

Middle East & Africa Differential-Pressure Mass Flow Controller Market Size and Forecast (2021 - 2031)

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Abstracts

The Middle East and Africa Differential-Pressure Mass Flow Controller Market is projected to grow from US\$ 7.0 million in 2024 to US\$ 8.4 million by 2031, reflecting a compound annual growth rate (CAGR) of 2.9% from 2025 to 2031. This growth is driven by the region's ongoing industrial modernization and diversification efforts, particularly in the oil and gas sector, as well as emerging industries.

Executive Summary and Market Analysis

The Middle East is a pivotal region for the global oil and gas industry, with countries like Saudi Arabia, the UAE, Qatar, and Kuwait leading the charge in modernizing both upstream and downstream operations. This modernization is fostering the adoption of advanced flow control technologies, which are essential for processes such as gas separation, refinery operations, liquefied natural gas (LNG) processing, and petrochemical production. As these nations pursue diversification strategies—such as Saudi Vision 2030 and UAE Vision 2050—there is a notable increase in non-oil industrial projects. These projects span various sectors, including specialty chemicals, food processing, advanced materials, and water desalination, all of which require precise flow control to optimize gas usage, ensure operational safety, and comply with international quality standards.

The region is also making strides in hydrogen production, particularly with green hydrogen initiatives in Saudi Arabia and the UAE. These projects necessitate the use of differential-pressure mass flow controllers for applications such as gas purity control, electrolyzer testing, and fuel cell integration. Meanwhile, Africa's industrial growth, although gradual, is expanding the demand for modern instrumentation across sectors like mining, smelting, fertilizer production, cement manufacturing, and mineral

processing.

Tightening regulations regarding emissions, flare gas management, and environmental monitoring are prompting industries in both the Middle East and Africa to adopt more reliable mass flow control systems. Additionally, increased investments in research centers, technical universities, industrial automation training, and partnerships with global original equipment manufacturers (OEMs) are further supporting the integration of differential-pressure mass flow controllers in the region.

Market Segmentation Analysis

The Middle East and Africa Differential-Pressure Mass Flow Controller Market can be segmented by flow rate and application. By flow rate, the market is divided into Low, Medium, and High categories, with the Low segment leading the market in 2024. In terms of application, the market is segmented into several industries, including Semiconductors, Food and Beverage, Chemicals, Pharmaceutical and Healthcare, Oil and Gas, and Others, with the Others segment dominating in 2024.

Market Outlook

Modern production lines are increasingly adopting robotics, precision machining systems, automated inspection tools, and digitally coordinated workflows, all of which require stable, accurate, and predictable gas flow control. Differential-pressure mass flow controllers play a crucial role in enabling real-time regulation of gases used in various processes, including coating, heat treatment, plasma applications, additive manufacturing, and controlled atmosphere production. Their ability to maintain consistent flow conditions, even under fluctuating system pressures, is vital for minimizing process variability and ensuring high-quality output. As industries strive for higher throughput and stricter precision tolerances, the reliance on advanced flow-control technologies is expected to grow alongside automation initiatives.

The transition to smart factories under the Industry 4.0 paradigm is further driving the adoption of digitally connected flow-control devices. Differential-pressure mass flow controllers equipped with communication protocols such as EtherCAT, Modbus, and Profinet facilitate seamless integration into automated control loops and centralized monitoring systems. Their compatibility with predictive analytics platforms enhances operational efficiency by enabling early detection of anomalies, reducing downtime, and optimizing energy usage. As manufacturing ecosystems become increasingly interconnected, leveraging cloud analytics, digital twins, and real-time performance

dashboards, the role of high-performance gas flow controllers becomes even more critical. This convergence of automation, digitalization, and precision control is propelling market growth.

Country Insights

Geographically, the Middle East and Africa Differential-Pressure Mass Flow Controller Market is segmented into the United Arab Emirates, Saudi Arabia, South Africa, and the Rest of Middle East and Africa. In 2024, the Rest of Middle East and Africa held the largest market share. Countries such as Qatar, Oman, Kuwait, and Bahrain are heavily investing in refining expansions, natural gas processing, and petrochemical diversification operations that rely on accurate gas flow measurement for process consistency and emission control.

Emerging hydrogen and synthetic fuel initiatives in Oman and Qatar are also increasing the demand for precision mass controllers in electrolyzers, pilot plants, and testing laboratories. Across East and West Africa, sectors such as food processing, brewing, fertilizer production, and cement manufacturing are gradually modernizing their production lines, leading to a greater reliance on differential-pressure mass flow controllers for controlled atmospheric conditions and gas-fed reactions. Nations like Kenya, Nigeria, and Egypt are enhancing their environmental monitoring infrastructure, creating opportunities for differential-pressure mass flow controllers in air-quality assessments, laboratory testing, and gas analysis platforms. The expansion of research universities, medical laboratories, and agricultural technology institutes across the region is generating new applications for precision gas control in climate simulation, crop science research, and sterilization systems. Continuous improvements in industrial automation, coupled with increasing public and private investment in the energy and manufacturing sectors, are driving steady market growth across the region.

