

Global Mass Flow Controller for Semiconductor Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Mass Flow Controller for Semiconductor market size is expected to reach \$ 1663 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

In 2025, global Mass Flow Controller for Semiconductor production reached approximately 947.31 k units with average price of 1,095 USD per unit.

Mass Flow Controllers (MFCs) for semiconductor applications are critical components used to precisely measure and regulate the flow of process gases; they are widely deployed in equipment utilized for etching, thin-film deposition, diffusion, ion implantation, cleaning, as well as ALD, CVD, and PVD processes. Their core function involves executing closed-loop control over gas flow based on a setpoint, thereby ensuring the stability, consistency, and repeatability of process conditions within the reaction chamber. Compared to general industrial settings, semiconductor MFCs are subject to far more stringent requirements regarding precision, response speed, repeatability, cleanliness, corrosion resistance, and long-term drift control; consequently, they must typically be compatible with environments involving high-purity gases, specialty gases, and corrosive gases. In terms of technical architecture, mainstream products include thermal MFCs, differential pressure MFCs, and for a limited number of high-end applications, Coriolis MFCs, with thermal MFCs remaining the dominant solution within semiconductor manufacturing equipment.

The upstream segment of the semiconductor MFC industry chain primarily comprises suppliers of stainless steel and specialty alloy valve body materials, sensor elements, control valves, seals, electronic components, chips, PCBs, and precision-machined parts. Within this segment, material purity, sealing performance, and machining

precision directly determine the product's overall reliability and cleanliness rating. The midstream segment consists of manufacturers responsible for the design, fabrication, assembly, calibration, and testing of MFCs; their core competencies lie in their sensing algorithms, valve control capabilities, gas property databases, long-term stability, and their ability to secure certification from semiconductor equipment manufacturers. The downstream segment primarily comprises semiconductor equipment manufacturers, gas delivery system integrators, wafer fabrication plants (fabs), and a broader range of 'pan-semiconductor' customers including those in the flat-panel display, compound semiconductor, and photovoltaic sectors. Overall, the MFC is not merely a generic, off-the-shelf component; rather, it is deeply integrated with specific equipment process platforms, gas types, and customer validation frameworks. Consequently, the industry is characterized by high technical barriers, significant certification hurdles, and strong customer stickiness.

The market outlook for semiconductor MFCs (Mass Flow Controllers) is generally positive, driven primarily by advancements in process technology, wafer fab capacity expansions, increased capital investment in equipment, and a sustained rise in the consumption of specialty gases. As the process complexity of logic, memory, power, and third-generation semiconductors continues to rise, equipment manufacturers are placing increasingly stringent demands on gas flow control specifically regarding precision, response speed, and multi-gas compatibility thereby driving the evolution of MFCs toward higher performance, digitalization, intelligence, and corrosion resistance. Concurrently, the development of processes such as ALD (Atomic Layer Deposition), advanced etching, and high-aspect-ratio deposition has spurred growing demand for low-flow, high-precision MFCs. Looking ahead, the industry is expected to exhibit three key trends: first, high-end product segments will continue to be dominated by technology leaders; second, the localization of supply chains will continue to advance within specific regional markets; and third, MFCs will evolve beyond being mere standalone flow-control components to become intelligent fluid-control nodes capable of integrating diagnostics, data feedback, and predictive maintenance functionalities. Overall, while fluctuations in the semiconductor capital expenditure cycle may impact short-term demand, the underlying logic for medium-to-long-term growth remains clear.

This report studies the global Mass Flow Controller for Semiconductor production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Mass Flow Controller for Semiconductor and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand

trends and competition, as well as details the characteristics of Mass Flow Controller for Semiconductor that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Mass Flow Controller for Semiconductor total production and demand, 2021-2032, (K Units)

Global Mass Flow Controller for Semiconductor total production value, 2021-2032, (USD Million)

Global Mass Flow Controller for Semiconductor production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Mass Flow Controller for Semiconductor consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Mass Flow Controller for Semiconductor domestic production, consumption, key domestic manufacturers and share

Global Mass Flow Controller for Semiconductor production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Mass Flow Controller for Semiconductor production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Mass Flow Controller for Semiconductor production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Mass Flow Controller for Semiconductor market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include HORIBA, Fujikin, MKS Instruments, Beijing Aurasky Electronics Co., Ltd, Hitachi Metals, Ltd, Pivotal Systems, MKP, AZBIL, Bronkhorst, Lintec, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Mass Flow Controller for Semiconductor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by

manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Mass Flow Controller for Semiconductor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Mass Flow Controller for Semiconductor Market, Segmentation by Type:

