

Factsheet

The Dutch Semiconductor Ecosystem:

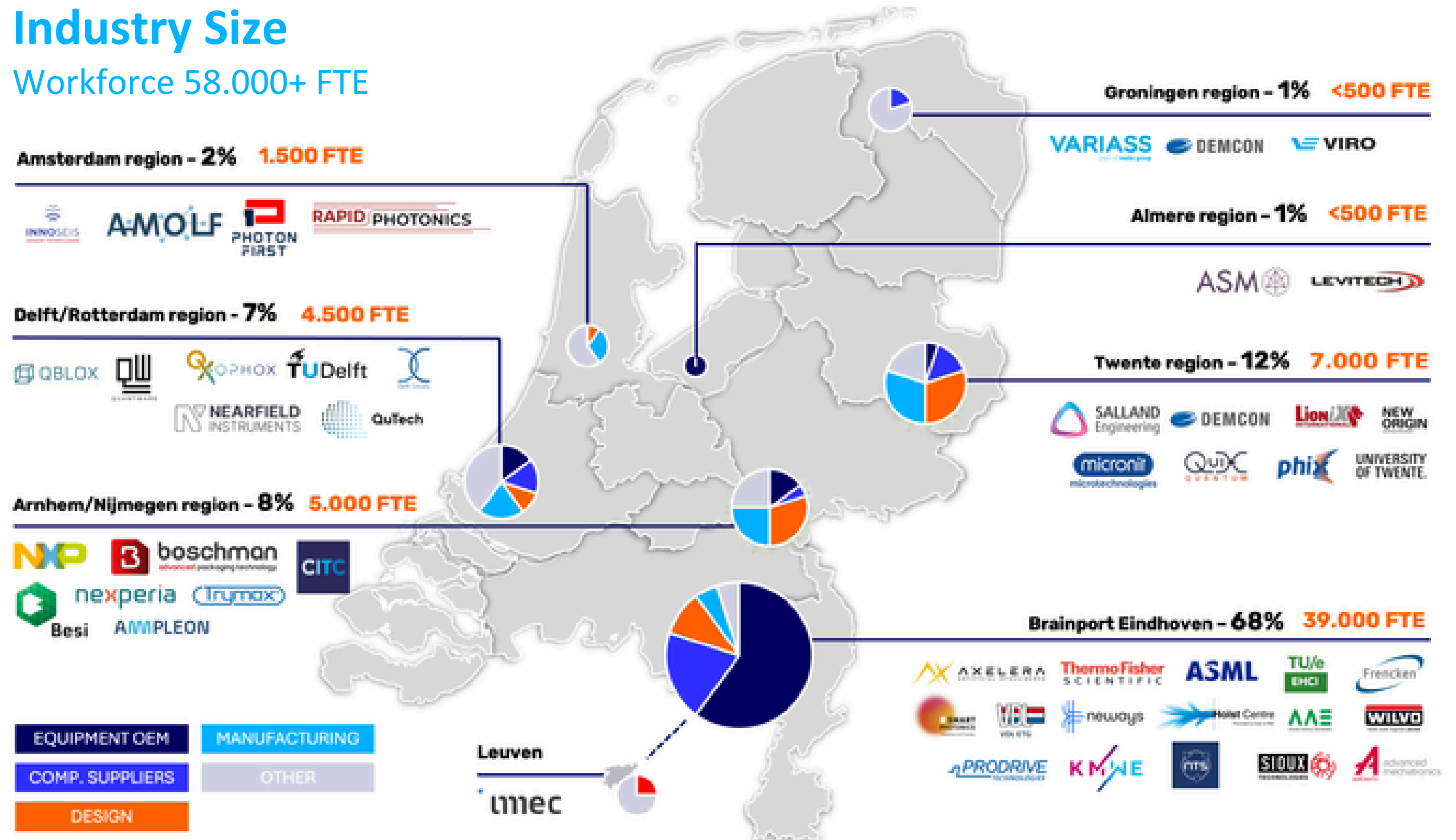
More Than One Success Story

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The Netherlands is home to one of **the world's most advanced and complete semiconductor ecosystems**. Far beyond its internationally recognised industry leaders, the Dutch ecosystem brings together equipment manufacturers, chip designers, photonics companies, materials suppliers, research institutes and innovative startups across the entire semiconductor value chain.

