

气候 x 弹性 欧洲科技

慕尼黑 2025年7月
1日



1 欧洲风投与气候科技

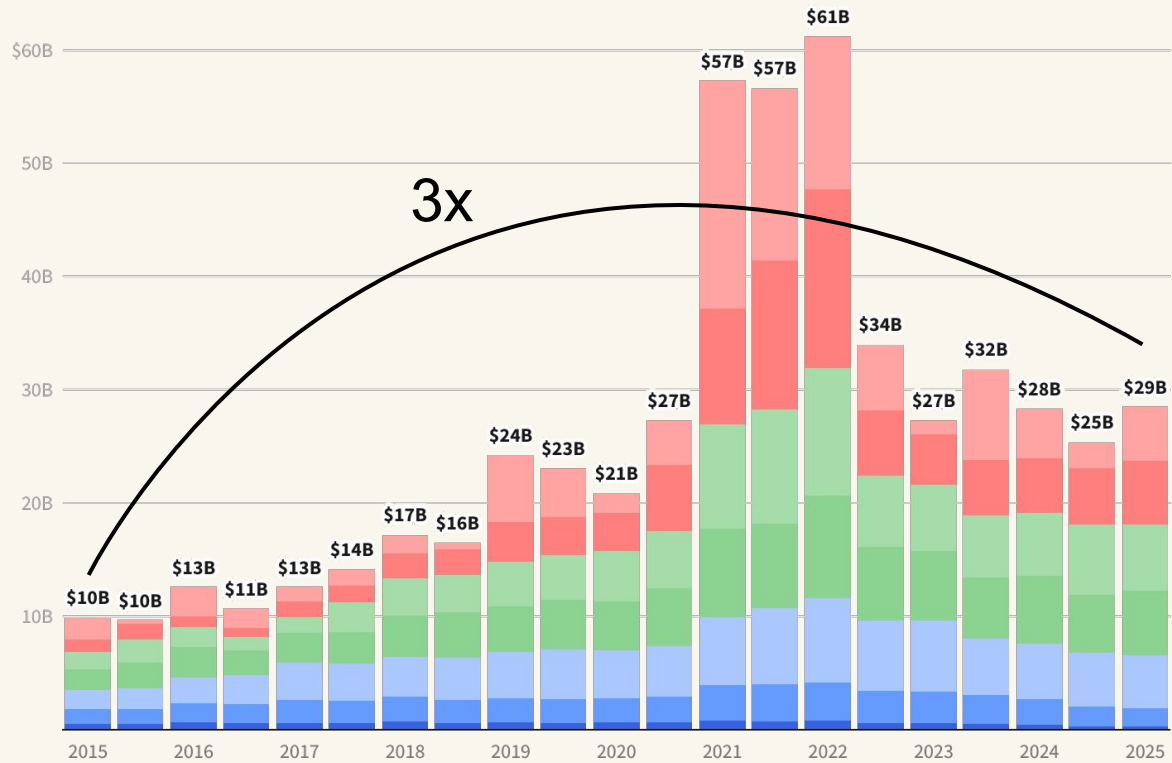
2 建设一个有韧性的欧洲

3 气候科技的发展

2025年欧洲风险投资小幅增长

欧洲风险投资 » 在线查看

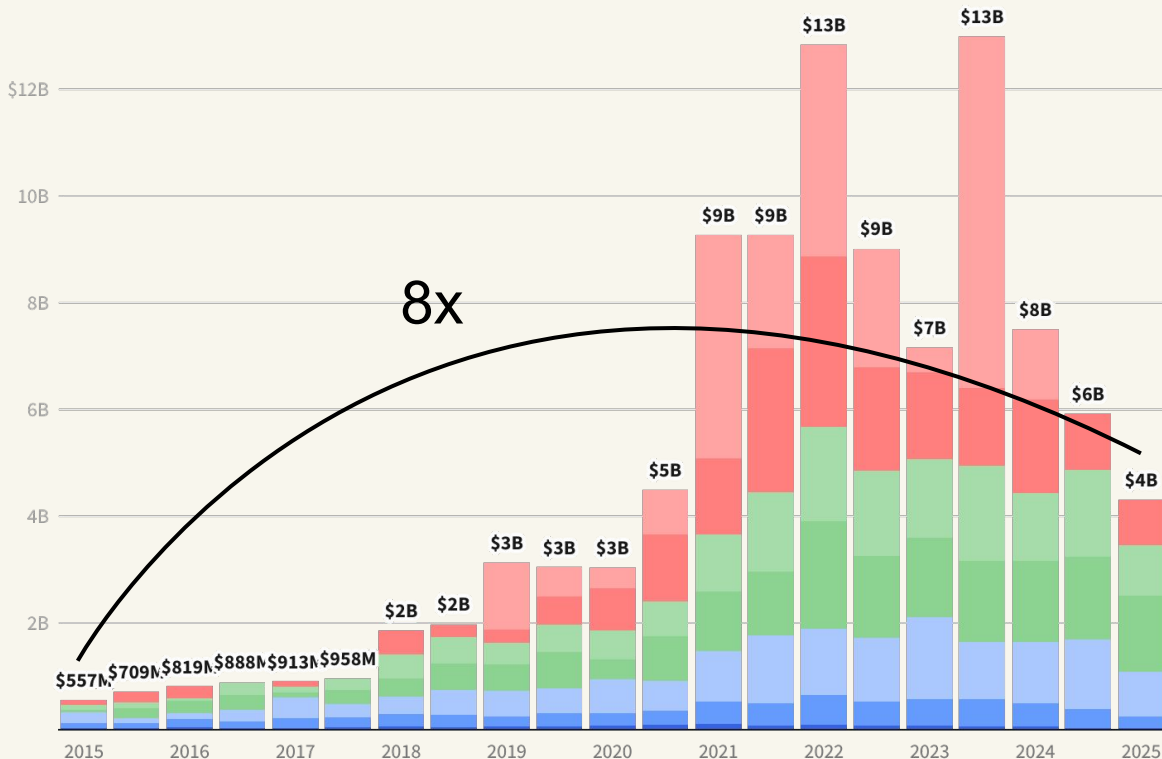
- \$250百万+ (mega+)
- \$100–250m (超大规模融资轮)
- \$40–100m (C轮)
- \$15–40m (B轮融资)
- \$4–15m (系列A)
- \$1–4m (种子资金)
- \$0–1m (种子轮前)



