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FALL 2025

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Meet the Chairman

Valve Packing



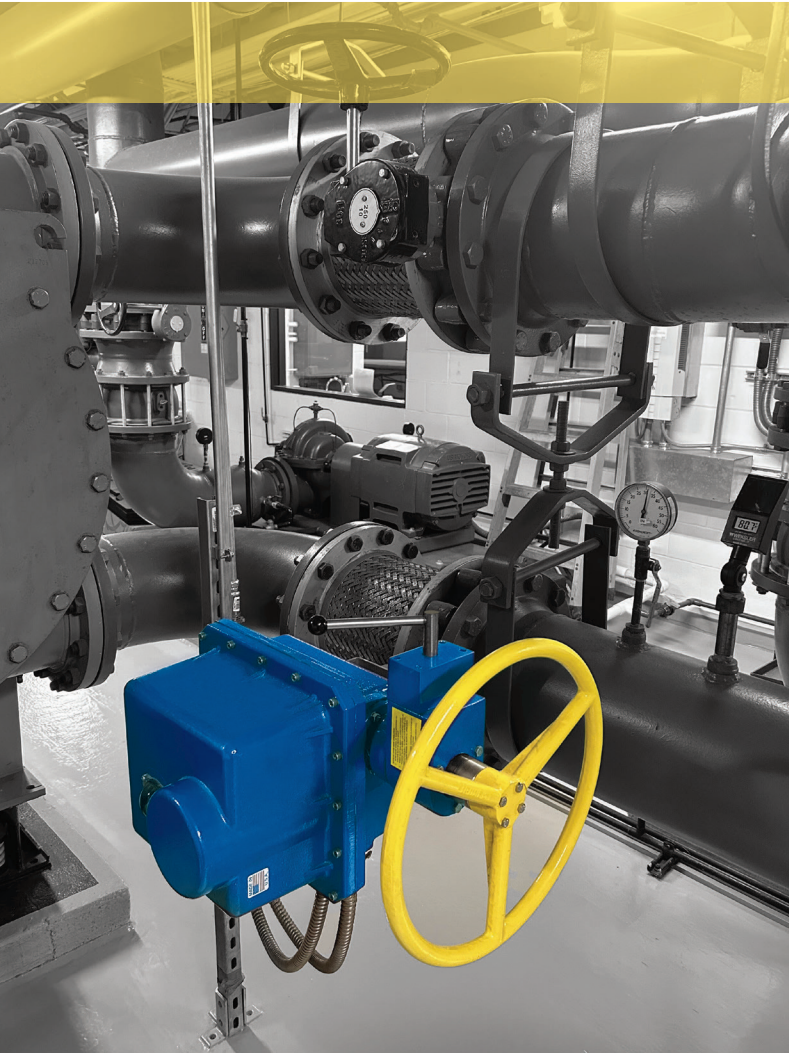
## Scanning the Horizon: Market Outlook for Valves and Flow Control

VOLUME 37 | NUMBER 4 | [VALVE-MEDIA.COM](http://VALVE-MEDIA.COM)

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# Market Outlook for the Valve and Flow Control Industry

**16** In a year of uncertainty with tariffs and other challenges to businesses around the world, the Market Outlook Workshop featured speakers from various sectors to share their insights and industry forecasts.

BY HEATHER GAYNOR

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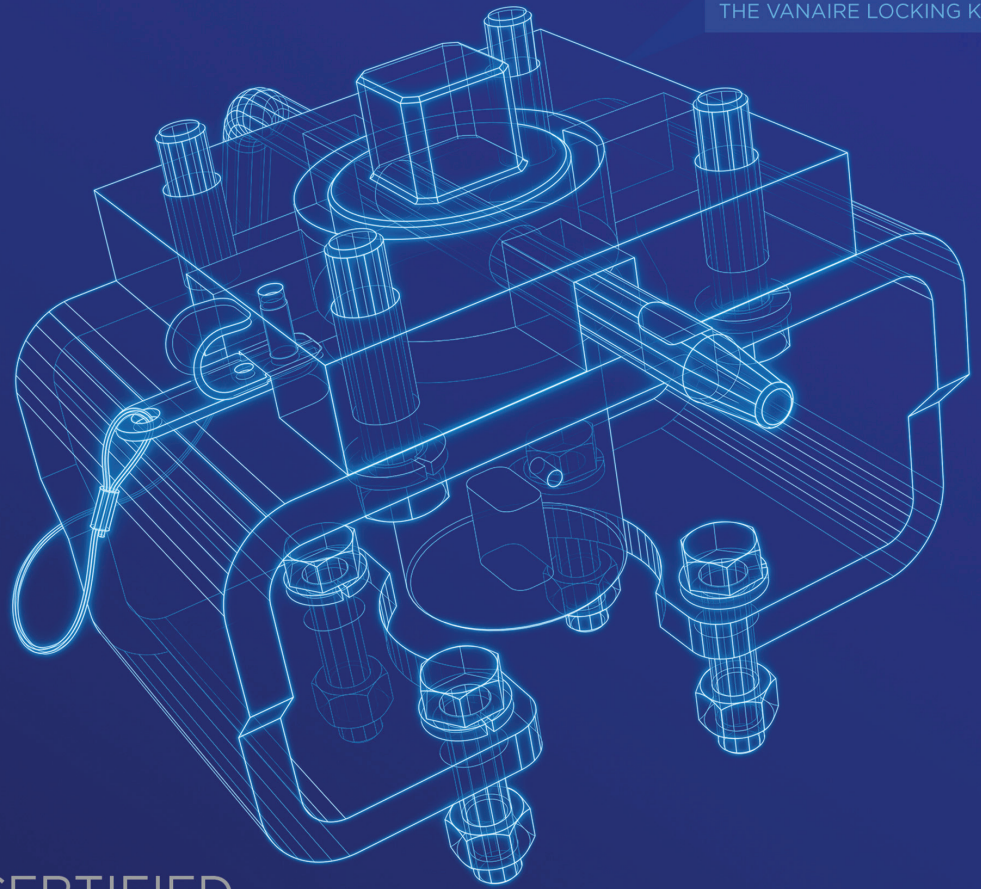
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# It's the Most Wonderful Time of the Year

Looking back and ahead at the same time.

As we are officially in the holiday season, fall has always been my favorite time of year. I love the colors in the trees and the crispness in the air. As I've gotten older, I've learned to love all the seasons, but fall is still leading the pack for me. It's the nostalgia of back-to-school season (I was a nerd who loved school), Halloween, the VMA Annual meeting and planning for the next year. All of these have me excited!

Fall is a season of planning and looking ahead while acknowledging the past year for many of us. I've had some personal changes, including now being part of the VMA staff, and professionally have tried to stay on top of all the changes brought about by the Trump administration and the impact it will have on all of you and our industry. Priorities shifting from renewables back to oil and gas means opportunity

for refineries, extending the life of existing fossil-fueled plants and even repowering shuttered plants to get them back online.

The Administration's focus on driving American manufacturing on American soil also means increased reliance on U.S. foundries, as discussed in the article on **page 10**.

In our recent Market Outlook Workshop and at the VMA annual meeting,

the power market and powering all the new technology in our world was a hot topic. Did you know that the average large data center being built today requires the same amount of energy on average that it takes to power 12,000 homes? With thousands of these under construction in the U.S. and around the world, there is an enormous opportunity for valve and all flow control manufacturers to not only power the grid, but to cool and power these data centers and all the fluid systems that go into them. The article on **page 16** provides more insights into key markets shared during the Market Outlook Workshop for the flow control industry.

Geopolitics continues to be a hot topic and was discussed in depth at the VMA Annual Meeting. The impact of tariffs, according to one speaker, isn't truly felt for 9-18 months. Since there has been so much uncertainty with the levying then lifting of tariffs, and the changing tariff amounts, it seems safe to say most of you still don't know just how deeply they are impacting your business today, or how the impact will continue to roll out.

As the year wraps up and we begin planning for 2026, we are looking for ways to better serve our readers of this magazine and members of VMA. If you have any ideas or suggestions, I'd love to hear from you! But for now, happy fall and happy holidays to you and yours, and thanks for being here! 🍂



**Heather Gaynor**, Editor-in-Chief  
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# INDUSTRY NEWS

## Competitions Launch for Fouling and Corrosion

HeroX, a platform and open marketplace for crowdsourced solutions, has announced the launch of two competitions — *The Electrode Code* and *The Emerson License to Flow Challenge*. Both challenges invite engineers, materials scientists and inventive thinkers to develop next-generation solutions that enhance the reliability, accuracy and lifespan of flow measurement systems used in vital industrial processes.

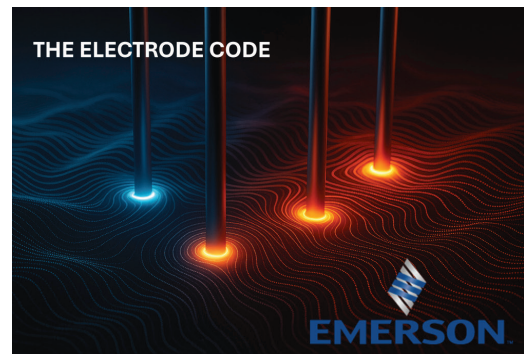
Across sectors such as oil and gas, water management and chemical processing, measurement precision is critical to performance and safety. Yet two key pain points persist: electrode fouling in electromagnetic flowmeters and acid corrosion in Coriolis flowmeters. These challenges can degrade accuracy, increase maintenance costs and reduce operational uptime — creating costly inefficiencies for industries that rely on continuous flow monitoring.

**The Electrode Code:** This challenge calls on engineers and innovators to design durable, conductive, PFAS-free solutions that prevent or remove fouling in electromagnetic flowmeter electrodes. In harsh industrial environments, coatings like paraffin, scale and abrasive particulates cause false readings and costly maintenance. Competitors must

develop materials or self-cleaning mechanisms that preserve signal integrity under extreme temperatures, pressures and chemical exposure while meeting REACH and RoHS standards. Solutions should be cost-effective, wear-resistant and compatible with existing systems to extend accuracy and uptime.

**The Emerson License to Flow Challenge:** This challenge invites innovators to create robust, compliant and cost-effective linings or coatings that protect Coriolis flowmeters from acid corrosion and mechanical wear. Substances like sulfuric acid and sodium hydroxide can erode stainless-steel flow paths, degrading accuracy and increasing downtime. Competitors must deliver materials or application methods that offer uniform, long-lasting protection under pressure and temperature extremes, preventing delamination and pitting without affecting performance. Solutions must meet REACH and RoHS standards, minimize PFAS, and demonstrate durability, adhesion and adaptability across complex geometries.

**The Prize:** A total prize purse of \$60,000 (\$30,000 for Electrode Code and \$30,000 for Emerson License to Flow) will be awarded across both challenges to top-performing teams whose submissions



demonstrate exceptional innovation, technical merit and real-world feasibility. Winning solvers will have the opportunity to partner with Emerson beyond the challenges, collaborating on development, testing and go-to-market opportunities.

The companies welcome entries from both established experts and unconventional innovators. Teams may represent universities, startups, corporations or independent inventors, provided they comply with all applicable U.S. regulations and international competition laws.

Learn more and sign up at:  
*Electrode Code:* [www.herox.com/ElectrodeCode](http://www.herox.com/ElectrodeCode)

*The Emerson License to Flow Challenge:* [www.herox.com/LicenseToFlow](http://www.herox.com/LicenseToFlow)

## Flowserve Divests Legacy Asbestos Liabilities

Flowserve Corporation, a provider of flow control products and services for the global infrastructure markets, has reached an agreement to divest BW/IP - New Mexico, Inc., a wholly owned subsidiary of the company that holds asbestos liabilities and related insurance assets, to an affiliate of Acorn Investment Partners, a portfolio company of

funds managed by Oaktree Capital Management L.P.

Under the terms of the agreement, Acorn will assume full responsibility for BW/IP and its administration and resolution of all current and future asbestos-related claims associated with the acquired liabilities. As a result of the transaction, Flowserve will permanently divest these liabilities,

enabling the company to simplify its capital structure and focus its future capital allocation toward value-enhancing opportunities.

At closing, Flowserve will have no further financial exposure to the transferred liabilities, which will be fully managed and administered by Acorn, and for which Flowserve will be fully indemnified.

## Trane Unveils Reference Design

Trane Technologies has announced the launch of the industry's first comprehensive thermal management system reference design, specifically engineered for the NVIDIA Omniverse DSX Blueprint for gigawatt-scale AI data centers. This solution sets new standards for performance, scalability and rapid deployment, supporting the most demanding AI factories, including gigawatt-scale factories powered by the latest NVIDIA AI infrastructure.

The new Trane Technologies thermal management system reference design delivers mission-critical temperature control, enabling data center operators to simultaneously manage power, water and land resources, allowing for continuously optimized performance, energy efficiency and sustainability. Additionally, it supports the advanced power and cooling needs of NVIDIA GB300 NVL72 infrastructure, ensuring

optimal performance for Blackwell and next-generation NVIDIA Vera Rubin systems. As rack density increases per NVIDIA's roadmap, Trane Technologies' gigawatt-scale design can flexibly scale to efficiently meet these demanding applications, optimizing compute power.

The reference design integrates the NVIDIA Omniverse DSX Blueprint for AI Factory Digital Twins. This allows project developers to aggregate 3D data from disparate sources with OpenUSD, helping engineers to address the complex challenges of designing, simulating and deploying gigawatt scale AI.

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## EPA Proposes Revisions to TSCA

U.S. Environmental Protection Agency (EPA) released a proposed rule to revise the process for conducting risk evaluations for chemicals already in commerce under the Toxic Substances Control Act (TSCA). The proposed amendments would ensure that EPA can more efficiently and effectively protect human health and the environment and follow the law while responding to public comments and concerns, including from other Federal agencies, on the current Framework Rule.

"The American public and the businesses that drive our nation's great economy need to have confidence in the safety of chemicals reviewed by EPA. That's why today's proposal lays out a clear, predictable, commonsense approach that's grounded in the law and the science," says EPA Administrator Lee Zeldin. "This work is yet another example of how we can and will protect human health and the environment while allowing manufacturing and industrial sectors to thrive."

Source: Getty Images

On March 10, 2025, EPA announced its intent to reconsider this rule consistent with Executive Order 14219 requiring the review of regulations to ensure consistency with Administration policy and agencies' statutory authority. The proposed amendments support Administrator Zeldin's "Powering the Great American Comeback" by ensuring chemicals that are already in the marketplace are reviewed in a way that adheres to Congress's intent for the law, uses the best available science and provides certainty for the regulated community.

