ITAD M&A Activity: Transaction Trends, Buyer Strategy and Market Direction

Published: 11 August 2026 | Author: David Daoud

Twenty-two ITAD transactions closed between October 2024 and July 2026. Deal frequency held flat year over year, but composition shifted: private equity platforms moved from opportunistic bolt-ons to stated, multi-deal roll-up programs, buyers began acquiring governance and program-management capability alongside processing capacity, and materials companies with no prior ITAD history took equity positions tied directly to data-center hardware lifecycle value.

This report looks at what those transactions actually confirm, and where they don't. It tests the scarcity thesis from Compliance Standards' April 2026 independent operator report against real deal activity, rather than restating it. It proposes a fourth buyer category, outside strategic capital, that doesn't fit the conglomerate, private equity, or independent framework the primary report built. And it weighs a genuine open question against the data: whether the ITAD capacity being assembled right now, on the strength of the data-center decommissioning wave, has the operational depth to last past that wave, or whether some of it is built for a moment rather than a decade.

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