

Annual Review

 **BVAA**® SPRING 2016



Chairman's Statement



David Millar, BVAA Chairman

Our March 2015 year-end confirmed that the **BVAA had had its best year ever again**, with record turnover and activity levels.

We have however been acutely conscious of the rapid decline in global oil and gas activity, the impact this has had in particular on the UKCS, and most especially on our many affected members in that sector.

On a practical level, BVAA 'bedded in' to its new freehold HQ in Banbury, and swiftly took prudent steps to significantly reduce our mortgage. The 'Peter Churm Technical Centre' has been well used by members and trainees alike and is proving to be a tremendous asset.

Despite the industry turmoil, membership again grew to a remarkable peak of 207, but already we have seen the first signs of consolidation in the industry and

entrenchment among members, plus the inevitable examination of the benefits returned by BVAA membership.

With that in mind, we have expanded services again, one example being our recent, hugely successful Regional Dinner and Supplier Day in Brighouse, the attendances at which exceeded all expectations. A thoroughly worthwhile event which we plan to repeat.

Training held up well throughout the year with a slight fall off towards year-end. This coincided however with an expansion of delivery to centres in Yorkshire and Aberdeen. Taken into account, overall we've seen more 'dilution' of training business rather than 'evaporation.' I am however

particularly proud of the new BVAA 'Future Leaders' initiative (see Training).

Our new Technical Consultant Martin Greenhalgh has rallied his technical troops magnificently and we welcome the engagement of Ron Strang and Paul Reeve into the fold of advisors and consultants. The 'Technical Expert Groups' (TEGs) initiative has launched successfully, with several new TEGs having met to develop technical issues that will ultimately benefit all members.

The role of BVAA Chairman would be extremely difficult without the support and fellowship I receive from my colleagues on the BVAA Board, plus of course the sterling work undertaken by the Association's various working groups and chairs, and I thank them all for their hard work.

I close with my sincere thanks to BVAA Director Rob Bartlett and his hard working Secretariat team who continue to provide members with such a professional service while all the time making one feel a member of a close-knit family.



Looking to alternative markets... 1" ASME 600 'Phase' Ball Valves (316 Ti + Hardide coating) complete with Rotork IQT actuators for a nuclear application (Heap & Partners)

Director's Report



Rob Bartlett, BVAA Director

'Our best year yet, but...'

Regular readers will know that a report of significant growth at BVAA – on several measures – has generally been the norm for the last decade. Indeed so it was in 2015, fiscally our best year ever...

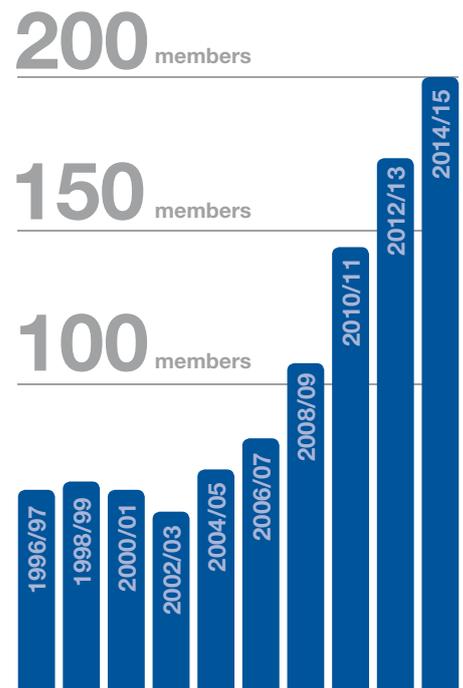
But with oil prices plummeting globally, the UKCS sector – where many members are focussed – is proving a particularly difficult place for them to win new project business. Yet perversely there was a recent announcement of a significant upturn in year-on-year UKCS production – the huge investments of recent years having obviously paid off. A lesson to be learned there for us all perhaps. Even so, not all the operators can turn a profit in the prevailing conditions, but some notably can, and we must ask ourselves 'why not all?'

Given the situation it will therefore come as no surprise that our Board have focussed attention on what BVAA can do to help the UKCS operators with efficiencies so they can continue to invest, while at the

same time – through the formation of a new BVAA Business Development Group – starting to explore opportunities in other markets for the industry.

Last year the Secretariat girded itself for a turn down, taking the appropriate measures, but again contrarily we were busier than ever ourselves. Despite consolidation in the industry BVAA membership continues to grow, albeit in a less dramatic manner. We did cross the 200-member threshold though – heady stuff compared to our low point of just 55 in 2003.

