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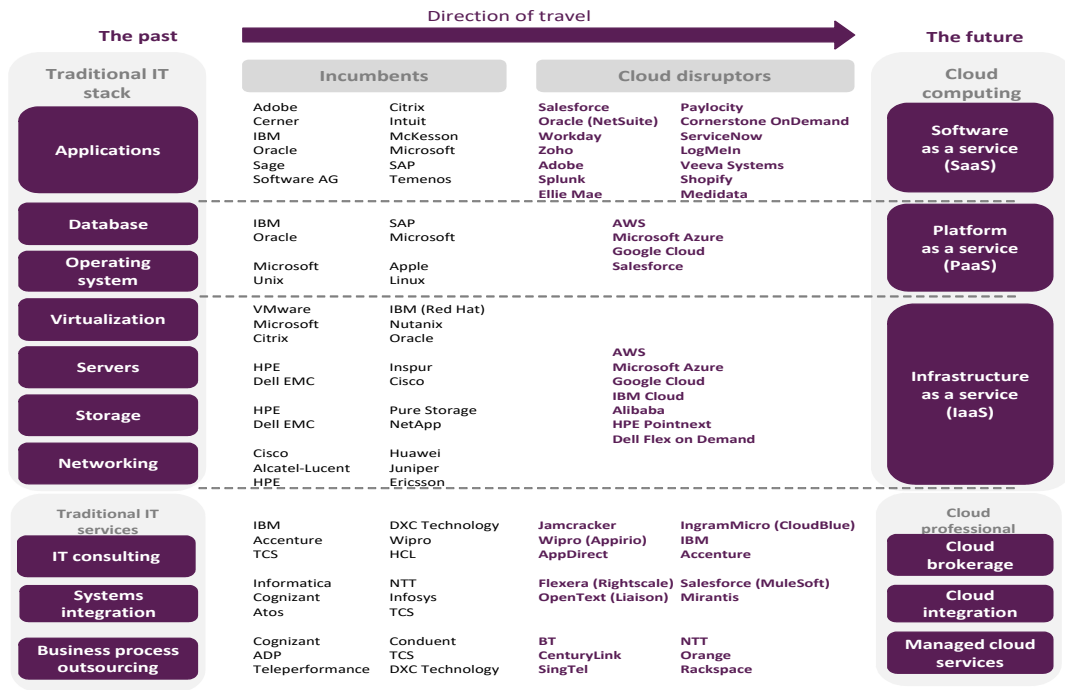
Cloud in Consumer: Deal trends Q4 2019 to Q4 2021



Tech briefing for cloud

Technologies and players in the cloud theme

The traditional IT stack is shifting to the cloud stack. The graphic shows some of the IT industry's incumbents alongside some of the cloud disruptors, categorized by their position in the cloud value chain.

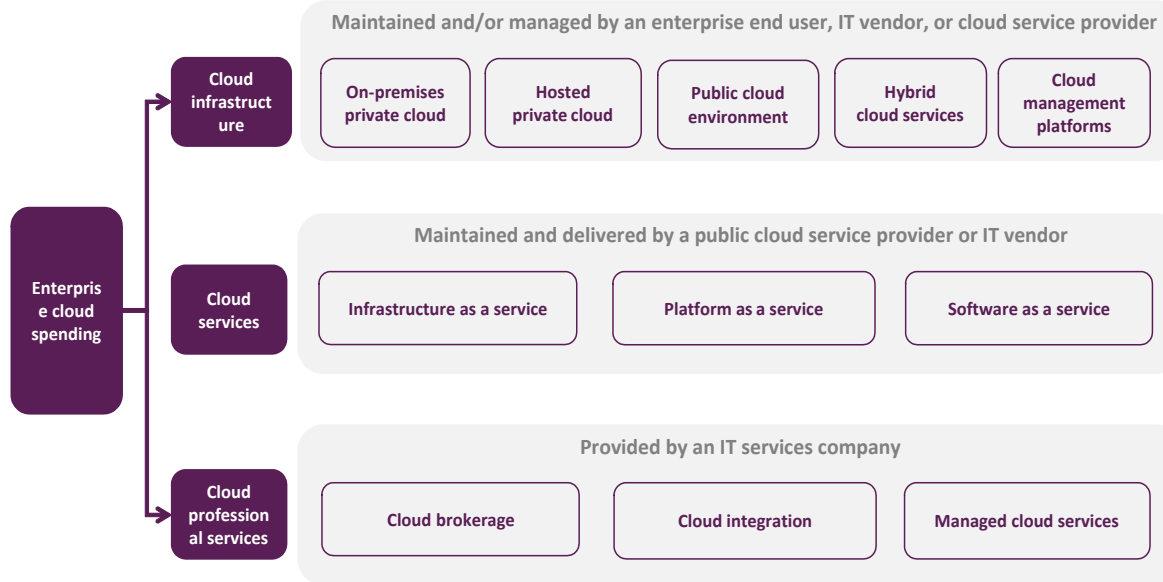


What is cloud?

