

# Asia Pacific Differential-Pressure Mass Flow Controller Market Size and Forecast (2021 - 2031)

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## Abstracts

The Asia Pacific Differential-Pressure Mass Flow Controller Market is projected to grow significantly, reaching an estimated US\$ 97.9 million by 2031, up from US\$ 72.2 million in 2024. This growth represents a compound annual growth rate (CAGR) of 4.6% from 2025 to 2031.

## Executive Summary and Market Analysis

The Asia Pacific region is a hub for semiconductor manufacturing, with major players such as Taiwan, South Korea, Japan, and China investing heavily in next-generation chip fabrication facilities. These advanced fabs require precise flow regulation for various processes, including lithography gas delivery, precursor management, vacuum operations, and sub-atmospheric applications. China's initiative for semiconductor self-sufficiency, encapsulated in the "Made in China 2025" strategy, alongside the shifting of supply chains to Southeast Asia, is driving the demand for high-performance differential-pressure mass flow controllers. These controllers are essential for ensuring reliability and rapid calibration in critical applications.

The Asia Pacific region stands as the largest global center for electronics manufacturing, encompassing industries such as LED production, printed circuit board (PCB) assembly, and battery cell fabrication. All these sectors necessitate precise gas control for processes like coating, cleaning, heat treatment, and testing. Additionally, the pharmaceutical and biotech industries in countries like India, Singapore, South Korea, and Japan are experiencing rapid growth, particularly in biologics, biosimilars, vaccines, and fermentation processes. This expansion is creating a robust demand for high-purity, contamination-resistant mass flow controllers.

Moreover, the rapid industrialization in ASEAN countries is further propelling the adoption of differential-pressure mass flow controllers across various sectors, including chemical processing, energy production, environmental monitoring, and wastewater treatment. The region is also venturing into new energy projects, such as large-scale hydrogen initiatives in Japan and South Korea, green ammonia production in Australia, and solar photovoltaic (PV) manufacturing in China and India, all of which require effective gas flow management.

The competitive landscape of the Asia Pacific market benefits from a cost-effective manufacturing ecosystem, a skilled engineering workforce, and the local availability of electronic components, which together facilitate competitive pricing and quicker product adoption across industries.

### **Market Segmentation Analysis**

The Asia Pacific Differential-Pressure Mass Flow Controller Market can be segmented based on flow rate and application.

**By Flow Rate:** The market is divided into Low, Medium, and High flow rate segments, with the Low flow rate segment leading the market in 2024.

**By Application:** The market is categorized into several sectors, including Semiconductors, Food and Beverage, Chemicals, Pharmaceutical and Healthcare, Oil and Gas, and Others. The Semiconductors segment is expected to dominate the market in 2024.

### **Market Outlook**

Differential-pressure mass flow controllers are crucial for delivering ultra-pure gases with high stability, which is essential to prevent contamination, ensure accurate experimental results, and maintain the integrity of sensitive chemical reactions. These controllers are designed to regulate purity-critical gases such as argon, helium, hydrogen, and high-grade nitrogen. In environments where analytical instruments like mass spectrometers and chromatographs are used, maintaining precise gas flow is vital to avoid fluctuations that could compromise results. Their high accuracy and responsiveness make them indispensable in scientific and high-precision applications.

Industries that produce specialty chemicals and electronic materials are expanding their

capabilities to manufacture high-purity compounds used in batteries, solar materials, optical coatings, and advanced polymers. These processes require controlled atmospheres and ultra-clean gas delivery systems to meet stringent product specifications. Differential-pressure mass flow controllers play a key role in these operations by ensuring consistent flow under varying load conditions, thus safeguarding product quality and minimizing waste. As global research and development activities intensify and industries aim for higher material purity standards, the demand for reliable gas-flow regulation technologies is on the rise. The increasing emphasis on purity-driven manufacturing, laboratory automation, and contamination-free production environments is significantly boosting the differential-pressure mass flow controller market.

## Country Insights

The Asia Pacific Differential-Pressure Mass Flow Controller Market is further segmented by country, including China, Japan, South Korea, India, Australia, and the Rest of APAC. China is anticipated to hold the largest market share in 2024.

The rapid establishment of domestic chip fabrication plants, display panel facilities, and power device manufacturing lines in China necessitates precise gas flow control for processes such as epitaxy, deposition, dry etching, and wafer inspection, leading to a high volume of differential-pressure mass flow controller adoption. Additionally, China's extensive chemical and petrochemical industries contribute significantly to the demand, as modern plants increasingly integrate automated gas-flow management systems to enhance product uniformity, reduce hazardous emissions, and comply with strict environmental regulations. The country's burgeoning hydrogen economy, supported by provincial subsidies and national decarbonization goals, is also expanding the use of these controllers in large-scale electrolyzers and hydrogen storage systems.