Thermal Type

Pressure Type

Coriolis Type

Global Mass Flow Controller for Semiconductor Market, Segmentation by Control Type:

Digital Type

Analog Type

Global Mass Flow Controller for Semiconductor Market, Segmentation by Gas Type:

Standard Process Gas MFC

Corrosive Gas MFC

Global Mass Flow Controller for Semiconductor Market, Segmentation by Application:

Semiconductor Processing Furnace

PVD&CVD Equipment

Etching Equipment

Others

Companies Profiled:

HORIBA

Fujikin

MKS Instruments

Beijing Aurasky Electronics Co., Ltd

Hitachi Metals, Ltd

Pivotal Systems

MKP

AZBIL

Bronkhorst

Lintec

Kofloc

Brooks

Sensirion

Jiangsu Gao Kai Precision

Sierra Instruments

Key Questions Answered:

1. How big is the global Mass Flow Controller for Semiconductor market?
2. What is the demand of the global Mass Flow Controller for Semiconductor market?
3. What is the year over year growth of the global Mass Flow Controller for Semiconductor market?
4. What is the production and production value of the global Mass Flow Controller for Semiconductor market?
5. Who are the key producers in the global Mass Flow Controller for Semiconductor market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Mass Flow Controller for Semiconductor Introduction
- 1.2 World Mass Flow Controller for Semiconductor Supply & Forecast
 - 1.2.1 World Mass Flow Controller for Semiconductor Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Mass Flow Controller for Semiconductor Production (2021-2032)
 - 1.2.3 World Mass Flow Controller for Semiconductor Pricing Trends (2021-2032)
- 1.3 World Mass Flow Controller for Semiconductor Production by Region (Based on Production Site)
 - 1.3.1 World Mass Flow Controller for Semiconductor Production Value by Region (2021-2032)
 - 1.3.2 World Mass Flow Controller for Semiconductor Production by Region (2021-2032)
 - 1.3.3 World Mass Flow Controller for Semiconductor Average Price by Region (2021-2032)
 - 1.3.4 North America Mass Flow Controller for Semiconductor Production (2021-2032)
 - 1.3.5 Europe Mass Flow Controller for Semiconductor Production (2021-2032)
 - 1.3.6 China Mass Flow Controller for Semiconductor Production (2021-2032)
 - 1.3.7 Japan Mass Flow Controller for Semiconductor Production (2021-2032)
 - 1.3.8 South Korea Mass Flow Controller for Semiconductor Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Mass Flow Controller for Semiconductor Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Mass Flow Controller for Semiconductor Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Mass Flow Controller for Semiconductor Demand (2021-2032)
- 2.2 World Mass Flow Controller for Semiconductor Consumption by Region
 - 2.2.1 World Mass Flow Controller for Semiconductor Consumption by Region (2021-2026)
 - 2.2.2 World Mass Flow Controller for Semiconductor Consumption Forecast by Region (2027-2032)
- 2.3 United States Mass Flow Controller for Semiconductor Consumption (2021-2032)
- 2.4 China Mass Flow Controller for Semiconductor Consumption (2021-2032)
- 2.5 Europe Mass Flow Controller for Semiconductor Consumption (2021-2032)
- 2.6 Japan Mass Flow Controller for Semiconductor Consumption (2021-2032)

- 2.7 South Korea Mass Flow Controller for Semiconductor Consumption (2021-2032)
- 2.8 ASEAN Mass Flow Controller for Semiconductor Consumption (2021-2032)
- 2.9 India Mass Flow Controller for Semiconductor Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Mass Flow Controller for Semiconductor Production Value by Manufacturer (2021-2026)
- 3.2 World Mass Flow Controller for Semiconductor Production by Manufacturer (2021-2026)
- 3.3 World Mass Flow Controller for Semiconductor Average Price by Manufacturer (2021-2026)
- 3.4 Mass Flow Controller for Semiconductor Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Mass Flow Controller for Semiconductor Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Mass Flow Controller for Semiconductor in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Mass Flow Controller for Semiconductor in 2025
- 3.6 Mass Flow Controller for Semiconductor Market: Overall Company Footprint Analysis
 - 3.6.1 Mass Flow Controller for Semiconductor Market: Region Footprint
 - 3.6.2 Mass Flow Controller for Semiconductor Market: Company Product Type Footprint
 - 3.6.3 Mass Flow Controller for Semiconductor Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Mass Flow Controller for Semiconductor Production Value Comparison
 - 4.1.1 United States VS China: Mass Flow Controller for Semiconductor Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Mass Flow Controller for Semiconductor Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Mass Flow Controller for Semiconductor Production Comparison

