Summary: IntelliTAD #18: $725B in AI Capex, Foreign Equity, and a Closing Window

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This issue covers what's reshaping the ITAD and electronics recycling industry in the back half of 2026. Hyperscaler capital spending, $725 billion this year, is keeping equipment flowing through the disposition channel and used-server values elevated as memory pricing stays inverted. Twenty-two ITAD deals have closed over the past 22 months, and the buyer pool has changed: foreign materials companies - Sumitomo, Mitsubishi Materials, Korea Zinc - are now taking equity positions in U.S. origination companies, and buyers generally are paying more for documentation and chain-of-custody than for raw processing capacity.

The issue also announces a new presentation for CIOs and enterprise IT decision-makers, The Refresh Cycle Reckoning, on how memory and storage price shocks are forcing a rethink of hardware refresh cycles, internal redeployment, and end-of-life asset recovery.

In this edition of IntelliTAD, we released these reports, a presentation and a general assessment of macro conditions affecting the ITAD sector:

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