Cloud refers to the provision of IT infrastructure and platform services to provide a flexible, scalable, and on-demand IT environment. At the simplest level of abstraction, it may refer only to IT infrastructure, such as a remotely hosted server, while at the furthest level of abstraction, it refers to a remotely hosted software application together with all the computing elements required to provide that software, such as a data center, networking equipment, servers, storage, operating software, and security software.

Our thematic framework for cloud

Our framework breaks down enterprise cloud spending into three broad categories: cloud infrastructure, cloud services and cloud professional services.



An overview

Cloud importance has grown significantly in recent years. It has enabled the use of shared IT infrastructure and services to create a flexible, scalable, and on-demand IT environment.

The widespread move to home-working necessitated by COVID-19 would have brought businesses to a grinding halt had investments in cloud not been made over the last 10 years. That investment now has the potential to transform the way some businesses operate.

Enterprise cloud spending falls into three broad categories. The first of these, cloud infrastructure, includes the hardware and software that is used to build, operate, and manage a cloud environment, whether it is public, private, or hybrid.

The second broad category of enterprise cloud spending is that of cloud services. Cloud services include; infrastructure as a service (IaaS) offerings, platform as a service (PaaS) offerings and software as a service (SaaS) offerings.

The third broad category of enterprise cloud spending is that of cloud professional services. These services support the procurement, deployment, and ongoing management of diverse cloud-based resources.



The impact of cloud on the Consumer industry

Thematic impact assessment for Consumer

The matrix below details the cloud computing technologies where Consumer companies should be focusing their time and resources.



Cloud in Consumer investment opportunities

The thematic impact assessment on the left looks at how each cloud technology can be used across the Consumer value chain.

We suggest that companies invest in technologies that are shaded in green, explore the prospect of investing in technologies shaded in yellow, and ignore areas shaded in red.

GlobalData insight

\$20bn

Within the Consumer goods sector, the market growth forecast for cloud services is projected to grow to \$20bn by 2024.



Cloud deals in Consumer: Q4 2019 to Q4 2021

Key findings



Venture Finance

The Consumer sector reported eight cloud-related venture financing deals in 2021, marking an increase of 166.7% over 2020.

Cloud-related venture financing deal value in Consumer totaled \$55m in 2021.



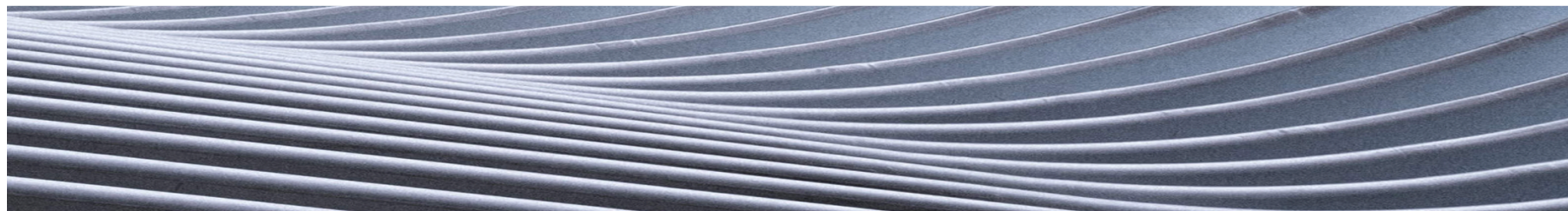
M&A

M&A deal activity related to cloud in Consumer saw six deals in 2021, indicating an increase of 100% over 2020.

Cloud-related M&A deals in Consumer were collectively valued at \$244m in 2021.