4.2.1 United States VS China: Mass Flow Controller for Semiconductor Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Mass Flow Controller for Semiconductor Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Mass Flow Controller for Semiconductor Consumption Comparison

4.3.1 United States VS China: Mass Flow Controller for Semiconductor Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Mass Flow Controller for Semiconductor Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Mass Flow Controller for Semiconductor Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Mass Flow Controller for Semiconductor Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Mass Flow Controller for Semiconductor Production Value (2021-2026)

4.4.3 United States Based Manufacturers Mass Flow Controller for Semiconductor Production (2021-2026)

4.5 China Based Mass Flow Controller for Semiconductor Manufacturers and Market Share

4.5.1 China Based Mass Flow Controller for Semiconductor Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Mass Flow Controller for Semiconductor Production Value (2021-2026)

4.5.3 China Based Manufacturers Mass Flow Controller for Semiconductor Production (2021-2026)

4.6 Rest of World Based Mass Flow Controller for Semiconductor Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Mass Flow Controller for Semiconductor Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Mass Flow Controller for Semiconductor Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Mass Flow Controller for Semiconductor Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Mass Flow Controller for Semiconductor Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Thermal Type

5.2.2 Pressure Type

5.2.3 Coriolis Type

5.3 Market Segment by Type

5.3.1 World Mass Flow Controller for Semiconductor Production by Type (2021-2032)

5.3.2 World Mass Flow Controller for Semiconductor Production Value by Type (2021-2032)

5.3.3 World Mass Flow Controller for Semiconductor Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY CONTROL TYPE

6.1 World Mass Flow Controller for Semiconductor Market Size Overview by Control Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Control Type

6.2.1 Digital Type

6.2.2 Analog Type

6.3 Market Segment by Control Type

6.3.1 World Mass Flow Controller for Semiconductor Production by Control Type (2021-2032)

6.3.2 World Mass Flow Controller for Semiconductor Production Value by Control Type (2021-2032)

6.3.3 World Mass Flow Controller for Semiconductor Average Price by Control Type (2021-2032)

7 MARKET ANALYSIS BY GAS TYPE

7.1 World Mass Flow Controller for Semiconductor Market Size Overview by Gas Type: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Gas Type

7.2.1 Standard Process Gas MFC

7.2.2 Corrosive Gas MFC

7.3 Market Segment by Gas Type

7.3.1 World Mass Flow Controller for Semiconductor Production by Gas Type

(2021-2032)

7.3.2 World Mass Flow Controller for Semiconductor Production Value by Gas Type

(2021-2032)

7.3.3 World Mass Flow Controller for Semiconductor Average Price by Gas Type

(2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Mass Flow Controller for Semiconductor Market Size Overview by

Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Semiconductor Processing Furnace

8.2.2 PVD&CVD Equipment

8.2.3 Etching Equipment

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Mass Flow Controller for Semiconductor Production by Application

(2021-2032)

8.3.2 World Mass Flow Controller for Semiconductor Production Value by Application

(2021-2032)

8.3.3 World Mass Flow Controller for Semiconductor Average Price by Application

(2021-2032)

