2019

CLOSED OUT A DECADE OF CHANGE AND UNCERTAINTY IN THE MARKETPLACE.

The year brought regulatory changes in the US and Canada, increased tariffs and trade barriers and a changing marketplace. Throughout it all, HI has kept members informed and better positioned to address uncertainty and opportunity. HI’s collective insight has helped Members better prepare for the changes ahead, and the next decade.

HI will continue to gather the insight of the growing community of Members, Partners, and End-users to look for new opportunities to serve our collective needs. With these added resources and perspectives, HI can develop more technical content, help streamline the specification process, improve pump system performance and expand our digital offerings.

Energy Efficiency is an opportunity that HI will continue to use as a framework to expand Training, Certification, Accreditation and Labeling programs that have grown in importance in the past decade to support this important market. With Basic Training, HI has created a platform to help Members and Partners prepare their workforce and ensure our industry has the talent, knowledge and skill to continually adapt and evolve.

By coming together with a unified voice on committees, at conferences and as an industry, HI will continue to grow the knowledge base of our industry and build programs that serve not only the pump manufacturing community, but also those who use our products.

Together, we can advance our industry and advance HI’s vision to become the world’s resource for pumping solutions by:

ADDRESSING PUMP SYSTEMS
DEVELOPING STANDARDS
EXPANDING KNOWLEDGE AND RESOURCES
EDUCATING THE MARKETPLACE
ADVOCATING FOR THE INDUSTRY
MEMBERSHIP ON THE RISE

STRONG ORGANIZATIONAL ENGAGEMENT FROM HI MEMBERS, DIVISIONS, ASSOCIATE MEMBERS, AND STANDARDS PARTNERS

NEW MEMBERS IN 2019 INCLUDE:

MEMBERS:
- CORNELL PUMP
- GICON PUMP

ASSOCIATE MEMBERS:
- CFTURBO, INC.
- VAZEL MECHANICAL SEALS

STANDARDS PARTNERS:
- US ARMY CORPS OF ENGINEERS
- GREAT LAKES WATER AUTHORITY
- CITY OF SASKATOON
- SANTA CLARA WATER VALLEY DISTRICT
- CALIFORNIA WATER SERVICE COMPANY
- PHOENIX CIVIL ENGINEERING, INC.
- TARRANT REGIONAL WATER DISTRICT
- HONOLULU BOARD OF WATER SUPPLY

As new members continue to be attracted to HI as a way to stay up to date and connected, an increasing number of Standards Partners look to gain access and knowledge to HI’s experts, technical resources and standards.
PREPARING FOR THE NEW EFFICIENCY RULE

WITH THE 2020 PUMP EFFICIENCY RULE CLEARLY IN SIGHT, HI SPENT MUCH OF 2019 PREPARING FOR THE RULE, LISTENING TO AND ANSWERING FREQUENTLY ASKED QUESTIONS, AND HOSTING INFORMATIONAL WEBINARS TO KEEP THE MEMBERSHIP INFORMED.

Energy Efficiency has emerged as a central theme and as HI’s suite of programs developed, focus shifted on growing participation. In 2019, related HI Programs all gained significant traction in the marketplace:

A trusted mark, the HI Pump Test Lab Approval Program includes 18 facilities in 4 countries – the US, Canada, Denmark and China. Products tested in an HI Approved Test lab are eligible for the HI Energy Rating Label.

QUICK ACTION SAVES TIME & MONEY

When Natural Resources Canada (NRCan) announced in July 2019 that it was aligning the Canadian pump efficiency regulations with the US DOE Requirements, HI quickly jumped into action. After hosting an informational webinar with NRCan officials, an additional requirement was quickly uncovered. The additional requirement for 3rd party accreditation emerged as a significant challenge to manufacturers hoping to comply before the 2020 deadline. Through meetings with several accreditation organizations, HI was able to negotiate the alignment of the HI Pump Test Lab Approval as meeting the essential requirements for Intertek’s compliance mark. The quick action helped streamline the requirements effort for compliance for members who are already in, or plan to be in the HI Lab Approval program – saving time and money – and underscored the importance of the HI Pump Test Lab Approval Program.

PG&E
PG&E has been running its energy efficiency incentive program since February 2018 and has issued hundreds of rebates to-date. They currently have four measures: Constant to Constant 3-50HP, Constant to Constant 50-200HP, Variable to Variable 3-50HP, and Variable to Variable 50-200HP.

XCEL
Xcel Energy launched their new incentive program in Minnesota for pump distributors or manufacturers in the irrigation, commercial HVAC and DH, industrial and municipal segments. They offer measures for Constant to Constant, Variable to Variable, and Constant to Variable speed.

