Alphabet’s 2Q2026 Results: More Capital Spending and Cloud Backlog

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Alphabet spent $44.9 billion in a single quarter building AI infrastructure, and raised its full-year guidance to $195-$205 billion. For anyone in decommissioning or ITAD, that number bodes well as it should be interpreted as a forward order book for the hardware this sector will eventually be asked to process. Revenue rose 24% to $119.8 billion, Cloud revenue grew 82% to $24.8 billion, and Cloud backlog hit $514 billion. But the capex figure is the one that maps directly onto future asset volume. CEO Sundar Pichai and CFO Anat Ashkenazi both said demand for AI infrastructure continues to outpace supply, which is another way of saying the buildout has not yet peaked.

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Our Offices: Boston, MA | 2361 Walnut Court, Pembroke Pines, FL 33026