

# IperionX – December 2025 Quarterly Report

30.01.2026 | [GlobeNewswire](#)

CHARLOTTE, Jan. 30, 2026 - [IperionX Ltd.](#) (IperionX) (NASDAQ: IPX, ASX: IPX) is pleased to present its quarterly report for the period ending December 31, 2025. Highlights during and subsequent to the end of the quarter include:

## Commercial operations

- **Commissioning Complete:** Equipment and systems for both titanium powder production and component manufacturing have been fully commissioned at the Titanium Manufacturing Campus in Virginia.
- **Manufacturing Capacity Expansion:** Advanced manufacturing capabilities continue to expand. The 100-ton uniaxial press (producing titanium nuts, bolts, and washers) and dry bag cold isostatic press (large titanium fasteners) are now operational. Additionally, a new 300-ton hydraulic press - designed for complex tiered shapes for consumer electronics enclosures or humanoid robotics components - will commence commissioning.
- **Path to Scale:** Manufacturing capabilities are projected to grow significantly as IperionX prepares for a production capacity of 1,400 tons per annum (tpa) in 2027, supported by the installation of additional powder metallurgy presses and HSPT sintering furnaces.
- **Commercial Progress:** Sales agreements are advancing, with a range of advanced prototyping activities underway across defense, consumer electronics, automotive, oil & gas, sporting goods, and industrial manufacturing.
- **New Agreements:** Major milestones include an initial sales order from Carver Pump for titanium naval shipbuilding components, and an order from American Rheinmetall for lightweight titanium components destined for U.S. Army heavy ground combat systems.
- **Inventory Build:** In parallel with custom prototyping, IperionX is building inventory for mass distribution channels. This includes a range of standard titanium fasteners, nuts, and washers, alongside dedicated fastener production for the U.S. military.
- **Quality Assurance:** Manufacturing operations have achieved ISO 9001 certification, validating the integrity of IperionX's quality management processes as production scales.

## 2027 U.S. Department of War (DoW) backed expansion to 1,400 tpa

- IperionX is advancing its expansion to scale titanium production capacity to 1,400 tpa. This milestone will position IperionX as the largest and lowest-cost titanium powder producer in the United States.
- The expansion is estimated to cost ~US\$75 million. The majority of this capital is secured via the U.S. DoW Industrial Base Analysis and Sustainment (IBAS) program, with the full US\$47.1 million award now obligated.

## Accelerated Growth Roadmap: Market Leadership in High-Performance Titanium

- **Next-Generation Development:** IperionX is advancing the development of a new facility in Halifax County, Virginia. This site is designed to host the next generation of HAMR and HSPT technologies, targeting a step-change reduction in the titanium cost curve.
- **Continuous Production Breakthrough:** These next-generation technologies utilize a new, patent-pending continuous production process that have been tested and proven at R&D level by IperionX. This titanium production innovation has the potential to deliver superior unit economics compared to the current batch processes.
- **Validation Timeline:** Pilot-scale work is currently underway to validate this continuous production method at higher throughputs, with completion targeted in 2026.

## U.S. Government Funding

- **Final IBAS Funding Obligated:** IperionX has been obligated the final US\$4.6 million under the U.S. Department of Defense's US\$47.1 million IBAS award. All funds allocated under this program have now been fully obligated, and a balance of US\$43.1 million remains available for future reimbursement.

- **Production Expansion Capital:** This final tranche of funding will be deployed to support IperionX's scale-up to a production capacity of 1,400 metric tons per annum (tpa).
- **Feedstock Secured:** The U.S. Government transferred ~290 metric tons (320 short tons) of high-quality titanium scrap metal to IperionX at no cost. This provides approximately 1.5 years of feedstock at current operating capacity.
- **Government Commitment:** The full obligation of IBAS funding and the provision of zero-cost titanium scrap reaffirm the U.S. Government's commitment to establishing a resilient, fully integrated, and low-cost titanium supply chain for the defense industrial base.

#### Titan Project Development

- **Critical Minerals Supply Chain Asset:** The Titan Critical Minerals Project is a vital link in the U.S. critical mineral supply chain. It remains one of the largest permitted U.S. sources of titanium, zircon, and rare earth minerals.
- **Closing the Heavy Rare Earth Supply Deficit:** With limited domestic production of DyTb and Y, the U.S. faces critical heavy rare earth supply gap. Titan's rare earth concentrate contains high proportions of DyTb and Y, and is uniquely positioned to supply these essential elements, which are required for high-performance permanent magnets in defense and energy sectors.
- **Project Readiness:** As a fully permitted project, Titan offers a fast-track solution for domestic DyTb+Y, titanium, and zircon supply. The Department of War funded Definitive Feasibility Study is on schedule for delivery in mid-2026.

#### Strong financial position

- As of December 31, 2025, IperionX held a cash balance of US\$65.8 million.
- IperionX has been awarded a total of US\$59.8 million in U.S. Government grants via the DoW's DPA Title III and IBAS/ICAM programs. All funds under these awards have been fully obligated, legally committing the capital to IperionX within the federal accounting system.
- These funds are accessed via a reimbursement model. IperionX incurs costs for approved activities and subsequently invoices the U.S. Government for repayment.
- To date, US\$13.3 million has been reimbursed to IperionX. A balance of US\$46.5 million remains available for future reimbursement to support ongoing operations and expansion.

Program	Reimbursable Balance
DPA Title III	<del>(\$20.7)</del>
IBAS / ICAM	<del>(\$3.0)</del>
Total	<del>(\$23.7)</del>

A link to the full release can be found [here](#).

#### Contacts

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<https://www.rohstoff-welt.de/news/720656--IperionX--December-2025-Quarterly-Report.html>

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