

Global Cloud Seeding Market: Analysis By Type (Aerial and Ground-based), By Seeding Technique (Hygroscopic and Glaciogenic), By Application (Increasing Precipitation, Mitigating Hail Damage and Dispersing Fog), By Flare (End Burning Flares, Ejection Flares, Manual Generator, Automatic and Remote Based Generator and Flare Trees), By Target Area (Agricultural Areas, Water Supply Areas, Drought-prone Areas and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

Cloud seeding is a weather modification process that involves artificially inducing or enhancing precipitation within clouds. This is typically achieved by dispersing seeding agents, such as silver iodide or potassium iodide, into clouds either from the ground or by aircraft. These seeding agents serve as nuclei around which cloud droplets form or ice crystals grow, thereby promoting the condensation or aggregation of water vapor. By enhancing the natural processes of cloud formation and precipitation, cloud seeding aims to increase rainfall or snowfall in specific regions, providing a potential means to alleviate drought conditions or enhance water resources. The global Cloud Seeding market value stood at US\$135.17 million in 2023 and is expected to reach US\$192.73 million by 2029.

The global cloud seeding market is experiencing steady expansion, driven by various factors. One significant driver is the need to regulate weather patterns in regions prone to droughts or water scarcity. Additionally, the increasing demand for agricultural

products and water sources necessitates innovative solutions like cloud seeding to enhance precipitation levels. Cloud seeding also finds application in urban water management strategies, helping to alleviate water shortages in densely populated areas. Furthermore, as pollution levels rise globally, there's a growing emphasis on using cloud seeding to cleanse the atmosphere and reduce pollution levels through precipitation. Moreover, cloud seeding plays a crucial role in hydroelectric power generation by enhancing rainfall in catchment areas. Overall, these factors contribute to the increasing adoption and growth of the global cloud seeding market, addressing various environmental, agricultural, and water resource challenges. The market is expected to grow at a CAGR of 5.95% over the projected period of 2024-2029.

Market Segmentation Analysis:

By Type: The report provides a bifurcation of the global cloud seeding market into two segments namely, Aerial and Ground Based Cloud Seeding. Aerial cloud seeding holds the highest share of the market and is expected to be the fastest-growing segment in the forecasted period due to several reasons. Firstly, aerial cloud seeding methods, such as using aircraft or drones, offer greater flexibility and coverage compared to ground-based methods, allowing for targeted and efficient seeding of clouds over large areas. Additionally, advancements in aerial technology have led to the development of more sophisticated and precise seeding techniques, enhancing the effectiveness of aerial cloud seeding operations.

By Seeding Technique: The report provides a bifurcation of the global cloud seeding market into two segments namely, Hygroscopic, and Glaciogenic. Hygroscopic cloud seeding holds the highest share in the market and is expected to be the fastest-growing segment in the forecasted period due to its effectiveness in enhancing rainfall. Hygroscopic seeding involves dispersing particles such as salts into clouds, which act as nuclei for water droplet formation, ultimately leading to increased precipitation. This method is favored for its ability to target specific clouds and induce rain in water-scarce regions. Additionally, advancements in seeding technology have improved the efficiency and reliability of hygroscopic cloud seeding, further driving its adoption.

By Application: The report provides a bifurcation of the global cloud seeding market into three segments namely, Increasing Precipitation, Mitigating Hail Damage, and Dispersing Fog. The Increasing Precipitation held the highest share in the market and is expected to be the fastest-growing segment in the forecasted period due to its critical role in addressing water scarcity and agricultural needs. As climate change exacerbates weather patterns, the demand for techniques like cloud seeding to enhance precipitation

becomes more pronounced. Cloud seeding methods aimed at increasing precipitation offer a promising solution to counter drought conditions and ensure water availability for various purposes. Additionally, advancements in technology have improved the effectiveness and efficiency of precipitation enhancement techniques, further driving the growth of this segment.