GlobalData deals database

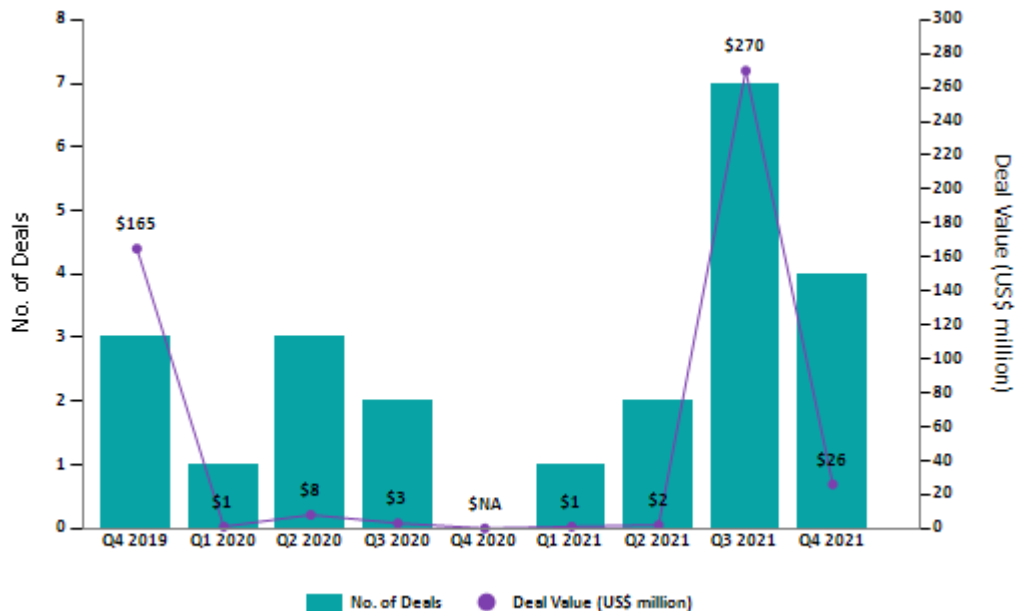
GlobalData deals database tracks financial deals globally on a real-time basis, covering mergers; acquisitions; equity offerings, including IPOs and private placements; debt offerings; partnerships; private equity, venture financing; asset purchase/sale transactions, and more to enable comprehensive analysis on deal activity.



Cloud deals in Consumer: Q4 2019 to Q4 2021

Value and number of cloud-related deals in the Consumer sector between Q4 2019 and Q4 2021

In the last nine quarters, Q3 2021 saw the highest number of cloud deals in Consumer and Q3 2021 by value.



Source: GlobalData

Deal trends

In 2021, the number of cloud deals in Consumer was 14, 133.3% higher than 2020 globally.

GlobalData insight

Cloud-related deal activity in the sector saw four deals in Q4 2021, marking a decrease of 42.9% over Q3 2021.

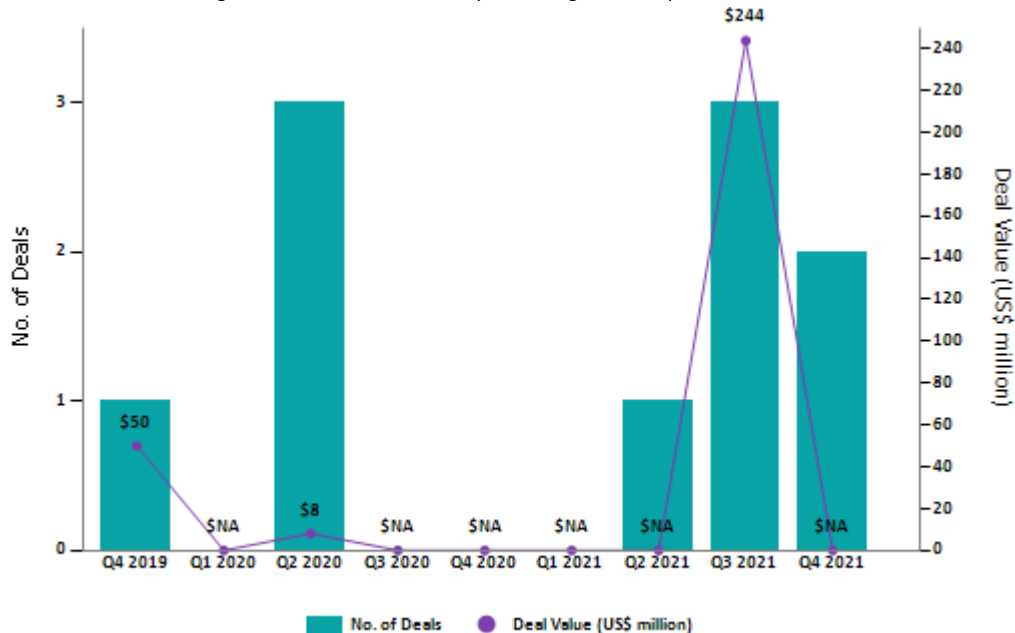
Overall, cloud-related deal value in the sector totaled \$26m in Q4 2021, when compared with \$270m in Q3 2021.