The new HQ is proving a solid, well-used investment and as our Chairman indicated we are already setting about reducing our modest mortgage. Seeing 32 delegates training on the same course together in the *Peter Churm Technical Centre* is certainly a very rewarding sight! As was the first of meeting there of our aforementioned 'Future Leaders' group – another huge BVAA investment in the future of our industry.



Membership continues to rise steadily.

This year also saw something of a renaissance in the already-busy Technical section, with several new strands of activity being launched, and the introduction of Technical Expert Groups – a new concept in the way technical matters will be managed.

Also new was our 'Supplier Day' initiative, bringing the valve industry supply chain and our many diverse members together. And at first offering, it was the best-attended event of the year, save the AGM. There's more on this in the following reports.

All this could not be done of course without my hardworking team of the BVAA Chairman, Board and members, and in particular the working group chairs.

Lastly I would also like to take this opportunity to personally thank my small team of Karen Webb, Barbra Homer, Isobel Goldthorpe and our Accountant Chris Griffin, plus of course Technical Consultant Martin Greenhalgh, who help keep the Association running so efficiently.



2016 will again see the BVAA participate in Valve World, and host the British Reception.

Technical Report



Martin Greenhalgh, BVAA Technical Consultant

BVAA Technical Service

I was deeply honoured to be asked to take over as Technical Consultant at BVAA, an organisation with which my family have been continually associated since its formation in 1939.

In order to provide a technical service 'fit for purpose' I felt it was necessary to first establish what the membership required from the technical function, and then to re-organise our efforts to deliver that, within the budget and resource available.

From the resultant survey it was clear that standards still played an important part in the lives of our technical experts. But as per our multi-faceted industry, a tremendous number and variety of standards were being utilised. In discussions with Rob Bartlett and my colleagues on the BVAA Board, the technical Working Groups, etc., it became clear that a new approach was required.

We have decided therefore to prioritise our time and resource on the standards that affect most members – the generic standards (materials, tests, etc.) - while at the same time facilitating a system whereby those interested in the usually product-specific standards had a route to participating in their development too.



SILs 'TEG' meeting with Paul Reeve leading the discussions



Casting Quality a likely new 'TEG' for 2016 (DMI)

I recently took over the Chair of BSI committee PSE/18, which mirrors all valve and actuator standards activity in ISO/TC153 and CEN/TC69, which I regularly attend, with ISO/TC185 similarly covered by my colleague Mike Gray (Pentair). BSI operates a very efficient document distribution and voting system so we felt it was not necessary to duplicate this at BVAA, however we did need BVAA fora that facilitated coverage of the generic work and also the specialist product-specific standards when required.

We created a new system whereby I would issue a timelier, easy-to-use monthly report on standards development and progress. Generic standards would continue to be discussed in the Valve Working Group, which I continue to attend and support. A new system of 'Technical Expert Groups' was formed however to allow the formation of small, time-limited groups to cover product specific standards and other topics of interest as they arise. Current groups include:-

- Fire Testing
- Butterfly Valves
- Safety Integrity Levels
- Subsea valve and actuators (API focussed)

More of these are envisaged, on Fugitive Emissions and Casting Quality, and no doubt others will follow. The 'TEGs' as they've come to be called address specific issues with a feedback loop to ensure BVAA members are informed of their progress, outcomes etc., the latter possibly including a position paper, guidelines on the topic, maybe a training course, perhaps even a new standard. These outcomes gel perfectly with my other goal; to ensure that the technical service was an invaluable educational tool for members, as it was for me in my early days in the industry.

Directives

Firstly I'm pleased to welcome Ron Strang (Alco) to our growing band of advisors, Ron being our resident expert on PED and ATEX - an area where new texts are in need of study and interpretation. A warm



PED expert and associated course lecturer, Ron Strang

welcome to Paul Reeve (Silmetric) also, who advises in a similar capacity on SILs.

Secondly, one major European country has decided to take a different position on the Machinery Directive - specifically on the subject of actuated valves - to that of BVAA and indeed the European Valve body, CEIR. I am participating and providing assistance on this complex issue which looks like it will encompass PED issues too.

Member Support

My routine day-to-day support to members on technical issues continues of course, as does my support in a technical capacity at BVAA events like exhibitions, the BVAA Conferences, AGM, etc.

