobsites. The keys to their success lie in a variety of benefits.

Imagine a machine that combines the top benefits of a variety of equipment while performing every function equally well. For a smaller-scale demolition job, for

example, a crawler skid excavator, like a traditional mini-excavator, is able to fit into a tight area with low clearance and break or perform other functions in any direction without repositioning the machine. At the same time, it offers higher flow to the attachment than a mini-excavator for greater power and higher reach than a skid steer, maximizing productivity.

Put the same machine on a large jobsite for clean-up and you have a machine that can travel up to 6.2 mph (10 km/h) — twice that of a mini excavator and similar to most CTLs on the market — with a bucket full of material and remain stable. Meanwhile, a crawler skid excavator is also capable of digging and loading from a single position, if needed, making it a powerful solution for contractors focused on maximizing ROI.

Wide range of motion

The ability to be both as compact and far reaching as possible is a win on demolition jobsites. The crawler skid excavator's boom design takes this concept to the next level. Consider that the majority of mini-excavators on the market today use a mono boom design, which has a limited overall range of motion. The main arm of a mono boom only allows it to move up and down, with the design relying on the dipper stick portion of the boom to reach, pull and



Crawler skid excavators are designed to have the compactness of a mini-excavator and the speed of a CTL to bring more versatility, range of motion and efficiency to a variety of applications. All photos by Mecalac



From a single position, a crawler skid excavator maintains space management, increasing productivity by letting contractors dig, break or perform a number of functions within a compact 9-foot (2.7-meter) radius.

Demolition Equipment Spotlight

Caterpillar

Cat's 352 straight boom excavator is designed specifically for low-level demolition work up to five stories high, bridges and industrial infrastructure. Its stick/boom configuration delivers a higher vertical reach up to 42 feet, 2 inches (12.85 m), with 36-percent more stick pin height compared to the standard 352 reach configuration. Working with up to a 13,228-pound attachment weight, the unit features standard Cat technologies for demolition and excavating applications. Designed for demolition, the 352 straight boom features reinforced booms, sticks and frame, increasing machine durability. Standard falling object guards (FOGS) protect the roof and front reinforced PSA laminated windows from falling debris during demolition, while helping to maintain jobsite visibility. Sloped to prevent mud and debris accumulation, the track frame design helps reduce track damage, while sealed track pins and bushings reduce travel noise and help to increase undercarriage life. Its Operator ID function offers push-button engine starting and programmable joystick functions that are remembered when the operator enters their unique ID.



Montabert

Montabert has a new line of Silent Demolition Tools, including grapples, processors, fixed and rotating pulverizers and scrap shears. Its SD series of hydraulic breakers is designed for use on skid-steer loaders, backhoe loaders and mini-excavators. A unique energy chamber acts as hydraulic shock absorber and reduces pressure variations in the hydraulic circuits to provide consistent energy to the breakers. Grapples are designed for carriers from five tons to 100 tons. Multiprocessor jaws for carriers weighing eight to 65 tons include combi-, multifunction and scrap-metal jaws. They offer 360-degree rotation, speed valve cylinders, and Hardox 600 crushing teeth. Montabert offers a fixed model pulverizer and a 360-degree rotating mode. All pulverizers feature Hardox 400 bodies, exchangeable/reversible blades, and exchangeable wear plates and teeth.



A crawler skid excavator is capable of digging and loading from a single position, making it a powerful solution for contractors focused on maximizing ROI.

dig. This restricts the ability to work close to the machine and requires more room to operate.

In the close quarters of demolition jobsites, a side-mounted, two-piece boom on a crawler skid excavator offers a decided advantage because of greater compactness and 360-degree range of motion. The articulated design features an arm that is made up of five total joints – one between the second and third sections – that allows for limited side-to-side motion. Bending or straightening each joint in order allows the boom to extend almost straight in any direction. It can then fold back in on itself for maximum compactness, mobility and a zero-turn radius.

This means that, from a single position, the equipment maintains excellent space management, increasing productivity by letting contractors dig, break or perform a number of functions within an incredibly compact 9-foot (2.7-meter) radius. Operators can take full advantage of these capabilities to ensure attachments are in the ideal position.

Jobsite MVP

To manage limited space and the need for multiple machines, a crawler skid excavator can be the ideal solution for demolition contractors looking to streamline their operations and maximize ROI. A machine that combines the best aspects of similar equipment with optimal performance for multiple functions is game-changing and sure to be the jobsite MVP. **RER**

Peter Bigwood is the general manager for Mecalac North America. He has more than 30 years of industry and leadership experience with international equipment manufacturers. He serves on the board of the National Demolition Association, and previously served on the board of the Concrete Sawing & Drilling Association.

Volvo Construction Equipment

Volvo's EC300E straight boom crawler excavator is a purpose-built demolition machine with a maximum reach of 33 feet. The 30-ton unit offers a lifting mode for multi-demolition boom that allows a high-reach demolition excavator to serve as a safe carrier for the lifting of machine components from a trailer to the ground. A 23-foot-long straight boom and purpose-built arm provides height and reach advantages. The cab is protected against falling debris with a frame-mounted Falling Objects Guard, while still providing clear views of the worksite. The roof window and front one-piece glass are made from P5A, resistant to high impact. The EC300E Straight Boom has a reinforced frame made of heavy-duty plate steel with bolt-head protection. There is also heavy-duty undercover protection, a belly guard and a full track guard.



