

Mineral Industry Surveys

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ALUMINUM IN FEBRUARY 2020

Domestic primary aluminum production in February 2020 was 88,000 metric tons (t). The average daily production in February was 3,030 t, slightly more than that in January, slightly less than that in February 2019, but 39% more than that in February 2018 (fig. 1, table 1).

Total aluminum recovered from scrap in February was 278,000 t, 3% more than the amount in January, slightly more than the amount in February 2019, but 5% less than that in February 2018. Of this, 157,000 t of aluminum was recovered from new scrap and 122,000 t was recovered from old scrap (fig. 1, table 1).

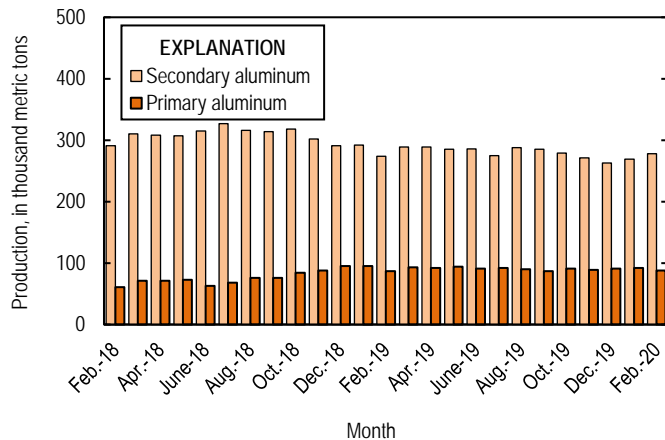


Figure 1. Monthly domestic primary and secondary aluminum production from February 2018 through February 2020.

Prices and Stocks

The February average U.S. spot market price of primary aluminum ingot was \$0.905 per pound, 4% less than that in January. The average cash price in February of primary aluminum ingot on the London Metal Exchange (LME) was \$0.765 per pound, 5% less than that in January (fig. 2, table 6).

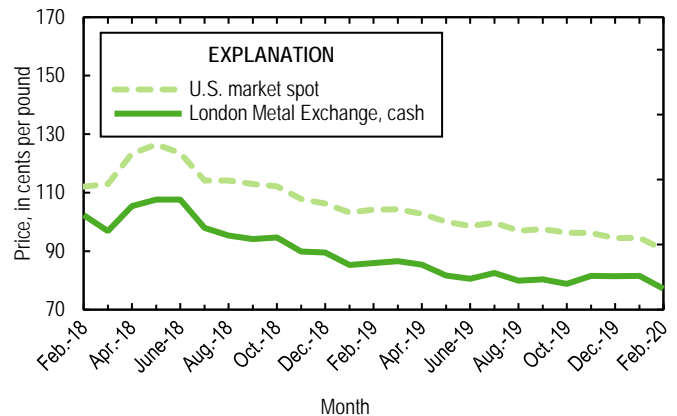


Figure 2. Average monthly prices for primary aluminum from February 2018 through February 2020. Source: Platts Metals Week.

Inventories of primary aluminum in LME-approved warehouses in the United States decreased to 3,725 t at the end of February from 4,200 t at the end of January. Inventories of secondary aluminum (North American Secondary Aluminum Alloy Contract) in LME-approved warehouses in the United States decreased to 35,260 t at the end of February from 37,620 t at the end of January (London Metal Exchange Ltd., 2020a, b).

Update

The U.S. Department of Commerce and the U.S. International Trade Commission (USITC) initiated antidumping and countervailing duty investigations on common alloy aluminum sheet from 18 countries. The investigations were requested in March by The Aluminum Association Inc. which alleged that producers in 18 countries sold common alloy aluminum sheet in the United States below market prices. The countries named in the antidumping petition were Bahrain, Brazil, Croatia, Egypt, Germany, Greece, India, Indonesia, Italy, the Republic of Korea, Oman, Romania, Serbia, Slovenia, South Africa, Spain, Taiwan, and Turkey. The countervailing

duty petition alleged that common alloy aluminum sheet producers in Bahrain, Brazil, India, and Turkey benefited from government subsidy programs. (See Aluminum in January 2020.) The alleged dumping margins ranged from 12.51% to 151%. The USITC was expected to make a preliminary determination by April 23 (Lazzaro, 2020b).