## Chart Industries Sale Approved to Baker Hughes

Baker Hughes and Chart Industries have entered into a definitive agreement under which Baker Hughes will acquire all outstanding shares of Chart's common stock for \$210 per share in cash, equivalent to a total enterprise value of \$13.6 billion.

Chart is a design, engineering and manufacturer of process technologies and equipment for gas and liquid molecule handling across a broad range of industrial and energy end markets. Its products and solutions are used in every phase of the liquid gas supply chain, from engineering and design to installation, preventative maintenance to repair and service, as well as ongoing digital monitoring. Chart generated \$4.2 billion in revenue and \$1.0 billion adjusted EBITDA in 2024. It operates 65 manufacturing locations with over 50 service centers globally.

Baker Hughes has also completed its all-cash, \$540 million acquisition of Continental Disc Corporation (CDC) from investment partnerships managed by Tinicum Incorporated.

The transaction brings a complementary portfolio of products to Baker Hughes' existing valves product line, expanding the company's addressable market in the flow control market with the addition of CDC's well-established, critical pressure management solutions.

Source: Getty Images



## UL Solutions Launches New Certification

UL Solutions Inc., a global leader in applied safety science, announced its new Ecologo certification program for energy and industrial automation equipment, such as circuit breakers and safety switches, that helps manufacturers advance the sustainability of industrial equipment and meet stakeholder demands.

UL Solutions' Ecologo Certification is a voluntary, multi-attribute, life cycle-based ecolabel certification that evaluates products and processes for reduced environmental and human health impacts. Ecologo is well-known across various types of consumer products, and this new certification for energy and industrial automation equipment is designed to help manufacturers demonstrate

their commitment to sustainability through third-party evaluation according to UL 2711, the Standard for Sustainability of Energy and Industrial Automation Equipment.

The Ecologo certification program evaluates products against a comprehensive set of criteria, including: materials used; manufacturing processes; health and safety and product life cycle.

Ecologo is part of the Global Ecolabelling Network's (GEN) GENICES system, classified as an International Organization for Standardization (ISO) Type 1 ecolabel, and has been assessed by the Global Ecolabeling Network. It is recognized by governments, retailers and users worldwide.

## BWXT and Rolls-Royce Sign MoU for SMR

BWX Technologies, Inc. announced a nuclear steam generator detailed design contract and a Memorandum of Understanding with Rolls-Royce SMR to support future collaboration on the development of the Rolls-Royce SMR.

BWXT subsidiary BWXT Canada Ltd. has been producing high-quality steam generators for the nuclear energy industry for more than 60 years and has shipped more than 315 steam generators to plant locations worldwide. The Rolls-Royce SMR is

Source: BWX Technologies

a pressurized water reactor capable of producing 470 MW. Each reactor utilizes three steam generators.

Key elements of the MoU are Rolls-Royce SMR's readiness to procure steam generators for multiple reactor units from BWXT and the development of a localization plan for future manufacturing work and other activities, if necessary, to support the Rolls-Royce SMR deployment in the global market.

Rolls-Royce SMR is the only company with multiple SMR commitments in Europe, having been selected as preferred bidder in the Great British Energy – Nuclear SMR competition, and by European utility, CEZ, to build up to three gigawatts of new nuclear power in the Czech Republic.

BWXT announced last year an \$80 million Canadian dollar expansion of its Cambridge, Ontario, manufacturing facility which will significantly increase capacity, improve productivity and create more than 200 long-term jobs for skilled workers, engineers and support staff in the area.



## Hollinger Promoted to COO at DeZURIK

DeZURIK has promoted Rachel Hollinger to the newly created position of Chief Operating Officer (COO). The leadership expansion reflects the company's continued momentum and its commitment to accelerating operational excellence and strategic growth. Hollinger is a member of the VMA Board of Directors.



Hollinger will play a central role in unifying operations across the company and strengthening DeZURIK's ability to deliver value to customers worldwide. She joined DeZURIK in 2018 and has since been recognized for her strategic mindset, customer focus and leadership in fostering collaboration throughout the organization. Her contributions have been instrumental in several major initiatives that position DeZURIK for long-term success.

## Mueller Water Products Appoints New SVP

Mueller Water Products, Inc., a manufacturer and marketer of products and solutions used in the transmission, distribution and measurement of water in North America, announced that it has named Darin Harvey as its senior vice president of operations and supply chain. He will report to the company's president and chief operating officer, Paul McAndrew.



Harvey most recently served as the executive vice president-supply chain at Advanced Drainage Systems, Inc., a provider of water management solutions, specializing in storm water and onsite septic wastewater systems.



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## American Foundry Society

With the impacts of U.S. policy on reshoring manufacturing and tariffs, Ben Yates, VP of business development for American Foundry Society, recently spoke at the 2025 VMA Annual Meeting to provide an overview of the foundry industry in the U.S. and discuss the opportunities and trends.

**HEATHER GAYNOR**, *Editor-in-Chief*

Founded in 1896, The American Foundry Society (AFS) is a member-based organization with about 1,100 corporate members. Based outside of Chicago in Schaumburg, Illinois, AFS is the leading voice and resource on technical, management and advocacy priorities for the metalcasting industry. Of these 1,100 members, there are approximately 377 foundries in the U.S. today that have expertise making valves and pipe fittings, and many other foundries that forge valve bodies and components for companies around the world.

According to AFS, the states with the most foundries today are Ohio, Wisconsin, Michigan, Pennsylvania and California — not surprising to see the traditional “Rust Belt” states account for the majority of the highest density of foundries in the country.

Aluminum is the metal with the most facilities reporting having expertise in, followed by iron, copper, steel, zinc and nickel. Other metals that make up the balance include super-alloys used in the manufacture of specialty valves. Industry growth forecasts from AFS estimate a slow but steady growth over the next five years for foundry revenues, as well as a small increase in number of total industry employees.

With the recent spate of tariffs, the foundry industry is one that seems likely to be impacted — and it has been. AFS says the industry has had a total industry tariff cost to date of \$1 billion, based largely on the 30% China tariffs, and this is having a moderate impact on foundries in the U.S. Despite this, when surveyed nearly 70% of members forecast very positive to neutral business outlook for the next 12 months, with just over 30% anticipating a somewhat negative impact. The most worrisome issues today are the demand for castings, labor shortages and the regulatory environment, and chemical and materials cost inflation, followed closely by tariffs.

Yates said the industry is seeing a fair amount of vertical integration, with services consolidation, foundry ownership groups covering multiple alloys instead of focusing on one or two, and OEMs building or buying their own foundries. There is also a push to modernize and expand existing foundries to meet the market needs, with some foundries offering new value-added services such as design and engineering, patternmaking and tooling, coremaking and more.

These new services provide additional revenue streams and expansion of core offerings.

He continued sharing that reshoring continues to occur due to tariffs and Department of Defense requirements for U.S. made materials and shipbuilding. Technology is being adapted and adopted by foundries including incorporation of additive manufacturing, automation and robotics, AI and industry 4.0 tools and systems.

Reshoring, however, will not be quick. Over the past decades, a massive number of U.S. factories have closed due to globalization, which helped to create a massive loss of manufacturing jobs. The U.S. Bureau of Labor Statistics cites over 7 million jobs lost since 1980. Bringing both new manufacturing facilities or foundries back to the U.S. brings benefits, including a more reliable supply chain, security of intellectual property, quality control and flexibility not easily found with overseas suppliers. But continued offshoring, a burdensome regulatory environment and workforce issues like knowledge transfer and succession planning continue to impact the stability of the foundry industry in the U.S.

AFS offers members access to The Reshoring Initiatives TCO Estimator (Total Cost of Ownership). Because many sourcing decisions are price-driven, companies often miscalculate the total cost of offshoring. The AFS website says: “According to The Reshoring Initiative, most companies make sourcing decisions based solely on price, oftentimes resulting in a 20 to 30% miscalculation of actual offshoring costs! The Total Cost of Ownership (TCO) Estimator is a free online tool that helps companies account for all relevant factors — overhead, balance sheet, risks, corporate strategy and other external and internal business considerations — to determine the true total cost of ownership. Using this information, companies can better evaluate sourcing, identify alternatives and even make a case when selling against offshore competitors.”

AFS is just one of many organizations with a significant relationship to valve and actuator manufacturers that we will continue to follow and work with at VMA. For more information on AFS, go to [afsinc.org](https://www.afsinc.org).





# Reflecting on 2025 and Charting a Strong Path Forward

One of my favorite times of year for VMA is the Annual Membership Meeting. It provides an invaluable opportunity to meet with members, understand the issues they face and discuss how VMA can continue to be a strategic partner. It is also a time to learn from experts, recognize those who contribute to VMA and reflect on our progress and direction.

As we look back on 2025, it is clear the year began differently than expected. Tariff actions created immediate uncertainty for manufacturers, distributors and suppliers across the U.S. and Canadian valve and flow control sectors. These shifts affected sourcing strategies, customer relationships and long-term planning almost overnight. While this disruption was not how we hoped to start the year, I am proud of how VMA responded — by providing timely updates and reliable information when members needed it most.



Government affairs remained central throughout 2025. VMA amplified our industry's voice on tax policy, workforce development and PFAS legislation at both the federal and state levels. We joined association partners to support national initiatives for R&D and CapEx expensing, expanded pathways for certifications and training, met with policy-makers on Capitol Hill, and submitted letters outlining how workforce, tax and PFAS actions impact our industry. These efforts reinforced VMA's role in shaping policies that affect member competitiveness.

Our events, education and networking programs also delivered strong value. The Valve Forum expanded its content in partnership with the Valve Repair Council (VRC), while Valve Basics and our webinar series reached professionals across all levels. The Annual Meeting, Market Outlook Workshop and Valve Repair Seminar highlighted the importance of connection and shared learning.

VMA's media and communications platforms saw meaningful growth as well, with more than 550,000 website impressions and over 17,000 LinkedIn connections. We also welcomed Heather Gaynor, who will continue as editor of *Valve Magazine* and help guide our next phase of outreach as VMA's Marketing & Communications Director.

This year included significant progress on refreshing the VMA Strategic Plan for 2026–2029. A comprehensive membership survey provided valuable insight into which programs members rely on most — and where VMA can expand offerings in technical content, workforce development, market intelligence and government affairs, and in enhancing our membership community. More information on both of these efforts will be shared early next year.

I extend my sincere gratitude to the many members who volunteer their time on VMA committees, and offer heartfelt appreciation to our outgoing Board members — Kirk Wilson, Dave Loula and Alex Alcalá — for their years of service, guidance and commitment, and also to Cliff Smith who has dedicated many years of service to the VRC Board. Their leadership strengthened the entire association.

As we move into 2026, we carry forward a solid foundation, clear priorities and a shared commitment to advancing our member companies and the broader valve industry. Thank you for your engagement, partnership and continued trust in VMA. 🙏

Heather Rhoderick, CAE  
President

VMA is dedicated to driving growth and innovation of the U.S. and Canadian valve industry globally. Through collaboration, education and advocacy, we work to create an environment where manufacturers, distributors and service providers of valves, actuators and controls can thrive. The VMA News section of *Valve Magazine* highlights key initiatives, industry developments and opportunities we're championing. To learn more or explore membership with VMA or VRC, contact VMA President Heather Rhoderick at [hrhoderick@vma.org](mailto:hrhoderick@vma.org).

## VMA and VRC Annual Meeting Delivered Connection, Insight and Industry Intelligence

VMA's premier member gathering took place this fall in Naples, Florida, drawing more than 100 attendees for three days of high-value content, discussion and networking. Participants reconnected with colleagues, engaged with an experienced slate of speakers and enjoyed ideal weather and first-class hospitality. Post-event evaluations reflected strong satisfaction with both the educational program and the numerous opportunities for peer interaction between industry leaders.

A central theme of the meeting was the rapidly increasing demand for power – particularly due to the influence of the tech sector and the related expansion of data centers across North America. Attendees engaged with speakers who examined whether the current build-out is sustainable, and what the potential implications are for flow control manufacturers, suppliers and distributors.

Additional sessions explored critical government affairs issues, including pending and proposed PFAS legislation, the “One Big Beautiful Bill” and tax implications for manufacturing and distribution businesses of all sizes, and evolving tariff policy. Industry-focused presentations highlighted power, water and wastewater and foundry market trends, and other presentations focused on suggestions for managing supply chains, workforce considerations and strategies for transforming data into actionable business intelligence.

Programming concluded with economic outlooks for the U.S., Canada and global regions, followed by a geopolitical briefing outlining potential global scenarios and their impacts on supply chains, workforce availability, political dynamics and economic stability worldwide. Other highlights included business meetings for both VMA and VRC members and the VMA Membership Awards Ceremony.

Attendees enjoy an al fresco reception on the opening night of the meeting, and industry experts addressed members throughout the meeting across verticals.



## VMA Board of Directors Slate Announced

At the Annual Meeting, the slate for the 2025-2026 Board of Directors was shared during the Business Meeting. These individuals are all industry leaders and dedicate their own time and expertise to deliver member value to our organization and we are grateful for their efforts!

The Executive Committee is made up of the following individuals:

**Board Chairman:** Rob Velan, Velan

**Incoming Board Chair/Finance Committee Chair:** Rachel Hollinger, DeZURIK

**At Large:** Kevin McKown, IMI Americas

**At Large:** Danilo Garcia, RF Valves

**Immediate Past Chair:** Matt Thiel, AUMA USA

**Directors:** Jordan Bast, Richards Industrials; Nick Bucchini, Emerson; Zachry Brown, Bray, Inc.; Shangaza Dasent, Crane Co.; Ludovic Goncalves, Baker Hughes; Scott Jackson, Flo-Works; Chick Kekeocha, Flowserve; Scott Lustyk, Curtiss-Wright; Kyle Rayhill, Valmet; and Brian Weisel, DFT, Inc., Kelly Lovell, United Valve and Cory Jones, VytI Controls, are Ex-Officio Board Members for the year.

## Outgoing Board Members Recognized for Their Service

VMA extends its sincere appreciation to the outgoing members of the Board of Directors, each of whom has contributed leadership, industry expertise and valuable time in service to the association and its membership.

Kirk Wilson, Flowserve, concluded five years of service on the VMA Board, most recently as the 2025 Chairman of the Board. During his tenure as Chair, Wilson guided Board discussions on how VMA could better communicate tariff updates and their implications to members. He also played a key role in strengthening alignment between VMA Committees and the Board of Directors and supported the launch of VMA's updated strategic planning process.

"During his time on the VMA Executive Committee and as Board Chairman, Kirk has led in a very genuine way," said Heather Rhoderick, President of VMA. "He has created pathways for others to take on leadership roles and fostered an inclusive environment across our committees.

The entire membership has benefited from his focus on delivering member value."