欧洲气候科技风险投资在2025年略有下降——较十年前增长了8倍

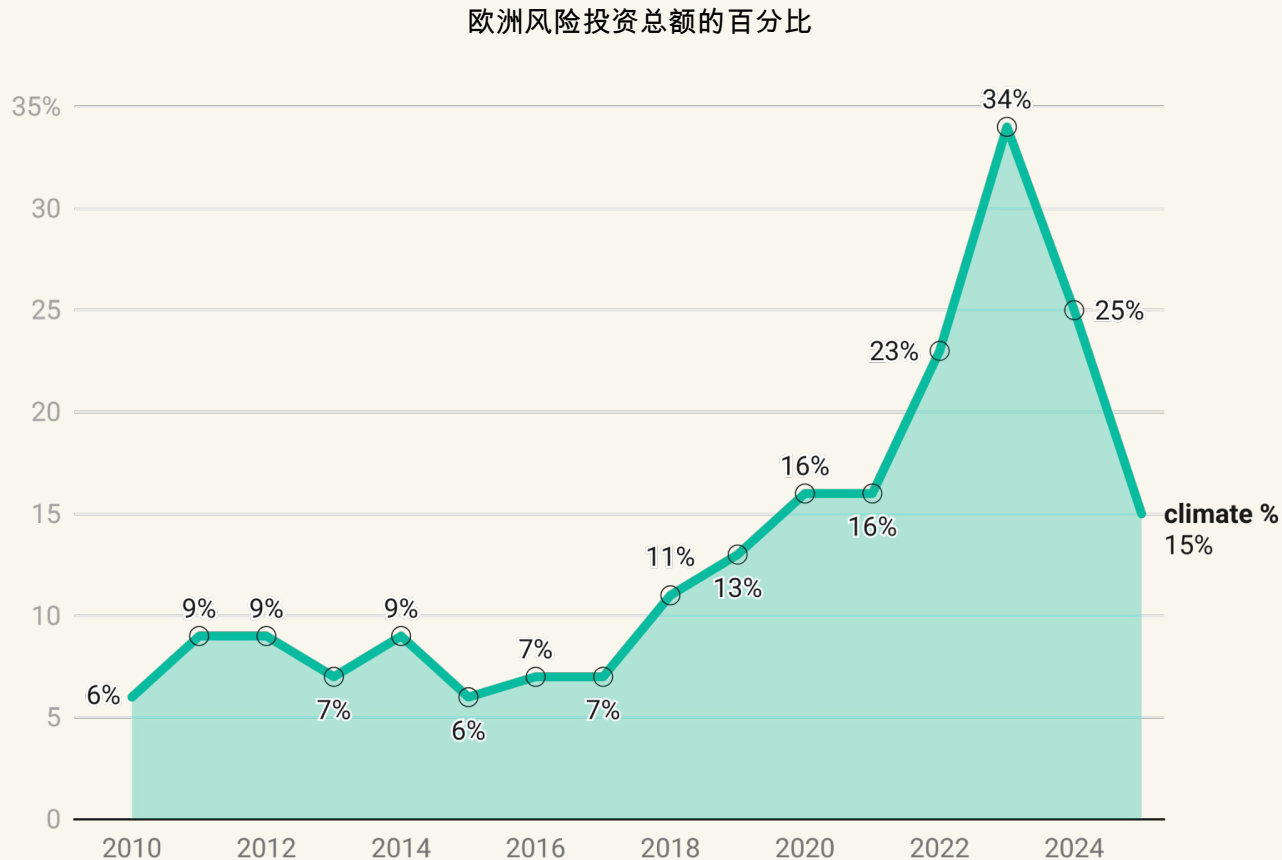
欧洲气候科技风险投资»在线查看

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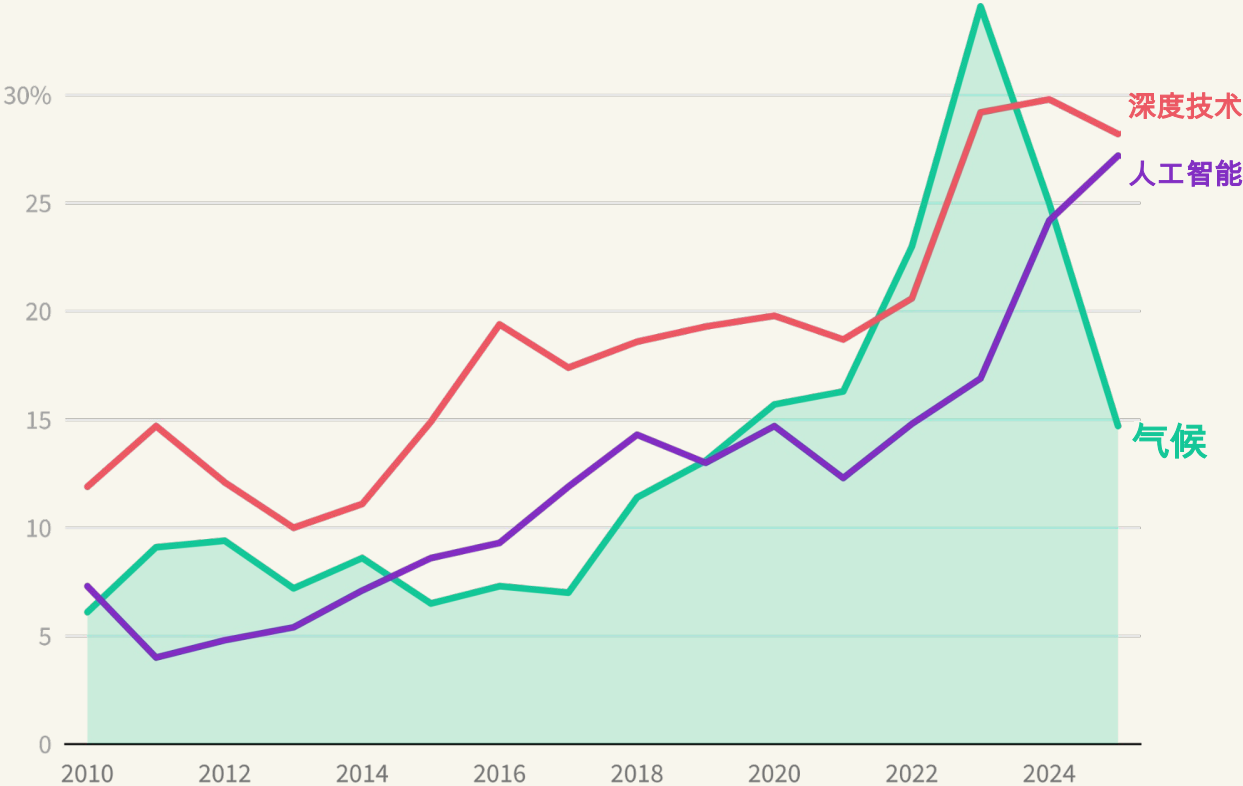
15%的欧洲风 投资金投入气 候技术领域

