

STRATEGIA · STRATEGIC MATERIAL INTELLIGENCE

Nouveau Monde Graphite — Matawinie

Supplier Diligence Pack

CA

North America

Ramping

Integrated

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Nouveau Monde Graphite — Matawinie

All-electric mine. Anode active material qualified by Panasonic and GM under bilateral US-Canada IRA accords.

Profile

Country Canada (CA)

Region North America

Operation type Integrated

Status Ramping

Annual capacity 103,000 t / y

ESG score 88 / 100

Established 2012

Public ticker NYSE:NMG

Compliance signals

FEOC status Compliant

IRA §30D eligibility Eligible

EU CRMA strategic project Eligible

OFAC sanctions Clear

UK HMT sanctions Clear

Beneficial ownership Verified

Certifications

IRMA

ISO-14001

B-Corp

Materials & market context

Spherical Graphite (battery anode)

5,650 · USD / tonne

C

Critical risk

CN 91%

China's export license regime (Dec-2023) forces qualification of African and North American flake graphite.

Recent intelligence (last 6 alerts)

2026-05-26 · TARIFF · UNITED STATES

USTR finalizes Section 301 graphite anode tariff at 25% from 2027-01-01

Office of the United States Trade Representative published final rule. Affects Chinese-origin spherical natural and synthetic anode-grade graphite. IRA FEOC rules apply concurrently — qualified non-Chinese material command premium.

2026-05-23 · NEW SOURCE · CANADA

Nouveau Monde Graphite achieves first commercial CSPG production

Bécancour, Québec — first coated spherical purified graphite shipment to Panasonic Energy. Annual run-rate 18,000t; full ramp to 42,000t by Q3-2026. Material qualifies as Foreign Entity of Concern compliant under IRA §30D.

HOW TO USE THIS PACK

This document is the public face of our continuous monitoring on Nouveau Monde Graphite — Matawinie. 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 00:55 from the live state of the STRATEGIA terminal. Records change continuously. For the live record, see the supplier page at strategia.ai/dashboard/suppliers/nouveau-monde.

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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.