Several extruders and rolling mills announced temporary shutdowns in response to the Coronavirus Disease 2019 (COVID-19). Among the companies announcing shutdowns in the United States are Aleris Inc., Arconic Inc., Hydro ASA, and Novelis Inc. Most original equipment manufacturers in the automobile and aerospace industries announced shutdowns of their facilities, decreasing demand from suppliers in the aluminum industry. (See Aluminum in January 2020.)

On March 30, Aleris shut down its rolling mill in Lewisport, KY, which produced automobile body sheet. Arconic shut down its rolling mill in Alcoa, TN, and its extrusion plant in Massena, NY. The Tennessee rolling mill produced automobile body sheet and the Massena plant produced extrusions for the aerospace, automotive, and defense industries (Lazzaro, 2020a).

Hydro didn't provide details of which plants were impacted, but plants with about 25% of the company's capacity in the United States were shut down. Plants with about 40% of Hydro's U.S. capacity were producing at reduced levels. Hydro also planned to decrease production from its secondary smelters in Commerce, TX, and Henderson, KY. Both smelters produced extrusion billet from recycled scrap and each had 90,000 metric tons per year (t/yr) of capacity, but details of the planned production rate were not available. On April 6, Hydro restarted its 115,000-t/yr secondary smelter in Clervaux, Luxembourg, which was shut down for several weeks in March and April. Hydro's customers were mostly in the automotive and construction industries (Blamey, 2020; Hydro ASA, 2020a; Lazzaro, 2020a).

In March, Novelis Inc. shut down production of automobile sheet from its rolling mills in Oswego, NY, and Kingston, Ontario, Canada, although beverage can sheet production continued. Constellium SE also announced shutdowns of rolling mills in North America in March but did not provide details on which facilities were affected (Blamey, 2020; Lazzaro, 2020a; Platts Metals Daily, 2020).

On April 22, Alcoa Corp. announced that it would temporarily shut down the Intalco smelter in Ferndale, WA, citing high production costs and low aluminum prices. The smelter would be shut down by the end of July. The capacity of the smelter was 279,000 t/yr, and 49,000 t/yr was already shut down (Alcoa Corp., 2020, p. 3).

Rio Tinto plc. temporarily shut down one of the four potlines at the Tiwai Point smelter in New Zealand to comply with an order that non-essential businesses be closed in response to COVID-19. The shutdown affected 85,000 t/yr of the smelter's 340,000 t/yr capacity. The shutdown was fully

implemented by the second week of April. The smelter was a joint venture among Rio Tinto (79.36%) and Sumitomo Chemical Ltd. (20.64%). Although the Government ordered the shutdown to last at least four weeks, a restart would depend on aluminum prices increasing from current levels (Zhang, 2020).

A fire in an electrical transformer on March 6 was cited for the shutdown 115,000 t/yr of capacity at the 460,000-t/yr Albras smelter in Barcarena, Brazil. The smelter was a joint venture among Hydro (51%) and Nippon Amazon Aluminium Co. Ltd. (49%). A restart schedule was not available (Hydro ASA, 2020b).

Employees represented by the United Steelworkers union at Century Aluminum Co.'s Hawesville, KY, smelter agreed to extend their labor contract to April 1, 2021. The contract would have expired on March 31, 2020. The capacity of the smelter was 250,000 t/yr (Century Aluminum Co., 2020).