Goals for 2016

With the assistance of the Secretariat I aim to complete the revision of the text for the 7th Edition of Valve and Actuator User Manual, BVAA's most successful publication.

I also have ongoing work updating the material for the Introduction to Valves course, which I deliver, and in which I hope to incorporate more of the Manual's excellent content.

I also have an ongoing goal of increasing the number of active participants in standards making, so that BVAA members' interests are taken into account in new and revised standards.

Finally I am indebted to the BVAA team and especially our BSI Programme Manager, Charlie Duncombe, for their ongoing support.

Training Report



Karen Webb, Member Services Manager

It's been a year of yet more new and interesting developments in the Training strand.

The first was the introduction of our new 'Advanced Valves' course developed by Martin Greenhalgh – sold out and well received at the two deliveries to date. Spread over two days, this was the natural next step on from our 'Introduction' course and has much more in-depth coverage of technical issues such as corrosion, design, materials, etc.

We also took BVAA courses 'on the road' for the first time. Although we've always offered – with some success – an in-house option for customers at their own facilities, we've never previously offered scheduled dates other than at our HQ. Venues were selected in Brighthouse (courtesy of Severn Unival) and Aberdeen, and both were tremendous successes which we aim to repeat.

Our portfolio has continued to grow with our range of Introduction to Pneumatics and Hydraulics courses, delivered in partnership with the National Fluid Power Centre. A further addition this coming year will be Introduction to Electrics – the 'brains' behind the fluid power brawn essential to many actuated valves.

Our own scheduled courses at the *Peter Churm Technical Centre* continue to flourish, despite the turn-down which has impacted only lightly so far on our training arm. Students this year came from as far away as Africa and Brunei – crossing continents apparently no barrier to good valve training! Members' customers still make up 35–50% of our students and they are often repeat visitors.

Further courses in development at the moment include HIPPS, Control Valve Sizing, Sealing, etc. Most of our hugely knowledgeable lecturers are volunteers, and we are eternally grateful for their support and cannot thank them enough for their time in re-developing the courses, as well as their delivery.

Another thank-you goes to my colleague Barbra Homer who oversees all the bookings and production of materials, and of course accommodates the many nuanced requests we receive for further assistance.

Scheduled BVAA course dates are already fixed for spring, summer and

autumn 2016. Details can be found at www.bvaa.org.uk/training or contact karen@bvaa.org.uk

Future Leaders

To close, a mention of the 'Future Leaders' initiative here at BVAA. A small group of talented people, nominated by their senior management, have engaged in a pilot programme spread over a year. The aim is to give the group the opportunity to benefit from a series of valve industry experiences, specially organised by BVAA, which they might not otherwise come across inside their own workplaces. The events include 'experience days' at manufacturers' sites, free personal development and technical training, and tours of 'Centres of Excellence' connected to the industry. Plus of course the opportunity to develop their own network of contacts. Launched in December 2015, the plan is to review and develop the initiative with a view to making it a rolling programme of talent development, helping to ensure the future of our industry.



BVAA Trainees at the National Fluid Power Centre, Worksop.



BVAA's Future Leaders Group at BVAA



Just one of BVAA's training partners (Academy of Joint Integrity)

Valve Working Group



Peter Burnett, Heap & Partners



Velan ball on Hardide Coatings' CMM (Hardide Coatings)



Before and after – how applying process control expertise can lead to dramatic improvements in Duplex and Super Duplex castings (Noel Village)

Meetings

The Valve Working Group has continued with its regular programme of two meetings per year. The March 2015 meeting involved a very informative visit to the Hardide coatings facility in Bicester, giving us an insight into their hardness coating process and its many applications. This was coupled with an afternoon WG meeting at BVAA – our first chance to see and utilise the impressive *Peter Churm Technical Centre*.

Our September meeting was at the equally interesting Noel Village (Foundries) facility in Doncaster, where we learned a great deal about weld-free castings. Once the *Holy Grail* of the industry, it was gratifying

to see a foundry able to deliver what was once thought impossible.

In 2012 we deliberately set out to open members' eyes to the technical opportunities in our own supply chain and I'm delighted that the Valve WG is doing its part in this regard.

Of key support to my WG was the rolling out of the *Technical Expert Group* initiative. Finding time to discuss all the detail of all the standards under our jurisdiction in our meetings was proving impossible. The TEGs however have allowed us to spin out issues like Fire Testing, Subsea and Butterfly valves to dedicated groups.