Dave Loula, ITT Engineered Valves, completed six years of service on the Board of Directors. Loula also contributed extensively to the Market Trends Committee, supporting the Market Outlook Workshop and developing pulse surveys that provided members with timely benchmarking information.

Alex Alcalá, Crane Co., served five years on the Board of Directors and championed the participation of numerous Crane Co. employees across VMA workshops and committees, expanding the company's engagement and strengthening the association's collective expertise.

"Kirk, Alex and Dave's voices will be missed at future Board of Directors meetings," Rhoderick added. "VMA is a stronger organization because of the commitment and contributions of these leaders."



Rhoderick presents outgoing Chairman Kirk Wilson with a photo of him on the "cover" of *Valve Magazine*.



Rhoderick and Dave Loula.



Alex Alcalá and Rhoderick.

## VMA Honors 2025 Membership Award Recipients

At the 87<sup>th</sup> Annual Meeting Member Awards Ceremony and Gala Dinner, VMA recognized two individuals for outstanding service to the association and the industry.

The Person of the Year Award, VMA's highest honor, was presented to Matt Thiel, former Chairman of the Board of Directors and President of AUMA USA. The Person of the

Year celebrates an individual who truly possesses passion for the industry and sharing their knowledge with others to help advance VMA and the industry at large. Thiel was honored for his long-standing commitment to VMA, his leadership on the Board — including three terms as Past Chairman — and his sustained contributions to the broader valve industry.

VMA President Heather Rhoderick and Person of the Year Matt Thiel.



Service Award winner David Escobar with Rhoderick.



The Service Award was presented to David Escobar, Director of R&D at Valmet Flow Control. The VMA Service Award recognizes individuals who have provided outstanding service, expertise and guidance while participating on a VMA committee. Escobar currently chairs the VMA Technical Committee and has served on several VMA issue-focused committees over the past years. He is widely recognized for providing expert technical guidance that strengthens both the association and the industry at large.

VMA is proud to recognize these leaders for their dedication and service and congratulates both individuals.

## VMA Business Meeting Previews Strategic Priorities

The final day of the Annual Meeting opened with the VMA Business Meeting, led by VMA President **Heather Rhoderick**, outgoing Chairman **Kirk Wilson**, and Board members **Rachel Hollinger** and **Rob Velan**. The slate of nominees for the Board of Directors was presented, and leadership discussed current industry challenges and opportunities which are influencing the association.

Members also received a summary of the 2025 membership survey results. These findings will help guide the development of VMA's new three-year strategic plan and shape initiatives aimed at delivering greater value to members.



## Valve Forum Call for Abstracts Shows Strong Response; Exhibit Sales Now Open

VMA's Valve Forum: Conference & Exhibits returns to the Houston area **April 13–15, 2026**, at The Westin in The Woodlands. This year's call for abstracts closed with double the number of submissions compared to previous cycles – an indication of the event's growing industry recognition and the variety of emerging technical and business topics.

The 2026 Valve Forum will feature sessions on valve design innovations, actuators and automation, business best practices and more. All content will be delivered in a noncommercial, educational format by respected industry thought leaders. The full program will be announced in early 2026.

The conference includes tabletop and small booth exhibits, a tour of a local manufacturing facility, multiple networking opportunities and interactive activities designed to test attendees' valve knowledge. Participants can expect to leave with new industry connections and practical insights relevant to their organizations. The exhibit area will once again provide ample time for exchanging ideas with manufacturers, suppliers and service providers.

A pre-conference **Valve Basics Seminar** – offering six professional development hours, hands-on demonstrations and networking – will also be available for those new to the industry or seeking a refresher.

**Exhibit and sponsorship sales and attendee registration are now open.** Learn more at [vmaevents.org/valve-forum](http://vmaevents.org/valve-forum).

## Valve Repair Council Reviews Progress, Sets 2026 Priorities

The Valve Repair Council (VRC) convened its Business Meeting during the Annual Meeting to review progress on current initiatives and outline priorities for 2026. Leadership recognized **Cliff Smith** of Valmet for 18 years of service on the VRC Board of Directors and welcomed new Board member **Mike Farano** of Riggio Valve. Farano brings extensive field and supervisory experience gained from his background as a Naval nuclear submarine machinist and his career in valve repair operations.

Members also previewed the draft 2026–2028 Strategic Plan, setting the stage for the Council's next phase of growth. Proposed bylaws updates were introduced, with additional information forthcoming. A call for volunteers was issued for the Planning Committee for the 2026 Valve Repair Seminar, scheduled for June 9–10, 2026, in Pasadena, Texas. The meeting concluded with an open forum and a strong sense of momentum for the year ahead.

For questions or to get involved with the VRC, contact Caitlin Hughes, Executive Director, at [chughes@vma.org](mailto:chughes@vma.org).



Cliff Smith with Chairman Chris Jones.



## VRC Welcomes Atlantic Valve Services

Atlantic Valve Services (AVS), an Emerson Impact Partner, serves customers throughout the Northeast and Mid-Atlantic region and is now a member of the Valve Repair Council. AVS technicians provide onsite, emergency, and in-shop valve repair services for its customers in a multitude of industries including petrochemical, refining, pharmaceutical, utilities, power, offshore and more. Find out more at [atlanticvalveservices.com](http://atlanticvalveservices.com).



### Calendar of Events

Learn more at [vmaevents.org](http://vmaevents.org) or contact Caitlin Hughes, VMA's Director of Education and Operations at [chughes@vma.org](mailto:chughes@vma.org).

#### Virtual Valve Basics: Ongoing

**Valve Basics Seminar** | April 13, 2026 | The Woodlands, TX

**Valve Forum: Conference and Exhibits** | April 13-15, 2026  
The Woodlands, TX

**Valve Repair Seminar** | June 9-10, 2026 | Pasadena, TX

**VMA and VRC Annual Meeting** | September 9-11, 2026  
Quebec City, Montreal, Canada

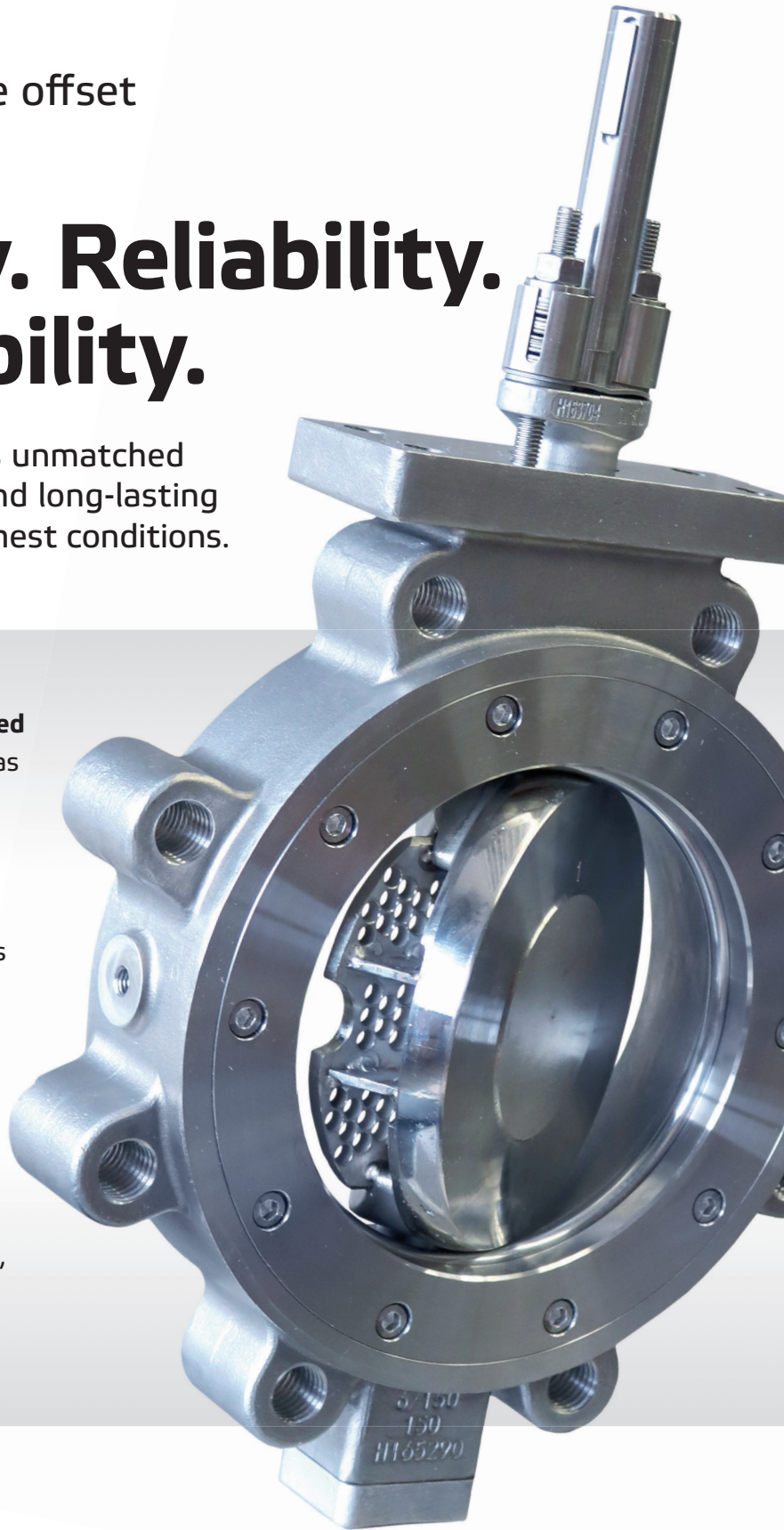
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**Valmet**   
FORWARD

FEATURED ARTICLE

# Market Outlook for the Valve and Flow Control Industry

The recent workshop highlighted key sectors and optimism seemed to prevail.

BY: HEATHER GAYNOR  
EDITOR-IN-CHIEF

In September, the Valve Manufacturers Association (VMA) and the Hydraulic Institute (HI) held their annual Market Outlook Workshop, covering key industry verticals critical to the flow control industry and open only to members of both organizations. The event was timely, given the current business environment. In this time of many moving parts geopolitically around the world, businesses are subjected to a continued air of uncertainty that

makes planning for the future challenging. Several projects that were greenlit by the previous administration have been cancelled or delayed, and new priorities are in place. The rapid move to decarbonize in industry has slowed, PFAS bans and new policies continue to be legislated largely at the state level, but the Federal focus persists globally and to some degree in the U.S. as well, and tariffs continue to challenge a supply chain that never fully recovered from the difficult conditions faced during the COVID-19 pandemic.

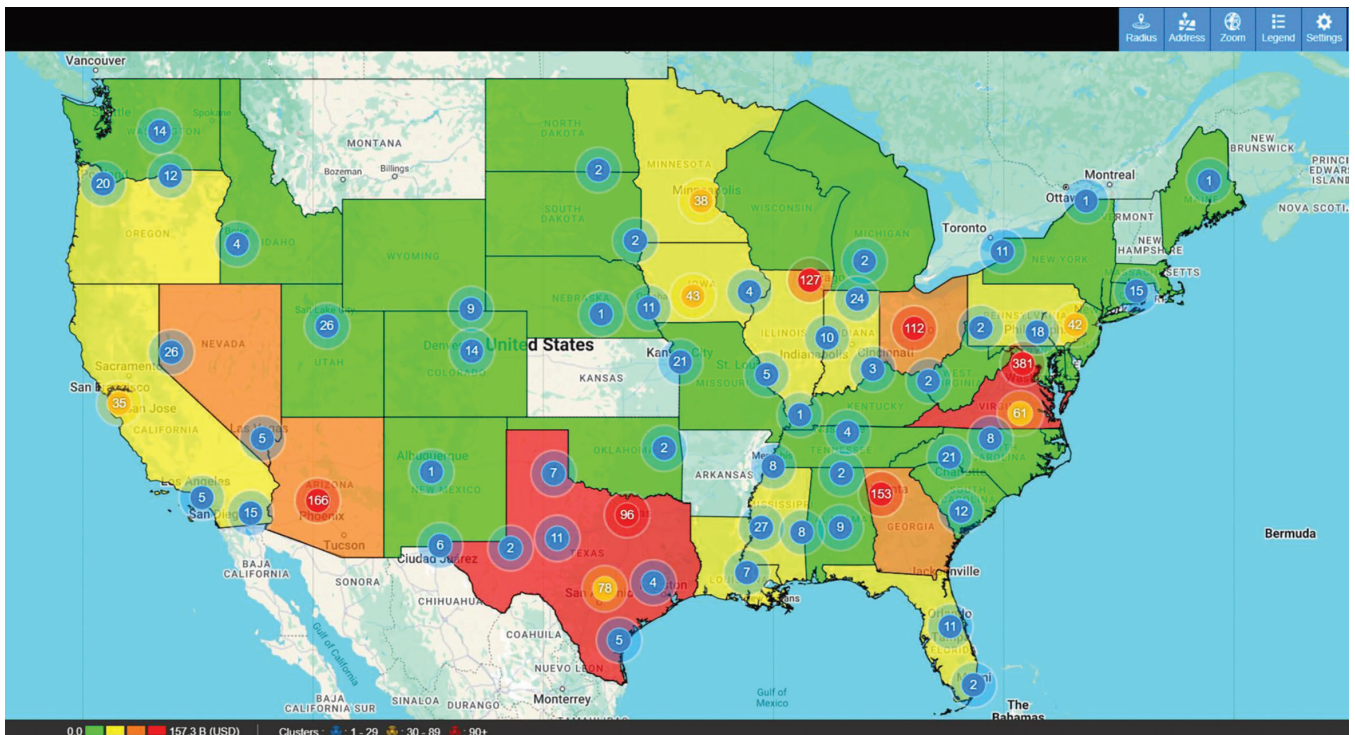
That said, most of the presenters shared cautious optimism or signs pointing toward positive business outcomes for the year ahead. And there was a consensus that the recession that has been hanging like a potential dark cloud seems to be dissipating slightly, with none of the presenters seeing a sign of a real downturn any time soon. Nearly every speaker addressed how their vertical was impacted by the huge growth of data centers across the country and around the world.

This article will share highlights from key market segments. If you are a member of VMA or HI and couldn't attend the virtual sessions live, you can access them online in the VMA Member's Only Resource Library starting in December 2025.