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TABLE 1
COMPONENTS OF ALUMINUM SUPPLY¹

(Thousand metric tons)

Period	Primary production	Secondary recovery ²			Imports for consumption			Total new supply ³	Stocks, end of period ⁴
		New	Old	Total	Metals and alloys, crude	Plates, sheets, bars, etc.	Total		
2019 ^p	1,093	1,870	1,510	3,380	3,800	1,440	5,240	9,710	1,600
2019:									
February	87	153	121	274	286	118	404	765	1,600
March	93	160	129	289	315	145	460	842	1,590
April	92	161	127	289	315	143	458	839	1,650
May	94	158	127	285	288	135	423	803	1,630
June	91	159	127	286	316	131	447	824	1,630
July	92	146	129	275	421	117	538	905	1,640
August	90	158	130	288	334	115	449	828	1,650
September	87	159	125	285	292	105	397	769	1,640
October	91	151	128	279	319	100	419	789	1,630
November	89	146	126	271	302	96	398	759	1,600
December	91	144	118	263	317	96	413	767	1,600
January–February	181	326	240	566	585	254	839	1,590	1,600
2020:									
January	92	146	123	269	347	28	375	736	1,650
February	88	157	122	278	208	22	230	596	NA
January–February	180	303	244	547	555	50	605	1,330	NA

^pPreliminary. NA Not available.

¹Data are rounded to no more than three significant digits, except "Primary production"; may not add to totals shown.

²Metallic recovery from purchased, tolled, or imported scrap, expanded for full coverage of industry.

³Primary production, secondary recovery, and imports for consumption.

⁴Inventory levels reflect total for U.S. and Canadian producers; data from the Aluminum Association Inc.

TABLE 2
ESTIMATED FULL COVERAGE CONSUMPTION OF AND METALLIC RECOVERY FROM
PURCHASED NEW AND OLD ALUMINUM SCRAP¹

(Thousand metric tons)

Period	Secondary smelters		Independent mill fabricators		Foundries		Other consumers		Total	
	Con-sump-tion	Metal recovery	Con-sump-tion	Metal recovery	Con-sump-tion	Metal recovery	Con-sump-tion	Metal recovery	Con-sump-tion	Metal recovery
	2019 ^P	2,200	1,660	1,770	1,620	101	93	4	4	4,070
2019:										
February	182	138	140	128	8	8	(2)	(2)	331	274
March	189	141	152	140	8	8	(2)	(2)	350	289
April	184	140	154	141	8	8	(2)	(2)	346	289
May	185	140	150	137	8	8	(2)	(2)	344	285
June	184	139	152	139	8	8	(2)	(2)	345	286
July	182	137	142	130	8	8	(2)	(2)	333	275
August	182	136	158	145	8	8	(2)	(2)	348	288
September	182	138	151	139	8	8	(2)	(2)	342	285
October	185	140	143	130	8	8	(2)	(2)	336	279
November	185	139	136	124	8	8	(2)	(2)	329	271
December	179	136	129	118	8	8	(2)	(2)	317	263
January–February	361	274	300	276	17	15	1	1	679	566
2020:										
January	180	137	135	124	8	8	(2)	(2)	325	269
February	180	136	145	134	8	8	(2)	(2)	334	278
January–February	361	273	281	258	17	15	1	1	659	547

^PPreliminary.

¹Data are rounded to no more than three significant digits; may not add to totals shown.

²Less than ½ unit.

TABLE 3
 CONSUMPTION OF AND RECOVERY FROM PURCHASED
 NEW AND OLD ALUMINUM SCRAP IN FEBRUARY 2020¹

(Metric tons)

	Consumption		Calculated metallic recovery	
	Tabulated reports	Estimated full coverage	Tabulated reports	Estimated full coverage
Secondary smelters	150,000	180,000	114,000	136,000
Independent mill fabricators	131,000	145,000	121,000	134,000
Foundries	7,040	8,450	6,440	7,730
Other consumers	273	328	273	328
Total	289,000	334,000	241,000	278,000

¹Data are rounded to no more than three significant digits; may not add to totals shown.

