Technology Distribution Outlook 2027: AI Infrastructure Drives Growth as Corporate Device Replacement Slows

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Executive summary

Third-quarter corporate earnings from CDW and TD SYNNEX indicate strong technology spending despite weakness in client device unit demand. Both companies benefited from higher selling prices and growing infrastructure investment, while customers increasingly favored more advanced configurations over larger equipment purchases.

CDW reported a 17.7% increase in net sales, while revenue at TD SYNNEX increased by 37.7%. Infrastructure spending contributed substantially to both companies' performance, although the financial benefits were accompanied by pressure on selected profitability measures.

CDW's reporting also provides evidence that customers are extending equipment life, reinforcing concerns about delayed corporate refresh programs. Meanwhile, TD SYNNEX's discussion of server consolidation identifies a potential source of decommissioning activity as newer systems replace multiple older servers.

Technology distributors are consequently operating across two increasingly divergent hardware replacement markets. Client equipment remains in service longer, while investment in advanced infrastructure creates opportunities for accelerated retirement of selected data center assets.

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