9 COMPANY PROFILES

9.1 HORIBA

9.1.1 HORIBA Details

9.1.2 HORIBA Major Business

9.1.3 HORIBA Mass Flow Controller for Semiconductor Product and Services

9.1.4 HORIBA Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 HORIBA Recent Developments/Updates

9.1.6 HORIBA Competitive Strengths & Weaknesses

9.2 Fujikin

9.2.1 Fujikin Details

9.2.2 Fujikin Major Business

9.2.3 Fujikin Mass Flow Controller for Semiconductor Product and Services

9.2.4 Fujikin Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.2.5 Fujikin Recent Developments/Updates
- 9.2.6 Fujikin Competitive Strengths & Weaknesses
- 9.3 MKS Instruments
 - 9.3.1 MKS Instruments Details
 - 9.3.2 MKS Instruments Major Business
 - 9.3.3 MKS Instruments Mass Flow Controller for Semiconductor Product and Services
 - 9.3.4 MKS Instruments Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 MKS Instruments Recent Developments/Updates
 - 9.3.6 MKS Instruments Competitive Strengths & Weaknesses
- 9.4 Beijing Aurasky Electronics Co., Ltd
 - 9.4.1 Beijing Aurasky Electronics Co., Ltd Details
 - 9.4.2 Beijing Aurasky Electronics Co., Ltd Major Business
 - 9.4.3 Beijing Aurasky Electronics Co., Ltd Mass Flow Controller for Semiconductor Product and Services
 - 9.4.4 Beijing Aurasky Electronics Co., Ltd Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Beijing Aurasky Electronics Co., Ltd Recent Developments/Updates
 - 9.4.6 Beijing Aurasky Electronics Co., Ltd Competitive Strengths & Weaknesses
- 9.5 Hitachi Metals, Ltd
 - 9.5.1 Hitachi Metals, Ltd Details
 - 9.5.2 Hitachi Metals, Ltd Major Business
 - 9.5.3 Hitachi Metals, Ltd Mass Flow Controller for Semiconductor Product and Services
 - 9.5.4 Hitachi Metals, Ltd Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Hitachi Metals, Ltd Recent Developments/Updates
 - 9.5.6 Hitachi Metals, Ltd Competitive Strengths & Weaknesses
- 9.6 Pivotal Systems
 - 9.6.1 Pivotal Systems Details
 - 9.6.2 Pivotal Systems Major Business
 - 9.6.3 Pivotal Systems Mass Flow Controller for Semiconductor Product and Services
 - 9.6.4 Pivotal Systems Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Pivotal Systems Recent Developments/Updates
 - 9.6.6 Pivotal Systems Competitive Strengths & Weaknesses
- 9.7 MKP
 - 9.7.1 MKP Details
 - 9.7.2 MKP Major Business
 - 9.7.3 MKP Mass Flow Controller for Semiconductor Product and Services

9.7.4 MKP Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 MKP Recent Developments/Updates

9.7.6 MKP Competitive Strengths & Weaknesses

9.8 AZBIL

9.8.1 AZBIL Details

9.8.2 AZBIL Major Business

9.8.3 AZBIL Mass Flow Controller for Semiconductor Product and Services

9.8.4 AZBIL Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 AZBIL Recent Developments/Updates

9.8.6 AZBIL Competitive Strengths & Weaknesses

9.9 Bronkhorst

9.9.1 Bronkhorst Details

9.9.2 Bronkhorst Major Business

9.9.3 Bronkhorst Mass Flow Controller for Semiconductor Product and Services

9.9.4 Bronkhorst Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Bronkhorst Recent Developments/Updates

9.9.6 Bronkhorst Competitive Strengths & Weaknesses

9.10 Lintec

9.10.1 Lintec Details

9.10.2 Lintec Major Business

9.10.3 Lintec Mass Flow Controller for Semiconductor Product and Services

9.10.4 Lintec Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Lintec Recent Developments/Updates

9.10.6 Lintec Competitive Strengths & Weaknesses

9.11 Kofloc

9.11.1 Kofloc Details

9.11.2 Kofloc Major Business

9.11.3 Kofloc Mass Flow Controller for Semiconductor Product and Services

9.11.4 Kofloc Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Kofloc Recent Developments/Updates

9.11.6 Kofloc Competitive Strengths & Weaknesses

9.12 Brooks

9.12.1 Brooks Details

9.12.2 Brooks Major Business

- 9.12.3 Brooks Mass Flow Controller for Semiconductor Product and Services
- 9.12.4 Brooks Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.12.5 Brooks Recent Developments/Updates
- 9.12.6 Brooks Competitive Strengths & Weaknesses
- 9.13 Sensirion
 - 9.13.1 Sensirion Details
 - 9.13.2 Sensirion Major Business
 - 9.13.3 Sensirion Mass Flow Controller for Semiconductor Product and Services
 - 9.13.4 Sensirion Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Sensirion Recent Developments/Updates
 - 9.13.6 Sensirion Competitive Strengths & Weaknesses
- 9.14 Jiangsu Gao Kai Precision
 - 9.14.1 Jiangsu Gao Kai Precision Details
 - 9.14.2 Jiangsu Gao Kai Precision Major Business
 - 9.14.3 Jiangsu Gao Kai Precision Mass Flow Controller for Semiconductor Product and Services
 - 9.14.4 Jiangsu Gao Kai Precision Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Jiangsu Gao Kai Precision Recent Developments/Updates
 - 9.14.6 Jiangsu Gao Kai Precision Competitive Strengths & Weaknesses
- 9.15 Sierra Instruments
 - 9.15.1 Sierra Instruments Details
 - 9.15.2 Sierra Instruments Major Business
 - 9.15.3 Sierra Instruments Mass Flow Controller for Semiconductor Product and Services
 - 9.15.4 Sierra Instruments Mass Flow Controller for Semiconductor Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Sierra Instruments Recent Developments/Updates
 - 9.15.6 Sierra Instruments Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Mass Flow Controller for Semiconductor Industry Chain
- 10.2 Mass Flow Controller for Semiconductor Upstream Analysis
 - 10.2.1 Mass Flow Controller for Semiconductor Core Raw Materials
 - 10.2.2 Main Manufacturers of Mass Flow Controller for Semiconductor Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Mass Flow Controller for Semiconductor Production Mode