International Standards

Another benefit of the TEGs will be the opportunity for those interested in any particular 'product standards' in CEN and ISO to form their own TEGs, alleviating our group from covering these in our meetings.

We can focus our attention now on core standards that cut across all valves types and disciplines such as test standards. Plus of course relevant directives like the PED, where a new text, and new national interpretations, seem likely to require our input.

The Valve WG will however continue to receive reports on the valve related strands of activity and offer guidance and advice as required.

The Future

Our plans / goals for 2016 include focussing effort on maintaining well attended meetings, ensuring timely communications with membership on key industry issues, growing representation / involvement of members in UK Technical Work and increasing attendances and activity in API and ASME or others where required.

As for myself this will be my last report as I plan to Chair the Valve WG for 2016 and then, having served 5 years, to rotate out to allow someone else the chance to lead this vibrant technical group. I would like to thank all my members for their considerable support, the BVAA team for looking after us so well, the new TEGs for their welcome assistance of late and of course the many hosts and speakers we've persuaded to make our meetings so much more informative.



BVAA Valve Working Group

Actuator Working Group



Peter Hirst, Rotork

Here at BVAA we've been quite busy preparing for revisions of some of our most important standards. As ever we do this by meeting regularly in conjunction with the BSI PSE/18/5 group, which comprises essentially the same experts.

ISO 5210 & 5211 Attachment Standards

The joint BVAA/BSI working group were able to meet and prepare our own proposed revisions of ISO 5210 'Industrial Valves - Multi turn actuator attachments' and its part-turn equivalent, ISO 5211. Since these are widely used, and both also adopted as 'BS' (British) and 'EN' (European) standards, they are hugely important projects to us and our valve manufacturer colleagues.

The BVAA-prepared texts were adopted by BSI, submitted as UK proposals, and formed a significant part of the discussions in ISO/TC153/WG1 in which we participated. Many details of the texts were subsequently examined and additional content discussed. A provisional target of February 2016 has been agreed for circulation of the texts for formal voting.

The key changes are:

ISO 5210 - inclusion of additional flanges to extend the torque/thrust range: F05 (20Nm / 10kN), F48 (20,000Nm / 2,000kN)



Rotork



Mounting kit (Heap & Partners)

and F60 (40,000Nm / 4,000kN). New couplings "C" and "D" for transmitting torque only have been added along with defined linear outputs.

ISO 5211 also has new flanges F80 (500,000) and F100 (1,000,000 Nm) and new couplings for involute spines, bi-square and an improved flat head design coupling. Informative annexes on the calculation basis for transmittable torques/ thrust and sizing have been added to both standards.

ISO New work item proposal from China and Korea for an electric actuator standard.

The proposal is limited to isolating duty electric actuators only and is unclear in its intent. It appears that they are indicating a lower specified life test and duty requirement. TC153/WG1 have tasked them to provide a clearer NWI proposal for circulation and voting in the first quarter 2016.

CEN Standards

The actuator group within CEN - TC69/WG1/SG10 has been reformed due to several new work item proposals and our group remains heavily involved. The proposed revision of EN 15714-2 'Industrial valves - Actuators - Part 2 : electric actuators for industrial valves - Basic requirements' to make it consistent with another largely unrelated water valve standard, was cancelled.

The study of possible conflicts between the EN 15714 series and the ISO 12490 pipeline valve actuator standard has continued as it is proposed that ISO12490 be adopted by CEN. The fundamental differences in design, and indeed operation of these two types of actuator - chiefly regular process operation versus very infrequent pipeline isolation operation - was deemed sufficient not to support the adoption of ISO 12490 directly as a 'part 5' of the EN 15714 series. Consequently it is proposed that a Part 5 will be drafted to indicate cross references and exclusions.

A proposed EN 15714- part 6 covering linear pneumatic and hydraulic actuators is also being mooted and early UK comments have already been submitted via BVAA and BSI. Work on these two aspects will commence in 2016



Stainless steel valve gearbox (Qucikits)

Valve Gearboxes standard

It's gratifying to note that the BVAA gearboxes guide was used as a basis for the original content of a proposed new EN standard on gearboxes due for development in 2016. However, as many years have passed since this was first drafted, our working group discussed ways in which to improve this content, including rationalising duty classes, torque bands, locking arrangements, etc. An updated draft has been submitted to CEN.

