



Technological Opportunities for a low-carbon World  
**Perspective from Asia and the Pacific**

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Renewable is 20% of Asia's energy mix.

China, the world's lead renewable investor-40%

India achieved 175 GW of renewable energy in 2022.

Indonesia, Thailand, and Vietnam set ambitious renewable targets.

Bangladesh, Myanmar, and Cambodia are slower to adopt but making some progress.



Southeast Asia Climate Tech

ECOSYSTEM

**FOOD**



**CIRCULAR ECONOMY**



**MOBILITY**



**RENEWABLES**



**CARBON MARKETS**



**STORAGE**



**BUILT ENVIRONMENT**

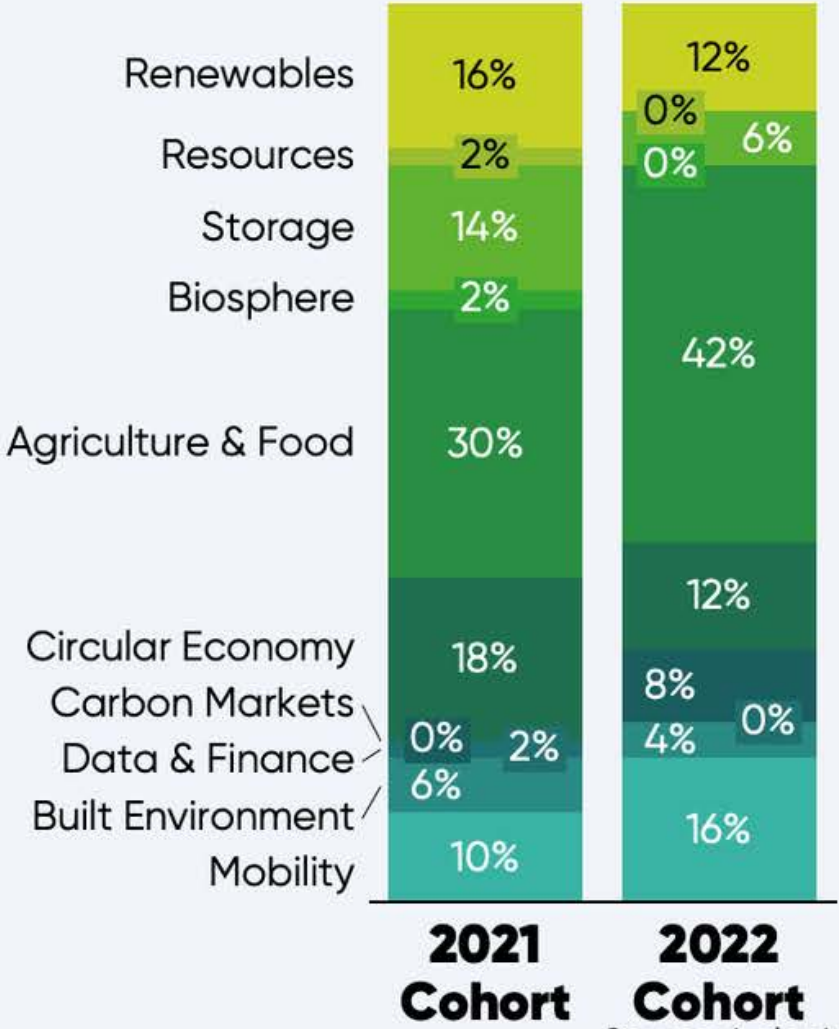
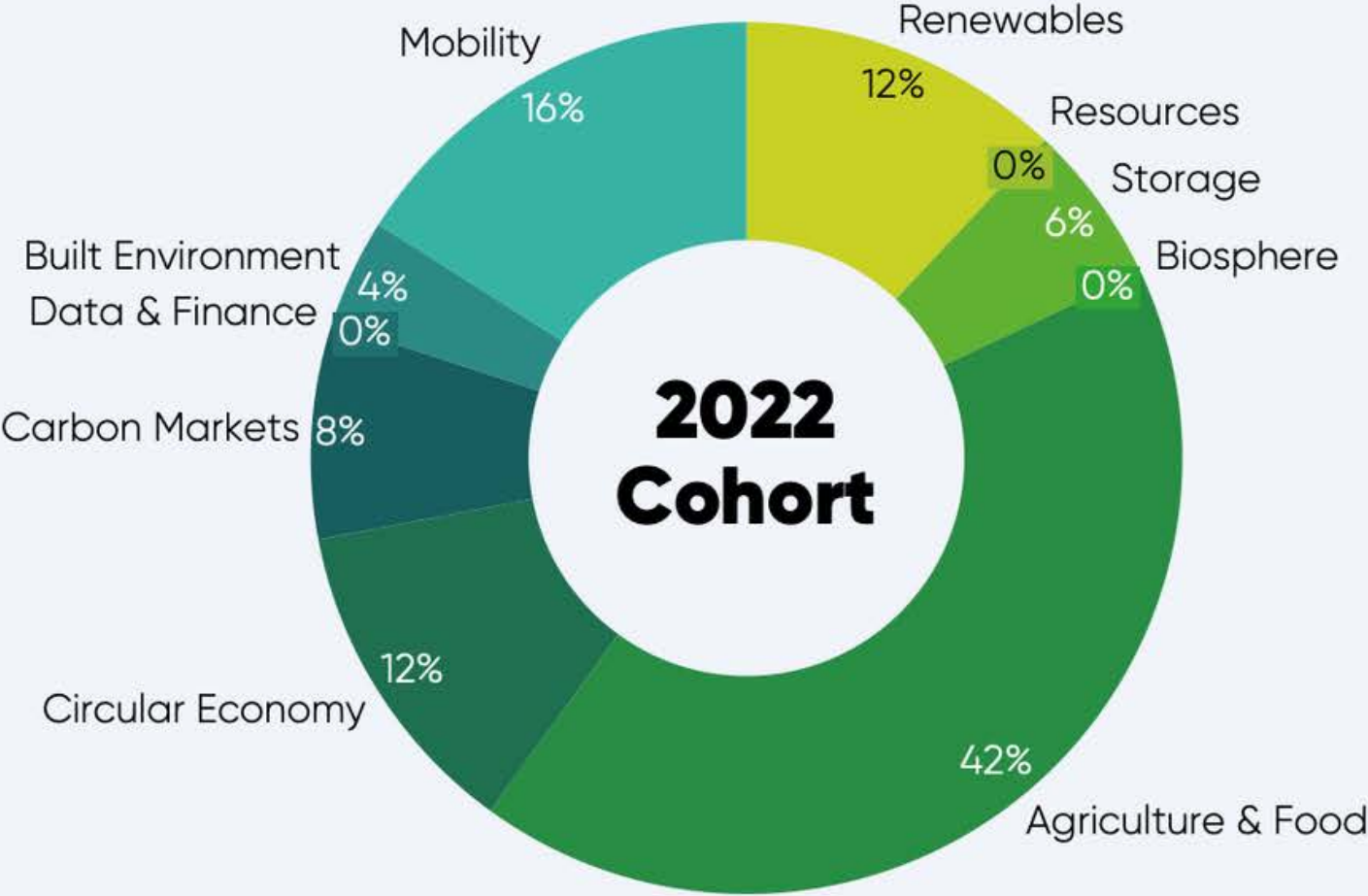


