

#1 of 5: Share of Texas Electronic Component Plants in the Top Three Texas Metro

**91.4% of Texas semiconductors
in 3 metros**

Source: ALEX Intelligence · Published October 24, 2026

THE DATA

91.4%

Share of Texas Electronic Component Plants in the Top Three Texas Metros (2022)

This figure represents the concentration of NAICS 3344 manufacturing facilities across Texas's largest tech hubs.

The data reveals that over nine in ten Texas electronic component plants are located within just three metropolitan areas. This extreme clustering suggests that the state's semiconductor ecosystem is not only growing but consolidating around a small number of high-capacity, infrastructure-rich zones. The implications for workforce development, supply chain resilience, and long-term R&D investment are profound.

Source: U.S. Census Bureau, County Business Patterns 2022, NAICS 3344 (Semiconductor and other electronic component manufacturing) • ALEX Intelligence computation
<https://alex-companies.com/data/2026-10-24-ai-semis-conc-3344-msa>



01

Fabrication is not scalable without infrastructure

The dominance of Dallas-Fort Worth, Austin, and Houston in semiconductor manufacturing is not accidental. These metros possess the deep infrastructure—power grids, water systems, transportation networks, and skilled labor pools—required to sustain high-precision, high-energy fabrication. The 91.4% concentration reflects not just market choice but physical and logistical necessity. No new fab can succeed without this foundation, making location a non-negotiable determinant of success.



02

The next wave will be about integration, not just scale

As the physical layer of AI hardware matures, the competitive edge will shift from raw fab capacity to advanced packaging, heterogeneous integration, and co-design. The current concentration in the top three metros may create a bottleneck: while these regions lead in volume, they may also face congestion in talent, land, and permitting. The real innovation frontier—AI-optimized chiplet architectures and memory stacking—will demand new sites with different spatial and regulatory profiles, potentially opening space for secondary hubs in Texas and beyond.

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