

Hybrid Cloud - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Hybrid Cloud Market size is estimated at USD 158.37 billion in 2025, and is expected to reach USD 430.12 billion by 2030, at a CAGR of 22.12% during the forecast period (2025-2030).

A major shift towards hybrid infrastructure services is apparent from the growth of cloud computing and industrial service, as well as a drop in traditional data center outsourcing. Compared to this, the conventional DCO market is shrinking, with investments in colocation and hosting as well as an increase in infrastructure utility services. This is expected to drive the shift to cloud infrastructure as a service and hosting. As a result of its advantages, hybrid cloud deployment continues to make up an increasing share of the cloud market.

Key Highlights

- In recent years, the Hybrid Cloud market has experienced a strong overall growth in comparison to other cloud computing services. For organisations with a large amount of data and the need to process requests, it offers some benefits.
- When businesses need to free up local resources for more sensitive data or applications, using a hybrid cloud allows them to scale computing capacity and help eliminate the necessity of investing large amounts of capital in handling short term spikes in demand.
- Hybrid cloud enables businesses to increase their onpremises infrastructure up to the Public Cloud in response to any surge that may occur, without exposing entire data sets to Third Party Data Centres' access when there are fluctuations in demand for information and processing. The end users concerned about their data security and initially reluctant to adopt such a solution have been able to benefit from these developments.
- Instead of purchasing, programming and maintaining other resources or equipment on a continuous basis, businesses with cloud services are required to cover the temporary consumption of these resources. This will help to reduce the costs that businesses do

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not make a profit from.

- Furthermore, the adoption of Hyperscale cloud with benefits including data center modernization, consolidated operation, security and management, as well as application innovation is being pursued by public bodies. Such needs can be supported by the Hybrid Cloud. Moreover, cloud computing allows government organisations to cope with a cyclical demand or emergency needs without exceeding an excessive amount of hardware consumption.
- As enterprises continue migrating their applications and workloads to a hybrid multicloud environment, integration and management become more complex which might hamper market growth
- In the face of a COVID-19 pandemic, many countries around the world are imposing work from home due to public health safety concerns which have led to the need for remotely accessible working facilities. The growing demand for virtual services, the longer term potential to recast the government workforce, and the need to provide adaptive and dynamic regulatory models are the result of increased demand for virtual services, coupled with increasing citizen expectations for the delivery of these services.

Hybrid Cloud Market Trends

Banking, Finance, Services, and Insurance (BFSI) Sector to Hold Major Share in the Market

- The banking sector has been using the hybrid cloud model, through which critical banking processes and applications are migrated to private clouds for better security. Moreover, non-critical applications are moving to the public cloud for agility and cost efficiency.
- As the majority of the banks' IT spending is primarily on maintaining their legacy technologies, along with managing and maintaining disparate systems, Consequently, they have had to invest in a Hybrid Cloud solution that consists of an onpremise mix of private and public cloud services with the aim of achieving higher scalability and integration across their various systems.
- Hybrid cloud is also increasingly being adopted to tackle issues in this sector. These issues include the increased number of transactions without cards, the digitization of several bank branches, the shift to remote working systems, the need for online documentation, etc.
- Modifying the hybrid cloud for banking leads to cost reduction, increases efficiency, and enables banks to manage their customers better, resulting in the growth of hybrid cloud in the BFSI industry.
- The growth of hybrid cloud in the BFSI industry worldwide is driven by a shift in consumers' preference toward hybrid cloud, an increase in digital disruptions, and technological advances like the integration of edge computing, (IoT), and artificial intelligence. However, the COVID-19 pandemic led to a sharp rise in the hybrid cloud in the BFSI market globally, owing to increased demand for increased computing power across banks and the overall fintech sector.

North America to Hold Significant Market Share

- A significant share of the hybrid cloud market is expected to be held in North America. A number of companies in the region are going beyond public clouds. They're entering a new era in which IT services are designed to combine government, industry and traditional infrastructure. In order to help them improve their business and provide services to their customers, these organisations have implemented a hybrid cloud strategy.
- North America pioneered the bring-your-own-device (BYOD) culture, resulting in widespread incorporation. As a result, organisations have begun to move away from traditional cloud models and are moving towards hybrids in order to ensure the safety of sensitive business information by using Private Cloud while giving employees more access to applications based on Public Cloud solutions which is required for certain applications that require field access. This trend was observed to benefit productivity, and it is expected to continue and grow during the forecast period. The BYOD trend is also becoming more and more

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common in Canada's companies. The growth of BYOD in the country is projected to increase, and it is estimated that over the forecast period this will have a positive effect on the Hybrid Cloud Market as tablets and smartphones become more frequently used for access to business critical information.

- Additionally, the COVID-19 pandemic accelerated cloud usage for US companies in every industry. Many US enterprises prioritizing cloud adoption in their organization noted the increased importance of cloud due to the pandemic.
- Moreover, to increase their consumer base and better meet demands across various applications, significant companies are also merging with other businesses and investing in new projects. For instance, in May 2023, IBM has announced Hybrid Cloud Mesh, a Software as a Service offering that allows enterprises to take management of their hybrid multicloud infrastructure. In order to help modern enterprises operate their infrastructure across hybrid multicloud and heterogeneous environments, IBM Hybrid Cloud Mesh is built on "applicationcentric connectivity" that automates the process, management or observability of application traffic between public and private clouds.
- Overall, the demand for flexibility, data security, cost reduction, digital transformation, enhanced analytics, and industry-specific requirements are some of the significant factors that are driving the hybrid cloud market in North America. Due to these reasons, businesses are being compelled to use hybrid cloud solutions in order to strike a balance between agility, control, and innovation.

Hybrid Cloud Industry Overview

The hybrid cloud industry is highly fragmented, with multiple significant competitors. Few major firms presently dominate the industry in terms of market share. These market leaders are concentrating on growing their consumer base in overseas nations. These businesses use collaborative strategic efforts to expand their market share and profitability. Companies in the industry are also purchasing start-ups focused on hybrid cloud computing technologies to boost their product abilities. Some key market players are Cisco Systems Inc., Hewlett-Packard Enterprise Company, Amazon Web Services (Amazon Inc.), Accenture PLC, and IBM Corporation, among others.

- In March 2023, Flexera announced the general availability of Flexera One FinOps. This solution helps in strengthening an enterprise's FinOps and central cloud teams while enhancing the convergence of IT asset management (ITAM) and FinOps, empowering enterprises to significantly improve the way they view and allocate cloud usage and charging, effectively manage hybrid IT estates on a large scale, and be able to operate their own private cloud.
- In March 2023, NTT Communications Corporation announced the launch of efforts involving digital humans and the virtual world as part of its business co-creation program, "OPEN HUB for Smart World," with the goal of broadening possibilities for all people, including those with workplace or time constraints. It plans to encourage solutions to address problems such as Japan's declining labor force participation.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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