TABLE 4
PURCHASED AND TOLL-TREATED ALUMINUM-BASE SCRAP IN FEBRUARY 2020¹

(Metric tons)

	February				January–February ²	
	Stocks, opening ²	Net receipts ³	Melted or consumed	Stocks, closing	Net receipts ³	Melted or consumed
New scrap:						
Extrusion	20,300	52,900	53,000	20,200	102,000	102,000
Can stock clippings	4,910	24,400	24,600	4,730	49,300	49,500
Other wrought sheet/clippings	14,700	33,300	37,800	10,300	65,500	69,800
Casting	3,370	5,820	5,820	3,370	11,700	11,700
Borings and turnings	3,530	11,800	11,700	3,550	23,100	23,300
Dross and skimmings	10,600	38,600	38,600	10,600	76,500	76,500
Total new scrap	57,400	167,000	171,000	52,700	328,000	333,000
Old scrap:						
Used castings	6,830	26,200	26,200	6,830	53,200	53,200
Used extrusion	7,320	16,000	16,000	7,320	31,900	31,900
Used cans (shredded, loose, baled)	9,160	34,500	34,600	9,080	74,400	74,400
Other wrought products	15,900	26,200	31,500	10,600	53,900	58,600
Fragmentized shredder (auto shredder)	4,410	8,860	9,100	4,170	17,600	18,000
Total old scrap	43,600	112,000	117,000	38,000	231,000	236,000
Total all classes	101,000	278,000	289,000	90,700	559,000	569,000

¹Data are rounded to no more than three significant digits; may not add to totals shown.

²May include revisions to previously published data.

³Includes data on imported aluminum-base scrap.

TABLE 5
ALUMINUM ALLOYS PRODUCED AT SECONDARY SMELTERS IN THE UNITED
STATES IN FEBRUARY 2020^{1,2}

(Metric tons)

	February			January–February		
	Stocks, opening ³	Production	Net shipments	Stocks, closing	Production	Net shipments
Die-cast alloys:						
13% Si, 360, etc. (0.6% Cu, max.)	3,220	1,670	1,670	3,220	3,340	3,340
380 and variations	7,700	15,400	15,400	7,700	30,700	30,700
Sand and permanent mold:						
95/5 Al-Si, 356, etc. (0.6% Cu, max.)	1,450	2,620	2,620	1,450	5,240	5,240
No. 319 and variations	4,730	4,190	4,190	4,730	8,380	8,380
F-132 alloy and variations	182	249	249	182	498	498
Al-Zn alloys	467	81	81	467	162	162
Al-Si alloys (0.6% to 2.0% Cu)	219	133	133	219	266	266
Al-Cu alloys (1.5% Si, max.)	673	161	161	673	322	322
Other ⁴	6,970	9,620	9,620	6,970	19,200	19,200
Wrought alloys, extrusion billets	10,400	54,600	54,600	10,400	109,000	109,000
Total all alloys	36,000	88,700	88,700	36,000	177,000	177,000
Less:						
Primary aluminum consumed	XX	15,600	XX	XX	31,100	XX
Primary silicon consumed	XX	1,830	XX	XX	3,670	XX
Other alloying ingredients consumed	XX	795	XX	XX	1,600	XX
Net metallic recovery from aluminum scrap consumed in production of secondary aluminum ingot⁵						
	XX	70,500	XX	XX	141,000	XX

XX Not applicable.

¹Excludes integrated aluminum companies.

²Data are rounded to no more than three significant digits; may not add to totals shown.

³May include revisions to previously published data.

⁴Includes alloys No. 12, Al-Mg, Al-Zn, Al-Cu, Al-Si-Cu-Ni, aluminum-base hardeners, variations of these alloys, plus other aluminum alloys.

⁵No allowance made for melt-loss of primary aluminum and alloying ingredients.