Sub Sea Actuators

The ISO/TC67/SC2/WG18 project on 'Actuator mechanical integrity and sizing for subsea pipeline valves' (ISO 16441) remains halted largely due to international political reasons outside the BVAA's control. API however continues to develop their standard 'API 6D SSX' for sub sea actuators. The meetings are helpfully held concurrently with the associated API 6DSS meetings for sub sea valves. UK delegates are occasionally able to attend these meetings, supported by BVAA travel funding, or alternatively submit comments for consideration. Such is the importance of these standards, a new dedicated sub sea 'Technical Expert Group' has been formed at BVAA led by my colleague Chris Williamson (BEL Valves).

I would like to close with my sincere thanks to my fellow working group members who give so freely of their time. Also to BVAA, particularly Martin Greenhalgh and Rob Bartlett for their support. My thanks also to BSI's Charlie Duncombe, for his skill in helping us prepare drafts and comments destined for the international standards groups.

Marketing Focus

Business Development

It's been a time of considerable change for the BVAA's Marketing function - the last few months particularly.

Our former Marketing & Comms Manager left and I took over a number of his Marketing related duties. Our long-time Chairman of the Marketing Committee, Laurence Kettle (Rotork) also stepped down after magnificently leading this activity strand for many years. In January 2016 the group appointed a new Chair, Tim Guest (Zoedale) and additionally the BVAA Board extended and reassigned the Marketing Group to focus on 'Business Development' rather than steering our marketing function. So a few changes to be going on with!

Supplier Day

One of our greatest success stories this year has to be the new 'Supplier Day' held in October in Brighthouse. Our plan was to bring together a small number of the major manufacturers in the association together with a range of our supplier members, and give them the opportunity to 'speed date' with a view to facilitating future business together.

A free-to-attend event, it proved far more popular than we'd ever imagined! Nearly 120



Mini expo also a part of the proceedings



One-to-one meetings at the Supplier Day



'1-to-1 meetings' were facilitated, with many more informal ones in the mini exhibition next door. We received hugely positive feedback on the day and afterwards, and will definitely run the event again.

Valve User

The success of BVAA's very own Valve User (VU) magazine continues to astound. Nine years since its launch as a very modest 24 page newsletter, the magazine now regularly tips the scales at 120+ pages.

The strength of the magazine has to be its core ethos; to be a service to *members and readers*, not a profit-generator. Unrivalled in its coverage of valve industry news, application stories, product launches and company profiles, the magazine recipients are predominantly in the customer base, with an opt-in readership - not many publications can claim that, and very few indeed can legitimately claim to be produced - *at a subsidised rate* - solely for the benefit of the membership of a trade association and their customers.

C.35,000 hard copies are produced each year, with many thousands more appearing on the BVAA DVD - and of course there is

the dedicated, new-look valveuser.com website, where the accumulated 2000+ articles live on forever.

Members tell us they win business through VU, and BVAA recruits many a member from it too. More importantly, our customer base is, via VU, perhaps the best informed in the world.

Exhibitions

Offshore Europe

The bi-annual Offshore Europe show in Aberdeen in September was eagerly awaited by many, largely it has to be said as a bellwether as to the state of the oil and gas industry and particularly the UK Continental Shelf. Busier than many anticipated, the show was nevertheless quieter than the previous event and confidence in that important valve sector appeared somewhat dented.

On the up side, BVAA were able to see, in just a few days, almost half of the companies in membership, making it a particularly pleasurable and fruitful event for the Association.

Such was the sector malaise, a decision was made early on in the year at BVAA to



New BD Chairman, Tim Guest



Isobel Goldthorpe, BVAA Marketing Manager



Just some of the BVAA members we met at Offshore Europe 2015.



BVAA Desktop exhibition at Score's Brighthouse facility.

rein back from other international oil and gas related events, so Offshore Europe was our only major external exhibition this year. I did however attend the PILOT Share Fair event (also Aberdeen) in November and had some useful dialogue with our members' customers.

Desktop Exhibitions

Always popular with members, we managed to host three 'desktop' exhibitions towards the latter half of the year. These included one at SNC Lavalin in London in September, a return visit to Bechtel London in October, and another new venue in Score Europe's Brighthouse facility – an event that spun out of the post-desktop debrief at Score's Peterhead event in February 2015.

There's no doubt the UKCS downturn has led to a slow-down in EPC project activity, and consequently our plan to extend the number of desktop events in 2015 was affected.