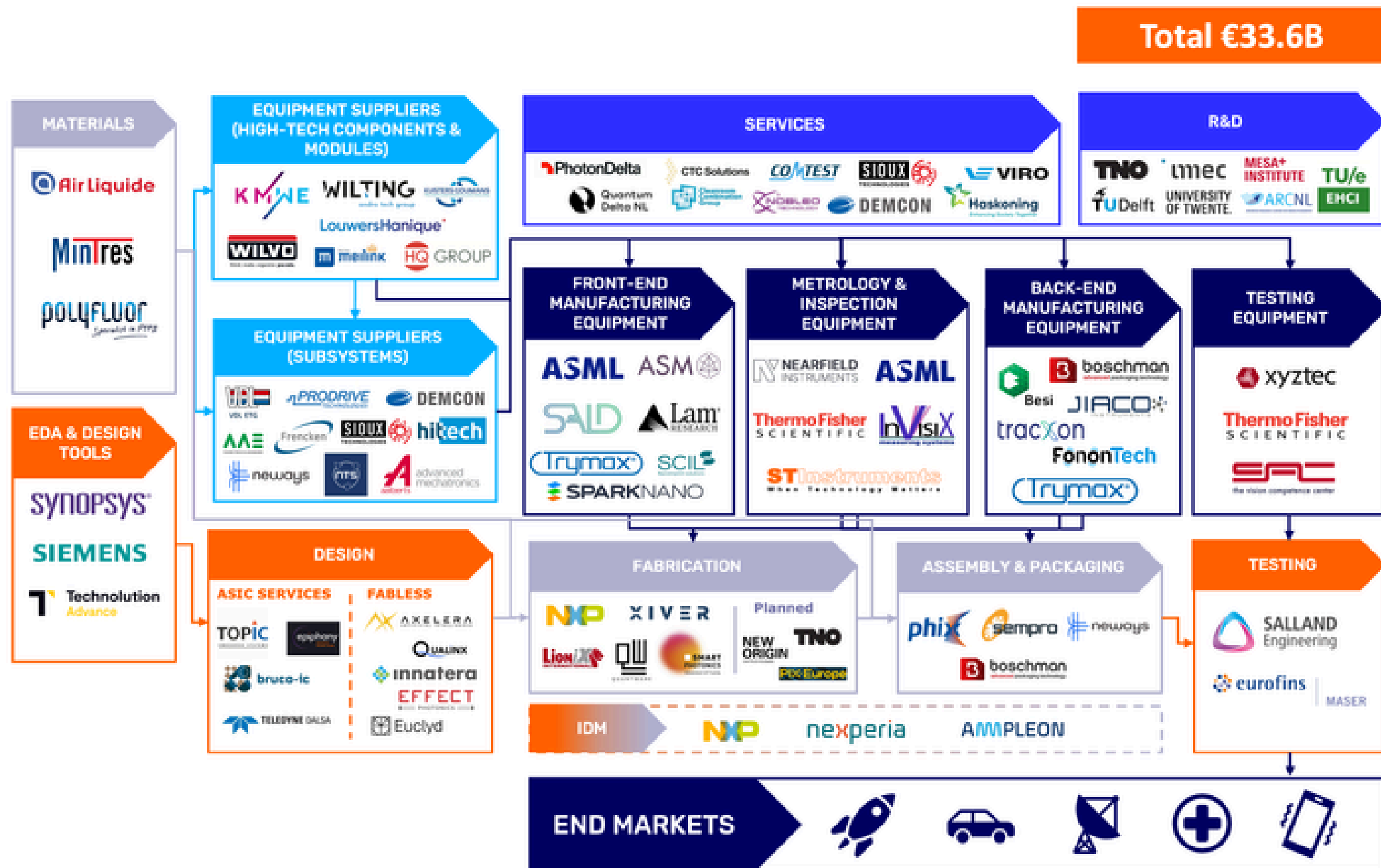
Industry Size

Workforce 58.000+ FTE



National Value Chain Overview 2025

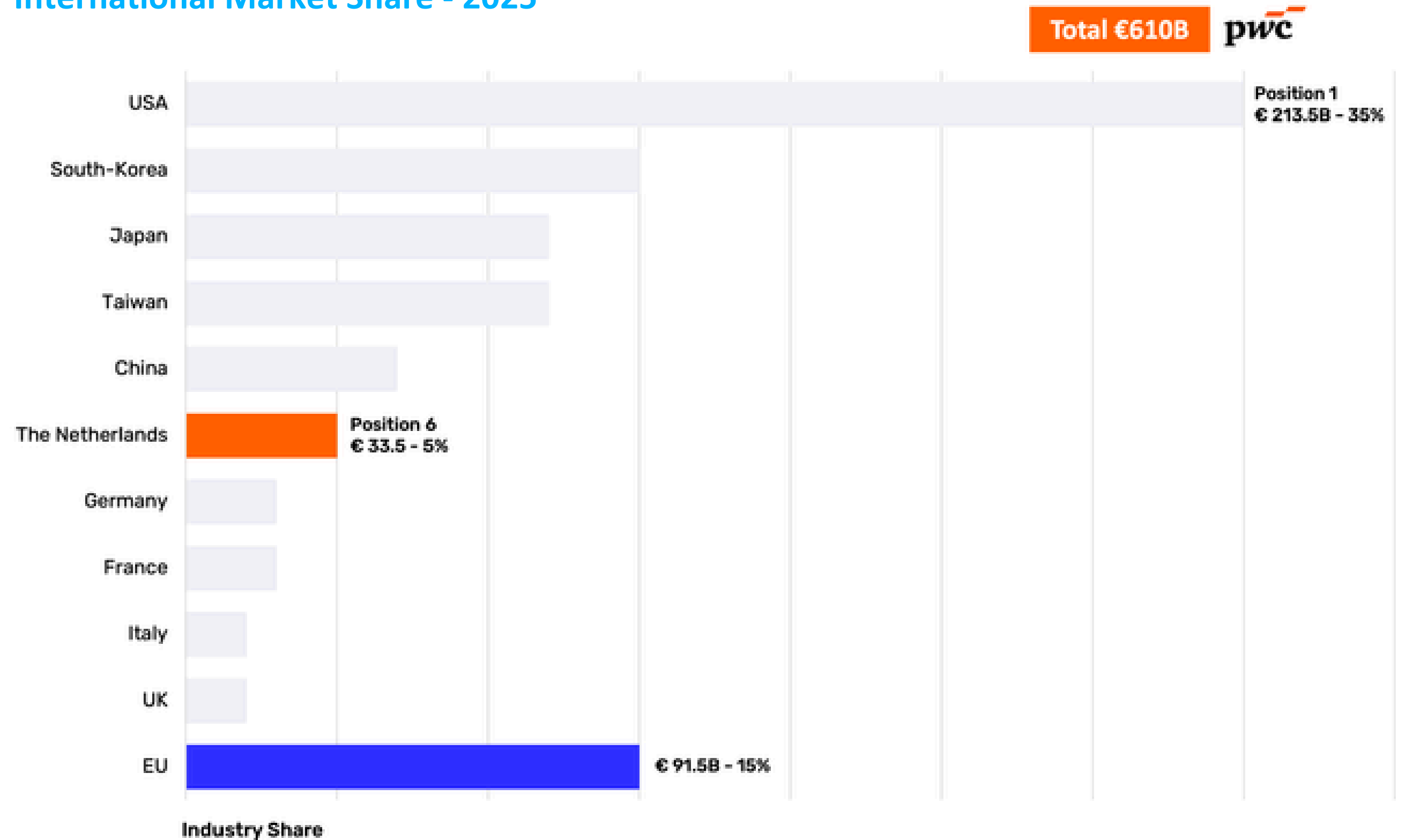
With an estimated economic value of **€33.6 billion** and more than **58,000 employees**, the sector plays a vital role in both the Dutch and European economy. Equipment manufacturing is the largest segment, representing almost **€20 billion**, while design, EDA and IDM activities contribute another **€6 billion**.



The Netherlands a unique and strategic position

The Netherlands accounts for approximately **33%** of the European semiconductor industry and holds a **5%** share of the global market, **ranking sixth worldwide**. The country is also home to the world's only supplier of leading-edge lithography equipment required for manufacturing the most advanced semiconductor nodes, giving the Netherlands a unique and strategic position within the global semiconductor landscape.