**2022 SOUTHEAST ASIA CLIMATE TECH 50**

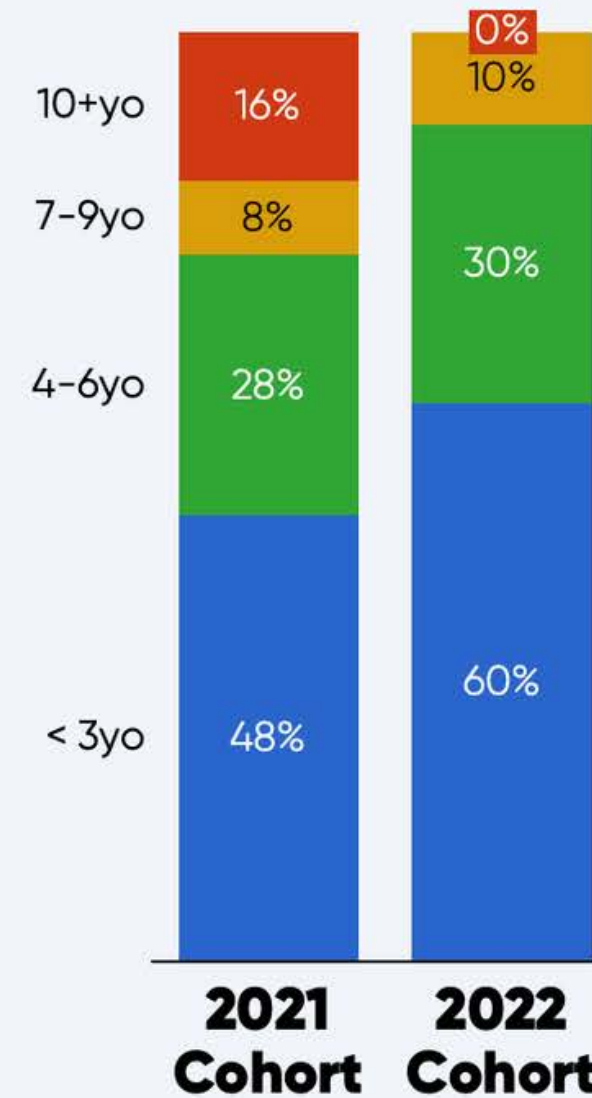
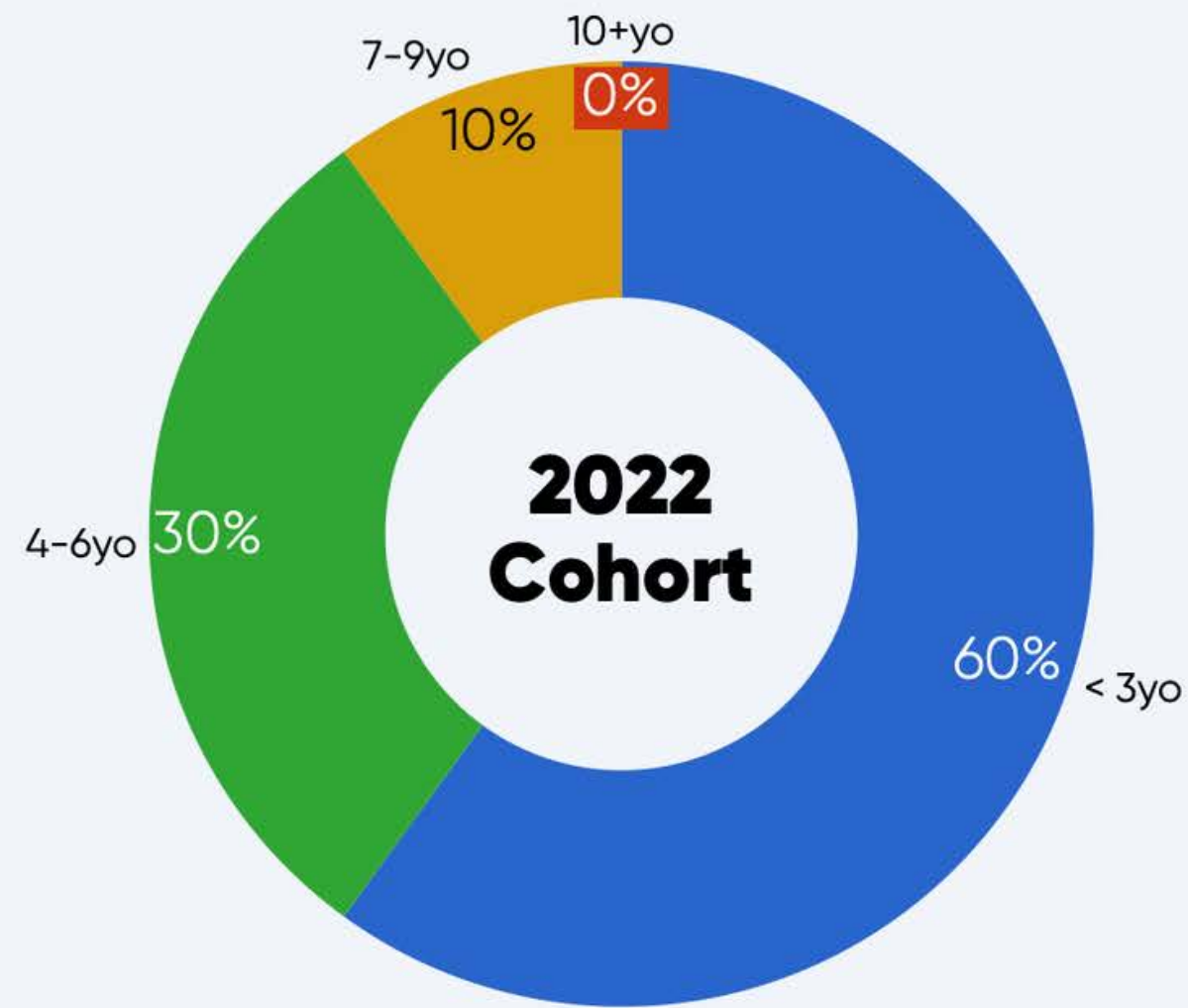
**Holon IQ**