## Powering up

The global power industry continues to grow with Industrial Info Resources' Britt Burt sharing that they are tracking over \$11.1 trillion investments in active capital and maintenance projects. While renewables were a big focus in recent years and companies and individual citizens were incentivized to go green, the current administration has put the brakes on the industry in the U.S. The public opposition, supply chain

U.S. data center infrastructure projects currently planned. Source: Industrial Info Resources



constraints and large tracts of land needed are just a few of the obstacles that the industry is challenged with today. However, public support and the global continued push and pressure to decarbonize will likely mean that some of these projects don't go away for good. There are still battery energy storage projects worth over \$400 billion globally in the works, with nearly half of these planned for the U.S. and Canada. Solar leads renewable projects, surpassing all others, but tax credits being altered many result in a change of plans. Curtailed approvals for offshore wind and renewables on federal lands have also caused the cancellation of several proposed projects.

In more traditional power markets such as fossil fuel-fired plants, the biggest share of spend is going toward plant capital expenditures (Capex) and maintenance. There is a booming demand for energy, driven largely by the new construction of over 2,700 data center projects planned just in the U.S. With an aging grid that is already somewhat unreliable, getting a stable baseload for all corners of the country continues to be a challenge. Grid congestion is another issue as new plants and capacity are added, where the current system can't keep up with the demand.

Since 2012, 138 GW of coal-fired power plants have been retired and another 78 GW are scheduled to be retired over the next 10 years but keep getting delayed due to increasing demand on the grid. Fuel switching and repowering of plants continues to grow in popularity as coal plants move to natural gas, bringing delayed retirement of facilities and a greater opportunity for MRO business.

There are currently 169 global nuclear projects representing nearly \$140 billion USD, including 102 new nuclear units

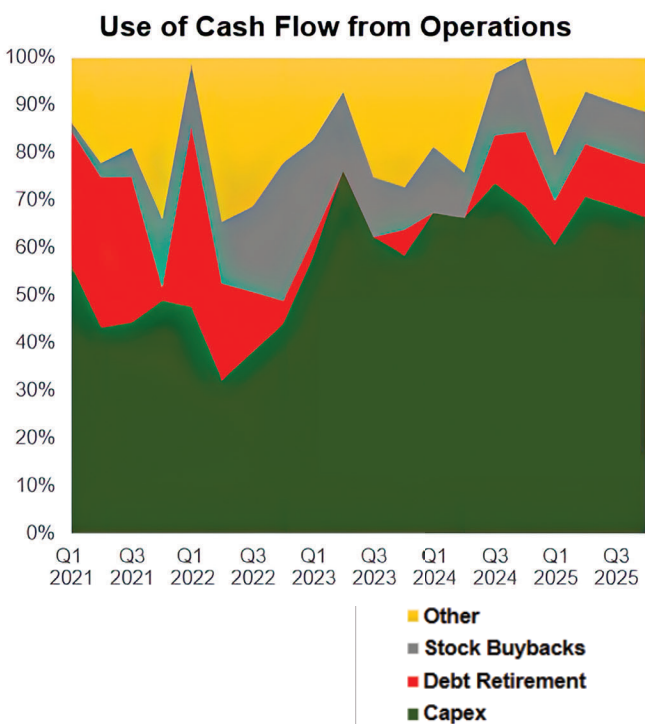
planned. Canada is proceeding with advancing small modular reactors and conventional nuclear plants, and there is a great potential for SMRs to be installed in the industrial sector so that plants can generate their own power. This is still many years off as designs are just being approved and permitted, but it's definitely something to watch.

According to IIR, there are 2,745 active data center construction projects with a value of \$1.6 trillion and average project size of \$582.8 million in the U.S. alone, with the majority of these being constructed in Texas, Virginia, Georgia and Illinois, Arizona, Pennsylvania and Ohio. The top companies funding this development are Amazon, Fermi and Tract, but the top 15 companies represent more than half of the total with nearly \$1 trillion USD in active projects currently.

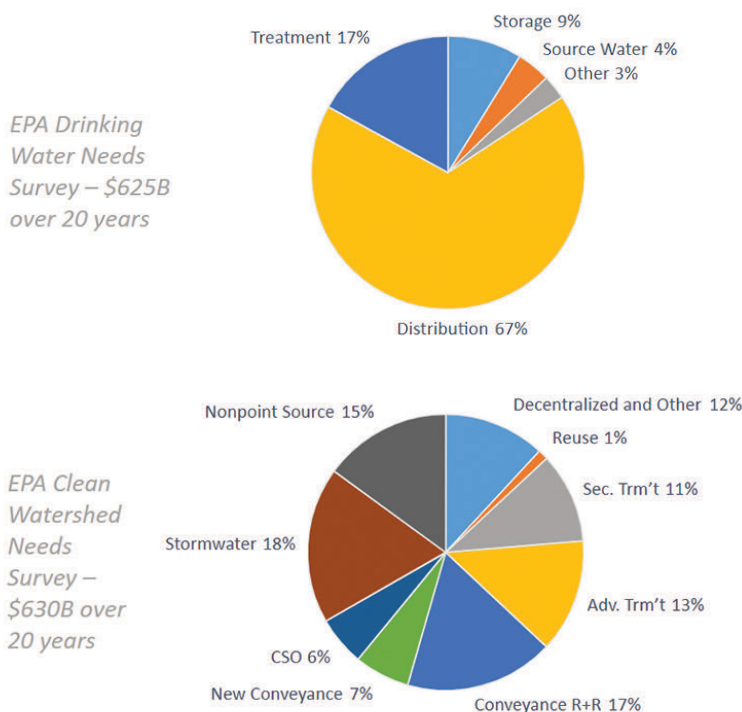
In the oil and gas market, John Spears, of Spears & Associates, shared that global oil demand was up 1% in the last year and is expected to be close to the same next year. Liquefied natural gas (LNG) demand and capacity continues to increase in the U.S. and Canada, and was up 7% in 2025 and is expected to increase 5% in 2026. The U.S. supplied a quarter of the global supply of LNG, followed by Qatar and Australia, while the European Union is the largest procurer of LNG, purchasing 30% of the global LNG as it plans to cut fossil fuel usage by 2030. China is 18% of LNG sales currently, but the demand for power has them shifting to pipeline gas in many cases.

Directly impacting the oil and gas industry, the recent federal budget reconciliation act, known widely as the One Big Beautiful Bill Act, included phasing out of credits for renewable energy vehicles and energy-efficient home improvements. It also mandates the Bureau of Land Management and

Cash flow from oil and gas operations is primarily going to Capex expenditures today. Source Spears & Associates



EPA Drinking Water Needs and Clean Watershed Needs Survey results. Source Thomas E. Decker Consulting



the Bureau of Ocean Energy Management lease sales and delays the previous approved methane emissions fee to 2035 while offering other incentives and accelerated reviews to benefit the industry.

Spears shared that while there is still some consolidation and merger and acquisition activity in the sector, operators are getting better at managing risk. Oil and gas prices are no longer driving upstream investment strategies, as operators are focused on profitability and shareholder returns. The rig count is flat this year, but estimates are for a rise of 10% in 2026. Gas and liquid transmission pipeline construction continued with more than 500,000 miles installed this year. The LNG sector is at full facility utilization in the U.S., and Spears said it is expected to increase by double in export capacity by 2030 while production capacity continues to grow. He also said that gas pipeline takeaway capacity constraints, gas turbine available and tariffs are the biggest external challenges for valve manufacturers today.

### Water and wastewater expansion continues

Returning speaker Tom Decker is still optimistic for both water and wastewater projects, based on spending nearly doubling between 2019 and 2025, much of this due to the Infrastructure Investment and Jobs Act (IIJA) passed by the previous administration. Other catalysts for growth are evident in the EPA's Clean Watershed Needs Survey that shows the U.S. wastewater system shows the need for \$630 billion USD investment over the next 20 years, while the Drinking Water Needs Survey shows \$625 billion needed.

With continuing droughts and water shortages in the western U.S. and southwest, data center water usage is expected to double by 2030. Decker shared that one large data center uses the equivalent of 12,000 households of water. While today this is largely potable drinking water, gray water is starting to be used and may be a good alternative, particularly in regions where water is scarcer.

IIJA funds expire next September but any ongoing projects may continue. Most water and wastewater funds were appropriated from IIJA but have not yet been authorized, leaving some uncertainty as to the projects coming to fruition. States have claimed nearly 70% of funds allotted from the EPA and the WIFIA program continues to be a good option for water utilities with low interest loans and long repayment terms. While rates continue to increase, affordability for consumers is becoming more challenging, even though the utilities are not charging full cost pricing, according to Decker.

PFAS and lead pipes continue to be in the news, with more than 9 million lead service lines planned for replacement by 2037. The compliance deadline for limiting PFAS has been extended federally to 2031, but states continue to introduce their own legislation and limits. VMA will continue to advocate for the industry and report on any new or changing legislation as it is enacted.

In the construction sector, Paul Trombitas of FMI Consulting shared that numbers are on the upswing, with the largest spending occurring in power and manufacturing. Water supply is a high-growth market, confirming what

Decker shared, and new construction of warehouses and logistics facilities as well as manufacturing plants and data centers are leading the market with data center construction of nearly \$45 billion estimated next year and continuing to rise for the following five years.

Soile Kilpi, AFRY Management Consulting, shared results of an executive survey the firm conducted. More than 75% said the biggest macro issues they see are risks from cost inflation and the economy in general, while 65% cited the perceived risk based on tariffs and other legislation. Like the oil and gas market, companies are most focused on cost optimization and shareholder returns. The pulp sector is seeing modest growth for virgin fiber usage for tissue and hygienic products, and bleached pulp that often comes from China or Brazil is putting concern on U.S. tissue mills as a result of the rising cost of inputs due to tariffs on these countries. The packaging market continues to expand in both consumption and production, and U.S. carton board mills are benefiting from improved competitiveness globally.

### Flow control overview

Michael Pesendorfer of Baird presented on the general state of the flow control industry based on the shares and performance of companies that Baird tracks. They are seeing an improvement in the industrial backdrop with signs of recovery in key sectors. Demand is finally normalizing post-COVID and cyclical opportunities are emerging in different sectors. While economic risk remains high, there is growth and optimism in various sectors of the market.

As for demand, it's mixed across end markets. Short-cycle orders have improved year to date, but leading indicators are mixed with PMIs (Purchasing Manager Index) below 50 but showing signs of stabilization.

Higher interest rates are impacting capital allocation decisions, and M&A activity is increasing in some sectors as companies seek growth opportunities. Underinvestment in infrastructure and manufacturing capacity is still a significant concern, but the automation, electrification and water markets are key areas for growth, while the energy transition and regulatory environment present opportunities for differentiation.

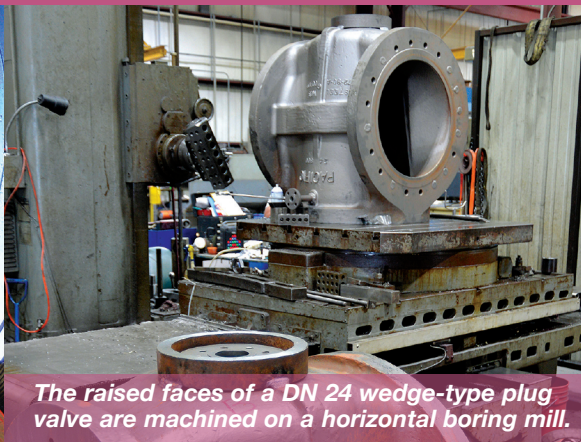
### What does it all mean?

After listening to these presentations and reviewing the slides, there does appear to be a lot to be positive about in our industry. There is a shift in priorities with the current administration focused on different objectives than the prior administration. But the growth of data centers alone will require the water and power markets to get creative and keep adding capacity and delivery mechanisms to their infrastructure to support the massive growth occurring. The reliance on technology, especially now including AI, seems poised to continue to expand, which bodes well for many of the verticals where industrial valves and flow control products are needed. Geopolitical concerns will continue to remain a factor, but the overall feeling of uncertainty many companies and markets have felt for the past 5 years seems to finally be ebbing some. Optimism is growing and that's good news for everyone. 📈

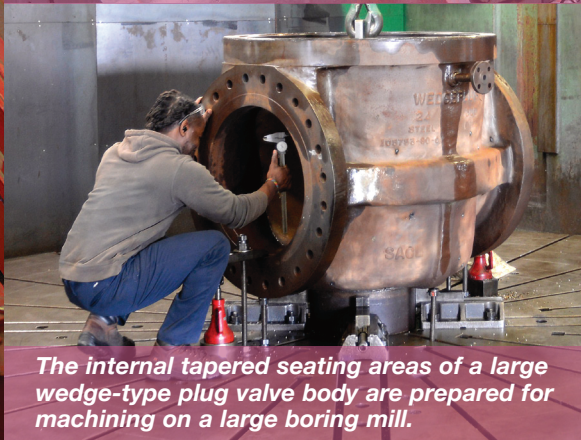
# Rising-Rotating Plug Valve Repair & Service



*The seating areas of a DN 30, wedge-type plug valve are weld-repaired, prior to machining and grinding.*



*The raised faces of a DN 24 wedge-type plug valve are machined on a horizontal boring mill.*



*The internal tapered seating areas of a large wedge-type plug valve body are prepared for machining on a large boring mill.*

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FEATURED ARTICLE

# Advanced Sealing Technologies for Subsea Ball and Gate Valves

Discover how single-piston effect (SPE) and dual-piston effect (DPE) seat designs are engineered to meet the demanding pressures and temperatures of subsea applications.

BY: MIKE HEDGER, *Director of Engineering*  
COMPANY: CDI PRODUCTS

Subsea oil and gas production environments impose extreme demands on valve performance requiring robust sealing systems to ensure operational reliability, safety and environmental compliance. Valves in these applications must meet qualification testing with pressures up to 10,000 psi, temperatures from -40°F to over 400°F, in order to ensure leak-tight isolation in application for decades without maintenance. Ball and gate valves, critical for flow control and emergency shutdowns, rely on advanced seat designs, particularly Single Piston Effect (SPE) and Dual Piston Effect (DPE) configurations, to meet these challenges.

## API standards governing valve configurations

The American Petroleum Institute (API) standards, specifically API 6D and API 6DSS, govern the design, testing, and performance of Double Block and Bleed (DBB) and Double Isolation and Bleed (DIB) valves for surface and subsea pipeline applications. These standards help to

ensure valve isolation integrity under extreme temperature and pressure conditions.

- **API 6D “Specification for Pipeline and Piping Valves:”** Defines requirements for pipeline valves, including DBB and DIB configurations. It mandates rigorous testing, such as hydrostatic shell and seat tests, to verify sealing under high-pressure conditions. For DBB valves, it ensures effective block-and-bleed functionality, while for DIB valves, it specifies bidirectional sealing and, where necessary, external pressure relief mechanisms.
- **API 6DSS “Specification on Subsea Pipeline Valves:”** Extends API 6D for subsea specific applications, addressing challenges like hyperbaric testing and material selection for extreme environments. It promotes DIB configurations for critical isolation to enhance safety and environmental protection.

