

Going Nuclear



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REGENERATIVE
By Sherrell Dorsey

Your front row seat to the future
of sustainable innovation.

Back in February, I found myself at the [Nuclear Energy Institute](#), talking about something I've been increasingly convinced of: the power of *storytelling* in this whole energy conversation. I was there with other journalists and TV producers— all of us geeking out on the best ways to communicate what's really going on in this space, along with the difficulty of getting it right.

Nuclear has been a bit of a revelation. For someone like me, who wasn't exactly steeped in its intricacies, it's been a standout lesson in unexpected growth and opportunity. Sure, we remember the plant shutdowns, the environmental red flags... but places like the NEI are highlighting a whole new set of possibilities. Especially when you look at the data center boom – it's on the lips of every city council and [economic development](#) strategist because they're finally waking up to the INSANE power demands of AI.

The support for nuclear energy is gaining ground. A recent [Gallup poll](#) indicates that Americans are increasingly in favor of leveraging nuclear as a low-emission energy source compared to their sentiments in prior years.

Nearly 95 nuclear power plants supply roughly 20% of our country's current electricity needs. But industry leaders want to advance smaller nuclear reactors, as larger plants retire, and triple the output of power to the grid within the next decade. Development of these plants doesn't come cheap. The [\\$30 billion dollar](#) Vogtle plants in Georgia are among the newest developments within the last 30 years, and questions of safety and safe disposal of nuclear waste are still key concerns for environmental groups and rate-payers alike.

Considering that the Trump administration has cancelled north of [\\$300 billion in contracts](#) that were geared toward green energy projects, and has supported a fossil-fuel first agenda, it could come at a surprise that his administration is widely [championing](#) a "nuclear renaissance" supported by tech giants seeking to advance its electricity needs for AI.

This development suggests a potential paradigm shift in our energy strategy. The convergence of increasing public support, technological advancements in smaller, more efficient reactors, and a renewed governmental focus – even from unexpected corners – points to a significant opportunity.

Realizing this potential, however, will require a multifaceted approach that goes beyond simply building new plants. Think: Targeted tax breaks and attracting a new generation of engineers and scientists.

In this week's newsletter, we're diving further into the policies and innovations shaping this sector. Let's get to it.

Stay sharp,



***P.S.** I'm opening up a couple of private coaching spots for startup founders this month. If you're navigating growth, fundraising, or big leadership decisions and want a clear, strategic thought partner in your corner — hit reply and let's chat. I'll share the details and see if it's a fit.*



COMPANY TO CLOCK: Valar Atomic

Valar Atomic is scaling nuclear energy for heavy industrial power and clean hydrocarbon fuel production.

www.valaratomics.com

Headquarters

Wilmington, DE

Why it matters

Valar Atomics is addressing critical energy and climate challenges by unlocking nuclear energy's potential for industrial-scale clean fuel production.

- Traditional energy sources can't meet the growing demands of heavy industry without harmful emissions.
- Nuclear innovation has been historically slow and costly—Valar is proving it doesn't have to be.
- Their breakthrough enables grid-independent solutions like hydrogen and clean hydrocarbons.
- A faster, more scalable nuclear model could dramatically accelerate decarbonization efforts.

The scale of the industry

The need for reliable, clean industrial energy is escalating rapidly due to:

- Surging global demand for hydrogen and clean fuels.
- Increasing pressure to decarbonize heavy industry, data centers, and transportation.
- Growing energy security concerns and the need for grid-independent solutions.
- Policy support for next-generation nuclear energy and infrastructure investment.

Traction

- Raised \$19 million in seed funding led by Riot Ventures, Initialized, and AlleyCorp.
- Built and developed the Ward One test reactor in record time—1 year and \$19M (vs. 4 years and \$80M typical).
- Signed a first-of-its-kind nuclear research contract with the Philippines Nuclear Research Institute.
- Assembled one of the world's top HTGR engineering teams.
- Founder Isaiah has presented directly to POTUS and built classified tech since age 16.

Major investors

- Riot Ventures
- Initialized
- AlleyCorp
- Steel Atlas
- Day One Ventures
- Stifel Bank
- Naval Ravikant
- Balaji Srinivasan
- Charlie Songhurst

BIG BILLS, BIG DEALS

- **Omnicidian**, a company transforming residential and commercial solar performance plans, raised **\$87+ million** to scale its clean energy

service platform. [BusinessWire](#)

- A **nuclear energy startup** closed its **Series A** and plans to **hire 100+ employees**, signaling major momentum for clean industrial power. [Energy Central](#)
 - **X-energy**, a leader in advanced small modular nuclear reactors, closed a **\$700 million Series C-1** round to accelerate development and deployment. [X-energy](#).
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POLICY PLAYS

- **Trump-era officials** are lobbying the International Energy Agency to **drop its climate mission**, raising alarms about future U.S. climate diplomacy. [Energy Central](#)
 - **Texas** is positioning itself to become the **epicenter of advanced nuclear**, with state leaders courting developers and loosening regulations. [Reuters](#)
 - Despite IRA incentives, **climate tech projects faced a wave of Q1 2025 cancellations**, with companies like Freyr and Kore Power delaying U.S. battery factories. [Utility Dive](#)
 - **Namibia**, one of the world's top uranium producers, is now eyeing **development of its first nuclear power plant**, signaling Africa's rising nuclear ambitions. [Bloomberg](#)
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INDUSTRY EVENTS & OPPORTUNITIES

- **[ClimaTech 2025](#)** (May 13–14, Boston, MA): A must-attend gathering of global leaders and climate tech innovators focused on sustainable solutions and profitable ventures.
 - **[HackSummit 2025](#)**: (May 15-16, Lausanne, Switzerland) A premier event spotlighting **climate deep tech**, bringing together cutting-edge startups, investors, and industry leaders at the forefront of innovation.
 - **[ReFed Food Waste Solutions Summit: \(June 23-25, Seattle, WA\)](#)**: The nation's premier gathering of the food waste movement.
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