NEEA
The Northwest Energy Efficiency Alliance (NEEA) launched a pilot incentive program that works alongside HI’s Energy Rating (“ER”) label and supports the sale of products with higher ER scores. NEEA offers a continuous incentive per ER point for pumps with ER scores above program minimum required levels. The offer applies to pumps from 1 to 50 HP.
ENERGY RATING LABEL

UTILITIES IN 6 STATES HAVE STARTED USING THE HI ER DATABASE AS A QUALIFIED PRODUCT

The HI Energy Rating Label has gained traction since its inception in 2018 as additional energy efficiency incentive programs were launched. The program now counts **8,000+ listed pumps spread across 15 brands** in the five pump types covered by the DOE efficiency rule. Submersible Turbines were added late in 2019 and Circulator Pumps are scheduled to be added mid-year 2020.

Utilities in 6 States used the HI ER Database as a qualified Product List, with more on the way.

Single Use Energy Rating Certificates were enabled late in 2019 so that a listed bare pump could be packaged with an efficient motor or drive in the marketplace and the new package with a more energy efficient rating would also qualify for incentives and rebates.

A VOICE IN WASHINGTON

HI’s work in Washington DC continues as members met with leaders and staff to push a legislative agenda through letter campaigns and visits to the nation’s capital. Issues that HI actively supported this year included legislation to reauthorize increased federal appropriations for several Clean Water Act authorities including the Clean Water State Revolving Fund and future legislation including:

- Water Quality Protection Act
- Water Infrastructure Sustainability and Efficiency Act
- Smart Energy and Water Efficiency Act
- Drought Resiliency and Water Supply Infrastructure Act

Senate Majority Leader Mitch McConnell (R-KY) with HI President DeLancey Davis (left), HI Past Chairman John H. White Jr. (right), and HI Government Affairs Consultant, Jeff More (far left) following a private dinner.

Members of the HI Government Affairs Team with Senator John Boozeman (R-AR) (center), Chairman of the Senate Environment and Public Works Committee.

Past HI Chairman John H. White Jr. with Senator Sheldon Whitehouse (D-RI) following the presentation of the HI Industry Excellence Award for Energy Efficiency.
HI completed a multi-year effort to combine the “1-series” standards covering centrifugal pumps and the “2-series” standards covering vertical pumps into a new, single “14 series” standard. This new American National (ANSI) Standard covers both pump types in a single standard series for rotodynamic pumps spanning:

- Nomenclature and Definitions ANSI/HI 14.1-14.2
- Design and Application ANSI/HI 14.3
- Performance Acceptance Tests ANSI/HI 14.6

Proper Lubrication Methods for Bearings White Paper
This white paper is a guideline for the design and application of bearing housing systems for horizontal process pumps.

Understanding the Effects of Selecting a Pump Performance Test Acceptance Grade White Paper
This paper highlights the importance of selecting the appropriate acceptance grade for pump performance testing to satisfy the needs of its intended service.

COMMERCIAL BUILDING SERVICES
Guidelines for Selection, Application and Operation
A one-of-a-kind guide exclusively for the selection, application and operation of pump application in commercial building services.

This guideline has been created to provide engineers, trainers, maintenance staff, and plant operators with the knowledge necessary to effectively specify pumps in North America. The material in this publication has been compiled by the Hydraulic Institute (HI) Pump Application Guidelines Committee and is intended to capture the experience and collective knowledge of pump and pumping systems experts for reference by system designers, constructors, and end users.

DRivers application guidebook: Electric Motors
A Guide for the Pumping Industry
Guidelines for Application, Installation, Maintenance, and Troubleshooting

It is widely accepted that the most commonly used drivers for pumps are electric motors. This guidebook provides a comprehensive review of application, installation, maintenance, and troubleshooting insights of electric motors. Additionally, this document imparts guidance and understanding on the selection, specification, and operation of electric motors including considerations when installing into a pumping system.

NEW COMBINED ROTODYNAMIC PUMP STANDARD

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Coming Soon…
A White Paper on Engine Vibration for Fire Pumps was started and work began to update the Engineering Data Book along with the format of the monthly statistical report of pump orders booked (M-10).
In 2019 PSAP clearly emerged as a credential that adds value and identifies true pump system expertise.

Hosting three separate PSAP Prep courses, HI was able to train and certify 26 new pump system assessment professionals this year. HI added live prep courses to its suite of prep materials that also includes a Body of Knowledge (BoK), a Study Guide, an on-line course and assessment tools.

The PSAP Prep Courses were hosted by Energy Efficiency Partners and by HI Members for their representative and distributor communities who now value the PSAP credential when discussing customers needs and evaluating their facilities.

