

# **Thermal 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 thermal mass flow controller market size was valued at US\$ 719.86 million in 2024 and is projected to reach US\$ 1,058.96 million by 2031; it is expected to grow at a CAGR of 5.9% during 2025–2031.

The growing demand for customisation, miniaturisation, and multi-gas capabilities in industrial and research applications is creating a powerful opportunity for the expansion of the thermal mass flow controller market. As industries increasingly diversify their production processes, there is a clear shift toward tailored flow control solutions that can meet unique operational requirements, including gas type, flow rate, environmental conditions, and system size. Customisable thermal mass flow controllers—offering configurable flow ranges, communication protocols, and calibration profiles—allow users to achieve precise performance across multiple applications, from large-scale chemical production to compact analytical instruments. Miniaturisation has become a crucial trend as laboratories, semiconductor fabs, and manufacturers of portable analytical devices seek smaller, lightweight, and energy-efficient flow controllers that do not compromise accuracy or responsiveness. The use of MEMS (Micro-Electro-Mechanical

Systems) technology is enabling TMFC producers to develop compact yet highly sensitive flow sensors that deliver fast response times and stable readings in low-flow and micro-flow environments. These innovations are expanding the applicability of thermal mass flow controllers in areas such as medical devices, gas chromatography, biotechnology, and space-constrained research systems, where traditional bulky controllers are impractical. By catering to the rising demand for compact, versatile, and application-specific devices, TMFC manufacturers can strengthen their presence in both industrial and scientific markets.

In the US, the thermal mass flow controller market is driven primarily by the nation's robust high-technology industries, strong research infrastructure, and aggressive industrial automation trends. The country is witnessing unprecedented investment in semiconductor manufacturing, boosted by initiatives such as the CHIPS and Science Act, which has triggered the construction of new fabrication facilities across states such as Arizona, Texas, and New York. Each fab requires a large number of precision gas control instruments, making mass flow controllers an indispensable component. The biotechnology, pharmaceutical, and advanced materials sectors also represent major demand areas due to their need for exact gas and liquid flow control in cleanroom and laboratory environments. The US is a frontrunner in adopting smart manufacturing and IoT-enabled instrumentation, integrating mass flow controllers into digital control systems for real-time process optimization.

The thermal mass flow controller market in China is one of the largest and fastest-growing globally, driven by rapid industrialization, significant technological investment, and the expansion of high-tech manufacturing. The country dominates semiconductor fabrication, solar panel production, and chemical processing, which requires highly accurate control of gas and liquid flow. Significant government initiatives, including the "Made in China 2025" strategy and investments in renewable energy and hydrogen, are accelerating demand for precision flow instruments in research and industrial applications. Automation and digital manufacturing adoption are rising, prompting factories in China to integrate mass flow controllers into smart and IoT-enabled production lines. The pharmaceutical and biotechnology sectors are expanding, with demanding precise flow control in laboratory processes and pilot-scale manufacturing. China's thermal mass flow controller market benefits from a combination of large-scale domestic demand, technological upgrades, and governmental incentives for clean and high-tech industries, making it a global growth hub for these instruments.

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

The overall thermal 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 thermal 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 thermal 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 Thermal 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 Thermal 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 Thermal 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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