

STRATEGIA · STRATEGIC MATERIAL INTELLIGENCE

# Neo Performance Materials — Silmet

Supplier Diligence Pack

EE

Europe

Operating

Refinery

GENERATED · 2026-06-22 00:54

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# Neo Performance Materials — Silmet

Only commercial rare-earth separation plant in Europe. EU Critical Raw Materials Act strategic project status.

## Profile

Country	Estonia (EE)
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Region	Europe
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Operation type	Refinery
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Status	Operating
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Annual capacity	2,500 t / y
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ESG score	86 / 100
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Established	1946
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Public ticker	TSX:NEO
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## Compliance signals

FEOC status	Compliant
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IRA §30D eligibility	Eligible
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EU CRMA strategic project	Eligible
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OFAC sanctions	Clear
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UK HMT sanctions	Clear
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Beneficial ownership	Verified
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## Certifications

IRMA

ISO-14001

# Materials & market context

Neodymium Oxide

78.4 · USD / kg

Nd

Critical risk

CN 87%

Beijing export-licensing tightening triggered Q2 spike. Lynas (AU) and MP Materials (US) the only at-scale ex-China options.

## Recent intelligence (last 6 alerts)

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2026-05-20 · PRICE · GLOBAL

### Neodymium oxide spot up 12.6% MoM — second consecutive monthly increase

Fastmarkets and Argus assessments converge on \$78–80/kg range as Chinese export-license tightening tightens free-market flow. Lynas and Iluka contracts repricing at quarterly indexed mechanism.

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#### HOW TO USE THIS PACK

This document is the public face of our continuous monitoring on Neo Performance Materials — Silmet. Subscribers receive deeper diligence (beneficial-ownership tree, audited tonnage, regulatory exposure history) and machine-readable updates via the STRATEGIA terminal and REST API.

# Sources & methodology

STRATEGIA monitors 312 source endpoints across government registries, customs feeds, sanctions actions, ESG filings and authoritative trade press. Records carry source URL, ingestion timestamp, classifier confidence and a human-readable rationale.

Public methodology: [strategia.ai/methodology](https://strategia.ai/methodology). Source bibliography summary: [strategia.ai/sources](https://strategia.ai/sources).

## Disclaimer

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## Versioning

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This diligence pack was generated on 2026-06-22 00:54 from the live state of the STRATEGIA terminal. Records change continuously. For the live record, see the supplier page at [strategia.ai/dashboard/suppliers/neo-silm](https://strategia.ai/dashboard/suppliers/neo-silm).

### COMMISSION A DEEPER DILIGENCE

Our analyst desk delivers a 12-page bespoke diligence within 72 hours — beneficial-ownership tracing, audited capacity verification, in-region context, qualified offtake alternatives. Contact [desk@strategia.ai](mailto:desk@strategia.ai).