峰值时为34%



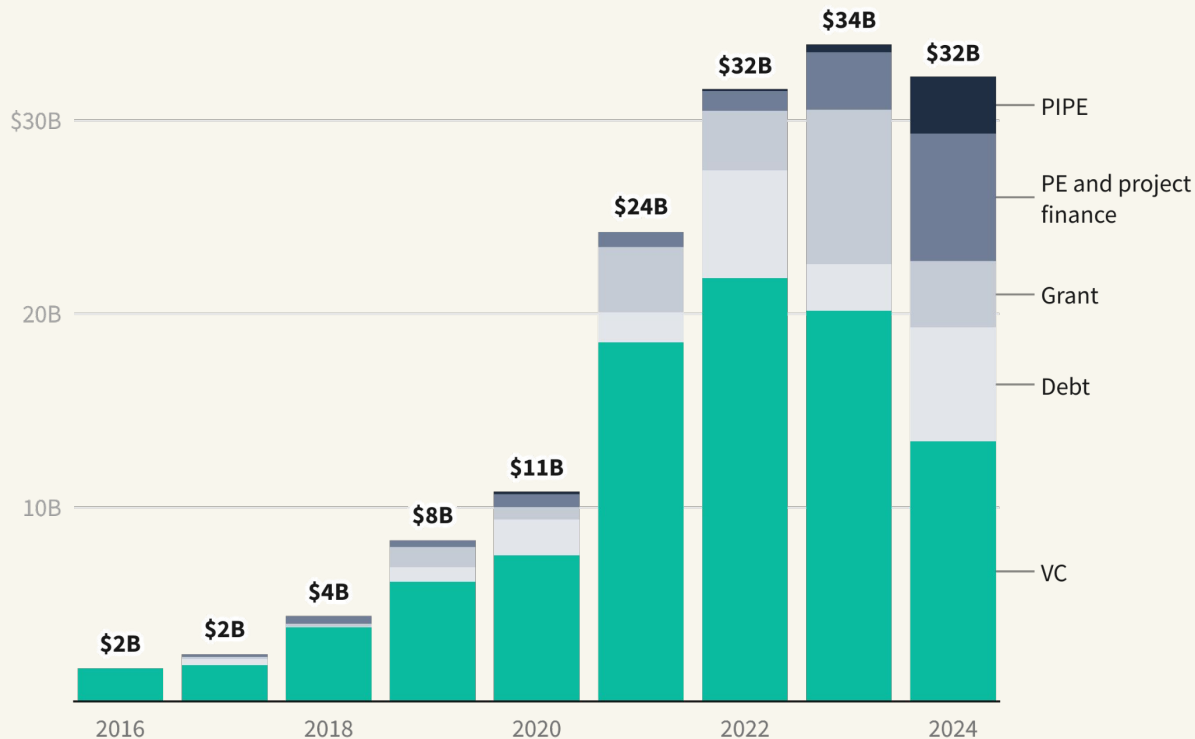
2025年的主要
主题是人工智
能和深度科技

欧洲风险投资总额的百分比



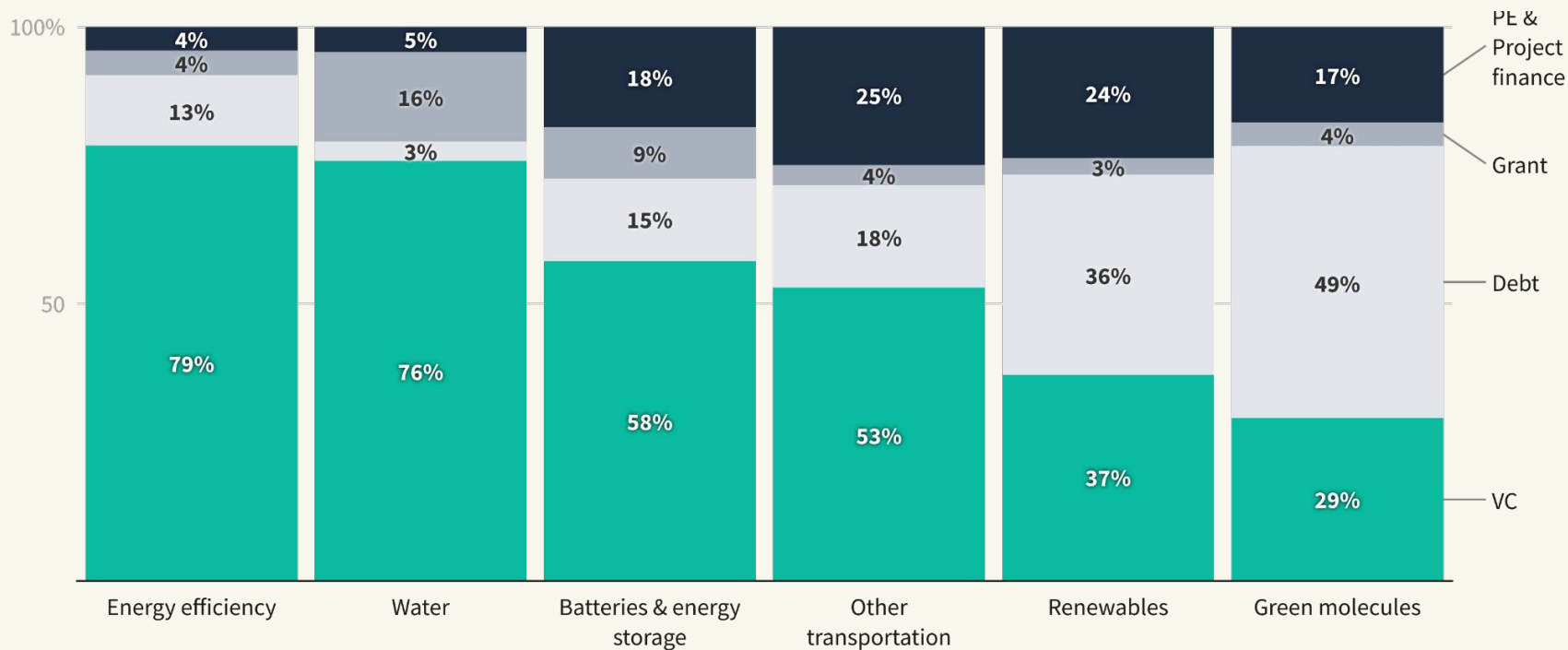
新的金融方式正在弥补风险投资资金缺口，并现已成为欧洲气候技术投资的一半

欧洲气候科技公司风险投资



绿色分子和可再生能源初创公司尤其利用了这一点

欧洲各能源部门每类型资金份额 (2016-2024)



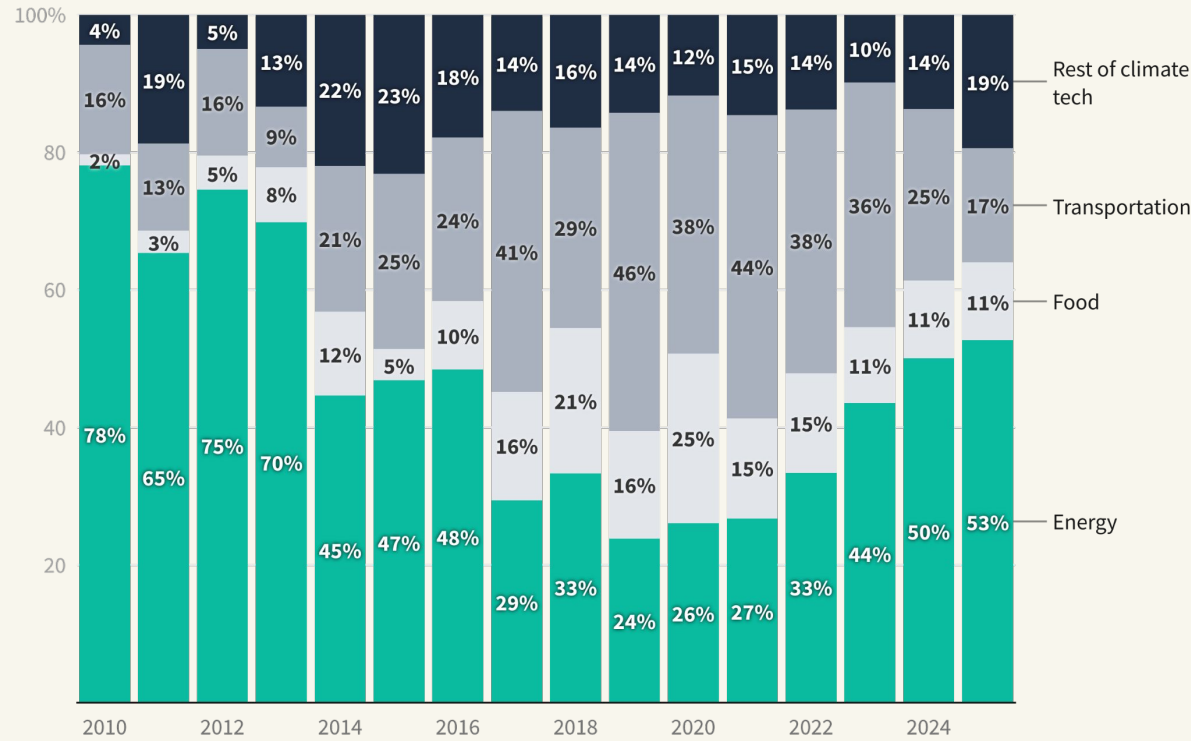
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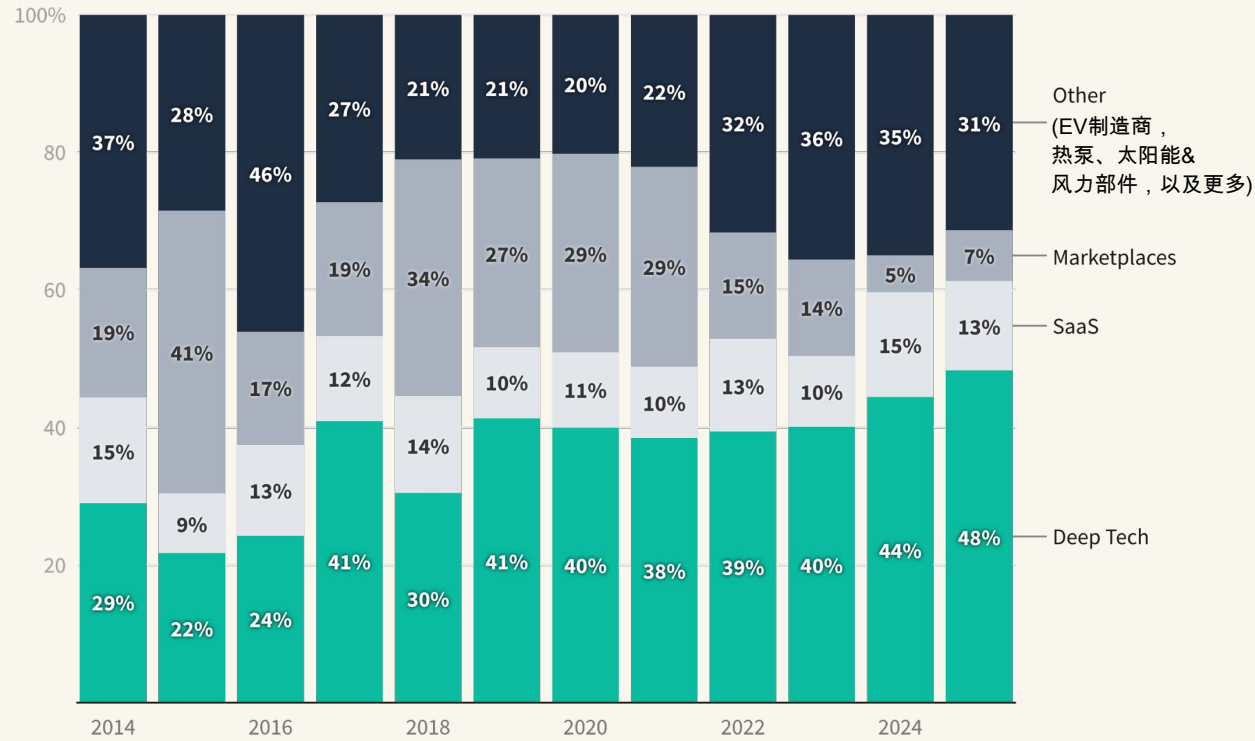
气候科技投资已重新转向能源

