Jamaica Bauxite Institute

Local Bauxite/Alumina Monthly Statistical Bulletin

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BAUXITE/ALUMINA INDUSTRY

Y-o-Y (kt)			Dec-25	Dec-24
Production				
Total Bauxite	⇩	42.3%	289	501
Crude Bauxite	⇩	9.7%	102	113
Alumina	⇩	52.8%	58	123
Exports				
Total Bx. Disposed	⇩	20.4%	388	488
Crude Bauxite	⇩	18.4%	110	135
Alumina	⇩	22.3%	87	112
Capacity Utilization (%)				
ACU (%)	⇩	52.8%	18.5	39.2

Y-T-D (kt)			2025	2024
Production				
Total Bauxite	⇩	4.4%	5,630	5,889
Crude Bauxite	⇧	6.8%	1,754	1,642
Alumina	⇩	11.1%	1,316	1,481
Exports				
Total Bx. Disposed	⇩	2.8%	5,898	6,062
Crude Bauxite	⇧	1.1%	1,726	1,707
Alumina	⇩	6.7%	1,417	1,519
Capacity Utilization (%)				
ACU (%)	⇩	11.2%	35.6%	40.1%

DECEMBER 2025

Production

In December 2025, **total bauxite[(1)] production** fell sharply by 42.3% year-over-year (YoY) to ~289 kt, reflecting significantly weaker alumina output alongside lower crude bauxite production amid persistent post-Hurricane Melissa disruptions. For the full-year 2025, total bauxite production reached ~5,630 kt, representing a 4.4% downturn compared with the identical period of 2024.

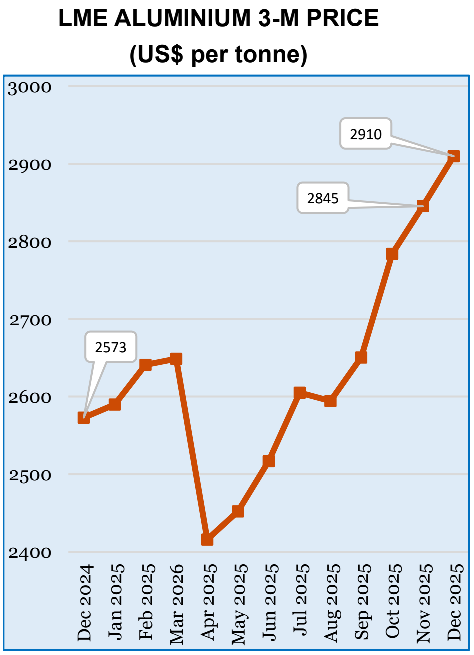
Crude bauxite[(2)] production totalled ~102 kt in December and was 9.7% lower YoY than the ~113 kt produced in December 2024. Mining operations continued to be constrained by damaged infrastructure, intermittent power outages and ongoing repairs at affected sites. Despite recent challenges, Year-to-date (YTD) crude bauxite production advanced 6.8% to ~1,754 kt, reflecting robust early-year operating momentum.

Smelter-grade alumina[(3)] output fell sharply to ~58 kt in December, down 52.8% YoY, as persistent digester issues at Jamalco continued to weigh on output, reducing YTD output by 11.1% to ~1,316 kt.

For December 2025, the alumina refineries operated at an **average capacity utilization[(4)]** rate of 18.5%, down from 39.2% 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, declined by 20.4% YoY to ~388 kt in December. The weaker outturn reflected lower shipments of both commodities, driven by reduced production and lingering post-hurricane operational constraints. Crude bauxite exports fell 18.4% YoY to ~110 kt (with no third-party sales), while alumina shipments were down by 22.3% YoY to ~87 kt. During the reporting period, Europe was the dominant market for exports as 74% of the alumina shipped was consigned to that region.



