

STRATEGIA · STRATEGIC MATERIAL INTELLIGENCE

Nornickel — Norilsk

Supplier Diligence Pack

RU

Eurasia

Operating

Integrated

GENERATED · 2026-06-22 02:22

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Nornickel — Norilsk

World's largest palladium and Class-1 nickel producer. Western OFAC sanctions in place.

Profile

Country	Russia (RU)
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Region	Eurasia
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Operation type	Integrated
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Status	Operating
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Annual capacity	220,000 t / y
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ESG score	31 / 100
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Established	1935
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Public ticker	Private
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Compliance signals

FEOC status	FEOC
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IRA §30D eligibility	Review required
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EU CRMA strategic project	Not eligible
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OFAC sanctions	SANCTIONED
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UK HMT sanctions	Clear
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Beneficial ownership	Verified
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Certifications

No third-party certifications on record.

Risk flags

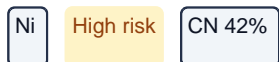
OFAC sanctions

Sustained pollution litigation

Materials & market context

Nickel — Class 1 (battery-grade)

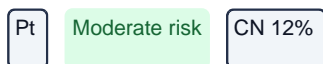
18,900 · USD / tonne



Indonesia controls ~55% of mined nickel; LME Class 1 premium widening on US IRA-compliant grades.

Platinum

1,184 · USD / oz



Hydrogen economy demand inflection. South Africa supply chronically constrained by grid instability.

Recent intelligence (last 6 alerts)

2026-05-25 · SANCTION · EUROPEAN UNION

EU 14th sanctions package: Norilsk Nickel partial restrictions extended

Council Regulation (EU) 2026/823 extends import restrictions on Russian Class-1 nickel through Q2-2027. Existing long-term contracts grandfathered until 2026-12-31. EU OEMs accelerating substitution programs.

2026-05-08 · GEOPOLITICS · INDONESIA

Indonesia formalizes raw-nickel export ban extension through 2030

President signed Reg. 18/2026. Downstream value-addition mandate maintained. Chinese-built HPAL capacity now ~620ktpa Ni-eq, but ESG and FEOC issues block IRA qualification of most output.

HOW TO USE THIS PACK

This document is the public face of our continuous monitoring on Nornickel — Norilsk. 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. Source bibliography summary: strategia.ai/sources.

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Versioning

This diligence pack was generated on 2026-06-22 02:22 from the live state of the STRATEGIA terminal. Records change continuously. For the live record, see the supplier page at strategia.ai/dashboard/suppliers/nornickel-norilsk.

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.