

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), Sensor Technology (Thermal Mass Flow, Coriolis Mass Flow, and Differential-Pressure Mass Flow), Application (Semiconductors, Food and Beverage, Chemicals, Pharmaceutical and Healthcare, Oil and Gas, and Others)

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Abstracts

The mass flow controller market size was valued at US\$ 1.16 billion in 2024 and is expected to reach US\$ 1.70 billion by 2031; it is estimated to record a CAGR of 5.8% from 2025 to 2031.

The surge in demand for mass flow controllers (MFCs) in high-purity gas applications is significantly driving growth in the MFC market, particularly within the semiconductor and specialty chemical industries. These sectors require highly precise and contaminant-free gas delivery to ensure the integrity of processes and end products. In semiconductor manufacturing, for example, even trace impurities can lead to defects in microchips, making ultra-precise flow control and cleanliness essential. MFCs are uniquely capable of meeting these stringent requirements by offering accurate, repeatable, and stable control of gas flow rates.

Additionally, the ongoing miniaturization of semiconductor devices and the push toward advanced nodes (e.g., 3 nm and below) demand even tighter control of gas flows in processes such as chemical vapor deposition (CVD) and etching. Specialty chemical

manufacturing also depends heavily on high-purity gases for catalyst reactions and material synthesis, further expanding the need for reliable MFC systems. As automation and digitalization in process industries increase, smart MFCs with integrated diagnostics and remote control capabilities are becoming more valuable. These trends are collectively driving robust investment in advanced MFC technologies, positioning them as a cornerstone in maintaining operational precision, safety, and quality across high-purity gas applications.

According to the World Energy Investment 2025 report, the Middle East has some of the world's most cost-effective oil and gas resources, accounting for approximately 30% of global oil output and 17% of worldwide natural gas production in 2024. Saudi Arabia's upstream oil and gas investment is the biggest in the area, expected to reach around US\$ 40 billion by 2025, nearly 15% higher than in 2015. Overall, the Middle East plans to invest over US\$ 130 billion in oil and gas supply by 2025, accounting for almost 15% of the global total. Middle Eastern and Asian national oil corporations now account for over 40% of upstream investment, up from 25% in 2015. The growing investment in oil production creates demand for mass flow controllers to maintain precise flow control in refining, petrochemical processing, and natural gas applications. Mass flow controllers enable accurate measurement and regulation of gas and liquid flows, improving efficiency and safety in complex processes. Countries such as Saudi Arabia, UAE, and South Africa are heavily investing in downstream infrastructure and petrochemical expansion, which require mass flow controllers for advanced flow management. As these nations pursue industrial growth and integrate automation into production facilities, mass flow controllers become indispensable for maintaining operational consistency and regulatory compliance. The combined effect of ongoing hydrocarbon activity and increasing industrial complexity is increasing the demand for mass flow controllers to maintain precise control over productivity is fueling the market.

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 mass flow controller market players that are profiled in this market study.

The overall 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 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 mass flow controller market.

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