

How Tariffs Are Threatening PC Industry Recovery, But ITAD May Be Entering New Phase of Strategic Relevance

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By [David Daoud](#): In my decades covering the PC industry, I have never seen anything resembling what is taking place today, thanks to the ongoing escalation in the tariff war initiated by Washington. Late last year and early this year, the industry began to sense a long-awaited recovery after three grueling years of contraction. The anticipated phase-out of Windows 10 in October 2025 and its replacement with Windows 11, growing enterprise IT budgets, and most importantly the surge in AI innovation and interest, had sparked strong optimism. These factors and the technologies that promise to substantially improve usage models, resulted in a sense of optimism among industry leaders. Optimism was palpable in the first quarter of 2025, with IDC reporting global PC shipments growing 4.9% year over year, reaching more than 63 million units. But the positive first quarter result is not likely to last. Instead, escalating tariffs have left the industry at a standstill, bracing for a potentially devastating downturn as the months progress.

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