

Differential-Pressure Mass Flow Controller Market Size and Forecast (2021 - 2031), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Flow Rate (Low, Medium, and High), Application (Semiconductors, Food and Beverages Industry, Chemicals, Pharmaceutical and Healthcare Industry, Oil and Gas, and Others), and Geography (North America, Europe, Asia Pacific, Middle East and Africa, and South and Central America)

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Abstracts

The Differential-pressure mass flow controller market size was valued at US\$ 135.49 million in 2024 and is projected to reach US\$ 177.38 million by 2031; it is expected to grow at a CAGR of 4.1% during 2025–2031.

Industries handling specialty chemicals and electronic materials are expanding their capacity for producing 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 achieve desired product specifications. Differential-pressure mass flow controllers support these operations by maintaining consistent flow under varying load conditions, thereby safeguarding product quality and reducing waste. As research and development activities intensify globally and industries strive for higher material purity standards, demand for dependable gas-flow regulation technologies continues to rise. The increasing focus on purity-driven manufacturing, laboratory automation, and contamination-free production environments is driving

significant growth in the differential-pressure mass flow controller market.

Spain, the Netherlands, Switzerland, Belgium, and Poland are among the major nations contributing to the differential-pressure mass flow controller market in the Rest of Europe. In Spain and Portugal, significant investments in renewable energy and green hydrogen production drive the deployment of differential-pressure mass flow controllers in electrolyzer systems, industrial gas storage facilities, and energy research centers. In the Netherlands and Belgium, advanced chemical clusters and port-based logistics hubs require precise flow controllers for gas handling, emissions monitoring, and the production of specialty materials. Nordic countries—particularly Sweden, Denmark, and Finland—emphasize clean technology, fuel cell development, and sustainable industrial processes, creating demand for high-efficiency flow controllers in environmental laboratories and green-energy pilot projects. Switzerland's high-precision industries, including medical devices, specialty electronics, and pharmaceutical research and development, require ultra-stable differential-pressure mass flow controllers for laboratory instruments, microreactors, and aseptic production. Central and Eastern European nations, such as Poland, the Czech Republic, Hungary, and Slovakia, are strengthening their automotive, electronics, and battery manufacturing ecosystems, driving the uptake of industrial automation and advanced flow control technologies. The focus on decarbonization, regulatory tightening, and competitive industrialization supports differential-pressure mass flow controller market expansion across the broader European landscape.

Taiwan, Singapore, Malaysia, Thailand, Indonesia, Vietnam, and New Zealand are among the prominent countries contributing to the differential-pressure mass flow controller market in the Rest of Asia Pacific. Taiwan's world-class semiconductor manufacturing and IC packaging industries generate demand for high-accuracy flow controllers across wafer processing, high-purity gas distribution, and backend assembly. Singapore's advanced biotechnology, pharmaceutical production, and chemical processing sectors require precise gas flow control for sterile production, laboratory instrumentation, and small-scale pilot plants. Malaysia and Vietnam are rapidly expanding as hubs for electronics and component manufacturing, leading to a greater adoption of differential-pressure mass flow controllers in PCB assembly, microelectronic packaging, and cleanroom automation. Thailand and Indonesia's food and beverage processing industries use flow controllers for modified-atmosphere packaging, fermentation control, and sterilization processes. New Zealand's life sciences, environmental research, and agricultural technology sectors rely on precision flow systems for atmospheric testing, laboratory automation, and controlled-environment experimentation. Meanwhile, rising investments across ASEAN in hydrogen pilots,

refinery modernization, wastewater treatment, and industrial automation are supporting the adoption of digital and high-efficiency mass controllers across multiple industries.

Horiba Ltd., Sensirion Holding AG, Teledyne Technologies Inc., Brooks Instrument, Parker Hannifin Corp., Azbil Corp., Axetris AG, Dwyer Instruments, Inc., Avantor Inc., and MKS Instruments Inc. are among the key Differential-pressure mass flow controller market players that are profiled in this market study.

The overall Differential-pressure mass flow controller market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the Differential-pressure mass flow controller market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the Differential-pressure mass flow controller market.

Reason to buy

Saves and reduces time required for identifying the market growth, size, leading players, and segments in the global Differential-Pressure Mass Flow Controller market.

Highlights key business priorities to assist companies in realigning their business strategies

Emphasizes key findings and recommendations that uncover emerging industry trends in the global Differential-Pressure Mass Flow Controller market, enabling stakeholders across the value chain to craft effective long-term strategies

Develop/modify business expansion plans by analyzing substantial growth prospects in mature and emerging markets

Scrutinizes in-depth global Differential-Pressure Mass Flow Controller market trends, along with factors driving the market, as well as those hindering it

Enhances the decision-making process by understanding the strategies that underpin commercial interest with respect to client products, segmentation, pricing, and distribution

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