



AI PCs vs. Refurbished Systems: Diverging Trajectories in a Saturated Market

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Despite big leaps in technology-AI chips, smarter performance, better battery life- consumers remain distant from AI PCs. Sales from major brands like Dell and HP continue to stall, and it's becoming clear that the average buyer isn't convinced the latest features are worth the upgrade.

Meanwhile, refurbished PCs are experiencing strong uptake, placing them either as a new source of revenue for OEMs active in that market or as competitors for OEMs that are not a participant. Once seen as second-best, they're now mainstream-and in many cases, first choice. Many buyers in the transactional markets, essentially comprised of consumers and small businesses, are choosing used over new, not just to save money, but because the value is clearer and the performance is still solid.

In this report, we profile the refurbished PC market and its ongoing strong performance, contrasting it with the new system market that continues to struggle. The strong demand for good used systems brings both risk and opportunity. For PC makers and OEMs, there is the urgency to adopt a more solid secondary market strategy, without which they risk losing ground to a market they no longer control. For ITAD companies, it may first be seen as a rare chance to move beyond back-end logistics and play a front-line role in the device economy. But doing that will take more than good inventory-it'll require a whole new mindset.

A third category of players is emerging a disruptive factor, albeit not a visible way. We are seeing the rise of specialized online marketplaces that offer curated, warranty-backed devices-posing a real challenge to traditional PC makers and retailers.

This report looks at what's driving the change, and what it'll take for both sides to stay in



the game.

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