Company Profiles

Key players in the Middle East and Africa 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 employing various strategies such as 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. MIDDLE EAST & AFRICA 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 - MIDDLE

EAST & AFRICA MARKET ANALYSIS

6.1 Middle East & Africa Differential-Pressure Mass Flow Controller Market Revenue (US\$ Million), 2024 - 2031

6.2 Middle East & Africa Differential-Pressure Mass Flow Controller Market Forecast and Analysis

7. MIDDLE EAST & AFRICA DIFFERENTIAL-PRESSURE MASS FLOW CONTROLLER MARKET REVENUE ANALYSIS - BY FLOW RATE

7.1 Low

7.1.1 Overview

7.1.2 Low: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Medium

7.2.1 Overview

7.2.2 Medium: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.3 High

7.3.1 Overview

7.3.2 High: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. MIDDLE EAST & AFRICA DIFFERENTIAL-PRESSURE MASS FLOW CONTROLLER MARKET REVENUE ANALYSIS - BY APPLICATION

8.1 Semiconductors

8.1.1 Overview

8.1.2 Semiconductors: Middle East & Africa 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: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Chemicals

8.3.1 Overview

8.3.2 Chemicals: Middle East & Africa 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: Middle East & Africa 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: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.6 Others

8.6.1 Overview

8.6.2 Others: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. MIDDLE EAST & AFRICA DIFFERENTIAL-PRESSURE MASS FLOW CONTROLLER MARKET - COUNTRY ANALYSIS

9.1 Middle East & Africa

9.1.1 Middle East & Africa Differential-Pressure Mass Flow Controller Market Revenue and Forecast and Analysis - by Country

9.1.1.1 Middle East & Africa Differential-Pressure Mass Flow Controller Market Revenue and Forecast and Analysis - by Country

9.1.2 United Arab Emirates: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.1.2.2.1 United Arab Emirates: Middle East & Africa Differential-Pressure Mass Flow Controller Market Share - by Flow Rate

9.1.2.2.2 United Arab Emirates: Middle East & Africa Differential-Pressure Mass Flow Controller Market Share - by Application

9.2.3.3 Saudi Arabia: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2.3.3.1 Saudi Arabia: Middle East & Africa Differential-Pressure Mass Flow Controller Market Share - by Flow Rate

9.2.3.3.2 Saudi Arabia: Middle East & Africa Differential-Pressure Mass Flow Controller Market Share - by Application

9.3.4.4 South Africa: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3.4.4.1 South Africa: Middle East & Africa Differential-Pressure Mass Flow Controller Market Share - by Flow Rate

9.3.4.4.2 South Africa: Middle East & Africa Differential-Pressure Mass Flow Controller Market Share - by Application

9.4.5.5 Rest of Middle East & Africa: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.4.5.5.1 Rest of Middle East & Africa: Middle East & Africa Differential-Pressure Mass Flow Controller Market Share - by Flow Rate

9.4.5.5.2 Rest of Middle East & Africa: Middle East & Africa 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. Middle East & Africa Differential-Pressure Mass Flow Controller Market Segmentation

Table 2. List of Vendors

Table 3. Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

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

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

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

Table 7. United Arab Emirates: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 8. United Arab Emirates: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 9. Saudi Arabia: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 10. Saudi Arabia: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 11. South Africa: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 12. South Africa: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 13. Rest of Middle East & Africa: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Flow Rate

Table 14. Rest of Middle East & Africa: Middle East & Africa Differential-Pressure Mass Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 15. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. Middle East & Africa Differential-Pressure Mass Flow Controller Market Segmentation - Country

Figure 2. PEST Analysis

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

Figure 4. Middle East & Africa Differential-Pressure Mass Flow Controller Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Middle East & Africa Differential-Pressure Mass Flow Controller Market Revenue (US\$ Million), 2024 - 2031

Figure 7. Middle East & Africa Differential-Pressure Mass Flow Controller Market Share (%) - by Flow Rate, 2024 and 2031

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

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

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

Figure 11. Middle East & Africa Differential-Pressure Mass Flow Controller Market Share (%) - by Application, 2024 and 2031

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

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

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

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

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

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

Figure 18. Middle East & Africa Differential-Pressure Mass Flow Controller Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 19. United Arab Emirates: Middle East & Africa Differential-Pressure Mass Flow

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

Figure 20. Saudi Arabia: Middle East & Africa Differential-Pressure Mass Flow

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

Figure 21. South Africa: Middle East & Africa Differential-Pressure Mass Flow Controller

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

Figure 22. Rest of Middle East & Africa: Middle East & Africa Differential-Pressure Mass

Flow Controller Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. Company Market Share Analysis, 2024

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