Compliance with these standards ensures subsea valves can withstand pressures up to 10,000 psi and operate reliably at depths exceeding 9,000 feet, minimizing risks of leaks or failures, and preventing costly interventions.

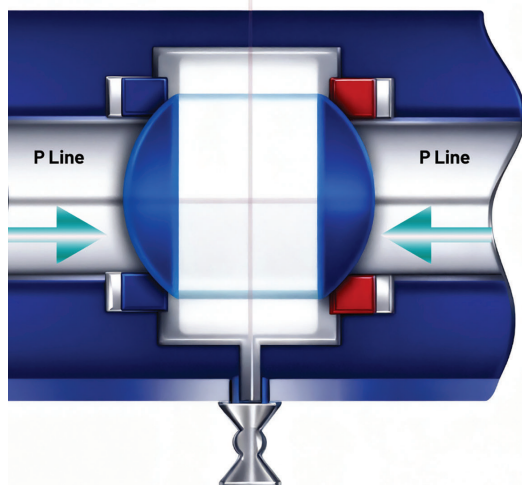
## Specific API configurations for subsea valves

API 6D and 6DSS specify configurations for DBB and DIB valves based on SPE and DPE seat combinations, tailored for subsea performance. The table on p. 21 outlines these configurations.

These configurations undergo rigorous testing, including hyperbaric and high-pressure seat tests, to ensure sealing integrity. Valves are marked (e.g., DBB, DIB-1, DIB-2) to indicate compliance and guide installation in subsea manifolds or flowlines.

The selection of double block and bleed (DBB), double isolation and bleed-1 (DIB-1), or double isolation and bleed-2 (DIB-2) valve configurations depends on the valve’s operational role, environmental conditions and system redundancy requirements.

Flow direction for ball valves for SPE and DPE seat seals.  
Source (all images): CDI



Drain Valve on Lowest Position of the Valve



Drain Valve on Lowest Position of the Valve



Configuration	Seal Combination	Key Characteristics	Subsea Applications and Relief Requirements
DBB	Both seats SPE	Seals against pressure from either direction; automatically relieves cavity pressure to the lower pressure side. Does not provide double isolation if one seat fails.	Used in subsea pipelines for maintenance or non-critical isolation; self-relieving design eliminates need for external relief, simplifying system design.
DIB-1	Both seats DPE	Provides true double isolation with bidirectional sealing on both seats. Traps cavity pressure, requiring external relief.	Critical for subsea applications requiring maximum isolation (e.g., high-pressure gas lines); requires external relief systems (e.g., relief valves or vent piping) to manage cavity pressure.
DIB-2	One seat SPE, one seat DPE	DPE seat provides bidirectional isolation; SPE seat allows self-relief on one side, reducing cavity pressure issues.	Suitable for subsea systems needing strong isolation with partial self-relief; external relief may be needed depending on valve orientation and pressure conditions.

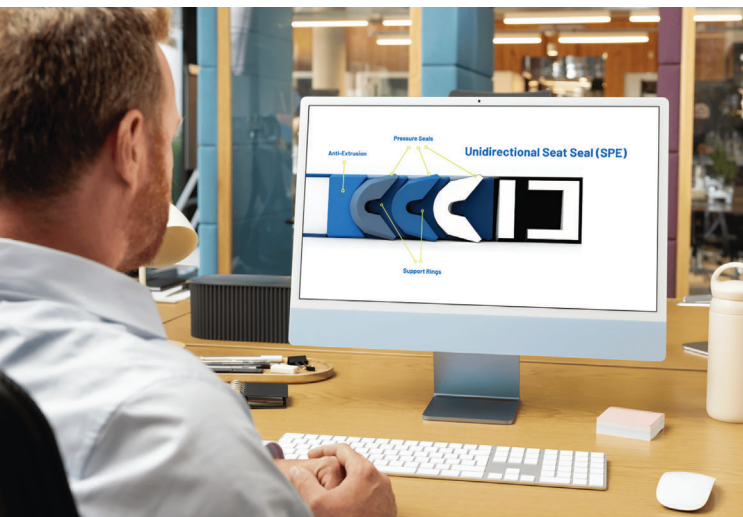
**Double block and bleed**

DBB valves, designed to provide two sealing barriers and a bleed point, are often used in flowline applications where cost and simplicity are prioritized, ensuring effective isolation with a single valve body.

**Double isolation and bleed**

- **DIB-1** valves, which offer bidirectional sealing on one seat and unidirectional sealing on the other, are suited for subsea trees where enhanced isolation is needed under specific flow conditions.
- **DIB-2** valves, with both seats providing bidirectional sealing, are typically specified for critical emergency shutdown valves (ESDVs) to ensure fail-safe isolation regardless of pressure direction, minimizing the risk of fluid loss or environmental damage.

An engineer reviews unidirectional seat seal design.



**Explanation of SPE and DPE seats**

- **Single piston effect (SPE) seats:** SPE seats, also known as unidirectional or self-relieving seats, seal primarily against pressure from one direction, typically upstream. Upstream pressure forces the seat against the ball or gate, forming a tight seal. If cavity pressure exceeds upstream pressure, the seat disengages, venting pressure upstream to prevent over-pressurization. This design limits sealing against reverse pressure, making SPE seats less suitable for bidirectional isolation in subsea applications with multidirectional pressure sources.
- **Dual piston effect (DPE) seats:** DPE seats, or bidirectional seats, seal against pressure from both upstream and cavity sides. Pressure from either direction presses the seat against the closure element, ensuring robust isolation. However, this can trap cavity pressure, requiring external relief systems to prevent valve damage under high-pressure subsea conditions.

To withstand subsea extremes — pressures depths up to 9,500 ft and internal pressures up to 10,000 psi, temperatures up to 400°F, and aggressive media like sour gas — SPE and DPE seats incorporate advanced sealing technologies such as spring-energized seals and V-ring live loaded seals.

**Sealing technologies used in SPE and DPE subsea valves**

- **Spring-energized seals:** These fluoropolymer-based seals, often featuring PTFE alloy jackets, are energized by metal springs which help ensure seal contact stresses to aid in sealing. This spring cavity also acts as a pressure energization feature, allowing system pressure to contribute to the overall sealing force. This style is commonly used in stem seals due to the tight sealing, low friction and stable performance over the life of the seal.  
**Advantages:** Internal spring energization generates lower friction than other options; pressure energization

Configuration	Position	Failed Seat Type	Main Effects	Key Concerns Beyond Leakage
DBB	Upstream	SPE	Cavity leakage, external vent relieves; no downstream leak if downstream holds.	Loss of redundancy; environmental vent risks; operational disruption.
DBB	Downstream	SPE	Downstream leakage, external vent partially relieves.	Isolation failure; safety/environmental hazards.
DIB-1	Upstream	DPE	Cavity buildup vented externally; downstream DPE seals (no downstream leak).	Redundancy loss; fluid trapping.
DIB-1	Downstream	DPE	Downstream leakage possible; external vent relieves.	Isolation compromise; maintenance risks.
DIB-2	Upstream	SPE	Cavity leakage, self-relieves upstream; downstream DPE seals (no downstream leak).	Redundancy loss; fluid cycling/wear.
DIB-2	Downstream	DPE	Downstream leakage; internal relief to upstream.	Isolation failure; environmental release.

There are numerous consequences to valve seat failures, especially in subsea, high-pressure applications.






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ensures tight sealing in high-pressure conditions; no need for gland tightening as seals react to changing pressure conditions; tight sealing up to 30,000 psi.

**Disadvantages:** Design can be more complex and costly; requires more care in installation to avoid damaging critical sealing surfaces.

- **V-ring seals:** These seals, with a V-shaped cross-section, are typically made from PTFE, PEEK and elastomers like NBR, HNBR, EPDM or FKM. With the use of male/female adapters, they can easily be configured as unidirectional or bidirectional seal assemblies depending on the orientation of the rings. Consisting of multiple sealing elements, materials and seal geometries are easily tailored to suit the specific challenges of an application. To achieve constant tight sealing as temperatures/pressures fluctuate, the entire seal assembly is spring loaded axially by external springs often embedded in the valve body, keeping the V-rings flared out to maximize sealing stresses. V-rings are also commonly used in valve stem packing and can be added behind OEM seals to provide a more redundant and robust sealing system.

**Advantages:** Flexible, adapting to misalignment and pressure dilation; more cost-effective and easier to install; suitable pressures up to 10,000 psi in dynamic applications.

**Disadvantages:** Limited to lower pressures compared to spring-energized seals; seal wear greatly reduces applied spring loads reducing sealing stress over time and may create greater friction.

### Consequences of SPE and DPE seal failure in subsea valves

Seal failures in subsea valves can lead to significant operational, safety, and environmental consequences, with distinct impacts based on seat type and location (see table, opposite page).

### Experience required to ensure long-term seal success

Choosing the correct seal types and configurations is paramount to ensuring performance as well as compliance with API standards. Users should work with their valve OEM or sales partner to ensure that the valves selected meet the requirements for their applications, including materials for the specific media that will be flowing through the

valves and the applications where the valves will be used. Using the correct products is the best way to ensure the integrity of the valve and protect the system, employees and the environment from product failures or malfunction due to incorrect specifications. ❌

### ABOUT THE AUTHOR

Mike Hedger is director of product management at CDI Products. He has nearly two decades of experience with high-tech polymer materials and specialized product design for sealing and bearing systems.



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FEATURED ARTICLE

# Keeping Track: PFAS Bans in Industrial Operations Continue to Evolve

With the new administration still finding its footing with bans, VMA continues to work as part of a coalition to influence policy decisions.

HEATHER RHODERICK, VMA President

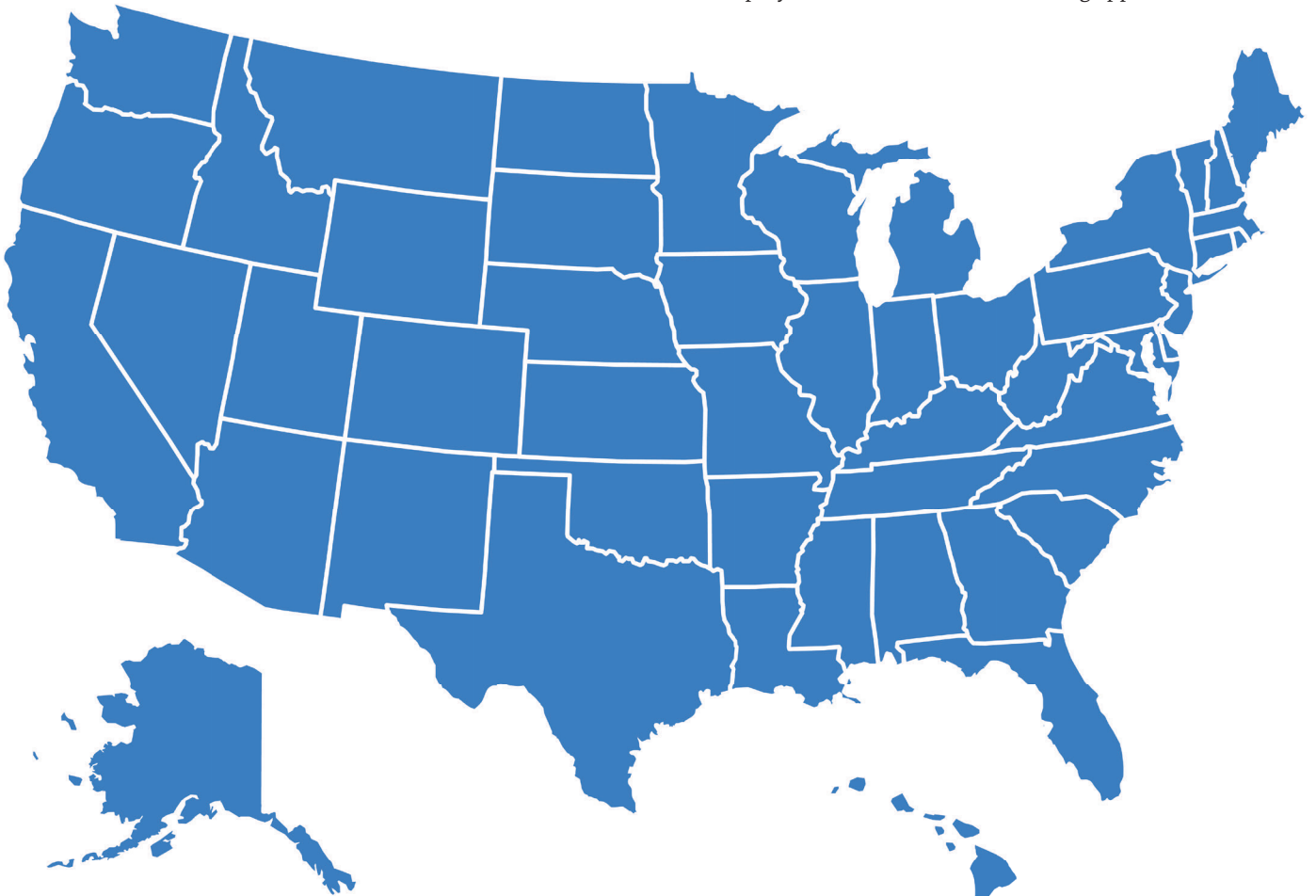
Per- and polyfluoroalkyl substances (PFAS) remain one of the most dynamic areas of environmental regulation in North America, with federal and state agencies continuing to adjust compliance expectations. For the industrial valve and flow control sector — where fluoropolymers such as PTFE, FKM/Viton and other engineered materials provide critical performance in seals, gaskets, packing and linings — the changing regulatory landscape creates ongoing uncertainty for manufacturers, distributors and their customers.

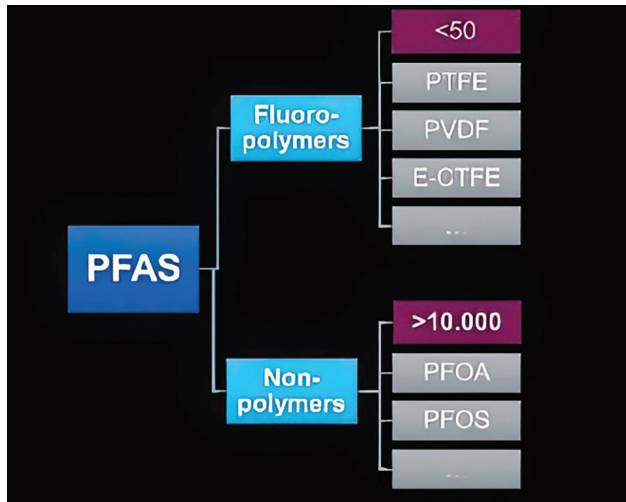
Recent federal announcements from U.S. Environmental Protection Agency (EPA) Administrator Lee Zeldin, active state-level reporting mandates and emerging labeling requirements are all taking place in the U.S. VMA has taken a leading role in educating lawmakers, countering overly broad PFAS bans and advocating for clear distinctions between fluoropolymers that are critical for safety and environmental protection in industrial operations and other types of PFAS.

