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# Nuclear developers look to DOE to speed fuel-supply funds



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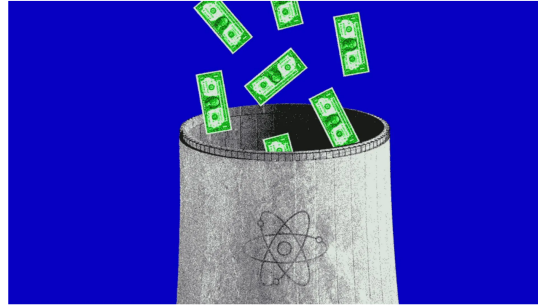


Illustration: Rebecca Zisser / Axios

The Trump administration is scrambling to fortify nuclear fuel supply chains to match the rising interest in nuclear to feed soaring electricity demand.

**Why it matters:** U.S. nuclear power plants [source](#) about one-quarter of their enrichment services from Russia, the world's largest supplier of enriched uranium.

- The nuclear industry — facing a [hard ban](#) on importing Russian uranium at the end of 2027 — has been pressing for more than a year for the Energy Department to pay out \$3.4 billion for uranium enrichment.

**Driving the news:** The DOE [said this week](#) that it's seeking U.S. companies to build and operate nuclear fuel production lines that the agency will authorize as part of a new [pilot program](#).

- The program was set in motion by White House nuclear [executive orders](#) in May that set a goal of deploying reactors on military sites by 2028.
- Those orders established a DOE-DOD partnership that will tap existing DOE uranium stockpiles to supply the first batch of reactors.

**Zoom in:** The DOD-hosted reactors will rely on processing some DOE-owned highly enriched uranium into a lower-enriched fuel that civilian reactors use, said Jeff Waksman, acting assistant Army secretary for installations, energy and environment.

- "We need to partner with [DOE] not only in order to get uranium but also to dispose of the uranium," Waksman told Axios.

**The big picture:** The harder challenge is what happens beyond 2030.

- To seed a self-sustaining fuel enrichment industry, Congress approved \$2.7 billion last year for uranium enrichment for the current nuclear fleet and for advanced reactors.
- That came on top of the IRA's \$700 million for fuel enrichment. Lawmakers initially authorized the DOE's advanced nuclear fuel program in 2020.

**Friction point:** Since [getting those funds](#) from Congress last year, the agency has faced calls to quickly disburse the awards to scale up enrichment.

- "We're still waiting to see some more concrete action there," said John Kotek, a senior vice president at the Nuclear Energy Institute.

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- The executive orders show "a recognition within the federal system that they need to get on with it, and so I do think that that is going to light a fire under the system that maybe didn't exist previously."
- DOE officials "have not moved fast enough on this," X-energy CEO Clay Sell, who's developing a DOE-backed advanced reactor demonstration project, [told Axios](#) last December. "I think everybody knows that."

**Energy Secretary Chris Wright** [told Congress](#) last month the agency is working with "a bunch of great, innovative companies with a lot of private capital behind them."

- The DOE [announced](#) in April that it would distribute a first round of advanced nuclear fuel — from the agency's stockpiles — to five developers as early as this fall.
- The agency also [extended](#) a contract with Centrus Energy to continue production of enriched fuel at its Ohio plant.

**And House appropriators** are [weighing a fiscal 2026 bill](#) that [would increase](#) DOE funding for fuel availability.