10.6 Mass Flow Controller for Semiconductor Procurement Model

10.7 Mass Flow Controller for Semiconductor Industry Sales Model and Sales Channels

10.7.1 Mass Flow Controller for Semiconductor Sales Model

10.7.2 Mass Flow Controller for Semiconductor Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Mass Flow Controller for Semiconductor Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Mass Flow Controller for Semiconductor Production Value by Region (2021-2026) & (USD Million)

Table 3. World Mass Flow Controller for Semiconductor Production Value by Region (2027-2032) & (USD Million)

Table 4. World Mass Flow Controller for Semiconductor Production Value Market Share by Region (2021-2026)

Table 5. World Mass Flow Controller for Semiconductor Production Value Market Share by Region (2027-2032)

Table 6. World Mass Flow Controller for Semiconductor Production by Region (2021-2026) & (K Units)

Table 7. World Mass Flow Controller for Semiconductor Production by Region (2027-2032) & (K Units)

Table 8. World Mass Flow Controller for Semiconductor Production Market Share by Region (2021-2026)

Table 9. World Mass Flow Controller for Semiconductor Production Market Share by Region (2027-2032)

Table 10. World Mass Flow Controller for Semiconductor Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Mass Flow Controller for Semiconductor Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Mass Flow Controller for Semiconductor Major Market Trends

Table 13. World Mass Flow Controller for Semiconductor Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Mass Flow Controller for Semiconductor Consumption by Region (2021-2026) & (K Units)

Table 15. World Mass Flow Controller for Semiconductor Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Mass Flow Controller for Semiconductor Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Mass Flow Controller for Semiconductor Producers in 2025

Table 18. World Mass Flow Controller for Semiconductor Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Mass Flow Controller for Semiconductor Producers in 2025

Table 20. World Mass Flow Controller for Semiconductor Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Mass Flow Controller for Semiconductor Company Evaluation Quadrant

Table 22. World Mass Flow Controller for Semiconductor Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Mass Flow Controller for Semiconductor Production Site of Key Manufacturer

Table 24. Mass Flow Controller for Semiconductor Market: Company Product Type Footprint

Table 25. Mass Flow Controller for Semiconductor Market: Company Product Application Footprint

Table 26. Mass Flow Controller for Semiconductor Competitive Factors

Table 27. Mass Flow Controller for Semiconductor New Entrant and Capacity Expansion Plans

Table 28. Mass Flow Controller for Semiconductor Mergers & Acquisitions Activity

Table 29. United States VS China Mass Flow Controller for Semiconductor Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Mass Flow Controller for Semiconductor Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Mass Flow Controller for Semiconductor Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Mass Flow Controller for Semiconductor Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Mass Flow Controller for Semiconductor Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Mass Flow Controller for Semiconductor Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Mass Flow Controller for Semiconductor Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Mass Flow Controller for Semiconductor Production Market Share (2021-2026)

Table 37. China Based Mass Flow Controller for Semiconductor Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Mass Flow Controller for Semiconductor Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Mass Flow Controller for Semiconductor

Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Mass Flow Controller for Semiconductor Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Mass Flow Controller for Semiconductor Production Market Share (2021-2026)

Table 42. Rest of World Based Mass Flow Controller for Semiconductor Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Mass Flow Controller for Semiconductor Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Mass Flow Controller for Semiconductor Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Mass Flow Controller for Semiconductor Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Mass Flow Controller for Semiconductor Production Market Share (2021-2026)

Table 47. World Mass Flow Controller for Semiconductor Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Mass Flow Controller for Semiconductor Production by Type (2021-2026) & (K Units)

Table 49. World Mass Flow Controller for Semiconductor Production by Type (2027-2032) & (K Units)

Table 50. World Mass Flow Controller for Semiconductor Production Value by Type (2021-2026) & (USD Million)

Table 51. World Mass Flow Controller for Semiconductor Production Value by Type (2027-2032) & (USD Million)

