



SECURING AUSTRALIA'S ALUMINIUM ADVANTAGE

THE CASE FOR RECOGNISING BAUXITE, ALUMINA AND ALUMINIUM AS CRITICAL MINERALS





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For all enquiries contact

Phone: +61 (0) 3 9221 6247

enquiry@orizondas.com.au

EXECUTIVE SUMMARY

Australia has a strategic sovereign capability advantage that few countries possess: a complete aluminium value chain extending from bauxite mining and alumina refining through to primary aluminium production and downstream manufacturing.

That capability should be recognised by adding bauxite, alumina and aluminium to Australia's Critical Minerals List.

Australia's Critical Minerals List is intended to identify minerals that are essential to modern technologies, economies or national security, for which Australia has geological potential and international partner demand, and whose supply chains are vulnerable to disruption.

This report sets out the reasons why Australia should join key strategic partners in recognising the criticality of these commodities.

Bauxite, alumina and aluminium comprehensively meet the existing criteria for listing, have an increasingly important role in defence, and the cost to the nation of losing this capability will be both unbearably high and irreversible – economically and strategically.

For bauxite, alumina and aluminium the case is not based on scarcity. Aluminium is essential to national security, modern economies, advanced manufacturing and clean energy. With global production highly concentrated and processing capacity increasingly shaped by a combination of industrial policy and geopolitical competition, Australia should align with its major strategic partners which recognise aluminium, bauxite and the broader value chain as critical.

Australia's own aluminium industry is already strategically important. It supports sovereign defence manufacturing, including aluminium products used in protected vehicles, aluminium hulls for the Evolved Cape-class patrol boats and the aluminium powder required for solid rocket propellants as Australia expands its guided-weapons and rocket-motor capability. The same industrial base can also support emerging critical-material supply chains through gallium recovery, fluorine and high-purity alumina.

Bauxite, alumina and aluminium comprehensively meet the existing criteria for listing (as critical minerals)...



Once refining capacity closes, the loss of workers, suppliers, technical knowledge and downstream relationships can be difficult and costly to rebuild.

At the centre of the value chain is alumina refining. FTI Consulting¹ estimated that alumina refining generated around \$7.9 billion in total value added and supported more than 32,000 jobs in regional areas, making it the largest source of economic contribution in the aluminium industry. It is also the essential bridge between Australia's bauxite resources and downstream aluminium production.

This capability cannot be taken for granted. Australian refineries depend on continued access to suitable bauxite, competitive energy, investment and specialist skills. Once refining capacity closes, the loss of workers, suppliers, technical knowledge and downstream relationships can be difficult and costly to rebuild.

Australia's integrated aluminium sector is of strategic value. Adding it to the Critical Minerals List aligns Australia more closely with key allies and trading partners, strengthens the basis for investment and international cooperation, and helps preserve one of the few complete industrial value chains Australia possesses at scale.

Australia does not need to create this capability. It needs to recognise, retain and grow it.

1. FTI Consulting, Economic Contribution of the Australian Aluminium Industry, a report for the Australian Aluminium Council, September 2024.

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**AUSTRALIA'S POSITION
IN GLOBAL BAUXITE,
ALUMINA AND
ALUMINIUM MARKETS**



Australia's aluminium sector already demonstrates a path to what many strategic industries and partners are trying to build – a reliable, advanced, vertically integrated supplier of the materials needed for defence capability, economic security, modern industry and clean energy.

Australia mines bauxite at scale, refines it into alumina, smelts aluminium metal and manufactures downstream extruded products. Very few countries have this full chain. Fewer still combine it with Australia's resource base, skilled workforce, environmental standards, export infrastructure and reputation as a trusted supplier.

Australia's position matters because the global aluminium value chain is highly concentrated. The top four producing countries account for approximately 85 per cent of bauxite production, 86 per cent of alumina production and 76 per cent of primary aluminium production. While Australia is currently in the top four producers of both bauxite and alumina, this scale does not make the industry immune from vulnerability. This means disruption at one stage or in one major producing region can have effects across the whole chain.