## Company Profiles

Key players in the Asia Pacific Differential-Pressure Mass Flow Controller Market include Parker Hannifin Corporation, Avantor Inc, Dwyer Instruments, Inc., Sensirion Holding AG, Teledyne Technologies Inc, Horiba Ltd, Azbil Corp, Axetris AG, MKS Instruments Inc, and Brooks Instrument. These companies are pursuing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their product offerings and increase market share.

## Contents

### **1. INTRODUCTION**

- 1.1 Report Guidance
- 1.2 Market Segmentation

### **2. EXECUTIVE SUMMARY**

- 2.1 Key Insights
- 2.2 Market Attractiveness

### **3. RESEARCH METHODOLOGY**

- 3.1 Secondary Research
- 3.2 Primary Research
  - 3.2.1 Hypothesis formulation:
  - 3.2.2 Macroeconomic factor analysis:
  - 3.2.3 Developing base number:
  - 3.2.4 Data Triangulation:
  - 3.2.5 Country-level data:

### **4. DIFFERENTIAL-PRESSURE MASS FLOW CONTROLLER MARKET LANDSCAPE**

- 4.1 Market Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
  - 4.3.1 List of Vendors in the Value Chain

### **5. ASIA PACIFIC DIFFERENTIAL-PRESSURE MASS FLOW CONTROLLER MARKET - KEY MARKET DYNAMICS**

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

### **6. DIFFERENTIAL-PRESSURE MASS FLOW CONTROLLER MARKET - ASIA**

## **PACIFIC MARKET ANALYSIS**

6.1 Asia Pacific Differential-Pressure Mass Flow Controller Market Revenue (US\$ Million), 2024 - 2031

6.2 Asia Pacific Differential-Pressure Mass Flow Controller Market Forecast and Analysis

## **7. ASIA PACIFIC DIFFERENTIAL-PRESSURE MASS FLOW CONTROLLER MARKET REVENUE ANALYSIS - BY FLOW RATE**

### **7.1 Low**

#### **7.1.1 Overview**

7.1.2 Low: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

### **7.2 Medium**

#### **7.2.1 Overview**

7.2.2 Medium: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

### **7.3 High**

#### **7.3.1 Overview**

7.3.2 High: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## **8. ASIA PACIFIC DIFFERENTIAL-PRESSURE MASS FLOW CONTROLLER MARKET REVENUE ANALYSIS - BY APPLICATION**

### **8.1 Semiconductors**

#### **8.1.1 Overview**

8.1.2 Semiconductors: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

### **8.2 Food and Beverage Industry**

#### **8.2.1 Overview**

8.2.2 Food and Beverage Industry: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

### **8.3 Chemicals**

#### **8.3.1 Overview**

8.3.2 Chemicals: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

### **8.4 Pharmaceutical and Healthcare Industry**

#### 8.4.1 Overview

8.4.2 Pharmaceutical and Healthcare Industry: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

#### 8.5 Oil and Gas

##### 8.5.1 Overview

8.5.2 Oil and Gas: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

#### 8.6 Others

##### 8.6.1 Overview

8.6.2 Others: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

### **9. ASIA PACIFIC DIFFERENTIAL-PRESSURE MASS FLOW CONTROLLER MARKET - COUNTRY ANALYSIS**

#### 9.1 Asia Pacific

9.1.1 Asia Pacific Differential-Pressure Mass Flow Controller Market Revenue and Forecast and Analysis - by Country

9.1.1.1 Asia Pacific Differential-Pressure Mass Flow Controller Market Revenue and Forecast and Analysis - by Country

9.1.2.2 China: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.1.2.2.1 China: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Flow Rate

9.1.2.2.2 China: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Application

9.2.3.3 Japan: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2.3.3.1 Japan: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Flow Rate

9.2.3.3.2 Japan: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Application

9.3.4.4 South Korea: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3.4.4.1 South Korea: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Flow Rate