欧洲气候科技公司风险投资



深度科技现在几乎是气候科技的一半

欧洲气候科技风险投资



德拉吉：“欧洲未来面临三大转型”

创新 & 竞争力

降低门槛。释放
创业
缩小创新差距
与美中

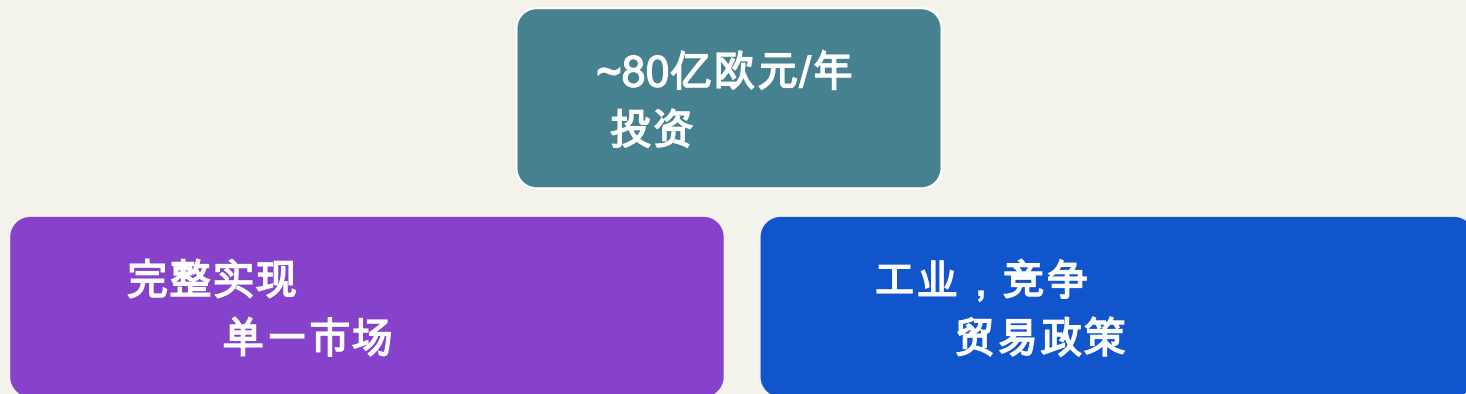
廉价 & 丰富 清洁能源

坐标
脱碳以转向
将之转化为一个机会
对于欧洲

弹性 & 安全

减少欧洲的
接触
地缘政治不稳定
和去全球化

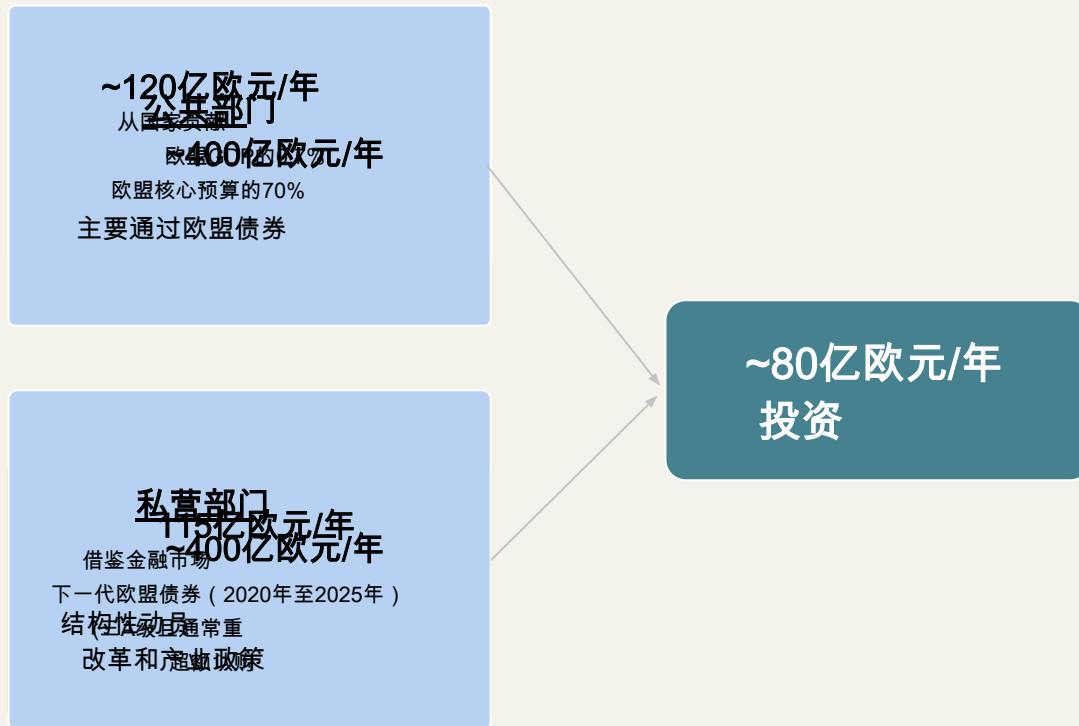
包括每年800亿欧元战略投资的三种构建模块



德拉吉报告，Dealroom 提供了一些指示性解读。百分比分配是 Dealroom 提供的指示性解读。* 历史上，私营部门资金约占 80% 的生产性投资，但德拉吉报告提到，在这种情况下，可能需要高达 50% 的公共部门承诺。这取决于改革的速度和深度。

