

21.2% Gap in Electrical Equipment Plant Growth — ALEX Intelligence 2026

21.2% Gap in Plant Growth — Where AI Hardware Expands

Houston leads, Hartford lags — the physical layer of AI is shifting fast

THE DATA

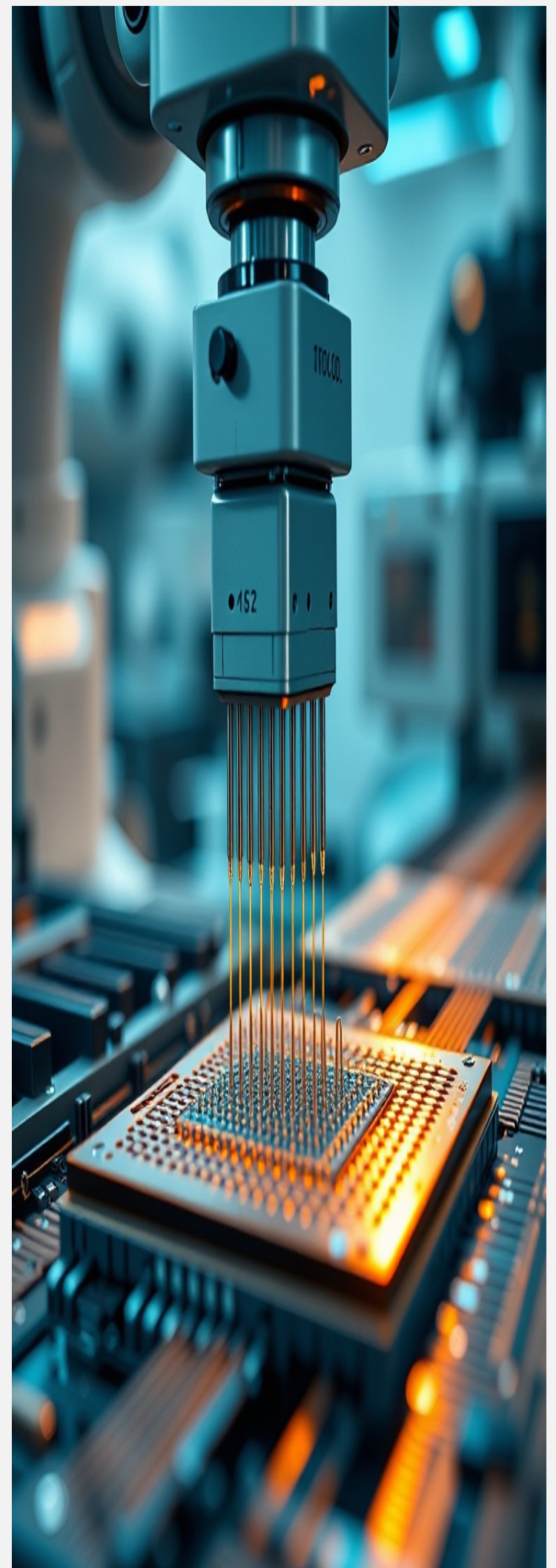
21.2%

Spread Between the Fastest and Slowest Growth in Electrical Equipment Plants (2022)

The gap between Houston-Pasadena-The Woodlands, TX and Hartford-West Hartford-East Hartford, CT reflects where physical infrastructure for AI semiconductors is truly scaling.

This 21.2% spread is not just a statistic — it's a geographic signal. It reveals where new electrical equipment manufacturing, a core component of AI chip production, is gaining momentum. The fastest-growing metros are not just near existing fabs; they're becoming hubs for the entire supply chain, from packaging to testing. This divergence suggests that AI hardware expansion is not uniform — it's being driven by localized investment in physical infrastructure.

Source: U.S. Census Bureau, County Business Patterns 2019 and 2022, NAICS 335 (Electrical equipment, appliance, and component manufacturing) • ALEX Intelligence computation
<https://alex-companies.com/data/2026-09-16-ai-semis-dive-335-msa>



01

AI Infrastructure Is Physical First

The data shows that AI's future isn't just in code or models — it's in factories. The 21.2% gap between Houston and Hartford isn't about software; it's about where new electrical equipment plants are being built. These plants are the physical backbone of AI chips, producing components like power management systems, sensors, and interconnects. The growth in Houston reflects a broader trend: regions with strong semiconductor ecosystems are attracting not just design talent, but the physical infrastructure needed to build and test next-gen AI hardware.



02

The South Is Becoming the New Semiconductor Core

Houston's position in the top 10 for growth — despite not being a traditional silicon valley — signals a shift in the physical layer of AI. The South is no longer just a consumer of semiconductor products; it's becoming a center for manufacturing and integration. This aligns with NIST's recent \$30M in MEP grants to support semiconductor innovation across multiple states, including Texas. The data confirms that investment in physical layer resilience is moving beyond legacy hubs and into new geographies with strong infrastructure, workforce, and logistics networks.

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