Table 52. World Mass Flow Controller for Semiconductor Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Mass Flow Controller for Semiconductor Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Mass Flow Controller for Semiconductor Production Value by Control Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Mass Flow Controller for Semiconductor Production by Control Type (2021-2026) & (K Units)

Table 56. World Mass Flow Controller for Semiconductor Production by Control Type (2027-2032) & (K Units)

Table 57. World Mass Flow Controller for Semiconductor Production Value by Control Type (2021-2026) & (USD Million)

Table 58. World Mass Flow Controller for Semiconductor Production Value by Control Type (2027-2032) & (USD Million)

Table 59. World Mass Flow Controller for Semiconductor Average Price by Control Type (2021-2026) & (US\$/Unit)

Table 60. World Mass Flow Controller for Semiconductor Average Price by Control Type (2027-2032) & (US\$/Unit)

Table 61. World Mass Flow Controller for Semiconductor Production Value by Gas Type, (USD Million), 2021 & 2025 & 2032

Table 62. World Mass Flow Controller for Semiconductor Production by Gas Type (2021-2026) & (K Units)

Table 63. World Mass Flow Controller for Semiconductor Production by Gas Type (2027-2032) & (K Units)

Table 64. World Mass Flow Controller for Semiconductor Production Value by Gas Type (2021-2026) & (USD Million)

Table 65. World Mass Flow Controller for Semiconductor Production Value by Gas Type (2027-2032) & (USD Million)

Table 66. World Mass Flow Controller for Semiconductor Average Price by Gas Type (2021-2026) & (US\$/Unit)

Table 67. World Mass Flow Controller for Semiconductor Average Price by Gas Type (2027-2032) & (US\$/Unit)

Table 68. World Mass Flow Controller for Semiconductor Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Mass Flow Controller for Semiconductor Production by Application (2021-2026) & (K Units)

Table 70. World Mass Flow Controller for Semiconductor Production by Application (2027-2032) & (K Units)

Table 71. World Mass Flow Controller for Semiconductor Production Value by Application (2021-2026) & (USD Million)

Table 72. World Mass Flow Controller for Semiconductor Production Value by Application (2027-2032) & (USD Million)

Table 73. World Mass Flow Controller for Semiconductor Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Mass Flow Controller for Semiconductor Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. HORIBA Basic Information, Manufacturing Base and Competitors

Table 76. HORIBA Major Business

Table 77. HORIBA Mass Flow Controller for Semiconductor Product and Services

Table 78. HORIBA Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. HORIBA Recent Developments/Updates

Table 80. HORIBA Competitive Strengths & Weaknesses

Table 81. Fujikin Basic Information, Manufacturing Base and Competitors

Table 82. Fujikin Major Business

Table 83. Fujikin Mass Flow Controller for Semiconductor Product and Services

Table 84. Fujikin Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Fujikin Recent Developments/Updates

Table 86. Fujikin Competitive Strengths & Weaknesses

Table 87. MKS Instruments Basic Information, Manufacturing Base and Competitors

Table 88. MKS Instruments Major Business

Table 89. MKS Instruments Mass Flow Controller for Semiconductor Product and Services

Table 90. MKS Instruments Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. MKS Instruments Recent Developments/Updates

Table 92. MKS Instruments Competitive Strengths & Weaknesses

Table 93. Beijing Aurasky Electronics Co., Ltd Basic Information, Manufacturing Base and Competitors

Table 94. Beijing Aurasky Electronics Co., Ltd Major Business

Table 95. Beijing Aurasky Electronics Co., Ltd Mass Flow Controller for Semiconductor Product and Services

Table 96. Beijing Aurasky Electronics Co., Ltd Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Beijing Aurasky Electronics Co., Ltd Recent Developments/Updates

Table 98. Beijing Aurasky Electronics Co., Ltd Competitive Strengths & Weaknesses

Table 99. Hitachi Metals, Ltd Basic Information, Manufacturing Base and Competitors

Table 100. Hitachi Metals, Ltd Major Business

Table 101. Hitachi Metals, Ltd Mass Flow Controller for Semiconductor Product and Services

Table 102. Hitachi Metals, Ltd Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Hitachi Metals, Ltd Recent Developments/Updates

Table 104. Hitachi Metals, Ltd Competitive Strengths & Weaknesses

Table 105. Pivotal Systems Basic Information, Manufacturing Base and Competitors

Table 106. Pivotal Systems Major Business

Table 107. Pivotal Systems Mass Flow Controller for Semiconductor Product and Services

