IntelliTAD #17: Europe’s ITAD opportunity and hyperscalers’ ITAD

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In this issue of IntelliTAD, we draw from two research/report tracks published this week.

Europe’s ITAD and Circularity Sector

The first track is on the Western Europe’s ITAD opportunity following a two-week visit of companies in the region, their HQs and facilities. We put together four separate reports on France, Belgium, the Netherlands, and Germany, and a fifth report synthesizing them into a single regional investment profile. Figures are drawn from discussions and interviews conducted by the author during a trip to the region in June 2026, as well as data from the underlying national producer-responsibility bodies, government statistics agencies, and company disclosures cited in each country report, and are presented here at the level of detail relevant to a capital-allocation decision rather than a market-structure study. Readers seeking country-specific sourcing, caveats, and data vintage should consult the underlying Euro Reports.

While we produced a super short video (see it on the right column), here is the overall investment summary for those of you interested or curious about Europe:

- First, a data center and AI infrastructure supercycle spanning all four countries is building the highest-value future decommissioning feedstock in the sector’s history, and the capital behind it is already disclosed and trackable.
- Second, regulation across the bloc is moving in the same direction: pricing repairability, reuse, and documented lifecycle outcomes into commercial value ahead of the U.S. market, which favors platforms that control lifecycle data and asset access over those that simply process volume.
- Third, capital has already begun consolidating three of the four markets through recognizable models (private equity, captive bank financing, infrastructure funds), while the fourth and largest, Germany, has not yet been priced by any of them, the clearest arbitrage in the region.

Access these following reports:

- Regional summary
- France’s ITAD and circularity sector
- Belgium
- The Netherlands
- Germany

As a supporting client, please feel free to book a private briefing should you need to discuss the profiles of these markets and their risk and opportunities.

Hyperscalers’ ITAD

We reviewed Google and Amazon sustainability reports for the year 2025. These are two of the largest technology companies on earth, moving more retired computer hardware in a single year than most ITAD companies see in a decade. Both reports get important things right, especially on data-center circularity and use of recognizable standards. Google is harvesting millions of components from retired servers, prioritizing internal reuse before resale, and backing Zero Waste to Landfill claims with UL certification instead of soft self-reporting. Amazon’s cloud business shows comparable strengths: quantified CO2e avoided through reuse, fewer new hard-drive purchases via consolidation, and AI-driven disassembly paired with certified Zero Waste programs across device assembly sites and suppliers. This is the internal-reuse-first hierarchy ITAD firms have pushed for years, now operating at hyperscale.

The weaknesses are equally clear and directly relevant to ITAD. Google reports big reuse and resale numbers without revealing total decommissioned volume, so its circularity rate can’t be calculated, and its Zero Waste metrics exclude leased colo sites where a lot of real-world hardware sits. Once assets leave Google’s custody, there’s no visible chain of custody or downstream certification. Amazon’s retail and marketplace flows are enormous but unsegmented-hundreds of millions of Outlet and ReCommerce items with no electronics-specific breakdown and no public data on what happens to non-resold stock. It admits an unsellable electronics stream via an AI composition tool and runs a sizable consumer trade-in program, but neither comes with named partners or standards. In both cases, the riskiest stage-the handoff into the secondary market-is the least transparent.

For readers of this newsletter, the takeaway is that upstream, internal reuse is largely spoken for; the future opportunity sits in the blind spots these reports reveal. The work to build is certified, audited downstream chain of custody once assets leave big-tech control, hard-verifiable data destruction for both enterprise and consumer hardware, and marketplace-scale electronics processing that regulators and investors can actually see.

Access the reports here:

- Strategy: What Google’s 2026 Environmental Report Means for Your ITAD Pitch: Six Gaps Worth Selling Against
- Amazon as a Hardware Retailer: Reading the 2025 Sustainability Report Beyond the Data Center

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