Market Reports/Intelligence

In November BVAA circulated that latest edition of our free-issue annual 'EIF Report' on the global valve industry. One of our most popular services, this includes a comprehensive 5 year forecast covering 63 of the world's most industrialised countries. The data is classified by nation, end-user industry and product type.

Our monthly series of 'industry intelligence' emails continues to grow, with more and more data sourced by ourselves. This bulletin includes news and project awards from the power, chemical/petrochemical, oil & gas, and water industries. Well received, we look forward to adding content to it during the coming months, and perhaps additional market reports.

Product Sourcing

We appreciate finding a new supplier can be an uncertain exercise so, through our product sourcing facility, we make sourcing the best of the British Valve industry easy for our customers. The

tool contains information searchable by product type, company name and brand name, (including the manufacturer's and any distributor's details) and can be accessed via the BVAA homepage, www.bvaa.org.uk. It's also distributed on our DVD via VU, at Exhibitions, events and via our extensive contact network.

Huge orders are reported to have been won through the service, so it's important for members to keep their data up to date, and for customers to note this service can save hours of time trawling the internet for potential new suppliers.



www.valveuser.com



BVAA's latest literature DVD

Activities Report

BVAA AGM

A lively and well-attended 2015 AGM at Crewe Hall saw a continuation of the mini-conference theme, with four speakers on topics as diverse as Export Finance, Bio-gas, Nuclear and UKCS Efficiency – each in their own way very thought provoking.

While members worked, their partners were hosted with a champagne lunch and fashion-themed partners' programme. A special presentation was also made later to outgoing Marketing Chair Laurence Kettle, who has completed 30 years' service on BVAA committees.

The evening Dinner and Ball was captivating, with a more 'atmospheric' stage set and cabaret provided by the amazing *'Out of the Blue'* a Capella band – who kept the bar rocking until the early hours - and the equally indefatigable Star Band.



The pre-AGM mini-conference in session

BVAA Spring Conference

The BVAA Dinner Dance is subsidised via member sponsorship – our grateful thanks once again go to Asco Numatics, KKI, Saco, Rotork and Zoedale who gave so generously.

Again generously sponsored by members HSP, Saco and Taylor Forgings, the BVAA Spring Conference was our best yet according to the feedback. Conference papers covered the use of CFD in the valve industry, development of subsea HIPPS valves, valve condition monitoring, API standards affecting the industry, the global oil and gas market outlook and more specifically the EIF world valve and actuator valve market forecast.

An extended Conference feature this year was the well-attended mini exhibition, which attracted 18 stands, mainly from our supplier members.

Golf

Again held in May at sun-blessed Celtic Manor, Wales, the Conference was followed by the usual members' dinner,



BVAA Chairman David Millar presents Laurence Kettle (right) with his well-earned BVAA cufflinks.



Mini expo at the BVAA Spring Conference



Hugely entertaining 'Star Band'



Dave Anderson of Score presenting at the Conference



'Out of the Blue' – all Oxford undergraduates and not an instrument in sight.



Wiining team HSP – at the Inverurie 1st tee and later with the BVAA Cup

and then the Annual Golf Day. As keenly fought as ever, and supervised superbly by honorary Golf Director Rob Boycott (Cameron) the eventual winners were the defending Champions Valvestock with an impressive 85 points.

Our customer golf day in Scotland – also generously sponsored by GPEC/ATV and Schoolhill Hydraulics - was held this year at Inverurie at the recommendation of our Scots Golf Director, Peter Robertshaw (BEL Valves). And what a day it was! Again blessed with the most fantastic weather, despite the late September date, the tournament was won by 2013 winners HSP with a whopping 97 points!

A smaller golf day was also held at Cleckheaton at the kind invitation of Control Valve course lecturer Dave Martin (Valve Solutions) after the Brighthouse Supplier Day - local knowledge obviously paying off as Dave's team won again!

CEIR & VMA

BVAA's Director Rob Bartlett and Technical Consultant Martin Greenhalgh participated in the CEIR Congress in Yorkshire in June. Although not members of this European body for some years, and with limited industrial valve activity of relevance to the UK, some of the sessions did prove useful with Rob participating in one of the panel sessions. BVAA has offered to participate in ongoing European Directives work to assist CEIR, as and when we can.

Rob Bartlett and Chairman David Millar attended the Valve Manufacturers of America Association (VMA) event in Naples, USA in October. The two Associations share many members and with ever-closer co-operation, such as at Valve World, find they have the same challenges and much in common.



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