By Flare: The report provides a bifurcation of the global cloud seeding market into five segments namely, End Burning Flares, Ejection Flares, Manual Generator, Automatic and Remote Based Generator, and Flare Trees. The End Burning Flares segment holds the highest share in the market due to its established use and effectiveness in cloud seeding operations. End burning flares are commonly employed for cloud seeding as they release seeding agents effectively into the atmosphere, promoting the nucleation of ice crystals or droplets that can lead to precipitation. On the other hand, the Automatic and Remote-Based Generator segment is expected to be the fastest-growing due to advancements in technology. Automated and remote-based generators offer greater efficiency, precision, and convenience in deploying seeding agents, leading to increased adoption and demand for these systems in cloud seeding operations.

By End User: The report provides the bifurcation of the global cloud seeding market into four segments namely, Agricultural Areas, Water Supply Areas, Drought-prone Areas, and Others. Agricultural Areas held the highest share of the market and are expected to be the fastest-growing segment in the forecasted period. Cloud seeding in agricultural areas aims to enhance rainfall, thereby addressing water scarcity concerns and promoting optimal growing conditions for crops. Increased precipitation through cloud seeding can mitigate the impact of droughts, improve soil moisture levels, and ensure adequate water supply for irrigation, ultimately leading to higher agricultural yields and improved crop quality. Additionally, as climate change exacerbates weather variability and drought frequency in many agricultural regions, there is a growing recognition of cloud seeding as a viable strategy to support agricultural resilience and food security.

By Region: The report bifurcates the global cloud seeding market into four regions namely, North America, Asia Pacific, Europe, and the Rest of the World. North America dominates the Cloud Seeding market, with the US, Canada, and Mexico contributing significantly. The region's advanced technology and substantial investment in weather modification programs drive widespread adoption. Diverse climate conditions, from arid regions to wildfire-prone areas, boost demand for cloud seeding. In the US, cloud seeding is extensively used in various states, particularly those facing water scarcity issues like California and Texas. These regions rely on cloud seeding to augment water supplies, manage droughts, and reduce the risk of wildfires during dry seasons. Canada

also boasts a significant presence in the cloud seeding market, leveraging the technology to enhance snowfall in mountainous regions for water resource management and winter sports activities.

The Asia Pacific emerges as the fastest-growing region in the cloud seeding sector, fueled by several key factors. Countries like China and India, with densely populated agricultural regions facing water scarcity challenges, are increasingly investing in cloud seeding technologies to enhance precipitation and address water security concerns. In China, extensive cloud seeding operations are conducted to alleviate droughts and ensure sufficient water supply for agriculture, urban water management, and hydroelectric power generation. Similarly, in India, cloud seeding initiatives are being implemented in drought-prone regions to augment rainfall and support agricultural productivity. Additionally, rising pollution levels and climate change impacts in the Asia Pacific region have spurred interest in cloud seeding as a potential solution to mitigate air pollution and regulate weather patterns. These factors contribute to the significant growth of the cloud seeding market in the Asia Pacific region.

Global Cloud Seeding Market Dynamics:

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Challenges: However, the market growth would be negatively impacted by various challenges such as commercializing cloud seeding technology, scientific uncertainty, etc. Commercializing cloud seeding technology could lead to concerns regarding its ethical and environmental implications. The prospect of manipulating weather patterns for profit raises questions about fairness, equity, and unintended consequences. Additionally, commercial interests may prioritize profitability over responsible stewardship of natural resources, potentially exacerbating existing socio-economic disparities and environmental risks.

Trends: The market is projected to grow at a fast pace during the forecasted period, due to market trends such as airport fog reduction, expansion in water-stressed regions, technological advancements, integration of remote sensing and weather modeling, increasing investment in cloud seeding research and development, expansion into new markets, growing emphasis on environmental sustainability, etc. The demand for airport fog reduction is expected to increase as airports seek solutions to mitigate the adverse effects of fog on air travel, such as delays and cancellations. Cloud seeding offers a promising method to dissipate fog and improve visibility, thereby enhancing aviation safety and efficiency. Additionally, the integration of remote sensing and weather modeling technologies into cloud seeding operations is anticipated to bolster market

