

# Europe Thermal Mass Flow Controller Market Size and Forecast (2021 - 2031)

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## Abstracts

The Europe Thermal Mass Flow Controller Market is projected to grow significantly, reaching an estimated US\$ 163.7 million by 2031, up from US\$ 116.9 million in 2024, with a compound annual growth rate (CAGR) of 5.1% anticipated from 2025 to 2031.

## Executive Summary and Market Analysis

The growth of the thermal mass flow controller market in Europe is fueled by a combination of established industrial activities, strong regulatory frameworks, and the region's commitment to energy efficiency and sustainability. Key sectors such as chemical processing, pharmaceuticals, food and beverage, automotive, aerospace, and renewable energy rely on precise and reliable flow measurement instruments to maintain quality control, ensure safety, and comply with stringent environmental regulations. The European Union's proactive approach to emissions control and sustainable production is prompting manufacturers to upgrade their facilities with advanced technologies, including thermal mass flow controllers that enhance efficiency and minimize waste.

The shift towards Industry 4.0 and digital transformation in European manufacturing is also a significant driver for the adoption of thermal mass flow controllers. As factories integrate smart sensors, IoT-enabled devices, and automated systems, these controllers become essential for real-time flow monitoring and process optimization. Europe's tradition of precision engineering, particularly in countries like Germany, Switzerland, and the Netherlands, has created a strong demand for high-performance instrumentation. Many companies are replacing older mechanical or volumetric flow devices with thermal mass flow controllers, which offer superior accuracy, faster response times, and lower maintenance requirements.

Additionally, the ongoing energy transition and the emergence of hydrogen economy projects in countries such as Germany, the UK, and the Nordic nations are expanding the application scope of mass flow controllers in gas flow regulation and blending. While market growth in Europe may be more gradual compared to rapidly industrializing regions, it remains steady, driven by modernization, regulatory compliance, and a focus on precision and sustainability.

### **Market Segmentation Analysis**

The Europe Thermal Mass Flow Controller Market is segmented by flow rate into Low, Medium, and High categories, with the Low segment leading the market in 2024. By application, the market is divided into sectors such as Semiconductors, Food and Beverage, Chemicals, Pharmaceuticals and Healthcare, Oil and Gas, and Others, with the Others segment dominating in 2024.

### **Market Outlook**

The rise of green energy and advanced manufacturing applications presents substantial growth opportunities for the thermal mass flow controller market as industries transition towards cleaner and more efficient technologies. These controllers are critical in hydrogen energy production, fuel cell systems, and carbon capture processes, where precise gas flow control is essential for optimal reaction efficiency and safety. In hydrogen production, whether through electrolysis or reforming, thermal mass flow controllers manage the exact quantities of gases like hydrogen, oxygen, and nitrogen to maintain desired process ratios and ensure consistent output quality. Similarly, in fuel cell applications, they control the flow of fuel and oxidants, enhancing the performance and reliability of cell stacks.

As nations commit to net-zero emissions and invest in green hydrogen infrastructure, the demand for high-precision flow control devices is increasing. Thermal mass flow controllers, which measure mass flow independently of temperature or pressure changes, are particularly suited for dynamic and high-efficiency energy systems. This trend extends to emerging clean technologies such as biogas and carbon capture, which require precise gas control to optimize conversion rates and minimize emissions.

Advanced manufacturing sectors, including additive manufacturing, biotechnology, pharmaceuticals, and nanomaterials, are also expanding the applications of thermal mass flow controllers. In 3D printing and materials processing, these controllers provide

the precise gas flow necessary for controlled atmospheres during critical processes. In biotechnology and pharmaceuticals, they regulate gases in fermenters and bioreactors, ensuring consistent flow vital for product purity and reaction yields. As manufacturing technologies advance, the demand for real-time, adaptive flow control systems is rapidly increasing, positioning manufacturers who offer customized solutions favorably in the market.

## **Country Insights**

The market is segmented by country into Germany, France, the United Kingdom, Italy, Russia, and the Rest of Europe, with the Rest of Europe holding the largest share in 2024. Countries like the Netherlands, Switzerland, Belgium, and the Nordic nations are significant contributors to the thermal mass flow controller market. Northern European countries are leading in clean energy innovations, while the Netherlands and Belgium have strong chemical and logistics sectors that depend on accurate gas flow measurement. Switzerland is known for its pharmaceutical precision, demanding high accuracy and reliability. Eastern European countries are also adopting industrial automation, contributing to market growth.