9.3.4.4.2 South Korea: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Application

9.4.5.5 India: Asia Pacific Differential-Pressure Mass Flow Controller Market -

## Revenue and Forecast, 2021 - 2031 (US\$ Million)

### 9.4.5.5.1 India: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Flow Rate

### 9.4.5.5.2 India: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Application

### 9.5.6.6 Australia: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

#### 9.5.6.6.1 Australia: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Flow Rate

#### 9.5.6.6.2 Australia: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Application

### 9.6.7.7 Rest of APAC: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

#### 9.6.7.7.1 Rest of APAC: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Flow Rate

#### 9.6.7.7.2 Rest of APAC: Asia Pacific Differential-Pressure Mass Flow Controller Market Share - by Application

## 10 COMPETITIVE LANDSCAPE

### 10.1 Heat Map Analysis by Key Players

### 10.2 Company Market Share Analysis, 2024

## 11 INDUSTRY LANDSCAPE

### 11.1 Overview

### 11.2 New Product Development

### 11.3 Merger and Acquisition

### 11.4 Other Strategic Developments

## 12 COMPANY PROFILES

### 12.1 Parker Hannifin Corporation

#### 12.1.1 Key Facts

#### 12.1.2 Business Description

#### 12.1.3 Products and Services

#### 12.1.4 Financial Overview

#### 12.1.5 SWOT Analysis

#### 12.1.6 Key Developments

## 12.2 Avantor Inc

### 12.2.1 Key Facts

### 12.2.2 Business Description

### 12.2.3 Products and Services

### 12.2.4 Financial Overview

### 12.2.5 SWOT Analysis

### 12.2.6 Key Developments

## 12.3 Dwyer Instruments, Inc.

### 12.3.1 Key Facts

### 12.3.2 Business Description

### 12.3.3 Products and Services

### 12.3.4 Financial Overview

### 12.3.5 SWOT Analysis

### 12.3.6 Key Developments

## 12.4 Sensirion Holding AG

### 12.4.1 Key Facts

### 12.4.2 Business Description

### 12.4.3 Products and Services

### 12.4.4 Financial Overview

### 12.4.5 SWOT Analysis

### 12.4.6 Key Developments

## 12.5 Teledyne Technologies Inc

### 12.5.1 Key Facts

### 12.5.2 Business Description

### 12.5.3 Products and Services

### 12.5.4 Financial Overview

### 12.5.5 SWOT Analysis

### 12.5.6 Key Developments

## 12.6 Horiba Ltd

### 12.6.1 Key Facts

### 12.6.2 Business Description

### 12.6.3 Products and Services

### 12.6.4 Financial Overview

### 12.6.5 SWOT Analysis

### 12.6.6 Key Developments

## 12.7 Azbil Corp

### 12.7.1 Key Facts

### 12.7.2 Business Description

### 12.7.3 Products and Services

- 12.7.4 Financial Overview
- 12.7.5 SWOT Analysis
- 12.7.6 Key Developments
- 12.8 Axetris AG
  - 12.8.1 Key Facts
  - 12.8.2 Business Description
  - 12.8.3 Products and Services
  - 12.8.4 Financial Overview
  - 12.8.5 SWOT Analysis
  - 12.8.6 Key Developments
- 12.9 MKS Instruments Inc
  - 12.9.1 Key Facts
  - 12.9.2 Business Description
  - 12.9.3 Products and Services
  - 12.9.4 Financial Overview
  - 12.9.5 SWOT Analysis
  - 12.9.6 Key Developments
- 12.10 Brooks Instrument
  - 12.10.1 Key Facts
  - 12.10.2 Business Description
  - 12.10.3 Products and Services
  - 12.10.4 Financial Overview
  - 12.10.5 SWOT Analysis
  - 12.10.6 Key Developments

## **13. APPENDIX**

- 13.1 About The Insight Partners

## List Of Tables

### LIST OF TABLES

Table 1. Asia Pacific Differential-Pressure Mass Flow Controller Market Segmentation

Table 2. List of Vendors

Table 3. Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 5. Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 6. Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 7. China: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 8. China: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 9. Japan: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 10. Japan: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 11. South Korea: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 12. South Korea: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 13. India: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 14. India: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 15. Australia: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 16. Australia: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 17. Rest of APAC: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 18. Rest of APAC: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 19. Heat Map Analysis by Key Players

## List Of Figures

### LIST OF FIGURES

Figure 1. Asia Pacific Differential-Pressure Mass Flow Controller Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: Differential-Pressure Mass Flow Controller Market

Figure 4. Asia Pacific Differential-Pressure Mass Flow Controller Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Asia Pacific Differential-Pressure Mass Flow Controller Market Revenue (US\$ Million), 2024 - 2031

Figure 7. Asia Pacific Differential-Pressure Mass Flow Controller Market Share (%) - by Flow Rate, 2024 and 2031

Figure 8. Low: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Medium: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. High: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 11. Asia Pacific Differential-Pressure Mass Flow Controller Market Share (%) - by Application, 2024 and 2031

Figure 12. Semiconductors: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. Food and Beverage Industry: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 14. Chemicals: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 15. Pharmaceutical and Healthcare Industry: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Oil and Gas: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. Others: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Asia Pacific Differential-Pressure Mass Flow Controller Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 19. China: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Japan: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. South Korea: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. India: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. Australia: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 24. Rest of APAC: Asia Pacific Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Company Market Share Analysis, 2024

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