Table 1

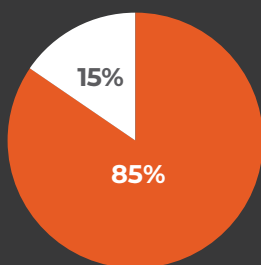
Australia's aluminium value chain and global market share, 2025

	Australia Production Mt	World Production Mt	Australia Market Share
Bauxite mining	102	440	23%
Alumina refining	17.4	150	12%
Primary aluminium	1.6	74	2%



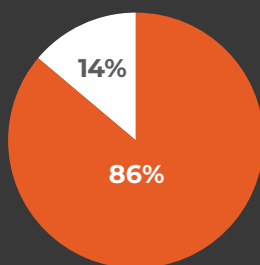
Figure 1

Market share of the top 4 bauxite, alumina and aluminium producing nations, 2025



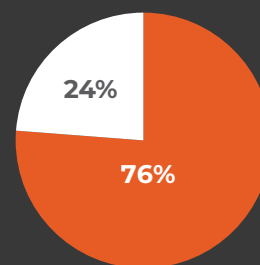
Bauxite

Top 4 Rest of World



Alumina

Top 4 Rest of World



Aluminium

Top 4 Rest of World

Source: U.S. Geological Survey.

Geopolitical conflict, sanctions, shipping disruption, energy-price shocks and industrial policy are increasingly shaping mineral supply chains. At the same time, competitor nations are actively seeking to attract refining and smelting investment. Australia therefore faces two separate strategic questions: whether global supply chains remain sufficiently diversified, and whether Australia itself will retain the processing capability required to convert its resources into high-value industrial products.

The distinction is important. Bauxite in the ground isn't by itself a guarantee of access to alumina, primary aluminium or fabricated aluminium products. Secure supply depends on mine approvals, refinery continuity, competitive energy, technical skills, downstream manufacturing and continuing capital investment.

Australia's strategic advantage lies in the integration of these stages, not simply in the size of its geological resource.

Competition is increasing across the value chain. In bauxite, Guinea has expanded rapidly and has become the largest supplier to China's import market. Recent reporting indicates Guinea's bauxite exports increased to around 183 million tonnes in 2025. In contrast, Australian bauxite output has plateaued.

Indonesia demonstrates how quickly policy can reshape aluminium supply chains. Following restrictions on raw mineral exports, Indonesia has actively encouraged domestic processing of its bauxite resources. Two of the world's youngest and lowest-cost coal fired alumina refineries are already operating there, with additional refineries under construction and being planned.

Recent forecasts project Indonesia's total alumina production capacity quadrupling from 7 million tonnes in 2025 to 32.5 million tonnes in 2030².

This emerging capacity will compete directly for future investment and market share. Indonesia benefits from local bauxite, relatively low labour and energy costs and an industrial policy explicitly designed to increase downstream production. Its progress demonstrates that processing capability isn't fixed: investment can migrate towards jurisdictions that provide the conditions for new capacity to be built.

The global market is moving. Australia's competitors are expanding capacity, attracting investment and using policy to support domestic production and processing and Australia needs to align with this.

Adding bauxite, alumina and aluminium to Australia's Critical Minerals List would be an important first step in recognising the value chain's strategic importance and aligning policy with its role in global supply chains, the national economy and regional communities.

2. Centre for Research on Energy and Clean Air, Indonesia's aluminium downstream: Following nickel into a captive coal boom, July 2026. CM Group, Vulnerabilities and Opportunities in Australia's Upstream Aluminium Sectors, a report for the Australian Aluminium Council, September 2024.

**THE ALUMINIUM VALUE
CHAIN SHOULD BE INCLUDED
ON AUSTRALIA'S CRITICAL
MINERALS LIST**



Australia's Critical Minerals List is intended to identify minerals that are essential to modern technologies, economies or national security, for which Australia has geological potential and international partner demand, and whose supply chains are vulnerable to disruption.

