Summary: Corporate Strategy: Blancco Bets on the Drive, Not the Device, as It Chases a Recover-First IT Market

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Blancco executive Tzvika Shahaf outlines a three-pillar strategy - data-bearing drives, data center decommissioning, and mobile devices - built around the physical storage drive rather than device category. Key points:

- Connected IT asset installed base approaching 22 billion devices by end of 2026, driven by AI training and data center buildout outpacing supply.
- Market shifting from “destruct-first” to “recover-first”: retired hardware increasingly refurbished, harvested for parts, or redeployed rather than scrapped.
- Blancco no longer separates enterprise vs. ITAD demand, since assets circulate between corporate IT, processors, and secondary markets.
- Windows 10 end-of-life and TPM/Windows 11 hardware requirements cited as a driver of decommissioning volume; certified erasure now often applied before hardware leaves the building, with a second pass at ITAD processing.
- Mobile segment growth tied to rising component costs pushing demand toward refurbished devices.
- EU device-passport and sustainability rules seen as ahead of North American regulation, with eventual U.S. convergence expected.
- New fab capacity takes 2-5 years to affect supply, positioning reuse/recovery as the near-term lever against hyperscaler-driven scarcity.
- Roadmap includes agentic AI capabilities added to Blancco’s platform, rolled out via a “crawl, walk, jog, run” approach.

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