AMD Q3 2026: Rack-Scale AI Systems Enter Service as PC Outlook Weakens

Enter Service as PC Outlook Weakens

Published: 12 November 2026 | Author: David Daoud

AMD · Semiconductors: server, PC and accelerator processors and rack-scale AI systems
· Lifecycle role: supplier of equipment that later enters the ITAD stream
· Q3 2026, quarter ended September 26, 2026 · Results announced November 3, 2026
· Compared with the quarter ended September 27, 2025 · Figures in US dollars
· Lifecycle markets: data center servers, AI accelerators, enterprise and consumer PCs, memory and components
· Compliance Standards · Report version 2.1 (first report under the 2026 earnings standard)

1. Operational summary

AMD shipped its first Helios rack-scale AI systems for revenue and began shipping Venice server processors, as data center revenue nearly doubled to 8.5 billion dollars. Management is planning for a double-digit decline in PC units in 2027 as memory costs raise system prices. Both shifts change which equipment reaches ITAD providers, and when.

COMPLIANCE STANDARDS · PULSE

This analysis is available to CS Clients and Pulse subscribers.

Already a subscriber? Log in

Subscribe to Compliance Standards' Sector Pulse Research

Contact us at 754.229.0095 or inquiries@Compliance-Standards.com

Our Offices: Boston, MA | 2361 Walnut Court, Pembroke Pines, FL 33026