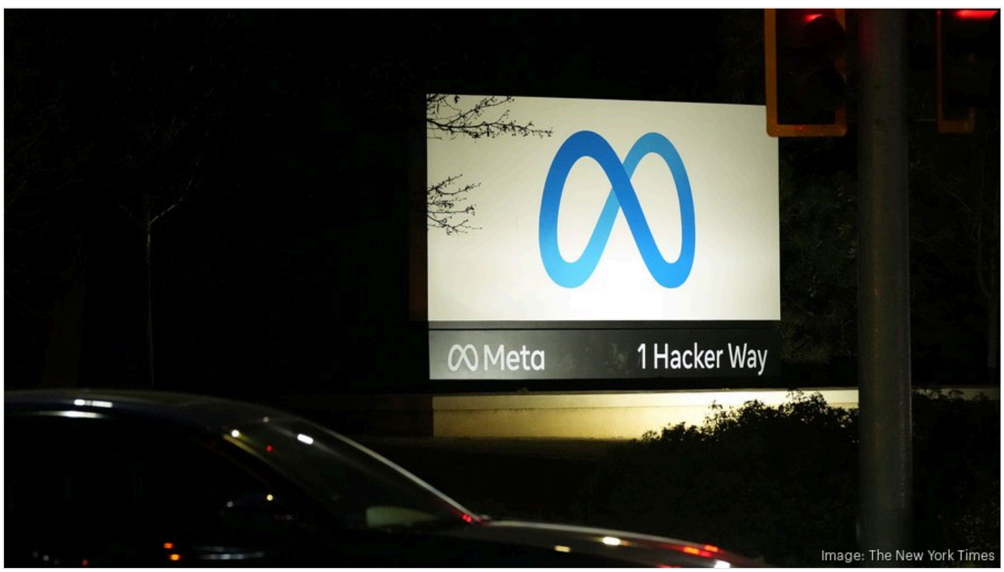
Energy

Meta’s nuclear strategy puts Ohio at forefront of data center power push, experts say



Meta has announced a trio of nuclear energy deals.
JIM WILSON/THE NEW YORK TIMES

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Jan 16, 2026

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For decades, Kevin Shoemaker worked on efforts to revitalize a 3,700-acre, Cold War–era nuclear site in Pike County that has been the focus of long-term cleanup.

Earlier this month, Shoemaker saw the culmination of that work. At least to some degree.

"This is really the vision we always had," said Shoemaker, legal counsel for the Southern Ohio Diversification Initiative – a group working to transform the site into a hub for economic development.

This month, Meta announced a trio of nuclear energy deals, including an agreement tied to Oklo's plans to develop a 1.2-gigawatt nuclear power campus on 206 acres at the Pike County site.

The deal, Oklo said, provides a mechanism for Meta to prepay for power and help finance early development.

"We see this as transformative for the entire area and perhaps the state," Shoemaker said.

A rendering of Oklo's Aurora powerhouse, the type of facility it plans to bring to Ohio.

OKLO

The Pike County project is one piece of a broader nuclear strategy Meta unveiled as it looks to secure electricity for its growing data center footprint. Another piece is its "Prometheus supercluster" in New Albany.

Meta also aims to add new capacity to the regional power grid as a result of its nuclear push.

Alongside the Oklo agreement, the tech giant entered into long-term power purchase agreements with Vistra for more than 2,600 megawatts of nuclear energy from three plants, including two in Ohio.

Under those agreements, Meta is backing upgrades at existing facilities, known as uprates, that increase output through equipment and efficiency improvements rather than new reactor construction.

Meta also struck a deal with TerraPower, calling the agreement its "largest support of advanced nuclear technologies to date" in a blog post.

Energy experts who spoke with *Columbus Business First* said the scope and structure of Meta's nuclear deals set them apart from more typical corporate power purchases.

Shayna Fritz, executive director of the Ohio Conservative Energy Forum – a group of conservatives who support clean energy – said the agreements reflect a growing expectation that large energy users account for the strain their operations place on the grid.

This view has become more prominent as data center development accelerates across Ohio and the broader PJM Interconnection electrical grid the state is a part of.

"I think this is a great opportunity for Ohio," Fritz said, "and shows the commitment that Meta has when it comes to building within the PJM region, ensuring that they're doing their part when it comes to accounting for the amount of power that data centers and AI take up."

Fritz said the Vistra agreements also help keep existing nuclear plants operating.

"It's saving three nuclear plants that not even just five years ago were on paths to retirement," she said.


Image: 4X-image

Nuclear power is garnering more attention in Ohio thanks to the growing amount of data centers coming to the state.

4X-IMAGE

The deals come as PJM faces mounting congestion. Last month, the regional grid operator said there is not enough power committed to meet its long-term reliability standard amid increasing demand from data centers.

In response, some data center operators have pursued alternative arrangements that include building behind-the-meter power plants that generate electricity exclusively for their facilities. *Business First* has reported that several such projects are underway in Central Ohio, including at Meta sites.

Ryan Evans, executive director of Chambers for Innovation and Clean Energy, said Meta's nuclear purchases differ in a key way: the power produced under the agreements continues to flow to the grid, rather than being walled off for a single user.

Meta is "doing the responsible thing," Evans said.

"They're securing their power. They don't want to take away power from the average Ohioan," he said.

Evans added that long-term power purchase agreements tied to stable generation sources such as nuclear can help reduce volatility and ease pressure on utilities.

The distinction matters, he said, because the nuclear deals add new electricity to the system, rather than simply lessening demand.

"We need every electron on the grid possible," Evans said.

But Fritz cautioned that adding generation alone will not be enough, unless there is parallel investment in transmission infrastructure to move that power where it is needed.

"We can continue to build as much generation as we want, but it has to get to us somehow," she said.

Both Fritz and Evans said Meta's approach could signal what comes next as power-hungry industries search for reliable electricity in constrained markets.

"I think these deals are very much what we will see for several years to come," Evans said.

Fritz said Ohio’s concentration of large energy users has made the state a natural testing ground for new approaches to secure electricity.

“It really shows that Ohio is leading in this area,” she said.