

Mineral Industry Surveys

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ALUMINUM IN SEPTEMBER 2020

Domestic primary aluminum production in September 2020 was 72,000 metric tons (t). The average daily production in September 2020 was 2,410 t, 7% less than that in August 2020, 17% less than that in September 2019, and 24% less than that in September 2018 (fig. 1, table 1).

Total aluminum recovered from scrap in September 2020 was 271,000 t, essentially unchanged from that in August 2020, 7% less than that in September 2019, and 7% less than that in September 2018. Of this, 147,000 t of aluminum was recovered from new scrap, and 124,000 t was recovered from old scrap (fig. 1, table 1).

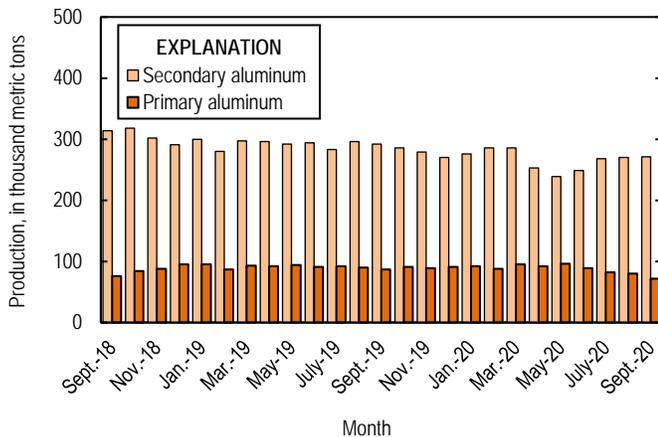


Figure 1. Monthly domestic primary and secondary aluminum production from September 2018 through September 2020.

Prices and Stocks

The September 2020 average U.S. spot market price of primary aluminum ingot was \$0.936 per pound, unchanged from that in August 2020, 4% less than that in September 2019, and 17% less than that in September 2018. The average cash price in September 2020 of primary aluminum ingot on the London Metal Exchange (LME) was \$0.792 per pound, essentially unchanged from that in August 2020, essentially unchanged from that in September 2019, but 14% less than that in September 2018 (fig. 2, table 6).

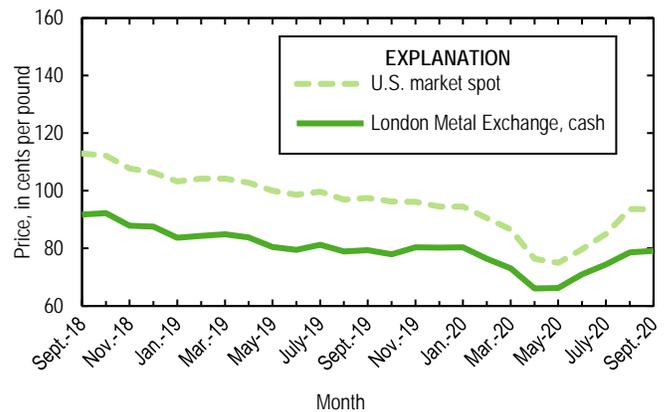


Figure 2. Average monthly prices for primary aluminum from September 2018 through September 2020. Source: Platts Metals Week.

Inventories of primary aluminum in LME-approved warehouses, including off-warrant inventories, in the United States increased to 223,809 t at the end of September from 221,342 t at the end of August. Inventories of secondary aluminum (North American Secondary Aluminum Alloy Contract) in LME-approved warehouses, including off-warrant inventories, in the United States decreased to 32,923 t at the end of September from 34,121 t at the end of August (London Metal Exchange Ltd., 2020a-d).

