



## X-energy and SGL Carbon Execute 10-Year Supply Agreement, Begin Graphite Production

January 15, 2026

**ROCKVILLE, MD, January 15, 2026** – X-energy Reactor Company, LLC (“X-energy” or “the Company”) and [SGL Carbon, LLC](#) (“SGL”) today announced a 10-year graphite supply agreement for X-energy’s Xe-100 small modular reactor (“SMR”). The agreement includes an initial three-year award valued at over \$100 million for X-energy’s first commercial deployment, anchored by a long-term framework to support production readiness for future projects. Together, these commitments help to strengthen X-energy’s SMR supply chain development at full commercial scale, supporting execution of the Company’s 11 GW commercial pipeline.

Under the initial contract, SGL has commenced production of graphite reactor components using their specialized NBG-18 medium-grain isotropic graphite for the first deployment of the Xe-100, [a proposed four-unit plant in partnership with Dow](#) in Seadrift, Texas under the [U.S. Department of Energy’s Advanced Reactor Demonstration Program](#). As part of the long-term framework, X-energy has reserved additional capacity in SGL’s production schedule for the [Cascade Advanced Energy Facility](#). Cascade is a planned 12-unit Xe-100 project in Washington State with Energy Northwest and the first of several X-energy projects with Amazon targeting at least 5 GW of new nuclear by 2039. X-energy and SGL’s long-term commitment is expected to support collaboration on future projects, helping to ensure supply chain continuity for safety-critical material across X-energy’s growing commercial orderbook.

SGL is a leading developer and manufacturer of advanced carbon materials, [operating at 29 sites across Europe, North America, and Asia](#) with extensive experience across sectors including automotive, aerospace, energy, and semiconductors. X-energy and SGL have collaborated since 2015 on the qualification of NBG-18 graphite for use in the Xe-100, leveraging SGL’s experience manufacturing graphite for high-temperature gas-cooled reactors (“HTGRs”). This work has helped establish a strong foundation of technical expertise that has now progressed into commercial-scale production.

Scaling new nuclear requires partners who know how to execute, and have done so time and again in the world’s most demanding industries. SGL brings decades of innovation in aerospace, automotive, energy, and semiconductor applications, and we are thrilled to bring that depth of experience into the new nuclear sector.

[J. Clay Sell](#), CEO of X-energy

Andreas Klein, CEO of SGL Carbon, said, “X-energy is a pioneer in the development and manufacture of small, modular, high-performance nuclear reactors for energy generation. X-energy has done groundbreaking work in recent years and is now entering the implementation phase with its first projects with Dow and other well-known customers. We are proud to be part of this success story and to contribute to a long-term and successful partnership. This is a first milestone in the development of new applications for our products and SGL Carbon’s entry into a strategically important market.”

X-energy and SGL’s agreement advances X-energy’s fleet-scale SMR supply chain development strategy and builds on recent announcements with global industrial leaders including [Doosan Enerbility for steel manufacturing and capacity expansion](#), [Korea Hydro & Nuclear Power for fleet-scale deployment collaboration](#), and [additional agreements for IG-110 fine-grain graphite](#). Together, this growing portfolio of suppliers supports timely execution of X-energy’s 11 GW commercial pipeline and reinforces the development of a resilient, U.S. and allied industrial ecosystem capable of delivering advanced nuclear energy at full commercial scale.

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### About X-energy

X-energy Reactor Company, LLC, is a leading developer of advanced small modular nuclear reactors and fuel technology for clean energy generation that is redefining the nuclear energy industry through its development of safer and more efficient advanced small modular nuclear reactors and proprietary fuel to deliver reliable, zero-carbon and affordable energy to people around the world. X-energy’s simplified, modular, and intrinsically safe SMR design expands applications and markets for deployment of nuclear technology and drives enhanced safety, lower cost and faster construction timelines when compared with other SMRs and conventional nuclear. For more information, visit [X-energy.com](#) or connect with us on [X](#) or [LinkedIn](#).

### About SGL Carbon

SGL Carbon is a technology-based company and a world leader in the development and production of carbon-based solutions. Its high-quality materials and products made from specialty graphite, carbon fibers and composites serve many industries that are shaping the trends of the future: climate friendly mobility, aerospace, solar and wind energy, semiconductors, and LEDs as well as the production of fuel cell and other energy storage systems. In addition, SGL Carbon develops solutions for chemical and industrial applications. In 2024, SGL Carbon SE generated sales of 1.0 billion euros. The company employs approximately 4,400 people at 29 locations in Europe, North America, and Asia. Further information on SGL Carbon can be found

at [www.sglcarbon.com/press](http://www.sglcarbon.com/press). Please find a collection of press photos available for download here: <https://www.sglcarbon.com/en/newsroom/press-images/>

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