Since our last look at this topic in the Spring 2024 issue of *Valve Magazine*, there have been some updates and changes affecting our industry.

## Why PFAS matters for the valve industry

While PFAS is often treated as a single category, industrial fluoropolymers used in valve and sealing applications are





Division of non-polymer and polymer PFAS. Source: Teadit

fundamentally different from the legacy PFAS compounds driving environmental concern. As many in our industry now know, fluoropolymers typically used in our industry are chemically inert, thermally stable and essential for preventing leaks, fugitive emissions and system failures.

These fluoropolymers provide extensive benefits in many energy, chemical processing and water/wastewater applications. Further, there are no viable alternatives that can withstand many of the required operating conditions in those applications. Eliminating fluoropolymers would increase operational risk, reduce equipment life and in many cases lead to more emissions.

This distinction between fluoropolymers and other PFAS substances has been central to VMA's educational efforts as regulators consider broad PFAS restrictions.

Since governments and regulatory agencies globally, starting with the EU, started to formally propose rulemaking and draft regulations on who to ban the use of PFAS, VMA has been monitoring the activity and providing impact analysis to our members. Additionally, VMA has been active in providing educational comments on proposed rules to agencies at the international, federal and state level. VMA has done this under its name alone, as well as with other coalition partners in the industrial flow control industry, most notably The Hydraulic Institute and Fluid Sealing Association.

## Federal developments: EPA proposes major revisions to PFAS Reporting Rule

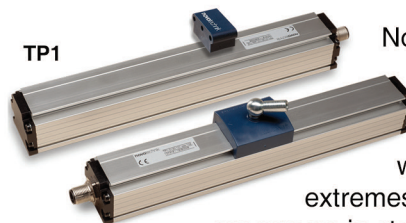
On November 10, 2025, EPA Administrator Lee Zeldin announced proposed updates to the PFAS reporting rule under TSCA. Under the current rule (finalized in 2023), any company manufacturing or importing PFAS — including importing articles containing PFAS such as seals and gaskets — must report extensive historical data. While the reporting windows remain scheduled for October 13, 2026, or April 13, 2027, (depending on company size and other criteria), the EPA has not yet released the required reporting portal, leaving companies without the tools they need to prepare.

**The new EPA proposal includes major changes impacting the industrial valve sector:**

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- Removing reporting requirements for companies that only import PFAS-containing articles, such as PTFE seals, O-rings, gaskets, packing and coatings. This is perhaps the most significant potential change impacting our industry.
- Shortening the reporting window from six months to three months.

If finalized, these changes would significantly reduce administrative burden for many in our industry. VMA is reviewing the proposal and anticipates submitting formal comments on this proposed rule.



### **Minnesota: Reporting still required by July 1, 2026, for now**

Minnesota's PFAS law remains expansive and directly affects industrial products. The law requires all products with intentionally added PFAS to be reported by July 1, 2026. Additionally, a ban on all products containing intentionally added PFAS,

unless a "currently unavoidable use" (CUU) designation comes into effect January 1, 2032. However, on August 28, 2025, a Minnesota Court of Administrative hearings judge noted several concerns with the rule and asked that the Minnesota Pollution Control Agency to address those concerns. The judge specifically disapproved of the rule due to the failure to assess the cumulative effect of the rule with other federal and state regulations. If the concerns are satisfactorily addressed, which could include modification of the rule in some way, there may be no changes. However, while there is indication that the concerns have been satisfactorily addressed, what the changes are to the rule are unknown at this time and the MPCA website notes that more information is expected January 1, 2026, and the reporting system to be used is expected soon as well.



### **Maine: A phased approach of reporting**

While Maine was the first state to ban all PFAS, it later set a phased-in approach, with various deadlines banning the use of intentionally added PFAS. For our industry, the ban starts on January 1, 2032, unless a currently unavoidable use designation is provided. VMA is

working with our members to determine ways to submit for this designation.



### **New Mexico: Emerging PFAS labeling requirement**

New Mexico's PFAS Protection Act bans all articles containing PFAS starting January 1, 2032, unless a currently unavoidable use designation is granted. Recently, a proposed framework supporting the PFAS Protection Act was

announced which discussed obtaining CUU, reporting, labeling of products with intentionally added PFAS. New Mexico is the first state to address a broad labeling of products with PFAS. VMA is evaluating the rule's applicability to our industry and will work with our members and the Flow Control Coalition to provide comments on this proposed rule.

### **VMA continues to support our members**

VMA has made PFAS policy one of its top government affairs priorities, working independently and through the Flow Control Coalition to:

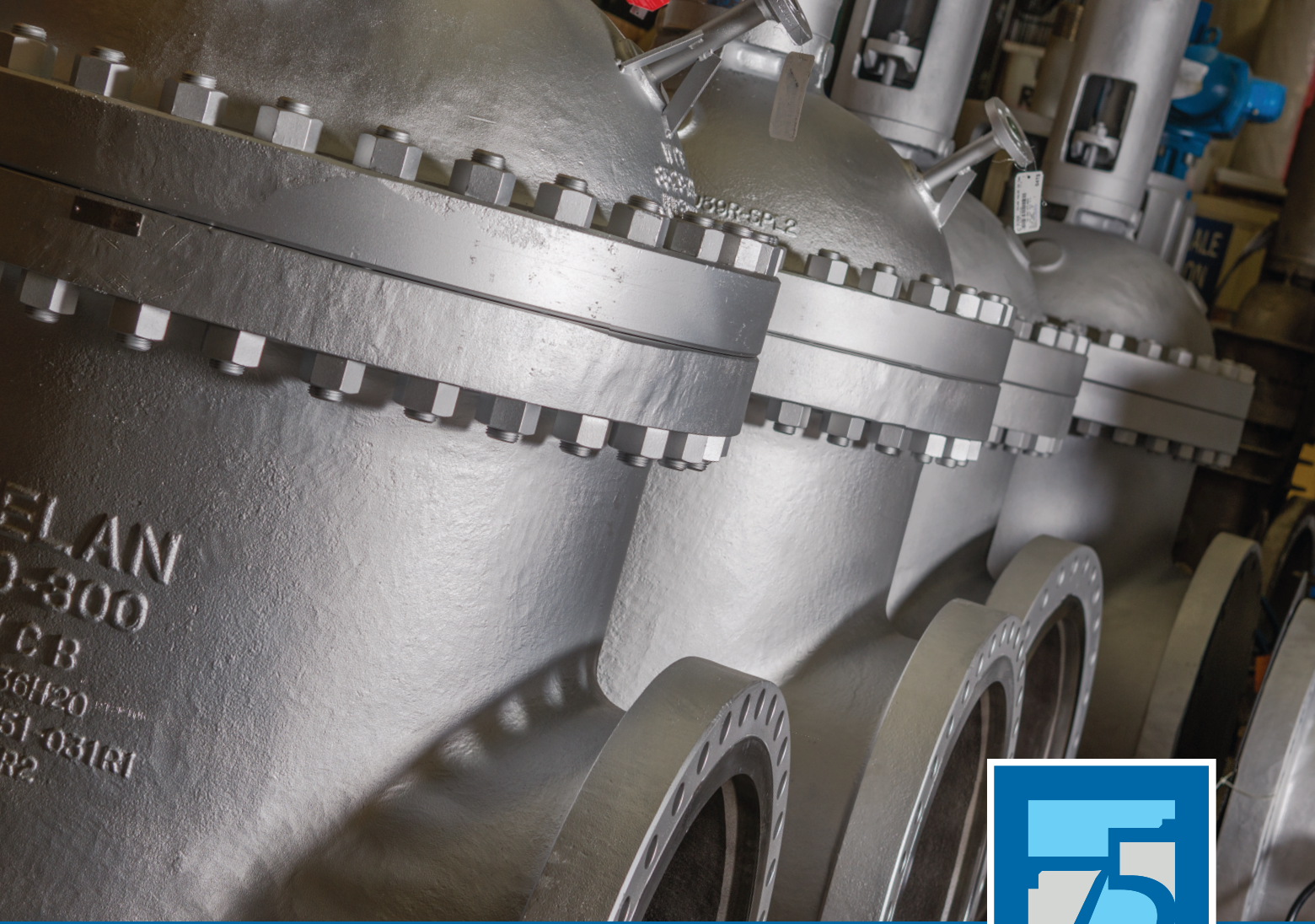
- Educate policymakers on the differences between harmful PFAS chemicals and essential fluoropolymers.
- Submit comments to federal and state agencies, including EPA, Maine and Minnesota, advocating for CUU designations and practical timelines.
- Develop customer communication tools, including template letters and guidance documents.
- Push for valve and flow control industry exemptions where fluoropolymers are necessary for safety, emissions reduction, and equipment integrity.

### **Looking Ahead**

While federal regulators appear ready to ease some PFAS reporting burdens at this time, state-level rules continue to present complex compliance challenges. For the valve and flow control industry, the stakes remain high: fluoropolymers are not just common materials, but mission-critical components that ensure environmental protection, worker safety and operational reliability.

VMA will continue monitoring developments, coordinating industry responses, and ensuring that policymakers understand the essential role our products play in maintaining safe, efficient flow control systems.

For questions or assistance, contact Heather Rhoderick at [hrhoderick@vma.org](mailto:hrhoderick@vma.org). 📧



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## FEATURED ARTICLE

# Meet the Chairman: Rob Velan

Velan shares his background and talks about his future goals for the coming year as Chairman of the Board of Directors of VMA.

HEATHER GAYNOR  
EDITOR-IN-CHIEF

### **Tell us about your background. Where and what did you study in university and how did you get involved in the valve industry?**

Given that Velan is a family business (founded by my grandfather AK Velan in 1950), I was essentially born into the valve industry. As a teen, I worked various summer jobs in the office and in the shop, allowing me to get to know the business. Upon graduating from Queen's University (in Canada) with a degree in business, I joined Velan full-time as a project manager for orders going into the power industry, which was booming with gas-fired power plants in the mid-90s. After an MBA at Cornell University and six years in management consulting working on strategy and supply chain projects, I rejoined Velan in 2004. Over the past 20 years, I have been fortunate to get to know many suppliers, manufacturers and customers within this great industry.

### **Energy expansion and the regulatory environment around issues such as PFAS and tariffs are top of mind right now. What other pressing issues do you think that the industry and VMA need to focus on for our members and the industry?**

Tariffs and PFAS continue to be primary and potentially disruptive legislation for our industry. Our members rely on complex global supply chains for raw materials, components and finished products, so increased tariffs affect companies differently — they can impact costs and change the competitiveness model. Strategies to cope with tariffs require careful planning to avoid disruptions in an ever-changing environment. Broad PFAS categorization risks sweeping bans of all PFAS classes, including PTFE. VMA has



been advocating for a differentiated approach, safeguarding critical polymeric PFAS while targeting the most hazardous variants.

Energy expansion is fueling demand for durable, precision-engineered valves capable of operating under extreme conditions and requiring smart integration and leak-tight performance across a variety of strategic, growing sectors. While all energy sectors are expecting significant growth in the next few years, the largest surges for valve manufacturers are expected in hydrogen and nuclear.

Other pressing issues include the use of AI and additive manufacturing. AI is transforming the industrial valve sector by optimizing design, improving predictive maintenance and streamlining business processes. The extent to which we leverage AI will help define the growth trajectory for our industry. Additive manufacturing, or 3D printing, is emerging as a game-changer for producing complex valve components and prototypes. While challenges remain in scaling production and ensuring compliance with stringent safety standards, the technology promises significant cost savings and flexibility in the coming years.

### **What do you see as the biggest challenges we face in our industry today? What about the greatest opportunities?**

In terms of challenges, our members are facing increasing global competition, fluctuating demand creating uneven order flow and difficulty securing skilled labor.

There are many opportunities facing North American valve manufacturers as energy markets are poised for rapid growth. Rising demand for IoT-enabled “smart valves” with sensing, diagnostics and connectivity supports predic-

tive maintenance and offers an opportunity for premium product differentiation. Focused expertise in complex valve types enhances value proposition and pricing power.

### How do you see VMA continuing to serve and advance the industry?

VMA recently conducted a survey of our members to gather feedback on how we could best serve them. There were three key areas of focus that came to light and VMA is crafting its strategic plan around:

- **Building a stronger community** by increasing membership and hosting events (in-person and online) to deliver important content and offer networking opportunities.
- **Educating** its members in a variety of areas including valve basic knowledge, existing/new technical standards, market trends and new legislation.
- Promoting our industry to policy makers and influencing **government affairs** in response to common challenges.

### What will your focus be as the chairman of the VMA?

Over the past five years, my predecessors, fellow board members, along with our President Heather Rhoderick, have done a great job to solidify the VMA and position it for growth. We are now looking to expand membership across all business partners to include even more suppliers and distributors for a truly connected industry association. We will also strive to align the committee mandates to support the three areas of focus in the new strategic plan.

### What advice do you have for someone considering joining VMA? For our members?

The VMA offers a community of valve-focused members with similar issues and interests. There are so many ways to get involved: join a committee, take advantage of educational opportunities, participate in events and many more. The more one gets involved, the more one gains from it. So please spread the good word throughout your organizations.

### What advice would you offer those entering the industry as either a new graduate or someone switching career paths mid-career?

The valve industry is more exciting than many might think and offers great career opportunities. It is a sector that is experiencing growth and embracing technological advances in many areas. To be a part of it is an opportunity to help propel this industry forward.

