

Client Brief: Iron Mountain Q4 2025 - Growth Analysis, Execution Risks, and Industry Benchmarks

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Iron Mountain reported exceptional Q4 2025 results for its Asset Lifecycle Management business, with 70% total revenue growth, 56% organic growth, and guidance projecting \$850 million in 2026 ALM revenue. The company added 90 Fortune 1000 customers year-over-year and disclosed that memory component remarketing pricing alone created a significant quarterly revenue swing, demonstrating the margin impact of downstream commodity markets.

However, beneath the growth story lie structural vulnerabilities that create strategic implications for the ITAD industry. The earnings call revealed heavy exposure to component pricing volatility, project-based revenue representing 40% of the business with no contracted recurring streams, cross-sell saturation with 38% Fortune 1000 penetration already achieved, and conservative Treasury contract guidance suggesting execution complexity management didn't fully disclose.

This brief analysis examines what scale players are achieving, the dependencies embedded in their growth models, and where execution risks create opportunities for differentiated operators.

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