



Local Bauxite/Alumina Monthly Statistical Bulletin

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Prepared by: Economics Division, JBI

JULY 2025

BAUXITE/ALUMINA INDUSTRY

Y-o-Y (kt)			Jul-25	Jul-24
Production				
Total Bauxite	↑	4.5%	469	449
Crude Bauxite	↓	3.3%	148	154
Alumina	↑	18.3%	118	100
Exports				
Total Bx. Disposed	↑	8.2%	490	453
Crude Bauxite	↓	18.3%	117	143
Alumina	↑	29.9%	136	105
Capacity Utilization (%)				
ACU (%)	↑	18.2	37.7	31.9
Y-T-D (kt)			2025	2024
Production				
Total Bauxite	↑	2.7%	3,689	3,591
Crude Bauxite	↑	9.7%	1,185	1,080
Alumina	↓	1.4%	866	878
Exports				
Total Bx. Disposed	↑	2.2%	3,720	3,640
Crude Bauxite	↑	3.0%	1,142	1,108
Alumina	↑	0.5%	890	886
Capacity Utilization (%)				
ACU (%)	↓	1.5%	40.3%	40.9%

Production

In July 2025, **total bauxite⁽¹⁾ production** grew by 4.5% year-over-year (YoY) to ~469 kt. This outturn was influenced by improved alumina production during the period. For the first seven months of the year, total bauxite production amounted to ~3,689 kt, reflecting a 2.7% increase relative to July 2024.

Crude bauxite⁽²⁾ production during the month under review stood at ~148kt, down 3.3% YoY. In contrast, crude output rose by 9.7% year-to-date (YTD), reaching ~1,185 kt, highlighting strong recovery from 2024 and steady progress at Discovery Bauxite.

Smelter-grade alumina⁽³⁾ output was up by a robust 18.3% YoY in July to ~118 kt. Higher output from Jamalco drove the increase, offsetting Windalco's sharp production decline due to logistical and mechanical challenges. Nonetheless, YTD production totalled ~866 kt, declining 1.4% relative to the same period last year. For July 2025, the alumina refineries operated at an **average capacity utilization⁽⁴⁾** rate of 37.7%, up from 31.9% when compared to the corresponding period of 2024.

Exports

Total bauxite disposed of, which includes both crude bauxite exports and bauxite refined into alumina before being shipped, grew by 8.2% YoY to ~490 kt in July. The increase stemmed from a ~30% rise in alumina exports as crude bauxite shipments (totalling ~117 kt) fell sharply by 18.3%, reflecting 2025's lowest monthly third-party exports/sales to China, as well as the smallest volume supplied to the Gramercy refinery in the U.S.

Meanwhile, **alumina exports** were up strongly in July, rising by 29.9% to ~136 kt. During the reporting period, Europe was the dominant market for exports as 92% of the alumina shipped was consigned to that region.

LME ALUMINIUM 3-M PRICE (US\$ per tonne)



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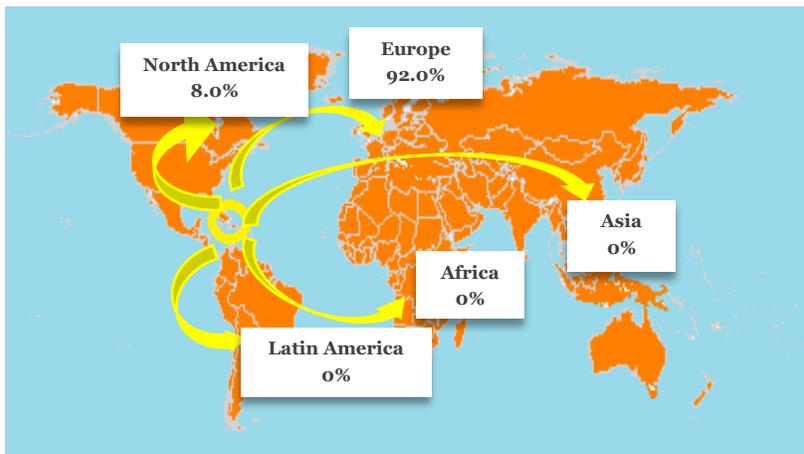


Figure 1: Jamaica's Alumina Export Volumes to Regional Markets in July 2025

Aluminium Prices

The **London Metal Exchange (LME) aluminium 3-month price** surged in July, driven by a weaker US dollar, new trade agreements with Japan and the EU, and the U.S. move to double tariffs on key metals, which accelerated trade activity. China's July 18 stimulus announcement and expectations of stronger demand, amid production nearing its annual cap, further boosted market momentum. During the coverage period (July 2025), the contract price averaged US\$2605/mt, increasing by 3.5% (US\$88/mt) compared to June 2025, and was up by 7.8% (US\$188/mt) year-on-year.

Crude Oil Prices

Average crude benchmarks (Brent, OPEC, WTI) held steady in July, posting a marginal month-on-month increase amid mixed market fundamentals that kept trading within a narrow range. The slight rise was supported by easing supply concerns following the early resolution of the Iran-Israel conflict, while late-stage U.S. trade agreements helped reinforce demand.

In July, the OPEC basket averaged US\$70.97/bbl, up 1.8% month-over-month but down 15.9% year-over-year. Brent crude traded at US\$70.95/bbl, decreasing by 0.6% from June's average. It declined by 16.8% with respect to the corresponding period a year ago. Meanwhile, at US\$67.37/bbl, the WTI benchmark was down by 0.7% compared to the preceding month and fell by 16.7% vis-a-vis July 2024.

The Energy Information Administration (EIA) is expecting Brent crude prices to decline sharply, falling from US\$71/bbl in July to an average of US\$58/bbl in Q4 2025, and further to around US\$50/bbl in early 2026. Annual averages are projected at US\$67/bbl for 2025 and US\$51/bbl for 2026. The downturn is largely attributed to accelerated production increases by the OPEC+, leading to substantial global inventory builds.

NOTES:

- (1) Crude Bauxite = Bauxite mined for export
- (2) Total Bauxite = Crude bauxite + bauxite converted to alumina
- (3) Smelter-grade alumina = High-purity form of alumina used to produce aluminium
- (4) Average Capacity Utilization = Percentage of total production capacity that was used

APPENDIX:

BAUXITE/ALUMINA PRODUCTION & EXPORT STATISTICS - JULY 2025						
PERIOD	PRODUCTION			SALES		
	ALUMINA	CRUDE BAUXITE	TOTAL BAUXITE**	ALUMINA	CRUDE BAUXITE	TOTAL BAUXITE
<u>MONTH</u>						
2025	118,288	148,475	468,956	136,312	116,596	490,393
2024	100,012	153,607	448,848	104,966	142,696	453,340
% Chg 2025/24	18.27	-3.34	4.48	29.86	-18.29	8.17
2023	130,554	166,155	528,564	164,887	155,504	612,899
% Chg 2024/23	-23.39	-7.55	-15.08	-36.34	-8.24	-26.03
<u>Y-T-D</u>						
2025	865,550	1,184,642	3,688,684	889,745	1,141,517	3,719,949
2024	878,032	1,080,424	3,590,670	885,512	1,108,392	3,640,422
% Chg 2025/24	-1.42	9.65	2.73	0.48	2.99	2.18
2023	772,825	1,222,013	3,419,451	821,899	1,242,448	3,580,136
% Chg 2024/23	13.61	-11.59	5.01	7.74	-10.79	1.68