### Tell us a bit about what you like to do outside of work.

I enjoy competing and pushing myself. I played a lot of sports while growing up including soccer, ice hockey and rugby. In my older years, I now focus on tennis and jogging. Exercise is a great escape for me. X

## NEWLY RELEASED: ANSI/MSS SP-58-2025, Pipe Hangers and Supports | Materials, Design, Manufacture, Selection, Application, and Installation

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# Rope, Steam & Sealing: The Basics of Valve Packing

BY: **RON FRISARD**, *Packing and Gasket Global Product Line Director*  
COMPANY: **A.W. CHESTERTON COMPANY**

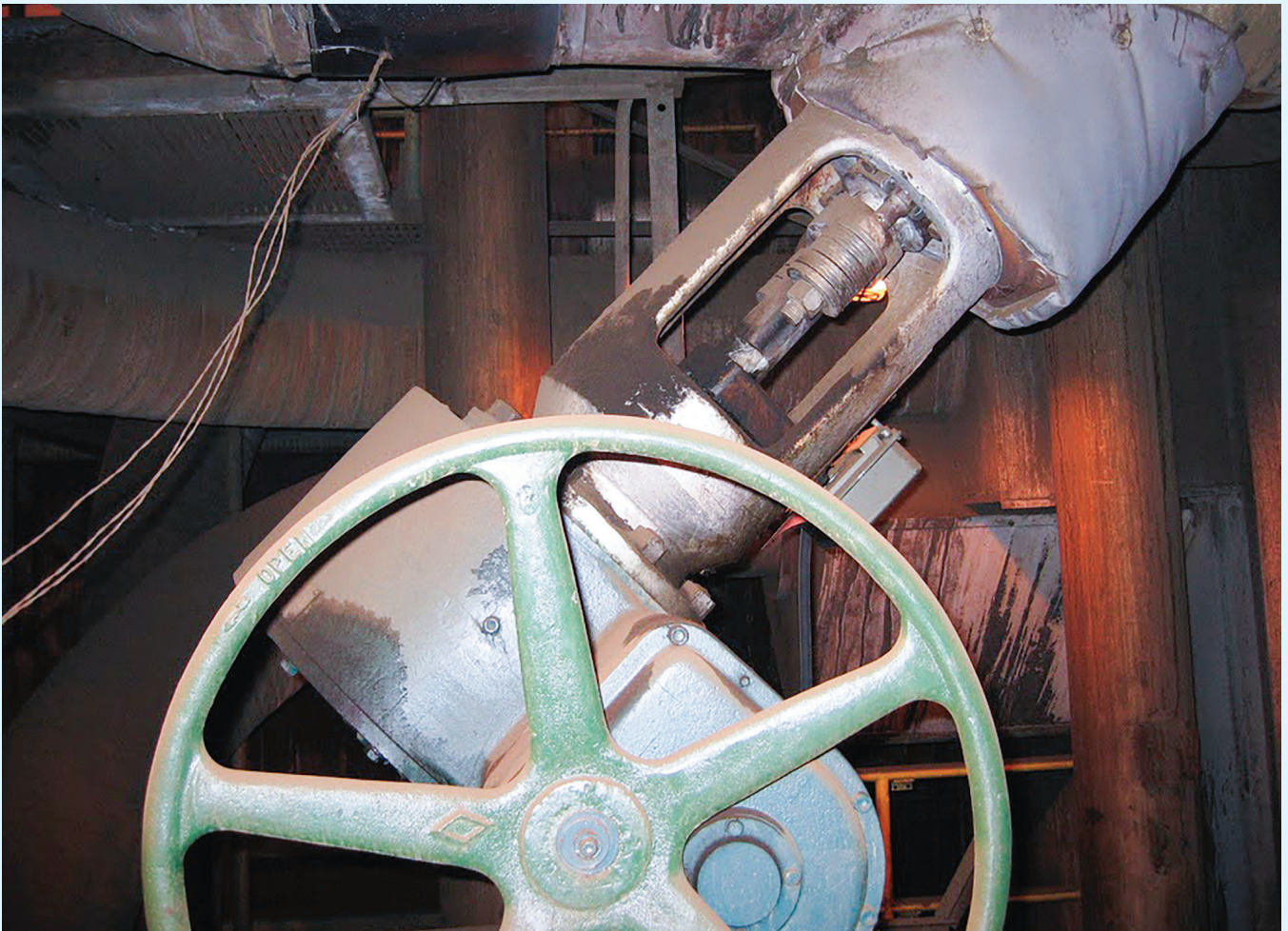
Mechanical packing may look simple, but it has a long history shaped by ships, steam engines, industrial growth and environmental responsibility. The material that now seals valve stems in refineries, chemical plants and power stations started life in a very different setting: a rope workshop in colonial Boston.

## From ropewalks to revolution

In the mid-1700s, Boston was home to long, narrow workshops called ropewalks, where fibers were stretched and twisted into miles of rope. The British Navy depended on this rope to control the sails and rigging of its ships. Rope was not just a product — it was a strategic advantage — and the people who made it understood their importance.

Rope makers were skilled craftsmen and, in many cases, deeply independent. They also felt the growing frustration toward British military presence. In early 1770, arguments and physical fights broke out between rope workers and British soldiers stationed nearby. These ropewalk clashes helped raise tensions that led directly into the Boston Massacre. In a very real sense, rope helped spark the American Revolution.

Motor-operated steam valve in service.  
Source: A.W. Chesterton Company (all images)



This connection matters, because the earliest sealing materials used in pumps and valves came directly from ropemaking. Braided fibers — coated in waxes, tallow or oils — were packed around moving shafts to keep steam, water or product contained. The first packings were simply rope with a job to do.

The story begins with rope.

And then it follows the rise of industry.

### James Watt and the steam engine

As industry expanded, sealing demands grew. One of the turning points came with James Watt in the late 1700s. Watt did not invent the steam engine, but he improved it so dramatically that it became practical for widespread use. His key improvement, the separate condenser, allowed the engine cylinder to stay hot while exhaust steam was condensed elsewhere, increasing efficiency.

But to take advantage of that improvement, the engine had to hold steam pressure. The rods and pistons passed through openings that leaked. Any loss of steam meant loss of power and wasted coal.

The solution was familiar to rope makers: braided packing.

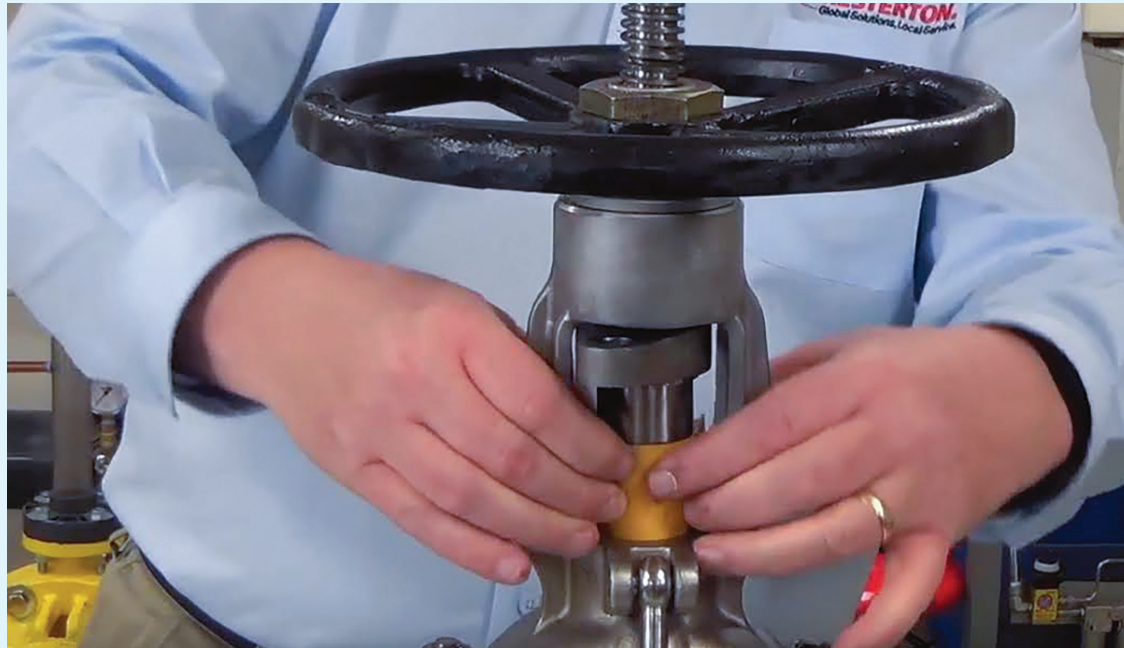
Watt and others packed the space around moving rods with braided fibers that had been coated with grease or animal fat. The packing needed to seal pressure while still allowing motion and had to be adjusted over time to maintain performance. This simple idea — a flexible material that can seal while something moves through it — remains the core purpose of valve packing today.

Packing has always existed where motion and pressure meet.

### What packing does in valves

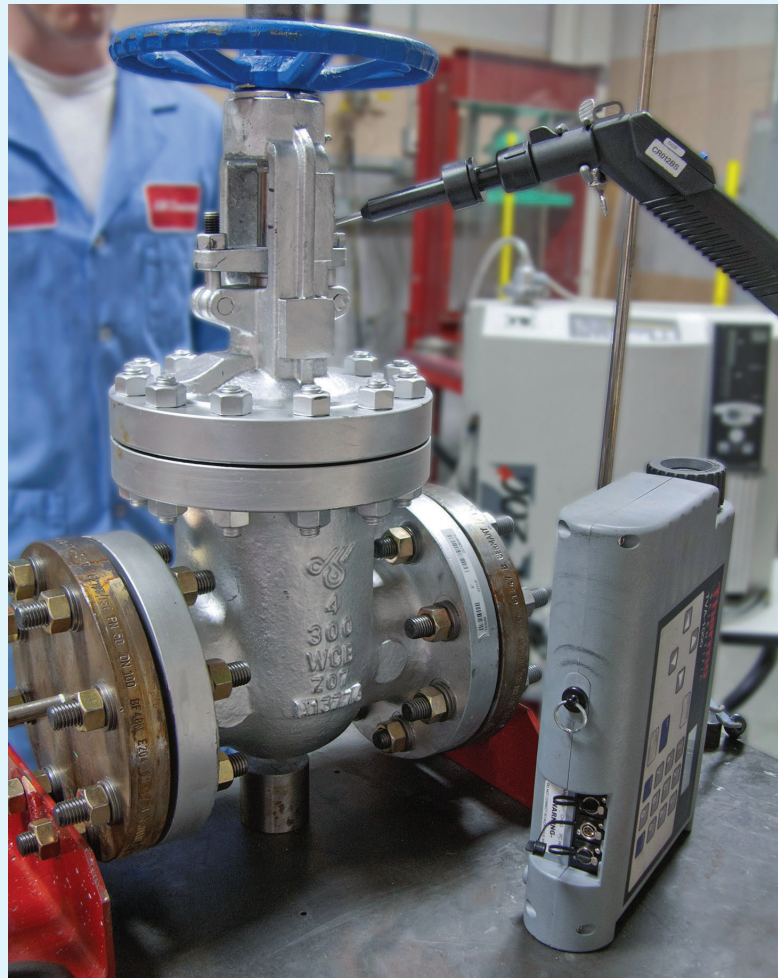
In a valve, packing seals the gap between the valve stem and the stuffing box so that fluid does not escape. The packing must maintain this seal while the stem moves through multiple cycles, temperature changes and pressure variations. Even though packing makes up a small portion of the valve's cost, its job has a big impact on safety, reliability and compliance.

If packing does not perform, the results can be serious. Product loss can increase operating cost. Leaks can create fire or safety risks. Extra friction can make a valve difficult to operate or cause stem wear. And in today's regulatory environment, leakage can also create reportable emissions events.



Tamping valve packing during installation.

Emissions monitoring of valve.



Packing may look simple, but it is a critical sealing component.

### Modern materials are engineered, not just woven

While packing still resembles rope, today's materials are engineered for specific applications. Flax and hemp have been replaced by fibers that handle extreme heat, corrosive chemicals, cycling stress and emissions control requirements. Graphite packing is used in high-temperature steam valves. PTFE is preferred in chemical service because it resists attack and provides very low friction. Carbon fiber supports high cycle service, especially in control valves that stroke frequently. In many cases, packing is now made from hybrid braids that combine properties to balance sealing pressure, durability and ease of operation.

These fibers are braided under controlled tension to maintain uniform density. The packing is then cut into rings and stacked, forming a sealing set that interacts mechanically with the valve stem and stuffing box.

Packing today is no longer simply rope with lubricant. It is a designed sealing element.

### How packing seals: Pressure and balance

Packing seals by converting axial force into radial pressure. When the gland follower is tightened, it compresses the packing rings downward. This compression forces the packing outward against the valve stem and stuffing box wall. The radial pressure created must be high enough to stop fluid leakage, yet low enough that the valve stem can still move freely.

This balancing act defines packing performance. Too little pressure leads to leakage. Too much pressure increases friction, causes stem scoring and can prevent actuators from seating or stroking the valve correctly. Friction is not something to eliminate entirely — it is a necessary part of sealing — but it must be controlled and stable, not excessive.

Once installed, packing should be cycled and allowed to settle. This consolidation step helps it form a uniform sealing surface. After consolidation, only small adjustments are needed to maintain performance.

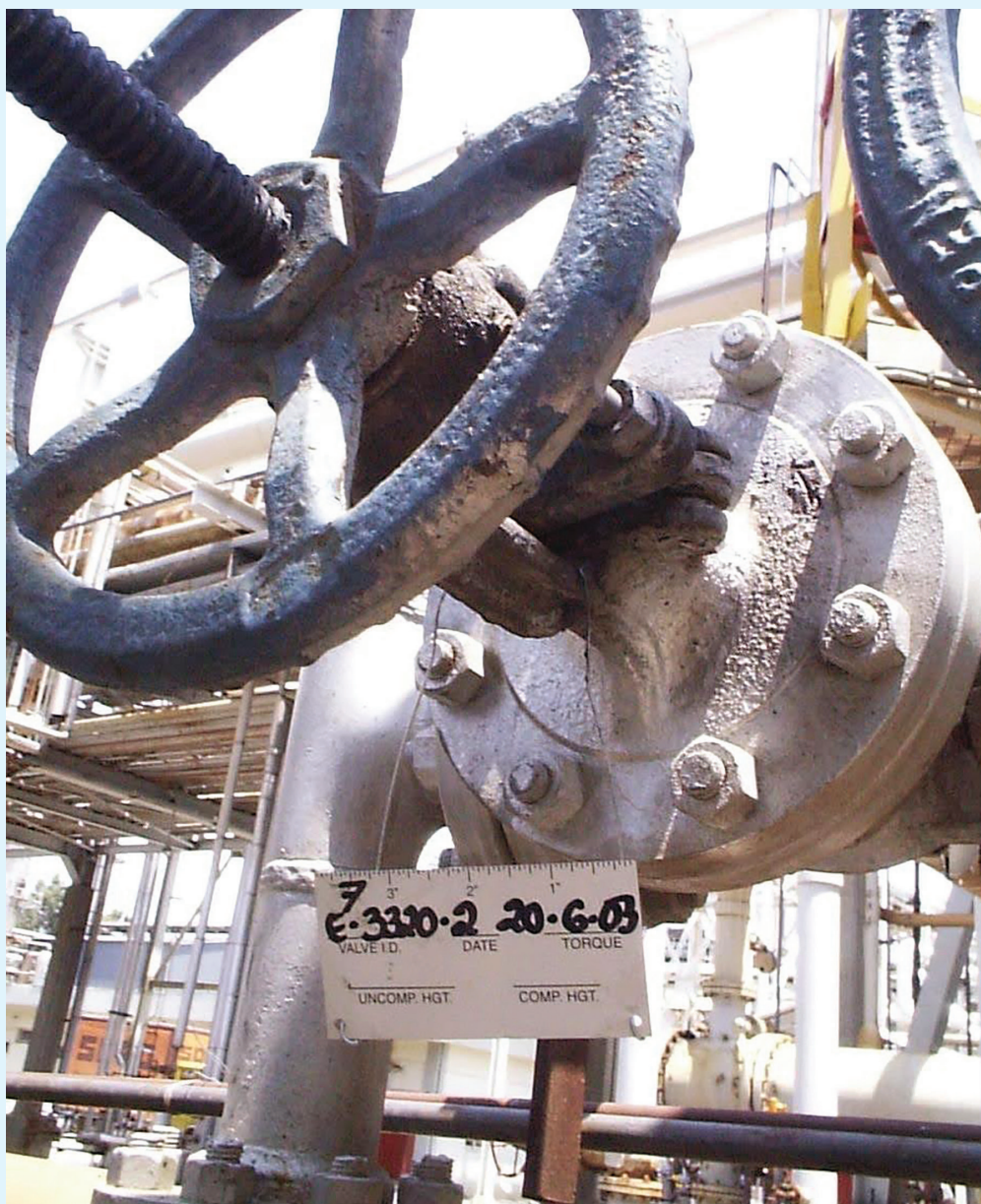
### Why installation matters most

The performance and life of packing depend heavily on how it is installed.

