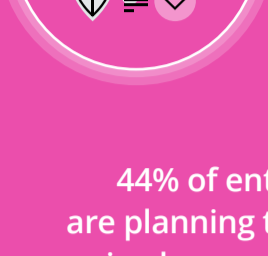


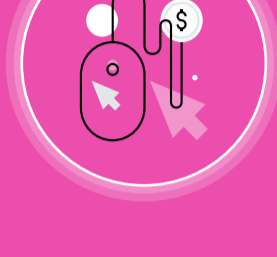
# Hyperscaler marketplaces are exploding as a procurement platform for enterprise customers

Omdia predicts that sales of third-party products through AWS Marketplace, Microsoft Marketplace and Google Cloud Marketplace will reach **\$163 billion by 2030, up from \$45 billion in 2025, growing at 29.1% CAGR.**



Enterprise software purchasing is undergoing a profound shift, as organizations increasingly turn to hyperscaler marketplaces to source their preferred software and cybersecurity products.

44% of enterprise customers are planning to increase or start using hyperscaler marketplaces over the next 18 months, according to Omdia research.



At the same time, ever-greater numbers of software vendors are making their products available to buy through these marketplaces.

## Regional breakdown 2030



## 2024 to 2030 growth



# 5.3x growth in just 6 years

## Why use hyperscaler marketplaces?



Globally, enterprises have committed to spend over half a trillion (US\$500 billion) with the hyperscalers on their public cloud services (through AWS PPA/EDP, Microsoft MACCs, Google Cloud Commits, etc.) on a multi-year basis. But many organizations can struggle to hit those commitments, leaving them at risk of losing discounts and other financial benefits.

The good news is that buying third party vendor products through the hyperscalers' marketplaces allows customers to 'burn down' a proportion\* of that committed spend, helping them to hit their targets and maintain their discounts.

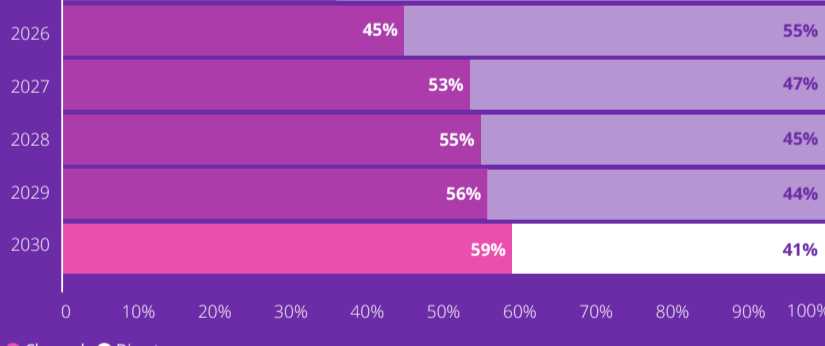


Customers point to other benefits of using marketplaces including access to cloud credits, consolidated billing (cloud and marketplace purchases combined into a single bill), and faster sales cycles, with cloud budgets already signed off, reducing the need for lengthy RFPs.

## Channel partners are playing a critical role in hyperscaler marketplaces

Many enterprise customers prefer to buy through a trusted channel partner or systems integrator. They help negotiate better pricing with the vendor and provide vital services.

### SHARE OF CHANNEL SPEND VIA HYPERSCALER CLOUD MARKETPLACES



**CHANNEL PARTNERS AND DISTRIBUTORS WILL ACCOUNT FOR 59% OF ALL HYPERSCALER MARKETPLACE SPEND BY 2030**



Through programs like Channel Partner Private Offers from AWS, Microsoft's Multiparty Private Offers and Google Cloud Marketplace Channel Private Offers, all three hyperscalers allow end-customers to purchase from marketplaces through their preferred partner.

## Marketplace sales through partners are outgrowing those of direct offers. By 2030, almost 60% of purchases will be via channel partners, according to Omdia.

To take advantage of this opportunity, customers should take action in three ways:

- 1 Leverage committed cloud spend**  
 Educate procurement teams internally on the opportunity to use commits for marketplace purchasing.
- 2 Engage with your channel partners**  
 Get their advice on the opportunity to buy through marketplaces
- 3 Download useful resources**  
 Including this joint Omdia/Red Hat webinar and latest ebooks

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