Cloud M&A deals in Consumer: Q4 2019 to Q4 2021

Value and number of cloud-related M&A deals in the Consumer sector between Q4 2019 and Q4 2021

Consumer witnessed an average of one M&A deal in cloud space during last nine quarters.



Source: GlobalData

M&A deal activity

Q3 2021 and Q2 2020 witnessed the highest number of cloud M&A deals in Consumer during last nine quarters.

GlobalData insight

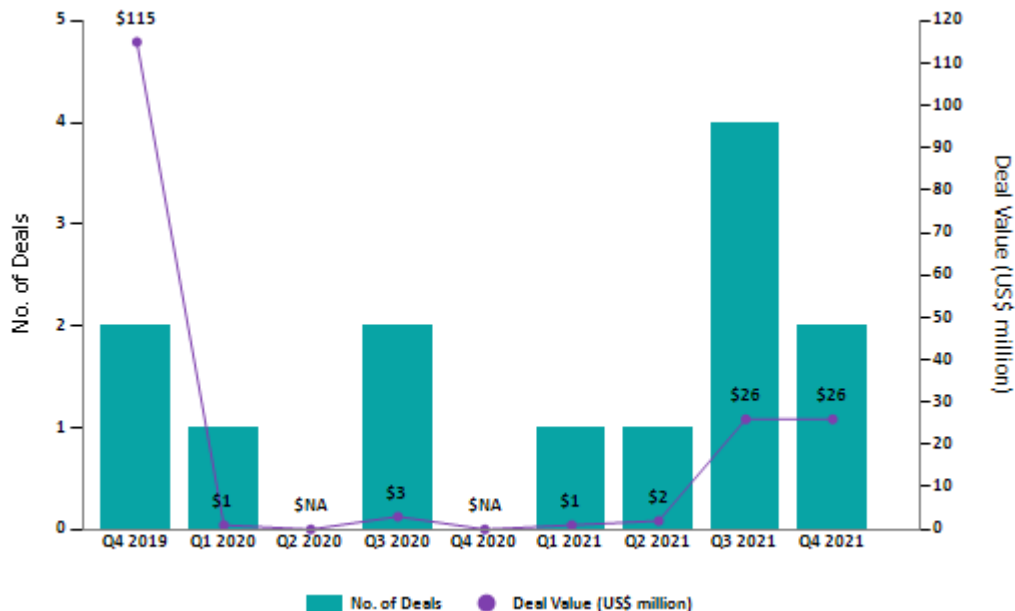
The cloud-related M&A deal activity in Consumer saw two deals in Q4 2021, representing a decrease of 33.3% over Q3 2021.



Cloud venture financing deals in Consumer: Q4 2019 to Q4 2021

Value and number of cloud-related venture financing deals in the Consumer sector between Q4 2019 and Q4 2021

The nine-quarter average of venture financing deal in Consumer stood at one.



Source: GlobalData

Venture financing deal activity

The companies in the US were involved in the majority of venture financing deals in the sector during last nine quarters.

