ALUMINUM[1]

(Data in thousand metric tons unless otherwise specified)

Domestic Production and Use: In 2025, three companies operated six primary aluminum smelters in five States. Two of these smelters operated at full capacity throughout the year, whereas two smelters operated at reduced capacity. Two smelters located in Hawesville, KY, and New Madrid, MO, have been temporarily shut down since 2022 and 2024, respectively. Domestic smelter capacity was 1.31 million tons per year in 2025, unchanged from that in 2024. Estimated primary production and secondary production from new and old scrap both decreased slightly from that in 2024. Based on published prices, the value of primary aluminum production was an estimated $2.6 billion, 35% more than that in 2024. The estimated average annual U.S. market price increased by 39% from that in 2024. Transportation applications accounted for 36% of domestic consumption; the remainder was used in packaging, 24%; building, 13%; electrical, 9%; consumer durables and machinery, 8% each; and other, 2%.

Salient Statistics—United States:	2021	2022	2023	2024	2025[e]
Production:					
Primary	889	861	750	676	660
Secondary (from old scrap)	1,520	1,480	1,560	1,560	1,600
Secondary (from new scrap)	1,780	1,920	1,870	2,120	2,000
Imports for consumption:					
Crude and semi-fabricated products	4,940	5,730	4,900	4,840	4,400
Scrap	679	685	677	700	890
Exports:					
Crude and semi-fabricated products	900	1,040	1,240	1,360	890
Scrap	1,930	1,720	1,780	2,100	2,200
Consumption, apparent[2, 3]	6,240	6,910	6,210	5,830	5,700
Supply, apparent[3, 4]	8,020	8,820	8,070	7,950	7,700
Price, ingot, average U.S. market (spot), cents per pound[5]	138.5	152.6	125.9	129.5	180
Stocks, yearend:					
Aluminum industry	1,870	2,050	1,820	1,690	1,800
London Metal Exchange (LME), U.S. warehouses[6]	69	9	5	16	8
Employment, number[7]	28,900	30,200	30,500	29,900	30,000
Net import reliance[8] as a percentage of apparent consumption	61	66	63	62	60

Recycling: In 2025, aluminum recovered from purchased scrap in the United States was about 3.6 million tons, of which about 56% came from new scrap (manufacturing) and 44% from old scrap (discarded aluminum products). Aluminum recovered from old scrap was equivalent to about 28% of apparent consumption.

Import Sources (2021–24): Canada, 56%; United Arab Emirates, 8%; Bahrain, 4%; China,[9] 3%; and other, 29%.

Tariff: Item	Number	Normal Trade Relations 12–31–25
Aluminum, not alloyed:		
Unwrought (in coils)	7601.10.3000	2.6% ad valorem.
Unwrought (greater than 99.9% aluminum)	7601.10.6040	Free.
Unwrought (between 99.8%–99.9% aluminum)	7601.10.6045	Free.
Aluminum alloys, unwrought (billet)	7601.20.9045	Free.
Aluminum scrap:		
Used beverage container scrap	7602.00.0035	Free.
Industrial process scrap	7602.00.0095	Free.
Other	7602.00.0097	Free.

Depletion Allowance: Not applicable.[1]

Government Stockpile:[10]

	FY 2025		FY 2026	
Material	Potential acquisitions	Potential disposals	Potential acquisitions	Potential disposals
Aluminum, high-purity and alloys	3.2	—	NA	NA

Prepared by **Adam M. Merrill [(703) 648–7715, amerrill@usgs.gov]**

ALUMINUM

Events, Trends, and Issues: In March, the United States imposed a 25% tariff on aluminum and aluminum derivative products and ended all previously existing country-specific exemptions. The action, authorized under section 232 of the Trade Expansion Act, was intended to address national security concerns related to the volume of aluminum imports and increase domestic production capacity. By June, tariffs doubled to 50% ad valorem for most countries, except for the United Kingdom, which remained at 25%. In August, over 400 additional aluminum-related tariff codes were added, with the tariffs applying only to the aluminum content of those products.

Two aluminum sheet facilities in Virginia and West Virgina closed in May and June, respectively. Commissioning continued at a 650,000-ton-per-year recycled aluminum flat-rolled products mill in Mississippi, which in June had shipped its first coils. In July, production began at an expanded recycling plant in Minnesota, adding 55,000 tons per year of billet capacity and increasing the plant's total capacity to 165,000 tons per year. In August, plans were announced to restart more than 50,000 tons per year of idled capacity at a 229,000-ton-per-year primary aluminum smelter in South Carolina, with full production planned for mid-2026. In September, an expansion project doubled capacity at a high-purity aluminum facility in Iowa.

In San Ciprian, Spain, a 228,000-ton-per-year primary aluminum smelter restarted after stopping production in 2022, with full production expected by mid-2026. Operations were expected to begin by yearend at a 500,000-ton-per-year primary aluminum smelter in North Kalimantan, Indonesia. In China, smelters in Guangxi, Guizhou, Qinghai, Sichuan, and Yunnan Provinces resumed production, or completed upgrades, including the addition of new potlines.

World Smelter Production and Capacity: Production in 2024 for Malaysia was revised significantly based on company and Government reports. Capacity data for the United States, China, and other countries were revised based on company and Government reports.

	Smelter production		Yearend capacity	
	2024	2025[e]	2024	2025[e]
United States	676	660	1,310	1,310
Australia	1,570	1,500	1,730	1,730
Bahrain	1,620	1,600	1,620	1,620
Brazil	[e]1,100	1,200	1,280	1,280
Canada	3,320	3,300	3,310	3,310
China	44,000	45,000	44,600	45,000
Iceland	742	750	880	880
India	[e]4,200	4,200	4,200	4,200
Malaysia	[e]1,050	1,100	1,080	1,080
Norway	[e]1,300	1,300	1,460	1,460
Russia	3,880	3,900	4,080	4,080
United Arab Emirates	2,690	2,700	2,790	2,790
Other countries	6,680	7,000	10,500	11,000
World total (rounded)	72,800	74,000	78,800	79,700

World Resources:[11] Global resources of bauxite are estimated to be between 55 billion and 75 billion tons and are sufficient to meet world demand for aluminum metal well into the future.

Substitutes: Composites can substitute for aluminum in aircraft fuselages and wings. Glass, paper, plastics, and steel can substitute for aluminum in packaging. Composites, magnesium, steel, and titanium can substitute for aluminum in ground transportation uses. Composites, steel, vinyl, and wood can substitute for aluminum in construction. Copper can replace aluminum in electrical and heat-exchange applications.

[e]Estimated. NA Not available. — Zero.

[1]See also the Bauxite and Alumina chapter.

[2]Defined as primary production + secondary production from old scrap + imports – exports ± adjustments for stock changes; excludes traded scrap.

[3]These calculations no longer include exported scrap, because its return to the domestic supply cannot be reliably determined.

[4]Defined as primary production + secondary production + imports – exports ± adjustments for stock changes; excludes traded scrap.

[5]Source: S&P Global Platts Metals Week.

[6]Includes off-warrant stocks of primary and alloyed aluminum.

[7]Alumina and aluminum production workers (North American Industry Classification System—3313). Source: U.S. Department of Labor, Bureau of Labor Statistics.

[8]Defined as imports – exports ± adjustments for industry stock changes; excludes traded scrap.

[9]Includes Hong Kong.

[10]See Appendix B for definitions. For fiscal year 2026, the Annual Materials Plan was not released.

[11]See Appendix C for resource and reserve definitions and information concerning data sources.