公共部门和私人部门各占50/50%。

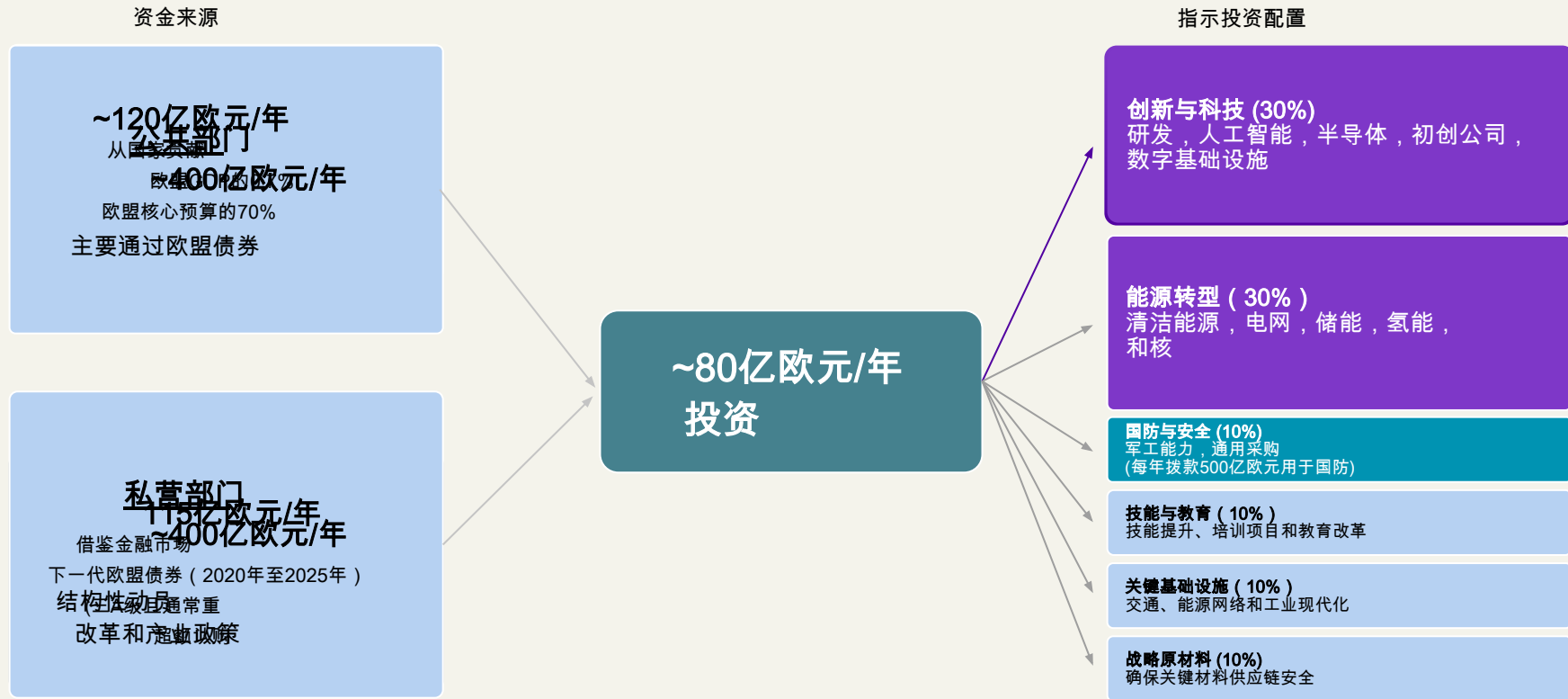
资金来源



德拉吉报告，Dealroom 对其中一些内容进行了一些指示性解读。百分比分配是 Dealroom 的指示性解读。* 历史上，私营部门资金约占生产性投资的 80%，但德拉吉报告提到在这种情况下高达 50%

/ 14 来源：可能需要公共部门的承诺。这取决于改革的速度和深度。

2024年理念：为能源转型和技术分配±5000亿欧元。



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德拉吉报告提到在这种情况下高达 50%

页面 / 15 来源：可能需要公共部门的承诺。这取决于改革的速度和深度。

但在2025年...

北约1.5%的19万亿欧
元欧盟27国GDP = 1万
亿美元/年

但在2025年...

