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

Published: 4 September 2026 | Author: David Daoud

Dell, HP, and Lenovo are reporting stronger technology spending while forecasting weaker PC unit shipments. That split matters for ITAD: OEM revenue tracks dollars, while operating capacity is consumed by physical units and processing work. Higher average selling prices and premium mix can lift manufacturer results even as fewer devices ship. The same pattern reaches disposition as fewer assets, each with more residual value and tighter handling requirements.

This report addresses how OEM revenue and PC unit volume are bifurcating, what that split does to 2027 ITAD intake, and the distinct operating response required for Dell, HP, and Lenovo. It covers contracted retirement planning, Windows 11 cycle timing, premium and AI-PC processing, data-center deinstallation, server consolidation, storage liability, and selective component harvesting. Access is limited to paying clients.

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