IntelliTAD 12: January 2026 ITAD Outlook: More Capacity, More Rules, Higher Material Stakes

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Building on momentum established in 2025, January 2026 marked a transition from planning to execution across the IT asset disposition (ITAD) and electronics recycling sector. Activity during the month was defined by formal facility commissioning, completed transactions, and regulatory provisions entering force, and less by broad capacity expansion. Operators advanced their European footprints, while manufacturers and recycling partners formalized collaborations aimed at securing critical material flows. In parallel, newly effective state, national, and EU rules on battery stewardship, repairability, data protection, and cross-border waste movements reinforced a more structured compliance environment. Battery recycling initiatives continued to evolve through organizational repositioning and safety guidance, while product design signals from CES 2026 highlighted ongoing trade-offs between disposability, repairability, and end-of-life risk.

Also this week’s releases:

Alongside this week’s IntelliTAD, Compliance Standards released three research notes addressing policy risk, secondary market dynamics, and strategic capital flows shaping the ITAD and electronics recycling sector in 2026.

Policy Advisory: Trade, Supply Security, and Enterprise Caution:
A new advisory examines how early-2026 U.S. policy signals, including trade uncertainty, supply-security framing, and shifting enterprise spending behavior, are indirectly influencing ITAD operations and secondary materials recovery. The analysis focuses on second-order impacts rather than politics, highlighting implications for pricing volatility, cross-border flows, compliance expectations, and domestic recovery strategies. Client access: Link here.

Secondary Market & ITAM Benchmarking Outlook
Drawing on Sage Sustainable Electronics’ latest enterprise benchmarking data, this report

analyzes structural changes in secondary IT markets. It explores the surge in server resale values tied to AI infrastructure demand, stabilization of device lifecycles, evolving data-sanitization practices, and the growing gap between ESG narratives and operational sustainability decisions. The findings point to a maturing ITAD market increasingly shaped by component economics, security controls, and disciplined lifecycle management. Client access: Link here.

Strategic Capital: Mitsubishi Materials and Elemental's U.S. E-Scrap Platform
The third report evaluates Mitsubishi Materials' minority investment in Elemental Group's U.S. e-scrap operations via Colt Recycling. Rather than treating the deal as a simple M&A event, the analysis places it in the context of downstream metals strategy, feedstock security, and the gradual convergence of ITAD, electronics recycling, and secondary smelting. The report outlines both the strategic logic and the execution challenges embedded in this type of vertical alignment. Client access: Link here.

Subscribers can access the full reports, including detailed analysis, data tables, and forward-looking implications, via the links below.

- Takeways: Mitsubishi Materials investment in Elemental's US e-scrap platform
- Takeaways: Secondary Market Dynamics and ITAM Strategy Shifts: 2026 Outlook
- Advisory Note: Tariffs, Supply Security, and Enterprise Caution Set the Operating Context for ITAD and Secondary Materials Recovery in 2026

Companies mentioned in this IntelliTAD report:

SK tes,
BMW Group,
Encory,
Korea Zinc,
Alta Resource Technologies,
Paladin EnviroTech,
R&L Recycling,
Reconomy,
RLG,
LiBCycle,
Honda Motor Co.,
Princeton NuEnergy,

Datagroup,
AFB Group,
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Tech Defenders,
The Battery Network

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