北约的5%
€ 19 万亿欧元区27国GDP
= 1万亿/年

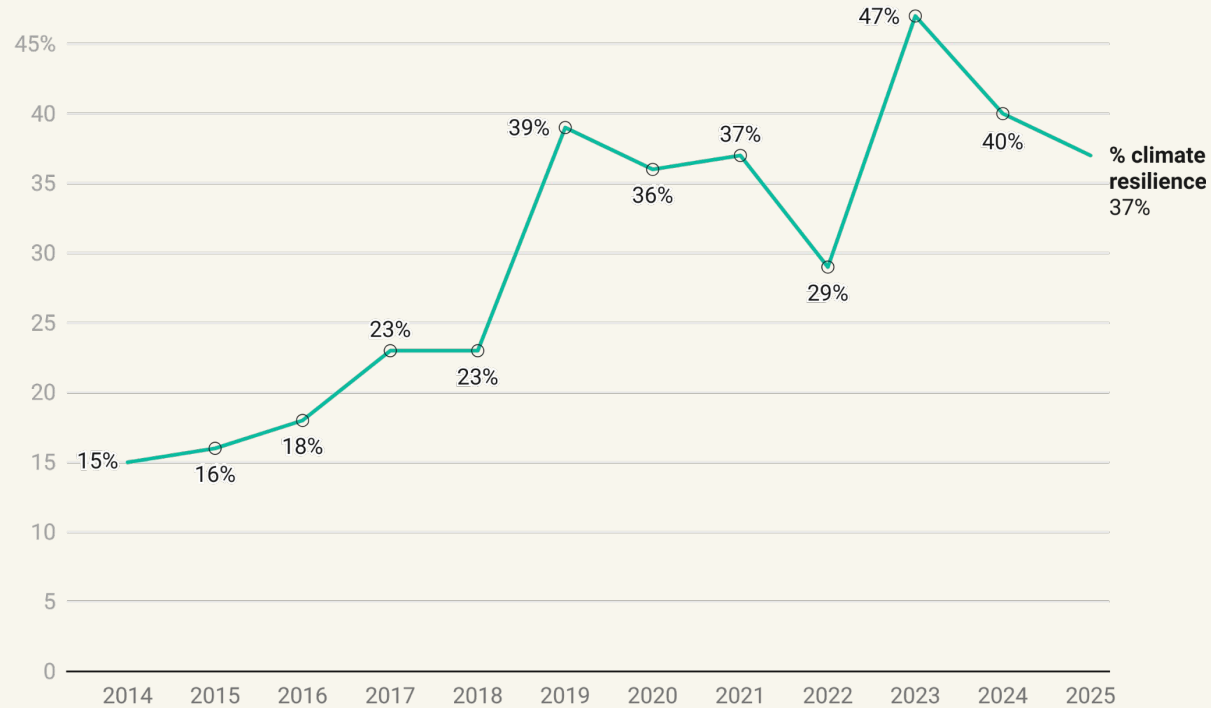
3.5% 防御

安全

韧性

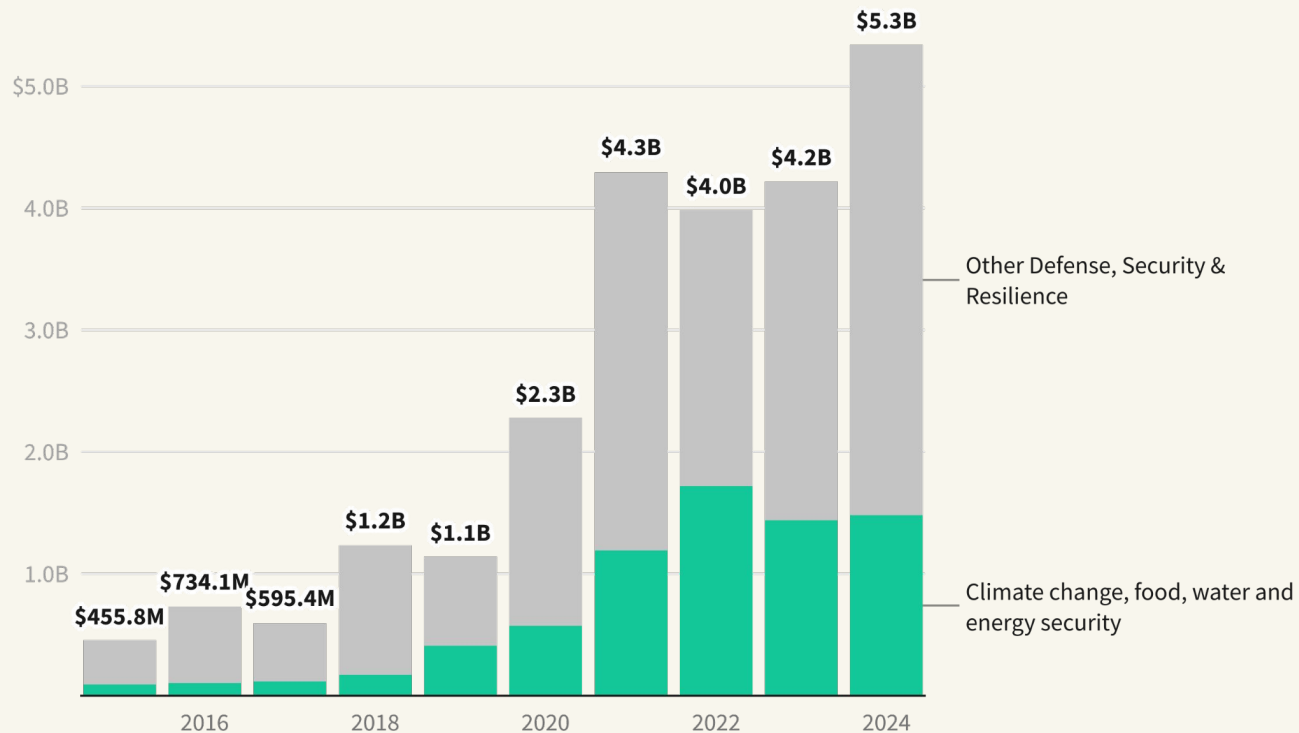
韧性现在是欧洲气候技术投资的37%

气候韧性细分领域在总欧洲气候技术资金中的占比



气候×韧性是国防、安全和韧性的日益增长的一部分

欧洲国防、安全和韧性投资

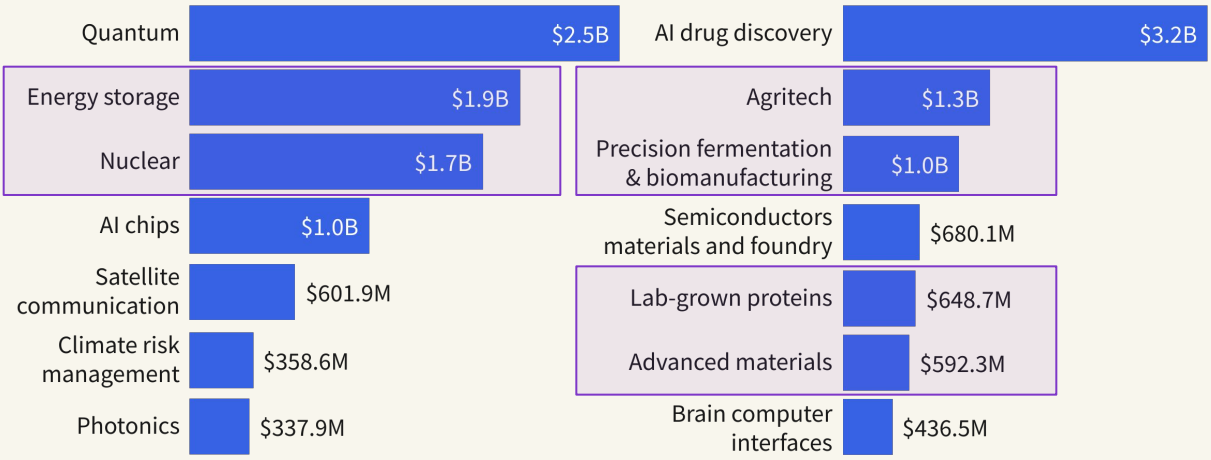


国防，安全和韧性

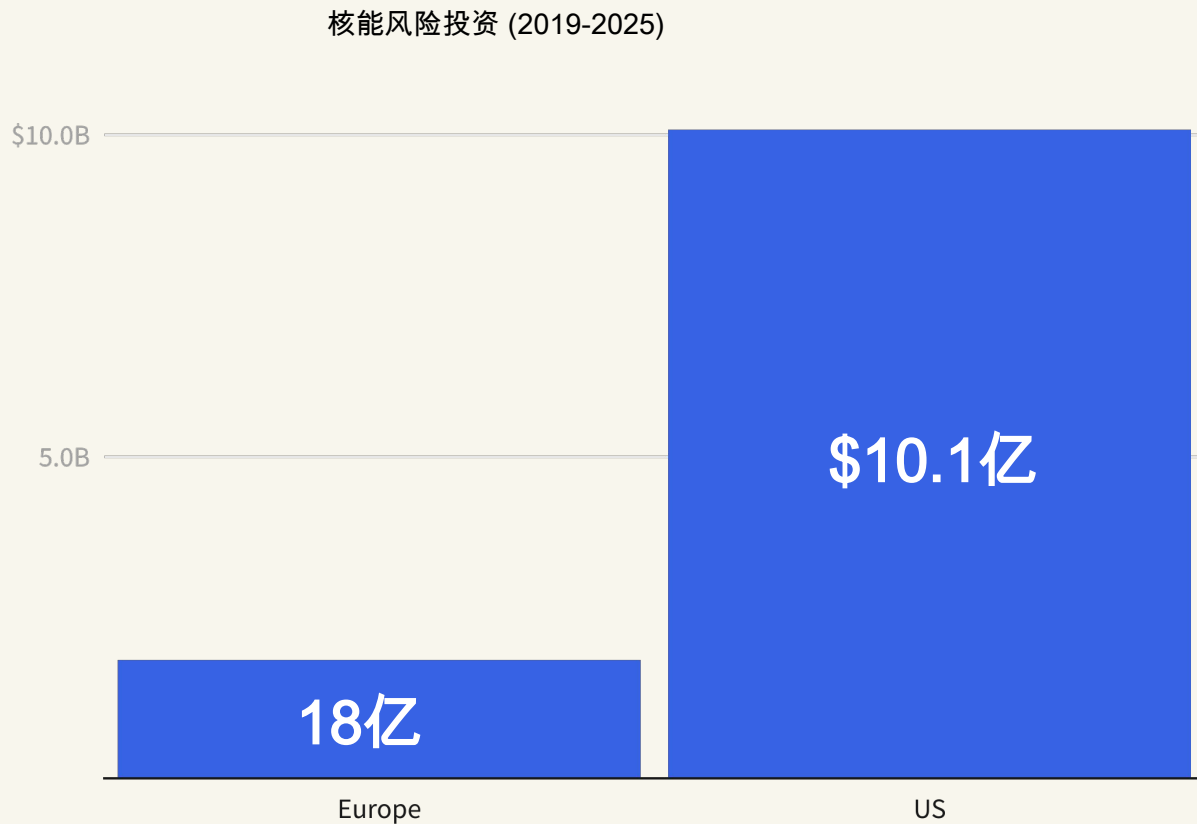
防御

安全

韧性



美国在核能上的投资高出5.6倍。考虑到欧洲对能源独立的需要，情况本应相反。



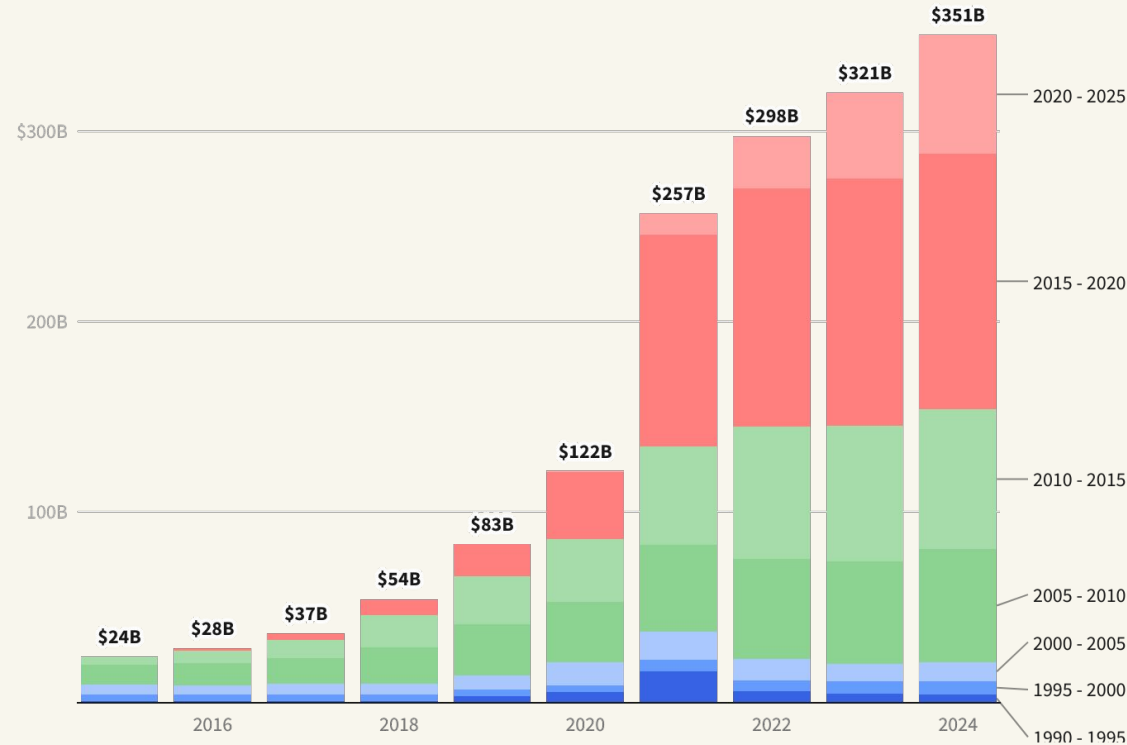
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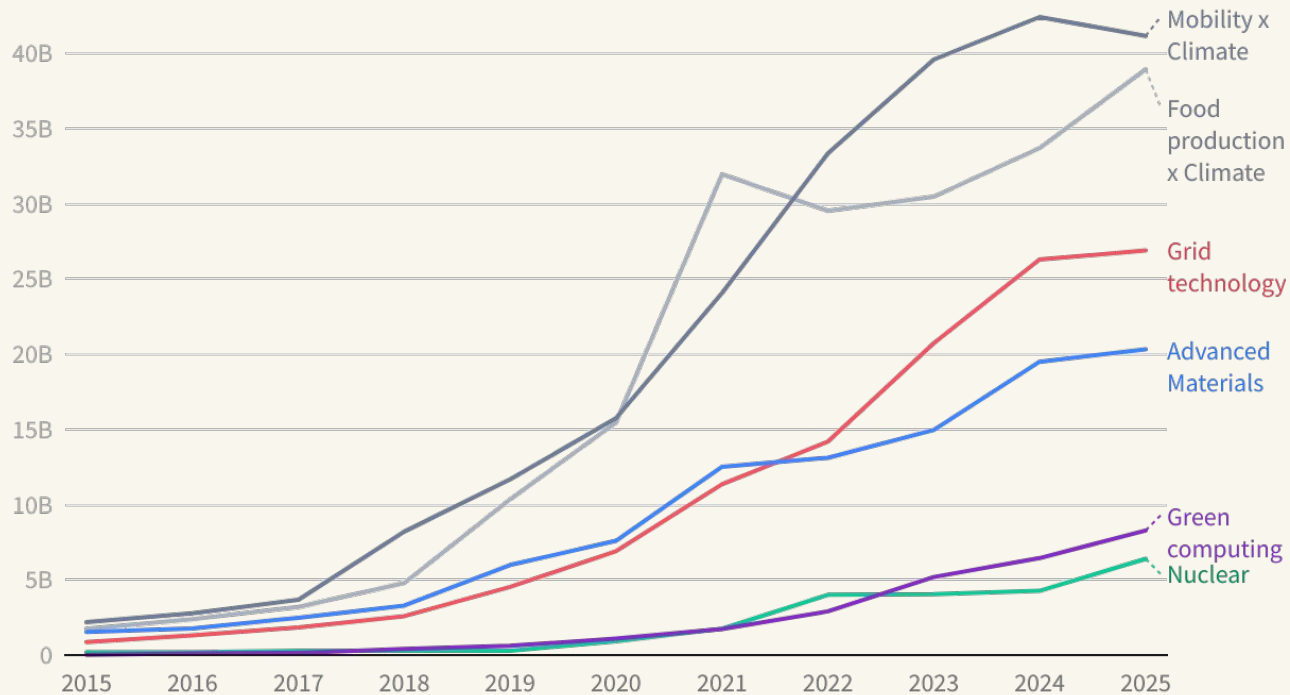
在气候科技领域
创造了3500亿
美元的企业价值

欧洲气候科技企业市值



接下来是什么？

欧洲气候科技企业市值



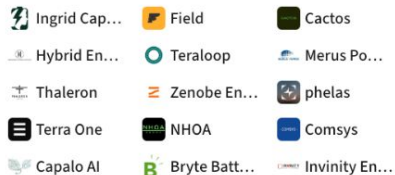