INDUSTRY NEWS continued

Tsurumi Pump Boosts Inventory to Aid Disaster-Stricken Regions, continued from page 15

"Historically at Tsurumi, we have taken pride in having reliable, efficient equipment in stock to meet the immediate and inevitable needs when disaster strikes," said Ben Houk, portable product manager at Tsurumi America. "We track tropical storms throughout the Gulf of Mexico and up the East Coast, as well as other weather events across the U.S., and have stocked inventory in strategically placed satellite warehouses to ensure our products are available to

those in need. Maintaining inventory levels in these warehouses is key to our response time because, in the aftermath of many of these storms, long-distance shipping becomes a challenge."

Houk explained that different types of pumps can be used in flood applications, especially after severe storms or hurricanes. The main distinction lies between electric submersible and engine-driven pumps.

"When a power source is available, electric submersible pumps are the preferred solution," Houk said. "These pumps provide reliable dewatering capabilities in an extremely efficient manner. When electricity is affected, and generators are not available, engine-driven pumps are the obvious choice. These pumps are capable of rapidly moving large amounts of water but require priming and repeated refueling."

Several Tsurumi pump and generator series are used in disaster remediation, including:

- HS semi-vortex electric submersible trash pumps
- LB top-discharge electric submersible dewatering pumps
- NK heavy-duty, high-head electric pumps
- LSC and LSR electric submersible low-level drainage pumps
- EPT and TE engine-driven trash and dewatering pumps (powered by Honda and Vanguard engines)
- TPG contractor-grade portable generator (powered by Honda)

"When flooding occurs, fast and efficient dewatering is imperative to preserving public safety and minimizing financial loss. Those in disaster-stricken areas need dependable products during and after an extreme weather event. That's where Tsurumi comes in, with the reliable equipment necessary to alleviate any stressful storm-related clean-up and rebuilding efforts," Houk added.



DISASTER AND FLOOD REMEDIATION SOLUTIONS

The company monitors developing weather patterns and strategically supplies distributors near the most susceptible areas to help with recovery efforts following a storm. Photo by Tsurumi Pump

Titan Machinery Acquires Australia's Largest Case Dealership J.J. O'Connor & Sons

WEST FARGO, N.D. – Titan Machinery, a network of full-service construction and agricultural equipment stores, and a major Case dealership, has entered into a definitive purchase agreement to acquire J.J. O'Connor & Sons, the largest Case dealership in Australia for U.S. \$63 million in cash, subject to final working capital and closing adjustments. O'Connor generated revenue of U.S. \$258 million and EBITDA of \$21.4 million.

O'Connor, founded in 1964, is the largest Case IH dealership group in Australia. O'Connor delivers a wide range of new and used equipment, parts and services through its 15 dealerships and one parts location located in the southeastern Australian grain belt, which includes the regions of Victoria, New South Wales, and South Australia. Also, O'Connor is a distributor for more than 25 short-line equipment brands, providing a range of complementary offerings to its core Case IH line of products, and has a strong parts and service business that provides a reliable recurring revenue stream.

On a consolidated basis, O'Connor achieved a gross margin of approximately 18.7-percent in the full fiscal year 2023, and generated a total pre-tax margin of approximately 7.2 percent, representing a margin profile that is consistent with Titan's.

"We are our pleased to announce our definitive agreement to acquire O'Connor's, Australia's leading Case IH dealership group," said David Meyer, Titan Machinery's chairman and CEO. "The transaction marks our entry into the Australian agriculture market, as we continue to seek opportunities for Titan to expand its reach, both domestically and abroad. O'Connors' operating metrics, core values, and customer-centric focus align with our own, making them a great partner for our entry



A contractor operates a Case mini track loader. Case is the primary equipment rented and sold by both Titan Machinery and Australia's J.J. O'Connor & Sons. Photo by Case Construction Equipment

into the Australian agriculture market, which is benefiting from strong fundamentals that are being driven by enhanced productivity, economies of scale, and farmer profitability.

"We are very impressed with the O'Connors' senior management team, led by CEO Gareth Webb, which has been operating the business exceptionally well over the last five years after succeeding the retiring major shareholders Dennis and Mark O'Connor. It's the strong management team, along with their great track record of retailing and supporting the high horsepower Case IH product lineup that makes this a very compelling acquisition. O'Connor's has established itself as a respected leader in the region, earning a reputation for its deep expertise and employee and customer-centric focus. Their long-term business relationships, built over nearly six decades, demonstrates their commitment to excellence. The O'Connor team has a proven track record of driving organic growth, M&A execution, and profitability, and we believe that there is additional opportunity to build upon their growth formula and capitalize on operational synergies across Titan's global footprint as we integrate the business." **RER**

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