growth by enabling more accurate and targeted cloud seeding interventions, optimizing resource allocation, and enhancing overall effectiveness. These advancements reflect the market's evolution towards more sophisticated and efficient cloud seeding techniques.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has had a significant impact on the cloud seeding market, causing disruptions in operations, supply chains, and research activities. Travel restrictions and social distancing measures have hampered fieldwork and data collection essential for cloud seeding projects. However, as economies recover and the focus shifts towards environmental sustainability and disaster management, the demand for cloud seeding solutions may increase. Governments and industries could invest in cloud seeding initiatives to address water scarcity, air pollution, and extreme weather events exacerbated by climate change. Furthermore, advancements in technology and remote sensing capabilities could enable more efficient and targeted cloud seeding efforts in the post-pandemic era, driving market growth.

Competitive Landscape and Recent Developments:

The global Cloud Seeding market is fragmented, with an increasing number of large and medium-sized players accounting for the majority of the market revenue, and the presence of a substantial number of regional market players with limited business offerings and customer base.

The key players in the global Cloud Seeding market are:

Snowy Hydro Limited
South Texas Weather Modification Association
ModClima
Mettech S.p.A
Cloud Seeding Technologies
Ice Crystal Engineering LLC
North American Weather Consultants Inc.
RHS Consulting, Ltd.
Weather Modification, Inc.

Some of the strategies among key players in the market are new launches, mergers, acquisitions, and collaborations. In 2023, Utah significantly increased funding for cloud

seeding, earmarking US\$12 million in one-time funding and US\$5 million in ongoing funding for the cloud seeding program. Additionally, The United Arab Emirates (UAE) plans to conduct around 300 cloud-seeding missions in 2024 to address water scarcity issues. The UAE Research Program for Rain Enhancement Science – National Center of Meteorology (UAERP-NCM) regulates the country's cloud-seeding efforts.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Cloud Seeding: An Overview

2.1.1 Introduction to Cloud Seeding

2.1.2 Advantages of Cloud Seeding

2.1.3 Working of Cloud Seeding

2.2 Cloud Seeding Segmentation: An Overview

2.2.1 Cloud Seeding Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Cloud Seeding Market: An Analysis

3.1.1 Global Cloud Seeding Market: An Overview

3.1.2 Global Cloud Seeding Market by Value

3.1.3 Global Cloud Seeding Market by Type (Aerial and Ground-Based)

3.1.4 Global Cloud Seeding Market by Seeding Technique (Hygroscopic, and Glaciogenic)

3.1.5 Global Cloud Seeding Market by Application (Increasing Precipitation, Mitigating Hail Damage, and Dispersing Fog)

3.1.6 Global Cloud Seeding Market by Flare (End Burning Flares, Ejection Flares, Manual Generator, Automatic and Remote Based Generator and Flare Trees)

3.1.7 Global Cloud Seeding Market by Target Area (Agricultural Areas, Water Supply Areas, Drought-prone Areas, and Others)