International Market Share - 2025

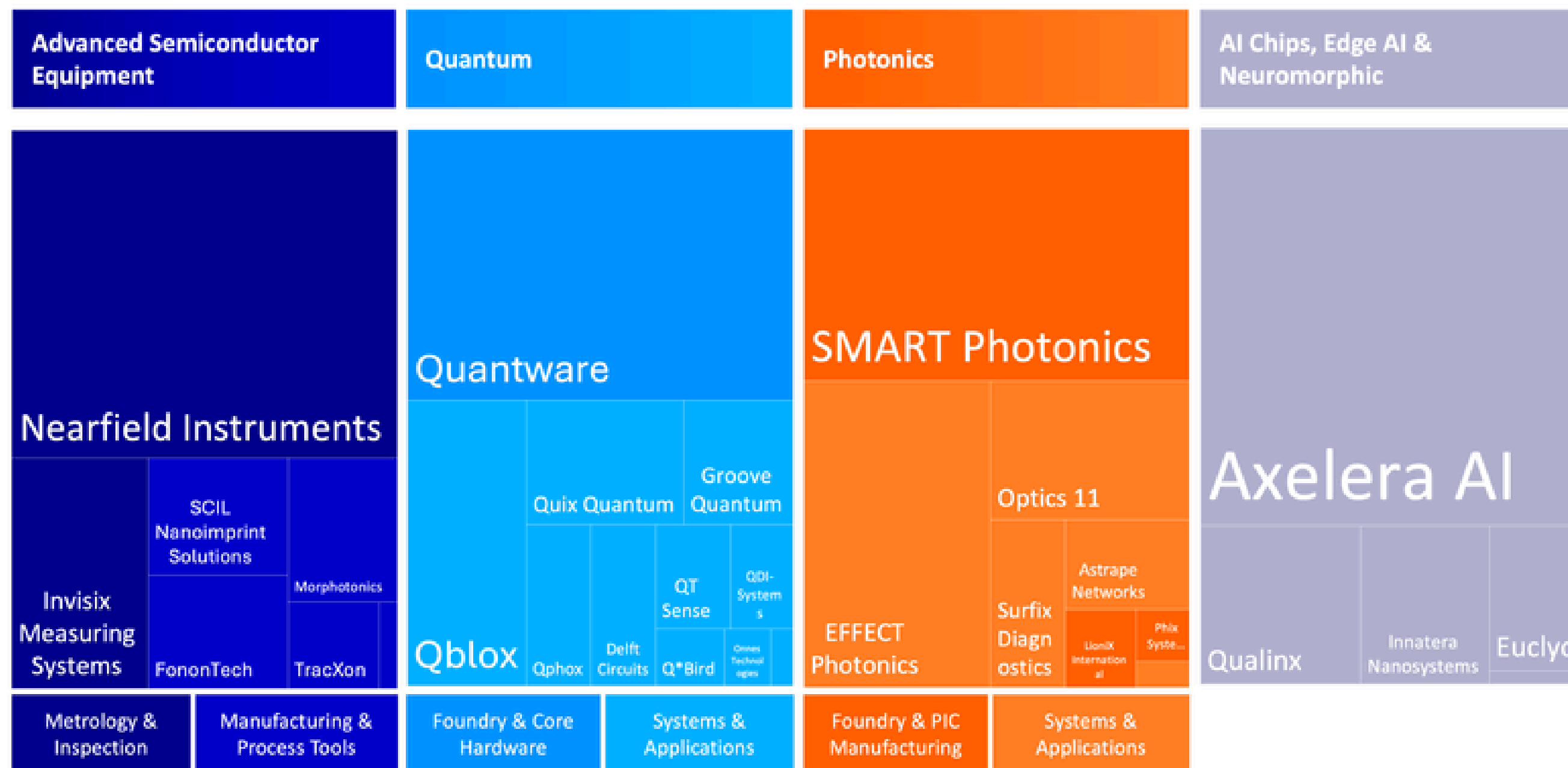


The ecosystem continues to innovate

At the same time, the ecosystem continues to innovate. **Future key enablers** in Metrology & Inspection, Photonics, and Edge AI already represent more than **€4 billion** in value and position the Netherlands at the forefront of next-generation semiconductor technologies.

Next generation semiconductor firms

Combined value, june 2026: €4B+



Insight

Together, these strengths demonstrate that the Dutch semiconductor ecosystem is a strategic European asset with global impact.





Ondersteund door



Consortium partners



Associated Partners

