



## Local Bauxite/Alumina Monthly Statistical Bulletin

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Prepared by: Economics Division, JBI

### AUGUST 2025

#### BAUXITE/ALUMINA INDUSTRY

Y-o-Y (kt)			Aug-25	Aug-24
<b>Production</b>				
Total Bauxite	↑	6.1%	500	471
Crude Bauxite	↑	44.9%	147	101
Alumina	↓	11.7%	119	135
<b>Exports</b>				
Total Bx. Disposed	↑	107.8%	566	272
Crude Bauxite	↑	51.2%	150	99
Alumina	↑	124.4%	140	62
<b>Capacity Utilization (%)</b>				
ACU (%)	↓	11.8	38.0	43.1
Y-T-D (kt)			2025	2024
<b>Production</b>				
Total Bauxite	↑	3.2%	4,192	4,061
Crude Bauxite	↑	12.7%	1,331	1,182
Alumina	↓	2.8%	985	1,013
<b>Exports</b>				
Total Bx. Disposed	↑	9.8%	4,284	3,903
Crude Bauxite	↑	7.0%	1,291	1,208
Alumina	↑	8.6%	1,030	945
<b>Capacity Utilization (%)</b>				
ACU (%)	↓	2.9%	40.0%	41.2%

#### Production

In August 2025, **total bauxite<sup>(1)</sup> production** grew by 6.1% year-over-year (YoY) to ~500 kt. This outturn was influenced by improved crude bauxite production during the period. For the first eight months of the year, total bauxite production amounted to ~4,192 kt, reflecting a 3.2% increase relative to August 2024.

**Crude bauxite<sup>(2)</sup> production** during the month under review stood at ~147kt, up 44.9% YoY. For the year-to-date (YTD) period, output rose by 12.7% year-to-date (YTD), reaching ~1,331 kt, underscoring a strong rebound from 2024.

**Smelter-grade alumina<sup>(3)</sup> output** dipped by 11.7% YoY in August, down to ~119 kt. Lower output from both refineries was responsible for the downturn, though Windalco experienced a MoM recovery from earlier mechanical and logistical setbacks. YTD production totalled ~985 kt, reflecting a YoY decline of 2.8%.

For August 2025, the alumina refineries operated at an **average capacity utilization<sup>(4)</sup>** rate of 38.0%, down from 43.1% 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 107.8% YoY to ~566 kt in August. The increase stemmed from sharp rises in both bauxite and alumina exports (51.2% to ~150 kt and 124.4% to ~140 kt, respectively). However, the robust uptick in alumina exports comes against a background of a weak base period, when shipments were severely constrained by Hurricane Beryl's damage to Jamalco's port facility.

During the reporting period, North America was the dominant market for exports as 57% of the alumina shipped was consigned to that region.

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



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

### Aluminium Prices

The **London Metal Exchange (LME) aluminium 3-month price** fell marginally in August, despite an early boost from a weak U.S. dollar, Fed rate cut expectations, and better manufacturing. Supply-side issues also added bullish pressure: Guinea expropriated an alumina refinery, and Africa's second-largest smelter warned of a 2026 shutdown over power issues. However, anticipated tariffs later in the month dampened sustained gains. During the coverage period (August 2025), the contract price averaged US\$2594/mt, decreasing by 0.4% (US\$11/mt) compared to July 2025, but was up by 9.2% (US\$217/mt) YoY.



### Crude Oil Prices

Average crude benchmarks (Brent, OPEC, WTI) trended down in August, primarily driven by persistent OPEC+ output hikes. The cartel increased its planned production for the fifth month in a row, adding 1.6 million barrels per day to global supply, while overall price volatility eased to a December low.

In August, the OPEC basket averaged US\$69.73/bbl, down 1.7% month-over-month and down 11.1% YoY. Brent crude traded at US\$68.24/bbl, decreasing by 3.8% from July's average. It declined by 15.5% with respect to the corresponding period a year ago. Meanwhile, at US\$64.08/bbl, the WTI benchmark was down by 4.9% compared to the preceding month and fell by 15.2% vis-a-vis August 2024.

The Energy Information Administration (EIA) is projecting a sharp decline in Brent crude prices, falling from ~US\$68/bbl in August to an average of US\$59/bbl in Q4 2025, and further to around US\$50/bbl in early 2026. This will be driven by significant global inventory builds, estimated at over 2 million barrels per day. These inventory levels are expected to remain elevated, contributing to continued price pressure throughout 2026.

### Contact Us

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Next Release date: October 31, 2025

**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:**

<b>BAUXITE/ALUMINA PRODUCTION &amp; EXPORT STATISTICS - AUGUST 2025</b>						
<b>PERIOD</b>	<b>PRODUCTION</b>			<b>SALES</b>		
	<b>ALUMINA</b>	<b>CRUDE BAUXITE</b>	<b>TOTAL BAUXITE**</b>	<b>ALUMINA</b>	<b>CRUDE BAUXITE</b>	<b>TOTAL BAUXITE</b>
<b><u>MONTH</u></b>						
2025	119,421	146,731	499,609	140,163	149,929	565,757
2024	135,277	101,256	470,687	62,469	99,130	272,238
% Chg 2025/24	-11.72	44.91	6.14	124.37	51.24	107.82
2023	141,104	187,798	570,776	150,999	169,167	581,086
% Chg 2024/23	-4.13	-46.08	-17.54	-58.63	-41.40	-53.15
<b><u>Y-T-D</u></b>						
2025	984,971	1,331,373	4,192,004	1,029,908	1,291,446	4,284,391
2024	1,013,309	1,181,680	4,061,384	947,981	1,207,522	3,902,925
% Chg 2025/24	-2.80	12.67	3.22	8.64	6.95	9.77
2023	913,929	1,409,811	3,990,689	972,898	1,411,615	4,160,929
% Chg 2024/23	10.87	-16.18	1.77	-2.56	-14.46	-6.20