



X-energy, Toyo Tanso Announce Graphite Supply Agreement for Initial Xe-100 Deployment

November 10, 2025

ROCKVILLE, MD, November 10, 2025 – X-energy Reactor Company, LLC (“X-energy” or “the Company”) today announced a Definitive Supply Agreement with Toyo Tanso USA, Inc., a subsidiary of [Toyo Tanso Co., Ltd.](#) (“Toyo Tanso”), to supply fine-grain graphite components for the first deployment of [X-energy’s Xe-100 small modular reactor](#) (“SMR”). The agreement, valued at approximately \$40 million, is a significant milestone for the proposed Long Mott Generating Station, a four-unit plant on the Texas Gulf Coast in partnership with Dow, Inc. (“Dow”), and supported by the [U.S. Department of Energy’s Advanced Reactor Demonstration Program](#).

Under the agreement, [Toyo Tanso has agreed to](#) manufacture graphite core structural components using their specialized IG-110 fine-grain isotropic graphite for the [four Xe-100 reactors proposed for Dow’s project at its UCC Seadrift Operations site in Texas](#) . Separately, X-energy and Toyo Tanso are in discussions regarding graphite components for the [Cascade Advanced Energy Facility](#), X-energy’s second project with Energy Northwest in Washington state, and the first of several X-energy and Amazon projects targeting more than 5 GW of new nuclear by 2039.

The agreement marks a significant milestone in the execution of X-energy’s first commercial project, and the Company’s broader efforts to support robust United States and allied SMR supply chain development. In addition to its proposed project with Dow, X-energy has announced customer engagements with Amazon and [Centrica](#), potentially totaling more than 11 GW across the United States and United Kingdom, equivalent to approximately 144 Xe-100 SMRs. The agreement with Toyo Tanso is expected to provide a strong foundation for partnership on future projects.

World-class technology demands a world-class team, and Toyo Tanso’s proven track record is a powerful addition to that team. This is an important step forward on our path to the commercial market, securing a critical supply chain component for our first deployment with one of the world’s leading nuclear suppliers.

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

Toyo Tanso is a leading global manufacturer of fine-grain graphite, a critical component of the Xe-100 and advanced nuclear reactors more broadly. Graphite is essential to the Xe-100 design, acting as both a neutron moderator and structural component, enabling the reactor to operate at high temperatures while maintaining exceptional safety characteristics. [Toyo Tanso’s IG-110 isotropic graphite](#) is known for its high thermal resistance and mechanical machining properties with proven operational credentials in high-temperature gas-cooled reactors.

X-energy’s initial proposed deployment is planned for Dow’s UCC Seadrift Operations Site on the Texas Gulf Coast, and supported by the U.S. Department of Energy’s Advanced Reactor Demonstration Program. In addition, X-energy and Amazon have committed to more than 5 GW of new nuclear by 2039, beginning in Washington state with Energy Northwest’s Cascade Advanced Energy Facility. The Company also recently signed a 6 GW Joint Development Agreement with Centrica for the United Kingdom’s first advanced reactor fleet. To ensure a stable domestic fuel supply for its reactors, X-energy is also constructing a first-in-the-nation fuel fabrication facility in Oak Ridge, Tennessee. Together, X-energy’s portfolio offers a grid-scale solution for utilities, industrial customers, and hyperscalers is designed to deliver safe, reliable, power at full commercial scale.

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About X-Energy Reactor Company, LLC

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](#).