Aluminium is not currently recognised federally as a Critical Mineral. Criticality is not only a geological characteristic. It changes as markets, technologies, trade relationships, industrial capacity and geopolitical risks change.

Bauxite, alumina and aluminium satisfy the policy logic for four reasons.

First, aluminium is economically important across housing, transport, electricity networks, renewable energy, advanced manufacturing, packaging, machinery, data centres and defence.

Second, global production is concentrated, and processing capacity is increasingly shaped by active industrial policy.

Third, Australia's domestic value chain is exposed to specific vulnerabilities, particularly the dependence of alumina refineries which are designed around specific grades and characteristics of local bauxite and historically competitive energy.

Fourth, aluminium is embedded in defence and allied industrial supply chains where resilience and the capacity to scale are becoming explicit policy priorities.

Australia's advantage is the chain itself: bauxite mining, alumina refining, aluminium smelting and downstream processing.

Australia's strategic partners now recognise aluminium as a critical mineral

Australia's major strategic and economic partners increasingly recognise bauxite, alumina, aluminium or the broader aluminium value chain as critical to economic security, advanced manufacturing and defence. Australia's current approach leaves it increasingly out of step with this international shift.

- **The US:** Aluminium was included on the US Critical Minerals List in 2022 and retained in 2025, reflecting its economy-wide use, exposure to trade disruption and importance to national security.
- **The UK:** Added aluminium to its Critical Minerals Strategy in 2024 and also identifies it as a growth mineral supporting electric vehicles, advanced manufacturing, clean energy and electricity grids.
- **European Union:** The EU's Critical Raw Materials Act explicitly recognises the aluminium value chain, including bauxite and alumina, because of its importance to clean energy, industrial, space and defence supply chains.
- **South Korea:** 2023 framework lists aluminium and bauxite among 33 critical minerals.
- **Japan:** Recognises the strategic importance of securing the upstream raw material for aluminium production, with its critical metals framework including bauxite – though not aluminium.
- **Canada:** Canada has included aluminium on its Critical Minerals List since 2021, recognising its economic and national security importance and its role in building secure, low-carbon supply chains.

Our strategic partners are not doing this because bauxite, alumina or aluminium are new or scarce. They are doing it because aluminium is essential to defence capability, clean energy systems, advanced manufacturing, transport, infrastructure and economic security, and the supply chain is vulnerable.

Critical minerals lists are more than descriptions of scarcity. They help shape investment priorities, eligibility for government programs, international partnerships, supply-chain planning, stockpiling, research and financing.

The practical consequence is that Australia risks underplaying one of its strongest existing industrial advantages. Unlike some competitors, Australia is not starting from scratch. It already has the resources, processing facilities, skilled workforce and export relationships that many countries are trying to build. Critical Minerals listing would align Australia's framework with its strategic partners and provide a clearer basis for cooperation on trusted supply chains.

Bauxite, alumina and aluminium meet the policy intent of critical-minerals listing, including disruption risk

Critical minerals policy is fundamentally concerned with materials that are economically important, strategically significant and exposed to supply-chain risk. Bauxite, alumina and aluminium meet that intent.

Aluminium is economically important to Australia because it is embedded across the national economy. It is used in housing, transport, electricity networks, renewable energy, packaging, machinery, data centres, defence systems and advanced manufacturing. It is also a major Australian industry in its own right.

Despite its size, bauxite, alumina and aluminium also meet the supply-risk test. Each stage of the aluminium value chain is concentrated in a relatively small group of producing countries. As an integrated industry, Australia's aluminium sector stands out when viewed in the broader context of our strategic allies. We have the ability to counter the domination by other countries of individual parts of the supply chain.

Australia benefits from strong relationships with major customers and partners, including China. As the largest participant in the global aluminium value chain, China has also become the leading source of offshore investment in the sector across Asia, particularly Indonesia, and in Africa, including Guinea and Angola.

