

The World Market Update for Mass Flow Controllers Overview



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The World Market Update for Mass Flow Controllers analyzes the world market for mass flow controllers and provides updates of key segmentation of the world market for mass flow controllers to 2014, with forecasts to 2019. It complements our comprehensive market study *The World Market for Mass Flow Controllers, 2nd Edition*, published in May, 2012. This Market Update includes a technology analysis, 2014 market share and market size data, segmentation of the market by key product types and eight geographic categories, and market growth projections through 2019. Average selling prices are also included – worldwide, by geographic region, and by key types. Specific marketing strategies are provided for suppliers.

Rationale for Study and Objectives

Several suppliers asked us to do this Market Update to more closely track key segments of the mass flow controller market. Our last MFC study was published in 2012, and they wanted an update that would bring them current with 2014 numbers. While this Market Update does not have as much detailed segmentation as the 2012 study, it does bring the market size and market shares current through 2014, with forecasts to 2019. The Market Update also segments the market into the semiconductor, industrial, and lab/research portions. **This is the most up-to-date data available anywhere on the mass flow controller market!**

The objectives met by this Market Update are as follows:

- Determine the 2014 market size in US dollars and unit volumes for mass flow controllers worldwide
- Determine the 2014 market shares of leading suppliers of mass flow controllers worldwide
- Forecast market growth for key types of mass flow controllers through 2019
- Identify factors influencing growth in the mass flow controller market
- Provide a product analysis for the main companies selling into the mass flow controller market
- Provide company profiles of the main suppliers of mass flow controllers
- Provide strategies to manufacturers for selling into the mass flow controller market

Primary Segmentation

This Market Update sizes each of three key market segments for mass flow controllers worldwide and by the eight geographic regions, providing both revenues and unit sales for each.

- Semiconductor
- Industrial
- Laboratory/Research

Geographic Regions

This Market Update divides the worldwide market into the following geographic regions:

- North America (United States and Canada)
- Western Europe
- Eastern Europe/FSU (countries east of Germany and Italy) / (Former Soviet Union)
- Middle East/Africa
- Japan
- China (including Hong Kong and Taiwan)
- Asia/Pacific (without Japan and China)
- Latin America (Mexico, Central and South America)



Additional Segmentation

- Average Selling Price of Mass Flow Controllers Worldwide by Region
- Average Selling Price of Mass Flow Controllers Worldwide by Region by Type

Products and Suppliers

This Market Update provides product analysis and company profiles for the major suppliers of mass flow controllers, and also provides 2014 market shares for major suppliers worldwide and for each of the three key market segments: semiconductor, industrial, and laboratory/research.

Growth Factors and Strategies



This Market Update includes discussion of factors influencing growth in the mass flow controller market, and also provides strategies for selling into the mass flow controller market.

While the semiconductor market is notoriously cyclical, it is still the dominant market segment for mass flow controllers. The industrial and lab/research markets are smaller than the semiconductor market, but their many segments provide longterm applications for mass flow controllers that are not cyclical in the way that semiconductor is. They can provide some predictability for companies that want more stable sales growth. Many MFC suppliers have made strategic decisions to focus on industrial and lab/research markets as a way of reducing the cyclical nature of their business.

This Market Update looks at these three market segments whole, thus their growth rates reflect an overall average of many sub-segments. While the averaged growths of the industrial and lab/research markets are somewhat lower than the semiconductor market, some specific application segments and regions have faster growth. This Market Update includes a table of Industrial and Lab/Research Applications. For comprehensive market data breakouts of these and much other segmentation for mass flow controllers, we invite you to inquire about our 2012 market study, *The World Market for Mass Flow Controllers, 2nd Edition*.

Flow Research

Dr. Jesse Yoder is President of Flow Research Inc., a company he founded in 1998. Dr. Yoder has 26 years' experience as a writer and analyst in process control and instrumentation.

Since 1990, he has written more than 180 market research studies, most of them in the area of flow and instrumentation. Some of the recent and currently-scheduled Flow Research studies are listed below. These and other available studies are described at www.flowstudies.com.



Dr. Yoder has also written more than 240 articles on flow and instrumentation for trade journals. Links to these can be found at www.flowarticles.com.

Flow Research is the only market research company whose primary mission is to research flowmeter, calibration, pressure, temperature, level, and other process control instrumentation markets. Flow Research studies can be purchased by anyone interested in the topics. We create these studies through interviews with suppliers, distributors, and end-users. Topics include all of the flowmeter technologies – both new and traditional – as well as pressure transmitters; temperature sensors and transmitters, infrared thermometers and thermal imagers; analytical instrumentation; selected API-certified valves; and studies specifically focused on certain major markets for flowmeters such as the oil and gas markets. Flow Research also started a working group focusing on flowmeter calibration, and is working on studies of flowmeter calibration labs. For more information on Flow Research, please visit our website at www.flowresearch.com.