GlobalData insight

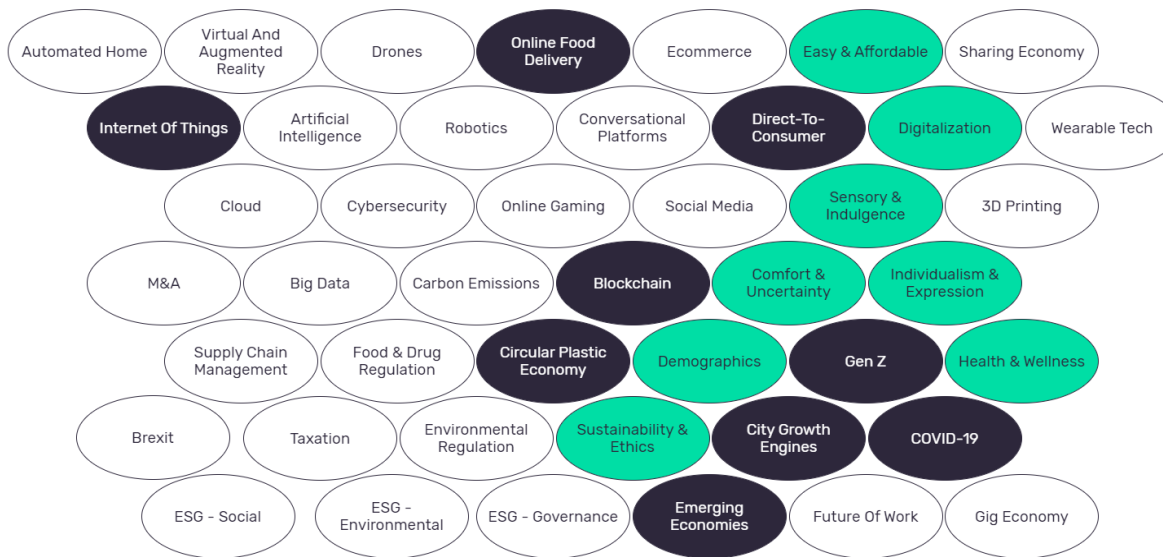
Cloud-related venture financing deal activity in Consumer stood at two in Q4 2021, indicating a decline of 50% over the previous quarter.

By means of value, cloud-related venture financing deals in Consumer totaled \$26m in Q4 2021, a flat growth when compared with Q3 2021.



More themes impacting Consumer

Our 2021 Consumer theme map below shows the big themes that will have a significant disruptive impact on all Consumer companies over the next two years.



Our 2021 theme map

We define a theme as any issue that keeps CEOs awake at night.

Our 2021 theme map shows the big themes driving growth in the sector.



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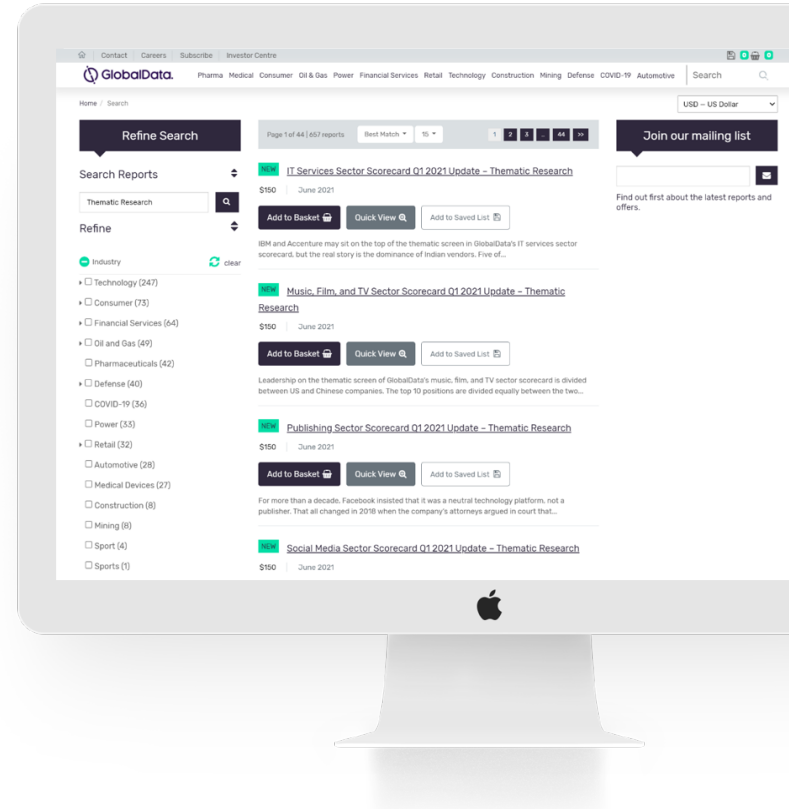
To find out more about major themes set to disrupt your industry, discover GlobalData's research reports.

We leverage the collective expertise of our in-house research analysts, consultants, and journalists, as well as thousands of external thought-leaders, to create differentiated and actionable insight.

Our thematic analysis offers a comprehensive lens into the future of your industry, enabling you to:

- Drill down into market shifts to determine strategy that drives your business forward
- Identify sector trends and themes early to protect your blindside
- Utilize forecasts and customer insight to power your product development & innovation

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