3.1.8 Global Cloud Seeding Market by Region (North America, Asia Pacific, Europe, and Rest of the World)

3.2 Global Cloud Seeding Market: Type Analysis

3.2.1 Global Cloud Seeding Market by Type: An Overview

3.2.2 Global Aerial Cloud Seeding Market by Value

3.2.3 Global Ground-Based Seeding Market by Value

3.3 Global Cloud Seeding Market: Seeding Technique Analysis

3.3.1 Global Cloud Seeding Market by Seeding Technique: An Overview

3.3.2 Global Hygroscopic Cloud Seeding Market by Value

3.3.3 Global Glaciogenic Cloud Seeding Market by Value

3.4 Global Cloud Seeding Market: Application Analysis

3.4.1 Global Cloud Seeding Market by Application: An Overview

- 3.4.2 Global Increasing Precipitation Cloud Seeding Market by Value
- 3.4.3 Global Mitigating Hail Damage Cloud Seeding Market by Value
- 3.4.4 Global Dispersing Fog Cloud Seeding Market by Value
- 3.5 Global Cloud Seeding Market: Flare Analysis
 - 3.5.1 Global Cloud Seeding Market by Flare: An Overview
 - 3.5.2 Global End Burning Flares Cloud Seeding Market by Value
 - 3.5.3 Global Ejection Flares Cloud Seeding Market by Value
 - 3.5.4 Global Manual Generator Cloud Seeding Market by Value
 - 3.5.5 Global Automatic and Remote Based Generator Cloud Seeding Market by Value
 - 3.5.6 Global Flare Trees Cloud Seeding Market by Value
- 3.6 Global Cloud Seeding Market: Target Area Analysis
 - 3.6.1 Global Cloud Seeding Market by Target Area: An Overview
 - 3.6.2 Global Agricultural Areas Cloud Seeding Market by Value
 - 3.6.3 Global Water Supply Areas Cloud Seeding Market by Value
 - 3.6.4 Global Drought-Prone Areas Cloud Seeding Market by Value
 - 3.6.5 Global Others Cloud Seeding Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 North America Cloud Seeding Market: An Analysis
 - 4.1.1 North America Cloud Seeding Market: An Overview
 - 4.1.2 North America Cloud Seeding Market by Value
 - 4.1.3 North America Cloud Seeding Market by Region America (the US, Canada, and Mexico)
 - 4.1.4 The US Cloud Seeding Market by Value
 - 4.1.5 Canada Cloud Seeding Market by Value
 - 4.1.6 Mexico Cloud Seeding Market by Value
- 4.2 Asia Pacific Cloud Seeding Market: An Analysis
 - 4.2.1 Asia Pacific Cloud Seeding Market: An Overview
 - 4.2.2 Asia Pacific Cloud Seeding Market by Value
 - 4.2.3 Asia Pacific Cloud Seeding Market by Region (China, Japan, India, South Korea, and Rest of the Asia Pacific)
 - 4.2.4 China Cloud Seeding Market by Value
 - 4.2.5 Japan Cloud Seeding Market by Value
 - 4.2.6 India Cloud Seeding Market by Value
 - 4.2.7 South Korea Cloud Seeding Market by Value
 - 4.2.8 Rest of Asia Pacific Cloud Seeding Market by Value
- 4.3 Europe Cloud Seeding Market: An Analysis
 - 4.3.1 Europe Cloud Seeding Market: An Overview

- 4.3.2 Europe Cloud Seeding Market by Value
- 4.3.3 Europe Cloud Seeding Market by Region(Germany, The UK, France, Italy, Spain, and Rest of the Europe)
- 4.3.4 Germany Cloud Seeding Market by Value
- 4.3.5 The UK Cloud Seeding Market by Value
- 4.3.6 France Cloud Seeding Market by Value
- 4.3.7 Italy Cloud Seeding Market by Value
- 4.3.8 Spain Cloud Seeding Market by Value
- 4.3.9 Rest of Europe Cloud Seeding Market by Value
- 4.4 Rest of the World Cloud Seeding Market: An Analysis
 - 4.4.1 Rest of the World Cloud Seeding Market: An Overview
 - 4.4.2 Rest of the World Cloud Seeding Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19 on Cloud Seeding Market
- 5.2 Post COVID-19 Impact on Cloud Seeding Market

6. MARKET DYNAMICS

- 6.1 Growth Drivers
 - 6.1.1 Regulating Weather Patterns
 - 6.1.2 Increasing Demand for Agricultural Products and Water Sources
 - 6.1.3 Increasing Adoption in Drought-Prone Areas
 - 6.1.4 Urban Water Management
 - 6.1.5 Curb Rising Pollution
 - 6.1.6 Hydroelectric Power Generation
- 6.2 Challenges
 - 6.2.1 Commercializing Cloud Seeding Technology
 - 6.2.2 Scientific Uncertainty
- 6.3 Market Trends
 - 6.3.1 Airport Fog Reduction
 - 6.3.2 Expansion in Water-stressed Regions
 - 6.3.3 Technological Advancements
 - 6.3.4 Integration of Remote Sensing and Weather Modeling
 - 6.3.5 Increasing Investment in Cloud Seeding Research and Development
 - 6.3.6 Expansion into New Markets
 - 6.3.7 Growing Emphasis On Environmental Sustainability