Table 108. Pivotal Systems Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Pivotal Systems Recent Developments/Updates

Table 110. Pivotal Systems Competitive Strengths & Weaknesses

Table 111. MKP Basic Information, Manufacturing Base and Competitors

Table 112. MKP Major Business

Table 113. MKP Mass Flow Controller for Semiconductor Product and Services

Table 114. MKP Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. MKP Recent Developments/Updates

Table 116. MKP Competitive Strengths & Weaknesses

Table 117. AZBIL Basic Information, Manufacturing Base and Competitors

Table 118. AZBIL Major Business

Table 119. AZBIL Mass Flow Controller for Semiconductor Product and Services

Table 120. AZBIL Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. AZBIL Recent Developments/Updates

Table 122. AZBIL Competitive Strengths & Weaknesses

Table 123. Bronkhorst Basic Information, Manufacturing Base and Competitors

Table 124. Bronkhorst Major Business

Table 125. Bronkhorst Mass Flow Controller for Semiconductor Product and Services

Table 126. Bronkhorst Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Bronkhorst Recent Developments/Updates

Table 128. Bronkhorst Competitive Strengths & Weaknesses

Table 129. Lintec Basic Information, Manufacturing Base and Competitors

Table 130. Lintec Major Business

Table 131. Lintec Mass Flow Controller for Semiconductor Product and Services

Table 132. Lintec Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Lintec Recent Developments/Updates

Table 134. Lintec Competitive Strengths & Weaknesses

Table 135. Kofloc Basic Information, Manufacturing Base and Competitors

Table 136. Kofloc Major Business

Table 137. Kofloc Mass Flow Controller for Semiconductor Product and Services

Table 138. Kofloc Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Kofloc Recent Developments/Updates

Table 140. Kofloc Competitive Strengths & Weaknesses

Table 141. Brooks Basic Information, Manufacturing Base and Competitors

Table 142. Brooks Major Business

Table 143. Brooks Mass Flow Controller for Semiconductor Product and Services

Table 144. Brooks Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Brooks Recent Developments/Updates

Table 146. Brooks Competitive Strengths & Weaknesses

Table 147. Sensirion Basic Information, Manufacturing Base and Competitors

Table 148. Sensirion Major Business

Table 149. Sensirion Mass Flow Controller for Semiconductor Product and Services

Table 150. Sensirion Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Sensirion Recent Developments/Updates

Table 152. Sensirion Competitive Strengths & Weaknesses

Table 153. Jiangsu Gao Kai Precision Basic Information, Manufacturing Base and Competitors

Table 154. Jiangsu Gao Kai Precision Major Business

Table 155. Jiangsu Gao Kai Precision Mass Flow Controller for Semiconductor Product and Services

Table 156. Jiangsu Gao Kai Precision Mass Flow Controller for Semiconductor Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Jiangsu Gao Kai Precision Recent Developments/Updates

Table 158. Jiangsu Gao Kai Precision Competitive Strengths & Weaknesses

Table 159. Sierra Instruments Basic Information, Manufacturing Base and Competitors

Table 160. Sierra Instruments Major Business

Table 161. Sierra Instruments Mass Flow Controller for Semiconductor Product and Services

Table 162. Sierra Instruments Mass Flow Controller for Semiconductor Production (K

Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Sierra Instruments Recent Developments/Updates

Table 164. Sierra Instruments Competitive Strengths & Weaknesses

Table 165. Global Key Players of Mass Flow Controller for Semiconductor Upstream (Raw Materials)

Table 166. Global Mass Flow Controller for Semiconductor Typical Customers

Table 167. Mass Flow Controller for Semiconductor Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Mass Flow Controller for Semiconductor Picture

Figure 2. World Mass Flow Controller for Semiconductor Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Mass Flow Controller for Semiconductor Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Mass Flow Controller for Semiconductor Production (2021-2032) & (K Units)

Figure 5. World Mass Flow Controller for Semiconductor Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Mass Flow Controller for Semiconductor Production Value Market Share by Region (2021-2032)

Figure 7. World Mass Flow Controller for Semiconductor Production Market Share by Region (2021-2032)

Figure 8. North America Mass Flow Controller for Semiconductor Production (2021-2032) & (K Units)

Figure 9. Europe Mass Flow Controller for Semiconductor Production (2021-2032) & (K Units)

Figure 10. China Mass Flow Controller for Semiconductor Production (2021-2032) & (K Units)

Figure 11. Japan Mass Flow Controller for Semiconductor Production (2021-2032) & (K Units)