U.S. Trade

Total imports for consumption of aluminum in the first 9 months of 2020 (table 8) increased by 4% compared with the amount in the same period in 2019. Imports of crude metal and alloys increased by 27% but imports of semifabricated products and scrap decreased by 29% and 15%, respectively. Canada continued to be the leading source of imported aluminum materials, supplying 59% of all aluminum imports during the first 9 months of 2020, followed by the United Arab Emirates (7%). Canada accounted for 71% of crude metal, 19% of

semifabricated products, and 64% of scrap imports in the first three quarters of 2020. The United Arab Emirates and Argentina accounted for 10% and 5%, respectively, of crude metal imports. China accounted for 11% of semifabricated product imports. Mexico was the source of 27% of scrap imports.

Total exports of aluminum (table 9) decreased by 12% during the first 9 months of 2020 compared with those of the same period in the previous year. Exports of crude metal and alloys, semifabricated products, and scrap decreased by 23%, 23%, and 6%, respectively, compared with those in the same period of 2019. The leading destinations for total aluminum products during the first 9 months of 2020, in descending order of quantity, were Mexico (18%), Canada (17%), Malaysia (15%), and the Republic of Korea (12%).

Update

On October 20, the U.S. Department of Commerce initiated antidumping investigations into imports of aluminum foil from Armenia, Brazil, Oman, Russia, and Turkey. Countervailing duty investigations will also be conducted on imports of aluminum foil from Oman and Turkey. The Department of Commerce's preliminary countervailing determination was scheduled for December 23, and the preliminary antidumping determination was scheduled for March 8, 2021. The U.S. International Trade Commission will also investigate the impact of aluminum foil imports from the five countries on producers in the United States (Lazzaro, 2020b).

Gränges AB restarted production from its rolling mill in Salisbury, NC, during the third quarter of the year. Production at the rolling mill was stopped earlier in the year in response to market disruptions caused by the COVID-19 pandemic. The rolling mill produces aluminum sheet used for automotive heat shields and in air conditioning systems. The Salisbury rolling mill's capacity was 40,000 metric tons per year (t/yr). Gränges also restarted an upgrade project on its rolling mill in Newport, AR. The Newport rolling mill had 20,000 t/yr of capacity and produced foil for food service, health care, and pharmaceutical uses (Lazzaro, 2020a).

On November 8, Novelis Inc. sold the Lewisport, KY, rolling mill to American Industrial Partners Inc. The sale of the rolling

mill was required by the U.S. Department of Justice for approval of the acquisition of Aleris Corp. The rolling mill produced aluminum sheet used by the automotive industry (Roh, 2020).

Brazil increased the quota on aluminum imports exempt from a tariff by an additional 30,000 t for the year on October 22. Within two days, import licenses for the entire amount of aluminum exempt from the tariff were granted. The initial quota of 150,000 t for the year was reached on September 9 (Rostas, 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	1,920	1,540	3,470	3,800	1,490	5,290	9,840	1,600
2019:									
September	87	164	128	292	292	118	410	789	1,640
October	91	156	131	286	319	109	428	805	1,630
November	89	150	128	279	302	106	408	776	1,600
December	91	149	121	270	317	95	412	773	1,600
January–September	821	1,470	1,160	2,630	2,860	1,180	4,040	7,490	1,600
2020:									
January	92	151	125	276	347	111	458	827	1,650
February	88	161	124	286	261	93	354	727	1,580
March	95	158	127	286	308	102	410	790	1,590
April	92	133	120	253	338	87	425	770	1,590
May	96	128	111	239	316	80	396	730	1,530
June	89	132	117	249	262	88	350	688	1,430
July	82	146	122	268	253	84	337	687	1,410
August	80	144	126	270	270	85	355	705	1,410
September	72	147	124	271	214	79	293	637	NA
January–September	786	1,300	1,100	2,400	2,570	809	3,380	6,560	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	
	Consumption	Metal recovery	Consumption	Metal recovery	Consumption	Metal recovery	Consumption	Metal recovery	Consumption	Metal recovery
2019 ^P	2,300	1,750	1,770	1,620	101	93	4	4	4,180	3,470
2019:										
September	191	145	151	139	8	8	(2)	(2)	351	292
October	193	148	143	130	8	8	(2)	(2)	345	286
November	193	147	136	124	8	8	(2)	(2)	338	279
December	187	144	129	118	8	8	(2)	(2)	326	270
January–September	1,730	1,310	1,360	1,250	76	70	3	3	3,170	2,630
2020:										
January	189	144	135	124	8	8	(2)	(2)	333	276
February	189	144	145	134	8	8	(2)	(2)	343	286
March	191	145	147	135	6	5	(2)	(2)	344	286
April	182	140	119	108	6	5	(2)	(2)	307	253
May	174	135	108	98	6	5	(2)	(2)	289	239
June	175	136	118	107	6	5	(2)	(2)	300	249
July	182	139	132	120	8	8	(2)	(2)	323	268
August	184	141	133	121	8	8	(2)	(2)	326	270
September	187	143	132	121	8	8	(2)	(2)	328	271
January–September	1,650	1,270	1,170	1,070	66	60	3	3	2,890	2,400