# Ag + Food, Carbon Markets and Mobility show large growth while Renewables, Storage and Circular Economy decline in this year's cohort

2022 Southeast Asia Climate Tech 50 by Sub-Sector



Younger startups show significantly more growth, continuing to dominate this year's cohort



# MACRO CHALLENGES / FIXES



FUNDING / INVESTMENT



OUTDATED  
REGULATIONS



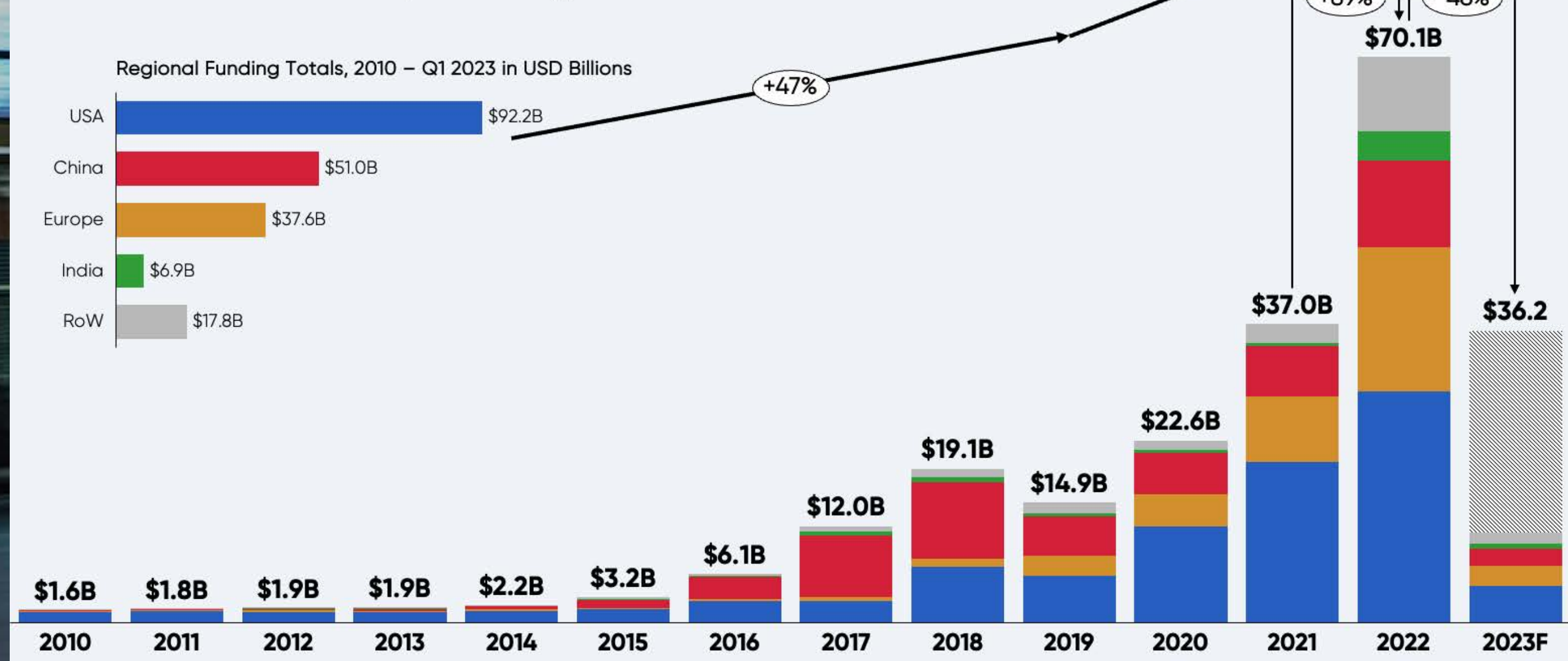
OUTDATED  
INFRASTRUCTURE

**GREEN TECHNOLOGY  
TRANSFORMATION**

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**\$11.2B of Climate Tech Venture Funding for Q1 2023. We're forecasting ~\$36.2B for the full year as investment slows further.**

Global Climate Tech Venture Capital Funding, 2010 – Q1 2023 in USD Billions



Source: HolonIQ, 7 April 2023. All numbers rounded and may not sum exactly due to rounding. Excludes PE transactions. All years calculated at historic FX (spot rate on funding date)