Battery energy storage planning and tools

Combined funding \$ 0.1M



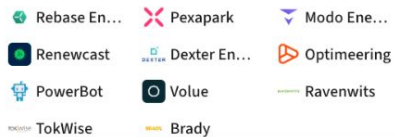
Battery operators for grid balancing and energy trading

Combined funding \$ 1.7B



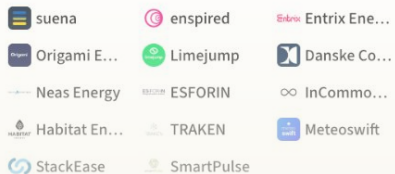
Forecasting and trading tools

Combined funding \$ 79M



Algotraders & battery optimisation

Combined funding \$ 189M



Ops & maintenance tools

Combined funding \$ 181M



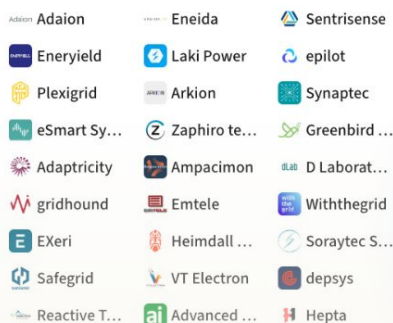
Grid: infrastructure expansion

Combined funding \$ 173M



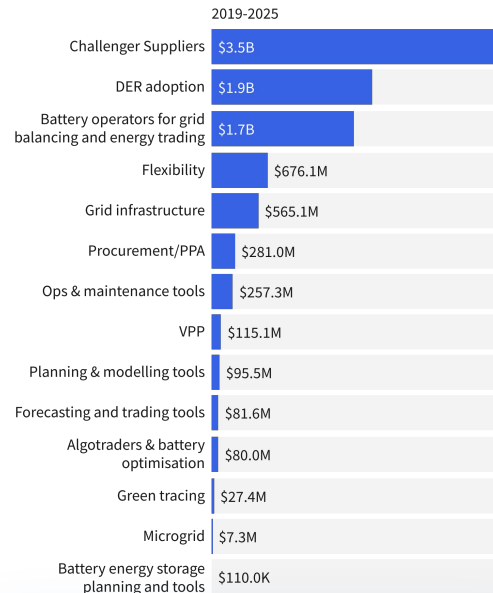
Grid: infrastructure monitoring and managment