^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 SEPTEMBER 2020¹

(Metric tons)

	Consumption		Calculated metallic recovery	
	Tabulated reports	Estimated full coverage	Tabulated reports	Estimated full coverage
Secondary smelters	155,000	187,000	119,000	143,000
Independent mill fabricators	118,000	132,000	108,000	121,000
Foundries	7,040	8,450	6,440	7,730
Other consumers	273	328	273	328
Total	281,000	328,000	233,000	271,000

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 SEPTEMBER 2020¹

(Metric tons)

	September				January–September ²	
	Stocks, opening ²	Net receipts ³	Melted or consumed	Stocks, closing	Net receipts ³	Melted or consumed
New scrap:						
Extrusion	20,400	39,800	39,700	20,500	381,000	382,000
Can stock clippings	4,370	25,800	25,700	4,450	224,000	224,000
Other wrought sheet/clippings	10,300	34,400	35,900	8,820	298,000	303,000
Casting	3,550	5,840	5,840	3,550	52,400	52,400
Borings and turnings	4,900	15,600	15,700	4,810	129,000	129,000
Dross and skimmings	10,900	37,800	37,800	10,900	330,000	330,000
Total new scrap	54,400	159,000	161,000	53,000	1,410,000	1,420,000
Old scrap:						
Used castings	7,000	27,400	27,400	7,000	236,000	236,000
Used extrusion	7,320	17,600	17,600	7,320	158,000	158,000
Used cans (shredded, loose, baled)	9,090	40,000	39,900	9,170	354,000	354,000
Other wrought products	5,930	23,100	23,300	5,700	201,000	210,000
Fragmentized shredder (auto shredder)	4,250	11,900	12,000	4,150	107,000	107,000
Total old scrap	33,600	120,000	120,000	33,300	1,060,000	1,070,000
Total all classes	88,000	279,000	281,000	86,300	2,470,000	2,490,000

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 SEPTEMBER 2020^{1,2}

(Metric tons)

	September			January–September ³		
	Stocks, opening ³	Production	Net shipments	Stocks, closing	Production	Net shipments
Die-cast alloys:						
13% Si, 360, etc. (0.6% Cu, max.)	3,270	2,440	2,440	3,270	18,100	18,100
380 and variations	8,820	19,300	19,300	8,820	143,000	143,000
Sand and permanent mold:						
95/5 Al-Si, 356, etc. (0.6% Cu, max.)	2,180	3,020	3,020	2,180	22,300	22,300
No. 319 and variations	3,820	3,850	3,850	3,820	28,500	28,500
F-132 alloy and variations	182	249	249	182	1,840	1,840
Al-Zn alloys	467	81	81	467	600	600
Al-Si alloys (0.6% to 2.0% Cu)	219	133	133	219	984	984
Al-Cu alloys (1.5% Si, max.)	318	245	245	318	1,810	1,810
Other ⁴	7,560	10,000	10,000	7,560	74,100	74,100
Wrought alloys, extrusion billets	10,400	45,000	45,000	10,400	333,000	333,000
Total all alloys	37,200	84,400	84,400	37,200	624,000	624,000
Less:						
Primary aluminum consumed	XX	15,600	XX	XX	115,000	XX
Primary silicon consumed	XX	1,810	XX	XX	13,400	XX
Other alloying ingredients consumed	XX	795	XX	XX	5,880	XX
Net metallic recovery from aluminum scrap consumed in production of secondary aluminum ingot ⁵						
	XX	66,200	XX	XX	490,000	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:		
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
March	86.591	73.070
April	76.450	66.095
May	74.961	66.215
June	79.682	70.943
July	85.022	74.360
August	93.613	78.648
September	93.627	79.167
January–September	86.115	73.922