Three categories of professionals are among the early adopters:
- HI members in service roles
- Member Reps and Distributors
- Consultants seeking to expand assessment services

The PSAP Credential will continue to grow and raise awareness of the benefits of system optimization while creating a need for qualified assessment professionals.
WORKFORCE DEVELOPMENT
SHARING PUMP KNOWLEDGE AND DEVELOPING LEADERS WITHIN THE PUMP MANUFACTURER AND SUPPLIER COMMUNITIES

“I thought the PILOT program was excellent and a great introduction into Hydraulic Institute. Without it, I may have felt pretty overwhelmed.”
2019 PILOT ATTENDEE

2019 PILOT PROGRAM
The 4th annual Pump Industry Leaders of Tomorrow (PILOT) program continued the tradition of bringing the next generation of leaders together. HI provides an introduction to the industry and association resources; while creating an instant network of manufacturers and suppliers to work together to share and grow.

WOMEN IN THE PUMP INDUSTRY
Women in the Pump Industry continue to gather at HI Meetings. What started as a networking event continues to grow as the group meets to hear speakers, share challenges and solutions along with HR and diversity related content at HI meetings.
A new Member benefit was launched this year. A comprehensive program designed to help Members on-board and prepare their workforce, Basic Training is a free web-based platform available to all employees of a member company. Containing webinars and other HI resources, Basic Training is designed to share a general understanding of pumps, components, pump system operations.

**WATCH AND LEARN**

**Introduction to Rotodynamic Pumps**

**Introduction to Rolling Element Bearings**

**Introduction to Basic System Hydraulics: Pump and System Curves**

**Introduction to the U.S. Department of Energy Commercial & Industrial Pump (CIP) Rulemaking**

**These titles and more!**

**READ AND LEARN**

**Proper Lubrication Methods for Bearings**

**Understanding the Effects of Selecting a Pump Performance Test Acceptance**

Users can view webinars where HI subject matter experts explain the basics or read white papers to gain a more in-depth understanding. An essential resource for those new to the industry or those looking for a refresher on pump system fundamentals.
EXPANDING HI’S PRESENCE IN THE MARKETPLACE

Exhibiting alongside members at AWWA - ACE, MFPT, TPS, VI and WEFTEC while promoting programs to new end-users and markets.

HI held workshops and presented on technical and regulatory topics at events hosted by: Association for Energy Services Professionals (AESP), Consortium for Energy Efficiency (CEE), Electric Power Research Institute (EPRI), Texas A&M Pump Symposium, Society for Machinery Failure Prevention Technology (MFPT) and the Vibration Institute.

AS MARKETS GROW

HI strives to bring real-time data and analysis to its Members. HI’s partnership with Oxford Economics prepares and delivers the Global Pump Market Report to all Members. The report provides analysis and forecasts in 71 countries of pump markets by end-use industry and in select pump applications. The HI Market Intelligence Committee works to ensure the Global Pump Market Report, along with internal booking surveys remain useful planning tools. These, along with quarterly CEO Surveys ensure HI Members are kept up to date with real trends in real time.

The HI-VMA Market Outlook Meeting is an opportunity to hear directly from industry specific experts regarding forecasts and market conditions. Market Intelligence presentations at HI conferences keep members up-to-date on current economic trends.

PUMP CONSUMPTION BY REGION

- Asia Pacific, 37%
- Europe, 28%
- North America, 22%
- South America, 4%
- Middle East & Africa, 9%

Source: Oxford Economics

Featured speaker Dr. Alan Beaulieu, ITR Economics provides regular insights through his keynote presentations at the HI Annual Conference and through quarterly updates for ITR subscribers.
AWARDS & RECOGNITION

HI honored individuals and organizations that are committed to using pumping systems to advance their business and improve the world around them during the HI Industry Excellence Awards at the 2019 HI Annual Conference in St. Petersburg, FL.

ENERGY EFFICIENCY
United States Senator Sheldon Whitehouse
(Sponsored by TACO Comfort Solutions)

INNOVATION & TECHNOLOGY
NET Power
(Sponsored by SULZER)

SOCIAL IMPACT
The Pump Industry
(Sponsored by SPP Pumps, Inc./Kirloskar Brothers, Ltd.)

PUMP INDUSTRY LEADERS RECOGNIZED FOR THEIR CONTRIBUTIONS
Each year, HI recognizes individuals from member and partner organizations who have demonstrated exceptional service and made significant contributions in support of the Institute in 2019.

LIFETIME ACHIEVEMENT AWARD
Arnold Sdano
Retired Senior Director, Pentair

MEMBER OF THE YEAR
Michael Mueller
Manager of Global Engineering Standards, Flowserve

STANDARDS PARTNER OF THE YEAR AWARD
William Marscher
President & Technical Director, Mechanical Solutions Inc.
(We also moved to a new address!)

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