OVERHAUL

AI infrastructure security and the new gold rush

AI infrastructure is the highest value, highest risk, highest consequence cargo in the world.

Servers, GPUs, racks — **worth millions** — are moving through supply chains in trucks and by planes. The scale of value, and of risk, is extraordinary.

It's not just businesses who want this AI infrastructure. **Highly organized criminal gangs and governments** in sanctioned countries are actively **trying to acquire AI chips and hardware.**

Let's look at what's driving this new gold rush.

$400B per year

AI Infrastructure capex is exploding

$400B in 2025 from Microsoft, AWS, Alphabet and Meta alone. [1]

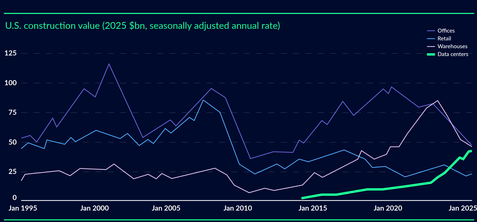
This is more than the entire global telecoms industry (~$300B).[2] Microsoft, Meta and Alphabet all forecast even higher capex growth in 2026. These four firms are investing $1.1B per day into AI infrastructure. OpenAI, Nvidia, Oracle and SoftBank have collectively announced $1.4T+ in AI-infrastructure commitments (2025–2027). [3]

What does this mean?

Every $1bn of capex becomes thousands of high-value hardware shipments to protect.

Data center building is going vertical

U.S. data-center construction has now overtaken office construction — **a total inversion of historical real-estate norms.**
U.S. data-center construction is running at ~$100B annualized [4]



OpenAI alone has announced 30+ GW of capacity and an aspiration for 1 GW/week at ~$20B/GW (≈ $1T/year build rate).[3]

What this means:
A single hyperscaler build cycle now means thousands of servers, racks, GPUs, load banks, and modular units in constant motion.

Hardware demand is outrunning supply

Nvidia's revenue growth is breaking historic curves, yet Nvidia and TSMC still "can't keep up" with demand.

Lead times for AI-server components have surpassed 40+ weeks across integrators [4]

What this means:
When supply is constrained, hardware becomes more valuable per unit and therefore **more attractive to organized crime.**

Infrastructure bottlenecks are worsening

U.S. data-center construction faces severe constraints in: [7]

- Utility power
- Access to chips
- Fiber
- Permitting
- Land availability

44% of respondents indicate their average quoted utility wait times are longer than 4 years. [8]
New projects are bigger than ever:

Nearly half (48%) of respondents say their new data centers now average 100+ MW, signaling an unprecedented scale of development. [9]
And when builds are delayed, AI hardware waits — in warehouses, trailers, distribution centers,

AI hardware at rest is AI hardware at risk

Global capacity may TRIPLE by 2030

Major analysts (IEA, Bloomberg, Goldman, Morgan Stanley, McKinsey, BCG) forecast 200–300 GW of new data-center capacity.

McKinsey estimates that by 2030 global data-center capex needs will reach ~ $6.7 trillion to keep pace with demand. [10]

$6.7 trillion

Global data-center capex by 2030

What this means:
A tripling of infrastructure = a tripling of AI hardware (server, GPU, rack, and modular-unit) movements.

AI hardware is the new target. Overhaul is the defense.

With Overhaul's support, every piece of sensitive AI equipment is monitored meticulously from origin to destination.

Whether you're moving a containerized data center, manufacturing GPU racks, or high-performance AI servers, Overhaul gives you real-time protection, robust chain of custody, and risk response from first dispatch to final deployment.

Overhaul protects the infrastructure that powers AI - in transit, on site, and at the edge.

[1,2,3,4] 'AI eats the world', by Benedict Evans. Nov 2025.
[3] OpenAI, October 28 2025
[4] Industry reporting 2025 (Gartner & Dell OEM supply-chain notes, Q1–Q3 2025)
[7] Evans: Schneider Electric industry survey, Feb 2025
[8,9] AlphaStruxure, "Before AI, After AI: The Energy Crunch," 2025
[10] McKinsey, April 28, 2025 https://www.mckinsey.com/industries/technology-media-and-telecommunications/our-insights/the-cost-of-compute-a-7-trillion-dollar-race-to-scale-data-centers

OVERHAUL