TABLE 6
 AVERAGE PRICE OF ALUMINUM IN THE UNITED STATES
 AND ON THE LONDON METAL EXCHANGE

(Cents per pound)

Period	Midwest U.S. market price	LME cash price Grade A
2019:		
February	104.202	84.333
March	104.286	84.907
April	102.825	83.849
May	100.083	80.510
June	98.625	79.547
July	99.707	81.310
August	96.929	78.950
September	97.507	79.340
October	96.283	77.949
November	96.236	80.375
December	94.488	80.288
January–December	99.537	81.256
2020:		
January	94.545	80.351
February	90.540	76.451
January–February	92.543	78.401

Source: Platts Metals Week.

TABLE 7
AVERAGE BUYING PRICES FOR ALUMINUM SCRAP

(Cents per pound)

Month	Used beverage cans	Mixed low copper clips	Old sheet	Old cast	Turnings (clean and dry)
2019:					
February	57.58	50.21	45.32	44.32	39.50
March	59.60	51.00	46.00	45.00	39.38
April	59.48	51.38	46.40	45.48	39.05
May	57.00	49.05	44.77	43.07	37.91
June	54.12	47.15	42.40	40.90	34.70
July	54.00	46.34	41.00	39.00	32.18
August	53.18	45.64	39.18	38.43	31.39
September	51.50	42.10	36.98	35.90	29.35
October	51.59	40.11	34.91	34.37	26.67
November	53.24	39.00	33.74	33.24	26.50
December	53.12	39.00	35.48	34.98	27.12
January–December	54.95	45.96	40.88	39.85	33.59
2020:					
January	53.40	40.10	37.38	37.07	29.62
February	51.66	42.16	39.29	39.24	33.82
January–February	52.53	41.13	38.34	38.16	31.72

Not available.

Source: American Metal Market.

TABLE 8
U.S. IMPORTS FOR CONSUMPTION OF ALUMINUM IN FEBRUARY 2020¹

(Metric tons)

Country or locality	Metals and alloys, crude		Plates, sheets, bars, etc		Scrap		Total	
	February	January– February	February	January– February	February	January– February	February	January– February
Argentina	12,800	34,700	--	--	--	--	12,800	34,700
Australia	9,650	29,400	--	--	--	--	9,650	29,400
Austria	--	--	145	491	--	--	145	491
Bahrain	24	24	--	--	--	--	24	24
Belgium	3	5	39	86	--	--	42	91
Brazil	--	--	324	814	--	--	324	814
Canada	145,000	344,000	281	536	5,300	11,500	150,000	356,000
Chile	--	--	--	--	83	150	83	150
China	214	236	4,860	12,800	--	--	5,070	13,000
Colombia	--	--	--	--	59	125	59	125
Costa Rica	--	--	--	--	11	23	11	23
El Salvador	--	--	--	--	150	361	150	361
France	270	613	8	22	--	--	278	635
Germany	3	136	1,770	4,360	--	96	1,770	4,590
Greece	--	--	97	244	16	16	113	260
Guatemala	--	--	--	--	464	709	464	709
Honduras	--	--	54	206	--	23	54	229
Hong Kong	--	--	6	32	--	--	6	32
India	3,510	15,900	168	334	--	--	3,680	16,200
Indonesia	--	--	25	119	--	--	25	119
Italy	136	281	196	698	136	281	468	1,260
Japan	--	--	539	684	--	--	539	684
Korea, Republic of	208	389	1,380	2,140	101	225	1,690	2,750
Malaysia	--	203	33	107	--	--	33	310
Mexico	--	--	687	1,510	1,640	4,060	2,320	5,570
Netherlands	116	214	19	50	--	--	135	264
New Zealand	1,430	5,030	--	--	--	--	1,430	5,030
Norway	1	78	--	--	--	--	1	78
Oman	--	99	--	6	--	--	--	105
Qatar	4,520	7,040	--	--	--	--	4,520	7,040
Romania	--	--	70	143	--	--	70	143
Russia	17,700	25,600	2	4	--	--	17,700	25,600
Saudi Arabia	387	2,140	7,450	14,900	--	--	7,840	17,100
South Africa	1,810	3,320	57	386	--	--	1,870	3,710
Spain	179	227	9	45	--	--	188	272
Sweden	--	--	561	869	--	--	561	869
Switzerland	--	--	17	35	--	--	17	35
Taiwan	--	1	83	153	--	--	83	154
Thailand	--	7	2,570	7,120	--	--	2,570	7,120
Turkey	--	--	148	278	--	--	148	278
United Arab Emirates	10,100	25,000	--	--	--	--	10,100	25,000
United Kingdom	6	30	206	952	369	484	581	1,470
Venezuela	--	25	--	--	--	--	--	25
Vietnam	--	--	73	117	--	--	73	117
Other	1	49	105	165	203	515	309	729
Total	208,000	494,000	22,000	50,400	8,520	18,600	238,000	563,000