7. COMPETITIVE LANDSCAPE

7.1 Global Cloud Seeding Market Players: Industry Developments

8. COMPANY PROFILES

8.1 Snowy Hydro Limited

8.1.1 Business Overview

8.1.2 Revenue by Type

8.1.3 Business Strategy

8.2 South Texas Weather Modification Association

8.2.1 Business Overview

8.3 ModClima

8.3.1 Business Overview

8.4 Mettech S.p.A

8.4.1 Business Overview

8.5 Cloud Seeding Technologies

8.5.1 Business Overview

8.6 Ice Crystal Engineering LLC

8.6.1 Business Overview

8.7 North American Weather Consultants Inc.

8.7.1 Business Overview

8.8 RHS Consulting, Ltd.

8.8.1 Business Overview

8.9 Weather Modification, Inc.

8.9.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Advantages of Cloud Seeding

Figure 2: Working of Cloud Seeding

Figure 3: Cloud Seeding Segmentation

Figure 4: Global Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 5: Global Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 6: Global Cloud Seeding Market by Type; 2023 (Percentage, %)

Figure 7: Global Cloud Seeding Market by Seeding Technique; 2023 (Percentage, %)

Figure 8: Global Cloud Seeding Market by Application; 2023 (Percentage, %)

Figure 9: Global Cloud Seeding Market by Flare; 2023 (Percentage, %)

Figure 10: Global Cloud Seeding Market by Target Area; 2023 (Percentage, %)

Figure 11: Global Cloud Seeding Market by Region; 2023(Percentage, %)

Figure 12: Global Aerial Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 13: Global Aerial Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 14: Global Ground-Based Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 15: Global Ground Based Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 16: Global Hygroscopic Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 17: Global Hygroscopic Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 18: Global Glaciogenic Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 19: Global Glaciogenic Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 20: Global Increasing Precipitation Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 21: Global Increasing Precipitation Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 22: Global Mitigating Hail Damage Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 23: Global Mitigating Hail Damage Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 24: Global Dispersing Fog Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 25: Global Dispersing Fog Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 26: Global End Burning Flares Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 27: Global End Burning Flares Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 28: Global Ejection Flares Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 29: Global Ejection Flares Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 30: Global Manual Generator Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 31: Global Manual Generator Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 32: Global Automatic and Remote Based Generator Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 33: Global Automatic and Remote Based Generator Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 34: Global Flare Trees Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 35: Global Flare Trees Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 36: Global Agricultural Areas Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 37: Global Agricultural Areas Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 38: Global Water Supply Areas Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 39: Global Water Supply Areas Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 40: Global Drought- Prone Areas Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 41: Global Drought- Prone Areas Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 42: Global Others Cloud Seeding Market by Value; 2019-2023 (US\$ Million)

Figure 43: Global Others Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 44: North America Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 45: North America Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 46: North America Cloud Seeding Market by Region; 2023 (Percentage, %)

Figure 47: The US Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 48: The US Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 49: Canada Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 50: Canada Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 51: Mexico Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 52: Mexico Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 53: Asia Pacific Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 54: Asia Pacific Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 55: Asia Pacific Cloud Seeding Market by Region; 2023 (Percentage, %)

Figure 56: China Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 57: China Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 58: Japan Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 59: Japan Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 60: India Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 61: India Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 62: South Korea Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 63: South Korea Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 64: Rest of Asia Pacific Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 65: Rest of Asia Pacific Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 66: Europe Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 67: Europe Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 68: Europe Cloud Seeding Market by Region; 2023 (Percentage, %)

Figure 69: Germany Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 70: Germany Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 71: The UK Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 72: The UK Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 73: France Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 74: France Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 75: Italy Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 76: Italy Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 77: Spain Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 78: Spain Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 79: Rest of Europe Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 80: Rest of Europe Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 81: Rest of the World Cloud Seeding Market by Value; 2020-2023 (US\$ Million)

Figure 82: Rest of the World Cloud Seeding Market by Value; 2024-2029 (US\$ Million)

Figure 83: Global Annual Mean Land-ocean Temperature Index; 2018-2023
(Temperature Anomaly, Celsius)

Figure 84: Snowy Hydro Limited Revenue by Type; 2023 (Percentage, %)

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