Packing rings must be cut to fit cleanly around the stem. Rings that are too short leave a gap where leakage will form; rings that are too long will bunch up and distort under compression. Cutting on a mandrel that matches the stem ensures proper length.

Next, the gland load must be applied deliberately, not by feel. Each packing manufacturer has specific calculations to calculate a gland nut torque to achieve the level of sealing.

Emission valve in service with info tag.



Finally, the stem and stuffing box surfaces must be inspected. A scratched stem creates a direct leak path that no packing can compensate for. A corroded stuffing box wall produces uneven compression. Proper sealing depends on surface condition.

These steps are simple, but they determine whether packing works for months or fails in weeks.

### The emissions era

Methane has a global warming impact more than 25 times greater than CO. As a result, valve leakage that once went unnoticed is now regulated. Years ago, valves leaking up to 10,000 ppm were considered acceptable. Today, most facilities aim for below 100 ppm, and many target 50 ppm or less.

This shift led to formal testing requirements. API 622 tests packing under thermal and mechanical cycling. API 624 evaluates the performance of valves assembled with qualified packing. ISO 15848 classifies emissions performance internationally.

These standards changed not only the packing itself, but also expectations around stem finish, valve design tolerances, gland follower flatness and load control procedures. Low-emissions performance is not simply a property of the packing — it is a system performance result that requires alignment from design through installation and maintenance.

In an era of tightening methane accountability, fundamentals are not optional — they are environmental compliance in motion.

### Why training matters

Even with improved materials and tighter manufacturing controls, many valve leaks result from preventable installation errors. Rings cut incorrectly, glands over (or under)-tightened, stems damaged but not repaired or packing that is adjusted repeatedly instead of consolidated properly — these are simple problems that appear again and again.

The solution is consistent, practical training. Installing packing is not difficult, but it requires understanding, not guessing.

### The role of the Fluid Sealing Association

The Fluid Sealing Association (FSA) plays a key role in supporting sealing reliability across the industry. The FSA provides best practice guides, training materials, and field-proven recommendations for installing and maintaining compression packing. Their goal is not to prioritize one manufacturer's solution, but to raise the industry's collective sealing knowledge so plants can achieve reliable, low-emissions operation.

As methane reduction becomes increasingly important, access to shared training and clear standards is essential.

### Conclusion

From the ropewalks of Boston to James Watt's steam engines to today's low-emissions plant operations,

packing has played a part in every major chapter of industrial development. The materials have changed. The performance expectations have increased. But the fundamentals remain:

- Understand how packing seals.
- Install it carefully.
- Apply correct load.
- Inspect valve components.
- Adjust with purpose, not force.

Packing may look like rope, but it protects reliability, safety and environmental performance. **X**

### ABOUT THE AUTHOR

Ron Frisard is packing and gasketing global product line director for A.W. Chesterton Company, where he leads global strategy, product development and market expansion for high-performance sealing solutions. He has been an involved leader in the Fluid Sealing Association and is a frequent author of technical articles on sealing technology.



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For information on joining the VMA or VRC, contact Heather Rhoderick at 202.331.4039  
hrhoderick@vma.org.

# LATEST LAUNCHES



## Continental Disc Announces Rupture Line Expansion

The company is expanding its APX rupture disc line. Now available in 6-inch and 8-inch sizes, the APX provides greater flexibility and protection for larger-diameter pressure relief applications across a wide range of industries.

The APX rupture disc is engineered for superior performance under demanding operating conditions. With high operating ratios (up to 95%), tight burst tolerances and a nonfragmenting design, the APX delivers precision pressure relief with minimal downtime and reliability.

The introduction of the 6" and 8" sizes meets growing demand in industries such as chemical processing, oil and gas, and energy, where larger piping systems and vessels require robust overpressure protection without compromising responsiveness or durability. The line also offers 95% operating ratio for maximum efficiency and is compatible with a full range of insert, reduced height, pretorqued and double-disc holders in various material. [contdisc.com](http://contdisc.com).

## Equilibar Introduces Series for High-Flow Applications

The IC Series is a new industrial collection of valves for back pressure, vacuum and flow control applications with high throughput. Featuring the company's dome-loaded multiple-orifice technology, these valves and regulators provide best-in-class performance in a practical, compact size. They are easily customized for a variety of applications and are well suited for demanding gas, liquid and mixed phase fluid applications that involve high valve flow coefficient (Cv).

Designed to offer virtually instantaneous control and precision for even the most challenging process conditions, a supple diaphragm is the Equilibar regulator's only moving part, enabling frictionless operation. Because it is dome-loaded, it provides reliably stable pressure control. At the same time, the multiple orifice design results in an ultra-wide flow range. Port sizes for the IC Series are available from 1.5 to 3 standard, with custom sizes on request. [equilibar.com](http://equilibar.com)



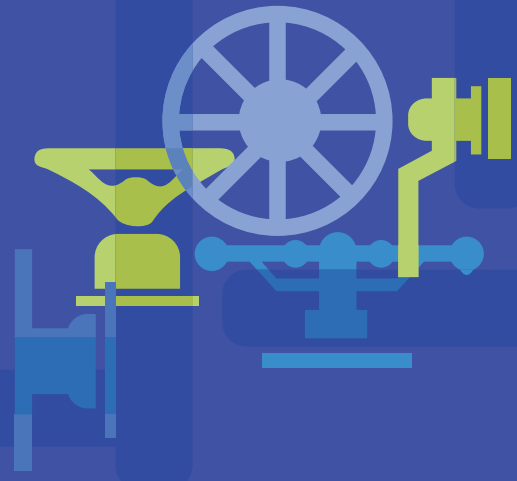
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## Harold Beck & Sons Launches Next-Gen Actuator

Harold Beck & Sons Inc.'s Beck 88-109 Multi-Turn Actuator is engineered for performance and longevity, and delivers maintenance-free, reliable control for rising and non-rising stem gate valves, large butterfly valves or any multiturn applications across the water, energy, manufacturing and process industries.

Building on decades of innovation, the Beck 88-109 is specifically for the harshest industrial conditions, offering rugged construction, advanced control and user-friendly features. Key advantages include durability, and a robust gear train that ensures reliable performance, even in demanding, continuous-duty modulating service; a no-burn-out motor; and a nonintrusive Wi-Fi configuration. In addition, end users benefit from maintenance-free operation, as the design eliminates oil baths and routine service points, minimizing downtime and reducing overall cost of ownership.

The 88-109 Multi-Turn Actuator is designed for water and wastewater treatment facilities, power generation plants, chemical and process plants, oil and gas transmission and refining or virtually any industrial setting.

[Haroldbeck.com](http://Haroldbeck.com)



## Rosemount Pressure Transmitter

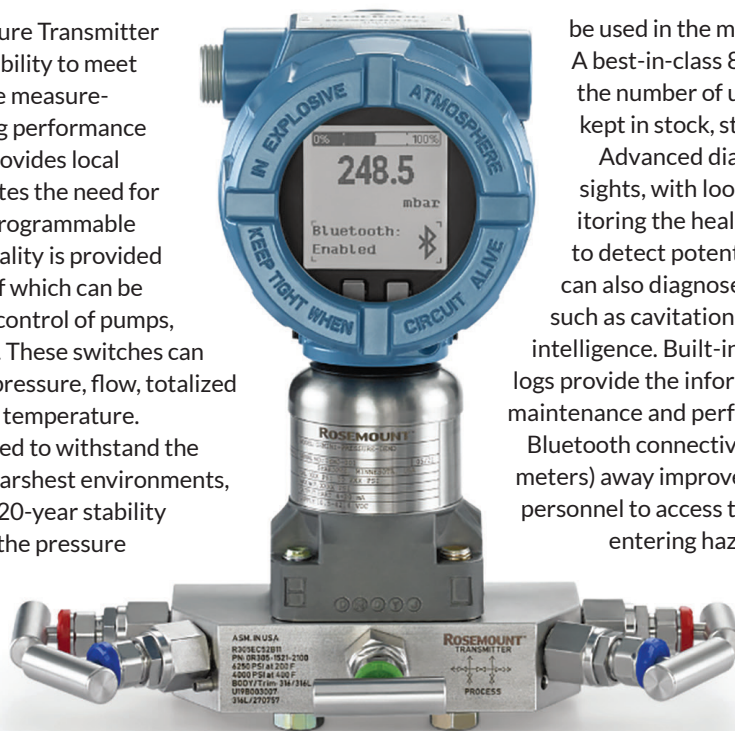
The Rosemount 4051S Pressure Transmitter from Emerson offers the flexibility to meet the most demanding pressure measurement challenges by increasing performance and operational insights. It provides local real-time control and eliminates the need for a separate device, such as a programmable logic controller. This functionality is provided by two relay switches, each of which can be configured to provide on/off control of pumps, motors and other equipment. These switches can also provide alerts based on pressure, flow, totalized flow, level, volume or module temperature.

The transmitter is engineered to withstand the toughest processes and the harshest environments, with a 20-year warranty and 20-year stability specification, both unique to the pressure transmitter market. Fast response time of 40 milliseconds allows the 4051S to

be used in the most demanding applications. A best-in-class 800:1 turndown ratio reduces the number of unique models needed to be kept in stock, streamlining inventory.

Advanced diagnostics provide more insights, with loop integrity continuously monitoring the health of the entire electrical loop to detect potential failures. The transmitter can also diagnose other abnormal conditions, such as cavitation, using its built-in process intelligence. Built-in calibration and diagnostic logs provide the information needed to optimize maintenance and perform root cause analysis.

Bluetooth connectivity from up to 50 feet (15 meters) away improves safety by allowing plant personnel to access the transmitter to avoid entering hazardous areas. [emerson.com/Rosemount4051S](http://emerson.com/Rosemount4051S)





## Rotork Launches RTP-4000 Intelligent Valve Positioners for Single- and Double-acting Actuators

Launching with the dual-certified RTP-4400 model, this release is ideal for energy-efficient operation in demanding oil and gas applications, as well as in other industries requiring high-end valve control solutions.

The range features magnet-based contactless position feedback, eliminating mechanical wear and ensuring long-term reliability for both linear and rotary actuators. Advanced pressure sensor-based diagnostics provide online real-time device status and predictive maintenance capabilities, while a user-friendly dashboard offers at-a-glance valve status. The corrosion-resistant construction features copper-free aluminum and electronic circuits potted in resin for durability and allowing for temperature range to ensure durability even in harsh conditions, and an arctic option extending the temperature range down to -55 -67°F (-55°C). [rotork.com](http://rotork.com)

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*Heather Rhoderick*

# Stephane Meunier

Stephane Meunier received his bachelor's of mechanical and aeronautical engineering from McGill University and recently completed an EMBA in international management from Lancaster University in the U.K. He is currently director of project pursuit and execution for Emerson in North America, based in Montreal, where he lives with his wife, Angela, and two children. He's a very active member of VMA, serving as chair of the new Education & Events committee and is a member of the technical committee, as well as a past winner of VMA's highest award, Person of the Year (2018).



Source: Stephane Meunier

## What inspired you to pursue a career in the world of valves and actuators?

It was a matter of being at the right place and at the right time! I was a young mechanical engineering graduate with a major in aeronautical engineering. Opportunities in that field at the time were scarce and I found out Velan was looking for an inside sales engineer for their quarter-turn valves division through a friend. I got hired and never looked back. The valve and valve automation industry has been my home ever since!

## Why did you decide to get involved with VMA?

I believe in the idea of communities where people of like interests and expertise can join and grow from one another. I also believe in giving back to those communities. I initially joined VMA's Technical Committee which was the perfect vehicle for that. I continued to increase my commitment to the industry and the association over the years. I've met a lot of great people along the way, many of which I call friends!

## Are there any exciting projects or initiatives you are working on that you'd like to highlight to our readers?

Professionally, my organization is going through some important transformations, embracing digitalization in the industry, and I'm happy to be an integral part of those initiatives.

Personally, I've completed my Masters in International Management with Lancaster University in the UK through the IMPM Executive program. It's been an exciting journey which has taken me to the UK, Canada, India, Japan, the Maldives and Brazil, and I am thrilled to have submitted my thesis on Middle Management and will be attending my graduation in December! I'm also excited to be a continuous part of VMA's strategic transformation which I believe will bring the association to new heights.

## How do you stay abreast with changes in the valve/actuator industry?

Through the VMA! The VMA provides numerous outlets to stay informed and has allowed me to create an extensive network within the industry which I communicate with regularly.

## Describe what you do outside of work — family, hobbies, etc.)

I live in Montreal with my wife Angela and two kids (Marco 15 and Clara 12). I enjoy soccer and like to stay fit by training and by running regularly. I am a self-proclaimed wine connoisseur and a whiskey and mezcal aficionado.

## Do you have a secret talent that would surprise or delight our readers?

Being partly of Italian descent, I've learned to make my own wine and limoncello and love to cook; I make a mean eggplant parm!

Read the full interview: [VALVE-MEDIA.com/articles/industry-profile-Stephane-Meunier](https://www.valve-media.com/articles/industry-profile-Stephane-Meunier)

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