Hyperscalers Q3 2026: Older Hardware Remains Productive as Custom-Chip Sales Add Recovery Contract Complexity

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. Cloud & Hyperscale Operators
· Calendar Q3 2026 sector assessment
· Amazon (Q3 2026), Alphabet (Q3 2026), Meta Platforms (Q3 2026) and Microsoft (fiscal Q1 2027)
. all covering July 1-September 30, 2026
. Findings come from company disclosures; interpretation and recommendations are Compliance Standards analysis.

1. Executive assessment

Amazon’s continued demand for older processors and utilization initiatives at Microsoft and Meta complicate forecasts of hyperscale equipment availability. Their disclosures show why ITAD providers need customer-level retention plans alongside product roadmaps. Alphabet adds a different commercial consideration: customer-site TPU systems with contractual repurchase rights that providers must understand before arranging disposition.

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