

STRATEGIA · STRATEGIC MATERIAL INTELLIGENCE

# Syrah Resources — Balama / Vidalia

Supplier Diligence Pack

MZ

Africa

Operating

Integrated

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STRATEGIA SAS · 8 RUE DE L'INDUSTRIE · 75009 PARIS

SIREN 942 188 503

# Syrah Resources — Balama / Vidalia

Largest natural graphite mine outside China + Louisiana anode plant (DoE loan). Cabo Delgado security risk monitored.

## Profile

Country	Mozambique / USA (MZ)
Region	Africa
Operation type	Integrated
Status	Operating
Annual capacity	350,000 t / y
ESG score	72 / 100
Established	2007
Public ticker	ASX:SYR

## 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

## Risk flags

Cabo Delgado insurgency proximity

# Materials & market context

Spherical Graphite (battery anode)

5,650 · USD / tonne

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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 Syrah Resources — Balama / Vidalia. 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/syrah-balama](https://strategia.ai/dashboard/suppliers/syrah-balama).

### 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).