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:					
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
March	50.02	41.80	38.95	39.95	35.18
April	40.79	37.12	32.45	34.17	29.25
May	39.80	36.80	32.35	33.80	29.25
June	44.77	37.50	35.39	35.77	29.91
July	47.45	40.09	37.86	37.20	31.23
August	48.40	42.69	40.52	39.60	34.64
September	50.93	46.10	37.38	37.07	29.62
January–September	47.47	40.48	36.84	37.10	31.39

Source: American Metal Market.

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

(Metric tons)

Country or locality	Metals and alloys, crude		Plates, sheets, bars, etc		Scrap		Total	
	September	January– September	September	January– September	September	January– September	September	January– September
Argentina	11,600	127,000	--	--	--	--	11,600	127,000
Australia	2,490	67,300	52	331	--	19	2,540	67,700
Austria	--	--	1,490	18,900	--	--	1,490	18,900
Bahrain	6,260	55,700	5	17,600	--	--	6,260	73,300
Belgium	38	111	620	3,960	--	--	658	4,070
Brazil	--	--	109	8,900	77	5,770	186	14,700
Canada	151,000	1,830,000	18,600	153,000	32,100	250,000	201,000	2,230,000
Chile	--	--	--	--	38	1,490	38	1,490
China	--	642	7,270	89,400	26	57	7,300	90,100
Colombia	--	--	755	4,550	45	589	800	5,140
Costa Rica	--	--	--	6	167	1,340	167	1,340
France	6	1,950	824	9,760	12	806	842	12,500
Germany	78	398	4,900	50,000	331	1,780	5,310	52,100
Greece	--	--	1,060	12,900	1	17	1,060	12,900
Guatemala	--	--	--	13	184	3,300	184	3,320
Honduras	--	--	503	3,780	--	66	503	3,850
Hong Kong	--	--	117	1,560	--	--	117	1,560
Iceland	19	566	--	--	--	--	19	566
India	2,380	78,000	780	20,500	--	343	3,160	98,900
Indonesia	--	--	1,590	16,800	--	--	1,590	16,800
Italy	9	286	1,570	16,900	--	1,000	1,580	18,200
Japan	--	--	1,320	10,500	22	691	1,350	11,200
Korea, Republic of	2,020	10,100	999	21,700	348	2,660	3,370	34,500
Malaysia	--	224	736	5,590	--	24	736	5,840
Mexico	9	10	4,190	23,200	11,700	107,000	15,900	130,000
Netherlands	20	805	358	4,340	182	902	560	6,040
New Zealand	--	6,810	1	4	--	--	1	6,810
Norway	--	155	466	1,910	--	--	466	2,060
Oman	--	99	3,180	46,200	--	--	3,180	46,300
Qatar	5,310	49,000	25	26	--	--	5,330	49,000
Romania	--	--	366	5,550	--	36	366	5,580
Russia	1,090	78,900	1,180	15,800	--	39	2,270	94,800
Saudi Arabia	--	5,450	6,260	56,200	--	--	6,260	61,600
South Africa	--	4,470	5,140	25,500	--	--	5,140	30,000
Spain	80	849	1,450	18,000	114	396	1,650	19,200
Sweden	--	--	808	5,220	--	7	808	5,230
Switzerland	--	--	621	4,600	--	--	621	4,600
Taiwan	32	344	722	22,600	6	244	760	23,100
Thailand	86	715	743	25,000	8	258	837	26,000
Turkey	2	2	1,300	34,900	--	--	1,300	34,900
United Arab Emirates	31,800	250,000	134	1,260	--	35	32,000	251,000
United Kingdom	--	301	184	3,340	292	2,630	476	6,270
Venezuela	--	25	--	--	--	--	--	25
Vietnam	--	--	2,260	16,400	--	9	2,260	16,400
Other	37	133	6,180	32,700	1,010	8,550	7,220	41,400
Total	214,000	2,570,000	78,800	809,000	46,600	390,000	339,000	3,770,000