-- Zero.

¹Data are rounded to no more than three significant digits; may not add to totals shown.

Source: U.S. Census Bureau.

TABLE 9
U.S. EXPORTS OF ALUMINUM IN FEBRUARY 2020¹

(Metric tons)

Country or locality	Metals and alloys, crude		Plates, sheets, bars, etc.		Scrap		Total	
	February	January-- February	February	January-- February	February	January-- February	February	January-- February
Australia	6	82	197	409	--	--	203	491
Belgium	13	16	53	72	439	826	505	914
Brazil	1	1	277	964	234	1,120	512	2,080
Canada	7,760	16,300	31,500	62,400	7,230	14,200	46,500	92,800
China	355	605	2,050	3,480	11,400	22,000	13,800	26,100
Colombia	--	--	12	79	--	40	12	119
Dominican Republic	--	--	28	37	59	59	87	96
France	37	153	966	1,650	145	357	1,150	2,160
Germany	5	8	381	1,000	469	743	855	1,750
Guatemala	--	2	5	16	--	--	5	18
Hong Kong	--	1	97	138	4,500	10,200	4,600	10,400
India	65	66	88	217	32,900	61,800	33,000	62,100
Indonesia	8	8	6	23	9,470	15,100	9,480	15,200
Ireland	--	--	98	130	--	--	98	130
Israel	4	4	1,280	2,260	--	--	1,280	2,270
Italy	18	18	242	378	423	1,020	683	1,420
Jamaica	12	12	2	5	--	--	14	17
Japan	146	197	1,290	2,600	1,010	2,570	2,450	5,360
Korea, Republic of	52	458	2,310	4,240	23,700	46,000	26,000	50,700
Malaysia	793	1,550	126	344	22,500	49,000	23,400	50,900
Mexico	9,200	15,100	24,100	50,200	16,800	34,100	50,200	99,400
Netherlands	6	11	44	72	166	338	216	421
New Zealand	--	--	49	77	--	--	49	77
Norway	--	--	--	1	--	--	--	1
Pakistan	--	39	1	5	832	1,610	833	1,650
Panama	--	--	7	19	--	--	7	19
Philippines	212	233	27	68	773	1,510	1,010	1,810
Poland	--	--	18	37	22	22	40	59
Romania	21	31	280	526	--	--	301	557
Russia	--	--	7	14	1,710	3,320	1,720	3,340
Saudi Arabia	--	1	20	128	37	58	57	187
Singapore	14	27	267	393	250	2,340	531	2,760
Spain	--	--	56	102	542	820	598	922
Taiwan	210	425	406	788	3,480	7,030	4,100	8,250
Thailand	1	1	132	213	5,280	10,300	5,420	10,500
Turkey	--	--	659	1,060	698	847	1,360	1,900
United Arab Emirates	--	4	27	70	383	1,280	410	1,350
United Kingdom	56	171	823	1,510	260	593	1,140	2,270
Vietnam	--	47	204	227	674	1,700	878	1,970
Other	19	27	449	854	2,100	3,550	2,570	4,430
Total	19,000	35,600	68,600	137,000	149,000	294,000	236,000	467,000

-- Zero.

¹Data are rounded to no more than three significant digits; may not add to totals shown.

Source: U.S. Census Bureau.