Strategy: PC OEMs confirm spending strength alongside a weaker unit outlook. Distinct 2027 ITAD actions for each OEM.

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PC OEMs Dell, HP and Lenovo are reporting strong technology spending alongside a weakening outlook for PC unit shipments. Three takeaways from the current earnings season: Dell shows continuing enterprise refresh activity and exceptional infrastructure demand. HP places the Windows 11 replacement cycle well past its midpoint and expects a steep decline in PC shipments. Lenovo reports record device revenue while forecasting an industry unit decline of roughly 15%.

When applying these findings on the ITAD segment, the distinction between spending and equipment volume becomes material. OEM revenue measures the dollars customers spend on new technology, while ITAD operating capacity is generally consumed by physical units and processing work. Those measures are bifurcating.

OEM data shows that higher average selling prices can support OEM revenue even when customers purchase fewer devices. Premium configurations also increase the value of each unit sold. The same pattern eventually reaches the secondary market: fewer assets may enter disposition channels, while each asset carries more resale value and requires more careful processing.

As we look forward into 2027, ITAD executives may have to build their plans around physical retirement indicators and contracted customer schedules as OEM revenue growth is no longer a dependable proxy for future intake.

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