-- 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 SEPTEMBER 2020¹

(Metric tons)

Country or locality	Metals and alloys, crude		Plates, sheets, bars, etc.		Scrap		Total	
	September	January– September	September	January– September	September	January– September	September	January– September
Australia	79	434	179	1,580	--	--	258	2,010
Belgium	1	24	14	183	448	5,430	463	5,640
Brazil	--	17	82	2,450	828	2,500	910	4,970
Canada	6,960	63,700	27,300	221,000	6,740	52,700	41,000	337,000
China	68	1,200	815	15,700	6,200	138,000	7,090	155,000
Colombia	--	6	55	566	21	151	76	723
Dominican Republic	--	9	10	209	24	163	34	381
France	--	305	381	5,610	79	990	460	6,910
Germany	79	206	311	4,460	468	6,800	858	11,500
Guatemala	1	3	2	46	--	--	3	49
Hong Kong	31	39	21	450	1,630	48,700	1,680	49,200
India	7	284	47	1,010	35,500	207,000	35,600	209,000
Indonesia	--	8	13	83	8,780	75,900	8,790	76,000
Ireland	1	2	9	453	--	67	10	522
Israel	--	10	1,120	13,000	--	--	1,120	13,000
Italy	--	159	68	1,070	--	4,210	68	5,440
Jamaica	--	81	--	43	--	16	--	140
Japan	31	1,060	483	10,800	2,170	11,300	2,680	23,200
Korea, Republic of	5	590	1,340	17,000	24,200	214,000	25,500	232,000
Malaysia	550	3,220	220	1,720	37,600	293,000	38,400	298,000
Mexico	8,710	62,100	22,900	196,000	12,800	103,000	44,400	361,000
Netherlands	62	98	45	308	682	1,470	789	1,870
New Zealand	--	--	57	358	--	19	57	377
Norway	--	1	--	20	--	--	--	21
Pakistan	--	39	--	15	1,250	9,320	1,250	9,370
Panama	--	12	1	30	--	--	1	42
Philippines	--	237	4	189	232	4,730	236	5,160
Poland	--	1	8	217	41	163	49	381
Romania	18	81	55	1,990	--	--	73	2,070
Russia	--	1	3	23	2,540	16,000	2,540	16,000
Saudi Arabia	--	13	15	450	256	1,090	271	1,550
Singapore	11	81	242	2,180	19	2,920	272	5,180
Spain	6	11	17	356	349	4,220	372	4,580
Taiwan	74	1,920	186	3,270	3,490	30,500	3,750	35,700
Thailand	--	1	89	624	5,590	53,900	5,680	54,500
Turkey	2	31	158	3,270	1,490	5,810	1,650	9,120
United Arab Emirates	--	4	68	485	1,140	6,780	1,200	7,270
United Kingdom	5	317	449	4,950	318	1,680	772	6,950
Vietnam	--	165	30	897	1,620	12,300	1,650	13,400
Other	58	602	331	3,040	2,030	16,200	2,420	19,900
Total	16,800	137,000	57,100	516,000	158,000	1,330,000	232,000	1,980,000

-- Zero.

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

Source: U.S. Census Bureau.