Issue 6: Chips, Capital, and Consumer Devices: What They Mean for ITAD

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The past week has delivered three developments that matter for the ITAD and electronics recycling sectors. Semiconductor earnings confirmed the widening gap between AI-fueled hyperscalers and the steadier, but more accessible, enterprise data center segment. Private equity entered the sector with Tailwind Capital's majority investment in DMD Systems Recovery, signaling growing outside interest but also raising questions about alignment with ITAD's compliance-heavy reality. And Apple unveiled the iPhone 17 Pro and Pro Max, devices that push sustainability and security forward while tightening Apple's grip on end-of-life recovery.

Taken together, these events highlight where ITAD executives should focus on. Many things come to mind, including chasing new opportunities in advanced hardware, adjusting to investor pressure, and handling devices that are simultaneously more recyclable, more secure, and harder to repair. Details below.

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