



Research: Memory Inflation, Component Spillover, and ITAD Harvesting Strategy, 2026-2027

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The hardware market that ITAD operators work in has evolved fundamentally in 2026. Driven by changes tied to the “AI vortex,” the component market is undergoing substantial transformation. Memory prices have doubled. Enterprise SSD supply won’t normalize until late 2027 at the earliest. The closure of the Strait of Hormuz has cut off helium supply critical to chip fabrication, stalled hyperscaler data center builds, and driven freight costs high enough to break international remarketing economics. China’s rare earth export controls - with a key suspension expiring November 10, 2026 - are adding licensing friction to the same semiconductor supply chains that determine what secondary market hardware is worth. This report breaks down twelve component categories by what to expect on pricing and availability, and what to do operationally, organized by urgency tier.

Paying subscribers get the full intelligence report with component-by-component forecast tables, confidence-weighted pricing logic, geopolitical scenario models through 2027, and the complete ITAD strategy framework for positioning your operation through this cycle.

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