## **Company Profiles**

Key players in the Europe Thermal Mass Flow Controller Market include Parker Hannifin Corporation, Avantor Inc, Dwyer Instruments, Sensirion Holding AG, Teledyne Technologies Inc, Horiba Ltd, Azbil Corp, Axetris AG, MKS Instruments Inc, and Brooks Instrument. These companies are pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions.

## 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. THERMAL 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. EUROPE THERMAL 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. THERMAL MASS FLOW CONTROLLER MARKET - EUROPE MARKET**

## **ANALYSIS**

6.1 Europe Thermal Mass Flow Controller Market Revenue (US\$ Million), 2024 - 2031

6.2 Europe Thermal Mass Flow Controller Market Forecast and Analysis

## **7. EUROPE THERMAL MASS FLOW CONTROLLER MARKET REVENUE ANALYSIS - BY FLOW RATE**

### **7.1 Low**

#### **7.1.1 Overview**

7.1.2 Low: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

### **7.2 Medium**

#### **7.2.1 Overview**

7.2.2 Medium: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

### **7.3 High**

#### **7.3.1 Overview**

7.3.2 High: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## **8. EUROPE THERMAL MASS FLOW CONTROLLER MARKET REVENUE ANALYSIS - BY APPLICATION**

### **8.1 Semiconductors**

#### **8.1.1 Overview**

8.1.2 Semiconductors: Europe Thermal 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: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

### **8.3 Chemicals**

#### **8.3.1 Overview**

8.3.2 Chemicals: Europe Thermal 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: Europe Thermal 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: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.6 Others

8.6.1 Overview

8.6.2 Others: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

## **9. EUROPE THERMAL MASS FLOW CONTROLLER MARKET - COUNTRY ANALYSIS**

9.1 Europe

9.1.1 Europe Thermal Mass Flow Controller Market Revenue and Forecast and Analysis - by Country

9.1.1.1 Europe Thermal Mass Flow Controller Market Revenue and Forecast and Analysis - by Country

9.1.2.2 Germany: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.1.2.2.1 Germany: Europe Thermal Mass Flow Controller Market Share - by Flow Rate

9.1.2.2.2 Germany: Europe Thermal Mass Flow Controller Market Share - by Application

9.2.3.3 France: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2.3.3.1 France: Europe Thermal Mass Flow Controller Market Share - by Flow Rate

9.2.3.3.2 France: Europe Thermal Mass Flow Controller Market Share - by Application

9.3.4.4 United Kingdom: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3.4.4.1 United Kingdom: Europe Thermal Mass Flow Controller Market Share - by Flow Rate

9.3.4.4.2 United Kingdom: Europe Thermal Mass Flow Controller Market Share - by Application

9.4.5.5 Italy: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4.5.5.1 Italy: Europe Thermal Mass Flow Controller Market Share - by Flow Rate

- 9.4.5.5.2 Italy: Europe Thermal Mass Flow Controller Market Share - by Application
- 9.5.6.6 Russia: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
  - 9.5.6.6.1 Russia: Europe Thermal Mass Flow Controller Market Share - by Flow Rate
  - 9.5.6.6.2 Russia: Europe Thermal Mass Flow Controller Market Share - by Application
- 9.6.7.7 Rest of Europe: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
  - 9.6.7.7.1 Rest of Europe: Europe Thermal Mass Flow Controller Market Share - by Flow Rate
  - 9.6.7.7.2 Rest of Europe: Europe Thermal 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. Europe Thermal Mass Flow Controller Market Segmentation

Table 2. List of Vendors

Table 3. Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 5. Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 6. Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 7. Germany: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 8. Germany: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 9. France: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 10. France: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 11. United Kingdom: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 12. United Kingdom: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 13. Italy: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 14. Italy: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 15. Russia: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 16. Russia: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 17. Rest of Europe: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 18. Rest of Europe: Europe Thermal 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. Europe Thermal Mass Flow Controller Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: Thermal Mass Flow Controller Market

Figure 4. Europe Thermal Mass Flow Controller Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Europe Thermal Mass Flow Controller Market Revenue (US\$ Million), 2024 - 2031

Figure 7. Europe Thermal Mass Flow Controller Market Share (%) - by Flow Rate, 2024 and 2031

Figure 8. Low: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Medium: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. High: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 11. Europe Thermal Mass Flow Controller Market Share (%) - by Application, 2024 and 2031

Figure 12. Semiconductors: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

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

Figure 14. Chemicals: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

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

Figure 16. Oil and Gas: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. Others: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Europe Thermal Mass Flow Controller Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 19. Germany: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. France: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. United Kingdom: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Italy: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. Russia: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 24. Rest of Europe: Europe Thermal Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Company Market Share Analysis, 2024

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