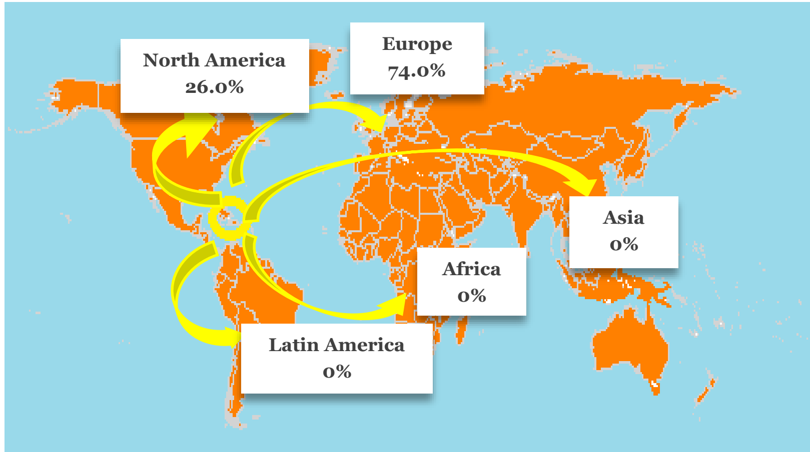


Figure 1: Jamaica's Alumina Export Volumes to Regional Markets in December 2025

Aluminium Prices

The **London Metal Exchange (LME) aluminium 3-month price** extended its rally in December, buoyed by macroeconomic optimism and supply concerns. A Fed cut and dollar weakness spurred optimism, complemented by record copper prices and robust investor positioning. Heightened supply risks (Mozal's closure and Nordural disruptions) pushed prices firmly above the US$2,900/mt threshold. During the coverage period (December 2025), the contract price averaged US$2,910/mt, increasing by 2.3% (US$65/mt) compared to November 2025, and up by 13.1% (US$337/mt) YoY.

Crude Oil Prices

Average crude benchmarks (Brent, OPEC, WTI) continued to decline in December pressured by sustained OPEC+ output hikes, record U.S. production, rising inventories, and seasonal demand softness, reinforcing persistent oversupply risks.

In December, the OPEC basket averaged US$61.74/bbl, down by 4.2% month-over-month and down by 15.5% YoY. Brent crude traded at US$62.69/bbl, decreasing by 1.5% from November's average. It declined by 15.1% with respect to the corresponding period a year ago. Meanwhile, at US$57.97/bbl, the WTI benchmark was down by 2.5% compared to the preceding month and fell by 16.9% vis-a-vis December 2024.

The Energy Information Administration's (EIA) outlook points to sustained downward pressure on oil prices in 2026 as global supply growth continues to outpace demand, driving inventory builds estimated at 2.8 mb/d. Brent crude is forecast to average around US$56/bbl for the year, representing a 19% decline from 2025 levels. OPEC+ output increases and rising floating storage volumes are expected to weigh on prices, although China's ongoing stockpiling will provide some support. Sanctions policy toward Venezuela remains a key source of uncertainty for the price trajectory.

Contact Us

Jamaica Bauxite Institute
Hope Gardens
Kingston 6
(876)-927-2070-3
info@jbi.org.jm
www.jbi.org.jm

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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 - DECEMBER 2025						
PERIOD	**PRODUCTION**			**SALES**		
	ALUMINA	**CRUDE BAUXITE**	**TOTAL BAUXITE****	**ALUMINA**	**CRUDE BAUXITE**	**TOTAL BAUXITE**
<u>MONTH</u>						
2025	58,058	102,260	289,497	87,225	110,200	388,123
2024	122,933	113,282	501,356	112,266	134,967	487,711
% Chg 2025/24	-52.77	-9.73	-42.26	-22.31	-18.35	-20.42
2023	140,774	149,890	530,168	130,051	169,144	526,988
% Chg 2024/23	-12.67	-24.42	-5.43	-13.68	-20.21	-7.45
<u>Y-T-D</u>						
2025	1,316,199	1,754,089	5,630,205	1,417,129	1,725,644	5,897,594
2024	1,481,234	1,642,119	5,888,924	1,518,507	1,706,617	6,061,624
% Chg 2025/24	-11.14	6.82	-4.39	-6.68	1.11	-2.71
2023	1,400,828	2,046,258	5,988,079	1,433,667	2,085,504	6,124,524
% Chg 2024/23	5.74	-19.75	-1.66	5.92	-18.17	-1.03