Combined funding \$ 372M



Flexibility platforms

Combined funding \$ 128M



网格技术

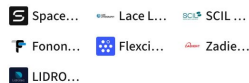
Semiconductor advancements: Materials

Combined funding \$ 412M



Semiconductor advancements: Manufacturing

Combined funding \$ 131M



Semiconductor advancements: Chip design

Combined funding \$ 716M



Computing technology innovations: Quantum

Combined funding \$ 313M



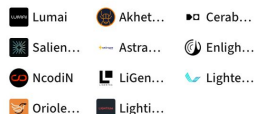
Computing technology innovations: Neuromorphic

Combined funding \$ 181M



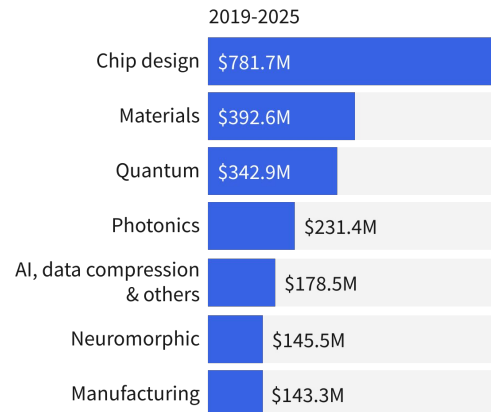
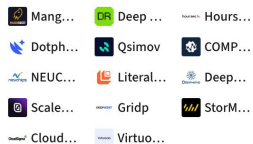
Computing technology innovations: Photonics

Combined funding \$ 220M



Software architecture innovations: AI, data compression & others

Combined funding \$ 163M



绿色计算

Discovering/designing new metal and alloys materials (AI material discovery, computational etc.)

Combined funding \$ 166M

- Foun...
- Phas...
- Daumet
- Citrin...
- Arcan...
- Amor...
- Quest...
- Vulkam
- kinaltek
- Fenix...
- Halcy...
- Impre...
- Micro...

Metal Extraction & Processing Innovations (Bioleaching / biomining, Electrochemical extraction, Low-carbon refining methods)

Combined funding \$ 712M

- EndoL...
- Nth C...
- pH7 T...
- Magr...
- Noval...
- Behol...
- Geno...
- Atlas ...
- Ceibo
- Ascen...
- Ivanh...
- Bindi...
- Tech...
- Helios

New manufacturing of metals/alloys (additive manufacturing, 3d printing etc)

Combined funding \$ 1.5B

- Seura...
- ValCUN
- Fabri...
- Trio L...
- Mantle
- Head...
- ziknes
- XJet
- Free...
- Vulca...
- 3DEO
- Addit...
- Zeda
- Rosot...
- MX3D
- Arcam
- WeNext
- Equis...

Metal Coatings & Surface Engineering (Nano-coatings, Anti-corrosive or anti-bacterial finishes, High-performance conductive coatings)

Combined funding \$ 83M

- Modu...
- Ferre...
- Alliu...
- Expa...

Sustainable / Green Metals (Green steel / aluminum, hydrogen, carbon capture)

Combined funding \$ 3.4B

- Bosto...
- Gree...
- MIMS...
- Envir...
- GK
- Magn...
- Gravi...
- Solut...
- Elem...
- Metal...
- Arctial
- Stegra
- Cocoon
- Electra
- Limel...
- Carb...
- Herth...

Recycling & Circular Metals (Circular economy, Closed-loop recycling tech, Metal recovery, Urban mining)

Combined funding \$ 419M

- Descy...
- Sorte...
- Mint I...
- Metal...
- Avert...
- Circul...
- Purifi...
- TND
- Ameri...
- Conti...
- Orbit...
- Rever
- Galdi...
- Reme...
- Ashvi...
- Novoen
- Plock...
- METY...
- Exces...
- Phos...

Nanomaterials & Nanotechnology (nanoparticles, quantum dots, nanocomposites, nanocoatings...)

Combined funding \$ 866M

- Nano H...
- Photio
- Nanos...

Remediation

Combined funding \$ 11M

- Enviro...
- Mycocy...
- Phibion

Mine tailings utilization

Combined funding \$ 54M

- Phoeni...
- Travert...
- Arca
- RockFix
- Planeta...
- Sitration

Water treatment with mineral extraction

Combined funding \$ 6.5M

- Waterc...
- Alkali...
- Olokun...

Rare earth portfolio developer

Combined funding \$ 619M

- TechMet
- USA Ra...

Lithium mining developer

Combined funding \$ 112M

- Comis...
- Northe...

Other mining developers

Combined funding \$ 10M

- Perpet...
- Metalex

Autonomous mining equipment

Combined funding \$ 112M

- SafeAI
- WAYTOUS
- OffWorld
- Zyfra
- Tribe T...

Connectivity for mines

Combined funding \$ 61M

- Astrocra...
- Hiber
- Tumi R...

Mineral trading

Combined funding \$ 58M

- Open M...
- Minehu...
- Waybri...

Advanced Ceramics & Glass

Combined funding \$ 138M

- Arceon
- Alusid
- Brite S...
- Barton ...
- CoolAnt
- FastCas...
- ReVSalt
- Fornax ...
- Zirconia
- Zeomem
- BJS Cer...
- BirdSh...
- Flexira...
- Magrat...
- Diam C...
- Hybrid...
- Gauzy
- Nanoco...

Energy materials (battery, fuel cell, solar, thermoelectric...)

Combined funding \$ 3.4B

- DioQuest
- Anovion
- GraphE...
- Homeo...
- Anovion
- 3DC
- Floatech
- Binks
- Carbon...
- Dioxycle
- EMC
- Bright ...
- SunGre...
- Zero Pe...
- E-magy
- Lyten
- Livium
- Graphe...
- OK
- ENWIRES
- PolyJoule
- Natron
- Anaphite
- Magment
- Synheli...
- CARBO...
- Sepion ...
- NanoGraf
- Next Eh...
- Niron ...
- Sila Na...
- Urbix
- CarbonX
- IONIC
- Swedis...
- SweetC...
- Swegan
- Kerionics
- Virent ...
- Quantu...
- Lumiant
- Primet ...
- NAWAH
- IsraZion
- CENS M...
- Photanol
- Boron ...
- Matteco
- PV3 Te...
- Veir
- Phase ...
- TETMET
- ZEN Gr...
- Bloomi...
- Diamo...
- OwnEn...
- Bolder ...
- Brinew...
- Skycoo...
- D-CRBN

Electronic & photonic

Combined funding \$ 1.1B

- QNA Te...
- Noctiluca
- Metam...
- Crayn...
- Callabs
- EpiGAN
- ZPI Opt...
- Advan...
- DIAMFAB
- Topolo...
- PROUD...
- Dyman
- Polar Li...
- Biohm
- CondAL...
- Diamo...
- Lithiu...
- Winterla
- OTI Lu...
- HelQ
- Greene...

2019-2025

Sustainable / Green Metals

\$2.8B

Metal Extraction & Processing Innovations

\$582.1M

New manufacturing of metals/alloys

\$100.9M

Recycling & Circular Metals

\$65.7M

Advanced Characterization & Testing

\$53.3M

Metal-as-a-Service / On-Demand Platforms

\$24.4M

Discovering/designing new metal and alloys materials

\$22.2M

关键材料

超过300家欧洲风险投资支持气候技术公司，收入超过2500万美元

新流程
初创公司

欧洲 ±7.5K 家天使投资公司组成的投资池

结果

1亿美元+收入 (纯血马)
和/或 10亿+ 估值 (独角兽)



±15K
+300
新流程
初创公司
发布第一轮风险投资
每年

4.2K
初创公司
(100K-15M
资金)

924
爆发
(\$15-100M
资金)

221
扩展
(1亿+
资金)

212
印第安纳波利斯小马队
(\$25-100M
收入)

93
\$100M+收入
和/或 10 亿美元至 100 亿美元价值

1
十角硬币

NEOEN