# MICRO CHALLENGES / FIXES



ECONOMIC UNIT



BUSINESS MODEL



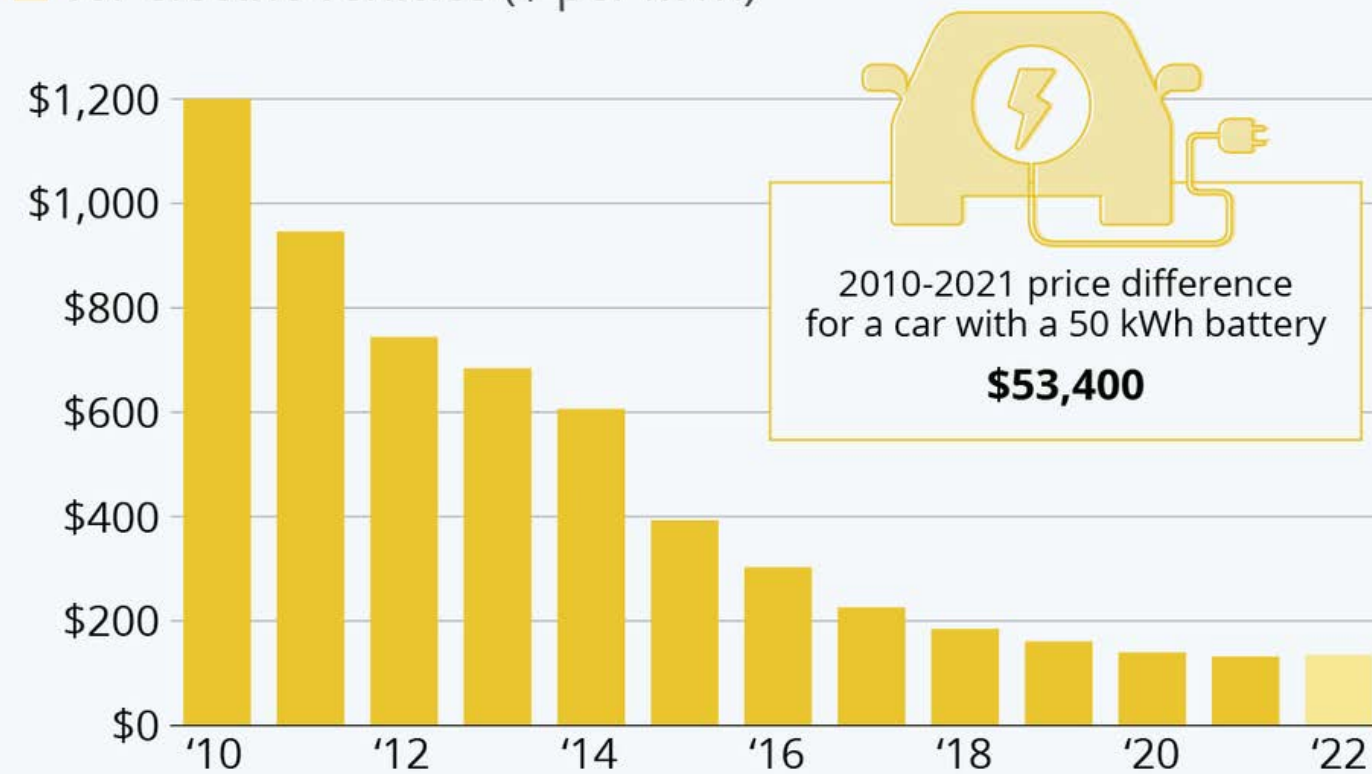
SCALABILITY

**GREEN TECHNOLOGY  
TRANSFORMATION**

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## Rising Commodity Prices Slow EV Battery Price Drop

Volume-weighted average price of battery packs for electric vehicles (\$ per kWh)\*



\* all prices in real 2021 dollars, except for 2022 forecast, which is given in nominal terms  
Sources: BloombergNEF



A wide-angle photograph of a large international conference taking place in a grand, ornate hall. The room features a large, curved wooden table with many participants seated around it. The participants are dressed in formal attire, and the room is filled with people, some standing and some seated. The background shows a large, detailed mural on the wall. The text is overlaid in the center of the image.

International Community  
**COLLABORATE & SHAPE TRUE  
SUSTAINABLE DEVELOPMENT**

# a two-sided coin

Sustainability is the next big growth engine.

Sustainable Development provides a competitive advantage.

The government, private sector, and civil society should promote green technologies.

## ON THE FLIP SIDE

Don't forget people. They need to play a key role in this transition.

Some countries may already have the upper hand in controlling resources and technologies.

Democratize technologies to balance Green Growth and Greed.



**THANK YOU**