Recent and currently scheduled Flow Research studies Websites

New-Technology Flowmeter Studies

The World Market for Coriolis Flowmeters, 4th Edition

www.flowcoriolis.com

The World Market for Magnetic Flowmeters, 5th Edition

www.flowmags.com

The World Market for Ultrasonic Flowmeters, 4th Edition

www.flowultrasonic.com

The World Market for Vortex Flowmeters, 5th Edition

www.flowvortex.com

The World Market for Thermal Flowmeters

www.flowthermal.com

The World Market for Mass Flow Controllers, 2nd Edition

www.flowmfc.com

Traditional Technology Flowmeter Studies

The World Market for Pressure Transmitters, 4th Edition

www.worldpressure.com

The World Market for Positive Displacement Flowmeters, 2nd Edition www.flowpd.com
 The World Market for Turbine Flowmeters, 2nd Edition www.flowturbine.com

Emerging Technology Flowmeter Studies

The World Market for Multiphase Flowmeters, 2nd Edition www.flowmultiphase.com
 Multiphase: Module A: The World Market for Watercut Meters www.flowmultiphase.com

Mass Flow Controllers

The World Market for Mass Flow Controllers, 2nd Edition www.flowmfc.com
 The World Market Update for Mass Flow Controllers www.flowmfc.com

Cross-Technology Flowmeter Studies

Volume X: The World Market for Flowmeters, 5th Edition www.flowvolumex.com
 Volume X: Module A: Strategies, Industries, and Applications www.flowvolumex.com
 The World Market for Natural Gas and Gas Flow Measurement, 3rd Ed. www.gasflows.com
 The World Market for Liquefied Natural Gas (LNG) www.flowlng.com
 The World Market for Oil and Oil Flow Measurement www.oilflows.com

Calibration

Core Study: The World Market for Gas Flow Calibration Facilities www.flowcalibration.org
 Module A: The World Market for Liquid Flow Calibration Facilities www.flowcalibration.org

Custom work, users surveys, and other market news and analysis

In addition to off-the-shelf studies, Flow Research specializes in **custom projects** for companies who are looking to expand their product line, merge with or acquire another company, or understand their customer needs better. We also conduct **user surveys** that include a detailed analysis of customer perceptions.

We are very experienced at doing user surveys that reveal hidden problems, emerging applications, and new product requirements. We gather the data and analyze it in light of our wealth of data on instrumentation. We then formulate strategies that help you achieve your goals.

We work with companies individually to **formulate strategies** that will help them succeed in an increasingly complex world. Dr. Yoder has been working in process control since 1986 and creating market research studies since 1990. He and his team have studied hundreds of companies during this time and have advised most of the top flowmeter suppliers on market and product strategies.

Flow Research also offers the **Worldflow Monitoring Service** that provides subscribers with quarterly updates on the flow and energy industries in the *Market Barometer* and the *Energy Monitor*, plus Flash Reports and access to other information. The *Market Barometer* covers news and analysis for flowmeters, level measurement devices and some other process industry instrumentation, plus calibration. The *Energy Monitor* covers news and analysis for the oil & gas, refining, power, and renewables industries. More details are available at www.worldflow.com.

Staff Profiles

Belinda Burum, Vice President, worked in journalism and advertising before entering high tech 18 years ago as a writer, marketing communications manager, and customer references consultant. She joined Flow Research in 2002, and has worked on many projects, studies and publications.

Norm Weeks, Senior Market Analyst, joined Flow Research in November 2004 after 24-years with Verizon specializing in innovative solutions for major enterprises, introducing new products and lifecycle management, and product marketing. He also served as Director of the Urban Fellows Institute in New York. At Flow Research, his contributions in development, research and writing are significant, and include involvement with studies, custom projects, White Papers, and Worldflow's *Energy Monitor* and *Market Barometer*.

Leslie Buchanan, Research Assistant and Publication Production Assistant, joined Flow Research in March 2010, with skills from a variety of work and life experiences. Early on, she took on management of the contacts database, assistance with customer liaison, and developing and implementing standards for our publication formats. She has since become increasingly involved in many capacities with Flow Research studies, Worldflow and other publications.

Nicole Riordan, Marketing Assistant, joined Flow Research in 2009. In addition to her previous work experience, Flow Research benefits from her continuing education. She capably handles a wide variety of essential office functions, and also assists with our marketing and direct outreach efforts.

Vicki Tuck, Administrative Assistant, joined Flow Research in June, 2012. She has experience in both the fast-paced law firms of Boston and in various nonprofit organizations. She assists with administrative and other tasks, including database, outreach, and Worldflow publications.

Christina Glaser, Website Maintenance and Research Assistant, is a seasoned software programmer, systems architect, and developer with significant website experience. She joined Flow Research in October 2010 assisting with various tasks, and soon took on the major role of refreshing, improving and maintaining our many company websites.

Rich West, Database and Research Assistant, joined Flow Research in 2014. He has experience in computer- and finance-related businesses. He works with our database and outreach, assisting with customer liaison and providing input and updates to manufacturer databases that are maintained for a variety of research purposes.



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The Flow Research Founding Sponsor Program

To produce studies that most closely match our clients' needs, Flow Research instituted the Founding Sponsor Program. This program enables companies who wish to participate at a high level in a study's research to influence its scope and segmentation. In addition, Founding Sponsors receive regular updates from Flow Research on study progress, and receive a significant discount on the standard retail price of the study.

Procedure: Early in the planning phase of a study, Founding Sponsors receive a proposal that includes the proposed segmentation. Founding Sponsors can propose additional segmentation, and can also suggest changes to the proposed segmentation. While the decision to adopt particular segmentation ultimately lies with Flow Research, and is based on input from all contributors, we will do our best to accommodate the specific needs of each of our clients.

During the research phase of a study, Flow Research will issue regular reports that provide updates on the progress of the research. These reports will be sent to Founding Sponsors, who are then invited to provide any additional input or comments into the study.

Being a Founding Sponsor requires making an early commitment to purchase the study. However, in return, Founding Sponsors receive a significant discount off the regular price of the study. Payment can be made either in one amount at the beginning of the study, or split into two, with the second payment due upon delivery of the study.

For additional details, or to find out how the Founding Sponsor program applies to any particular study, please contact Flow Research. We look forward to working with you!

If you have any questions about the Founding Sponsor program, please contact Norm Weeks at +1 781 245-3200, or norm@flowresearch.com.

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