Figure 12. South Korea Mass Flow Controller for Semiconductor Production (2021-2032) & (K Units)

Figure 13. Mass Flow Controller for Semiconductor Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Mass Flow Controller for Semiconductor Consumption (2021-2032) & (K Units)

Figure 16. World Mass Flow Controller for Semiconductor Consumption Market Share by Region (2021-2032)

Figure 17. United States Mass Flow Controller for Semiconductor Consumption (2021-2032) & (K Units)

Figure 18. China Mass Flow Controller for Semiconductor Consumption (2021-2032) & (K Units)

Figure 19. Europe Mass Flow Controller for Semiconductor Consumption (2021-2032) & (K Units)

Figure 20. Japan Mass Flow Controller for Semiconductor Consumption (2021-2032) & (K Units)

Figure 21. South Korea Mass Flow Controller for Semiconductor Consumption (2021-2032) & (K Units)

Figure 22. ASEAN Mass Flow Controller for Semiconductor Consumption (2021-2032) & (K Units)

Figure 23. India Mass Flow Controller for Semiconductor Consumption (2021-2032) & (K Units)

Figure 24. Producer Shipments of Mass Flow Controller for Semiconductor by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Mass Flow Controller for Semiconductor Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Mass Flow Controller for Semiconductor Markets in 2025

Figure 27. United States VS China: Mass Flow Controller for Semiconductor Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Mass Flow Controller for Semiconductor Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Mass Flow Controller for Semiconductor Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Mass Flow Controller for Semiconductor Production Market Share 2025

Figure 31. China Based Manufacturers Mass Flow Controller for Semiconductor Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Mass Flow Controller for Semiconductor Production Market Share 2025

Figure 33. World Mass Flow Controller for Semiconductor Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Mass Flow Controller for Semiconductor Production Value Market Share by Type in 2025

Figure 35. Thermal Type

Figure 36. Pressure Type

Figure 37. Coriolis Type

Figure 38. World Mass Flow Controller for Semiconductor Production Market Share by Type (2021-2032)

Figure 39. World Mass Flow Controller for Semiconductor Production Value Market Share by Type (2021-2032)

Figure 40. World Mass Flow Controller for Semiconductor Average Price by Type (2021-2032) & (US\$/Unit)

Figure 41. World Mass Flow Controller for Semiconductor Production Value by Control Type, (USD Million), 2021 & 2025 & 2032

Figure 42. World Mass Flow Controller for Semiconductor Production Value Market Share by Control Type in 2025

Figure 43. Digital Type

Figure 44. Analog Type

Figure 45. World Mass Flow Controller for Semiconductor Production Market Share by Control Type (2021-2032)

Figure 46. World Mass Flow Controller for Semiconductor Production Value Market Share by Control Type (2021-2032)

Figure 47. World Mass Flow Controller for Semiconductor Average Price by Control Type (2021-2032) & (US\$/Unit)

Figure 48. World Mass Flow Controller for Semiconductor Production Value by Gas Type, (USD Million), 2021 & 2025 & 2032

Figure 49. World Mass Flow Controller for Semiconductor Production Value Market Share by Gas Type in 2025

Figure 50. Standard Process Gas MFC

Figure 51. Corrosive Gas MFC

Figure 52. World Mass Flow Controller for Semiconductor Production Market Share by Gas Type (2021-2032)

Figure 53. World Mass Flow Controller for Semiconductor Production Value Market Share by Gas Type (2021-2032)

Figure 54. World Mass Flow Controller for Semiconductor Average Price by Gas Type (2021-2032) & (US\$/Unit)

Figure 55. World Mass Flow Controller for Semiconductor Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World Mass Flow Controller for Semiconductor Production Value Market Share by Application in 2025

Figure 57. Semiconductor Processing Furnace

Figure 58. PVD&CVD Equipment

Figure 59. Etching Equipment

Figure 60. Others

Figure 61. World Mass Flow Controller for Semiconductor Production Market Share by Application (2021-2032)

Figure 62. World Mass Flow Controller for Semiconductor Production Value Market Share by Application (2021-2032)

Figure 63. World Mass Flow Controller for Semiconductor Average Price by Application (2021-2032) & (US\$/Unit)

Figure 64. Mass Flow Controller for Semiconductor Industry Chain

Figure 65. Mass Flow Controller for Semiconductor Procurement Model

Figure 66. Mass Flow Controller for Semiconductor Sales Model

Figure 67. Mass Flow Controller for Semiconductor Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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