Recent conflicts in Ukraine and the Middle East have demonstrated how energy, shipping, sanctions, trade flows and industrial inputs can become entangled with geopolitical risk, particularly for the alumina and aluminium markets which are highly correlated with energy resources. In a concentrated market, disruption in one region or at one stage of the chain can have wider consequences. The supply chain is insufficiently resilient to absorb these vulnerabilities and therefore requires active management across commodity cycles.



Bauxite mining, alumina refining and aluminium smelting are therefore part of the industrial base needed to deliver the government's broader economic objectives.

Critical-minerals status would support broader policy goals

Critical-minerals status would strengthen investment confidence by signalling government support for the sector and improving its visibility in project prioritisation, financing, research, international partnerships and policy programs. This would help sustain existing capacity, encourage new investment and support regional jobs.

It would also align the Critical Minerals List with Future Made in Australia. Aluminium is essential to clean energy, electricity grids, advanced manufacturing, defence and regional industry. Bauxite mining, alumina refining and aluminium smelting are therefore part of the industrial base needed to deliver the government's broader economic objectives. However, the ability to produce aluminium depends on the ability to continue to mine bauxite and refine alumina to support this domestic capacity.

The sector can also support new critical-minerals capability. Existing mines and refineries provide opportunities to recover gallium, rare earths and other valuable by-products, and to produce advanced materials such as high-purity alumina and fluorine chemicals.

**AUSTRALIA'S ALUMINIUM
VALUE CHAIN IS CRITICAL
TO OUR NATIONAL DEFENCE
INDUSTRY CAPABILITY**



Australia possesses an increasingly valuable strategic capability: an aluminium supply chain extending from bauxite mining and alumina refining through to primary aluminium production and downstream manufacturing. Few countries retain this combination of resources, processing capability, skilled workers and manufacturing capacity.

For defence, the significance of this capability goes beyond simply having a domestic source of metal for direct use and for supply to our trusted trading partners. Modern defence equipment relies on aluminium in many forms – including structural alloys, extrusions, fabricated components and specialised powders – while emerging defence technologies increasingly depend on advanced materials that can also be produced from the aluminium value chain.

Australia's mine-to-market aluminium industry is therefore both supporting defence capability today, directly and through our trusted supply chains, and providing a platform for the technologies Defence will increasingly rely upon in the future.

An Australian supply chain already supporting defence

Australia's aluminium industry is already connected to sovereign defence manufacturing.

Australian aluminium extrusions are used in the supply chain for the Bushmaster Protected Mobility Vehicle, one of Australia's most successful domestically manufactured defence platforms. Built by Thales Australia at Bendigo, the Bushmaster has been produced for the Australian Defence Force and international partners. Extruded and fabricated aluminium components form part of the broader vehicle supply chain. This demonstrates how Australia's downstream aluminium manufacturing capability can support a sophisticated sovereign land-defence industry and is a clear example of the small but significant mine-to-market contribution of Australia's integrated aluminium industry.

Naval shipbuilding provides an even more visible example. The Royal Australian Navy's Evolved Cape-class patrol boats are 58-metre aluminium monohull vessels, designed and constructed by Austal Australia at Henderson in Western Australia. Ten vessels have now been delivered to the Navy, with the program drawing on Austal's Australian workforce and domestic and trusted supply chains.

Few countries retain this combination of resources, processing capability, skilled workers and manufacturing capacity.

Here aluminium forms the basic structure of an Australian-built naval vessel performing maritime security and naval missions. The Evolved Cape-class demonstrates the strategic value of maintaining the capability not only to produce aluminium, but to work both directly and with trusted supply chains to manufacture and fabricate it into the products required by Australia's defence industry.

The connection extends into one of Australia's highest defence priorities – the Guided Weapons and Explosive Ordnance Enterprise (GWEO).

Solid rocket motors commonly use fine aluminium powder, such as that provided by Kymera in Bell Bay, Tasmania, as a metallic fuel within their propellant. The aluminium burns with the oxidiser, releasing energy that contributes to the thrust produced by the rocket motor. Aluminium therefore does more than simply support or contain the weapon: in these applications, it forms part of the energy that propels it.

Australia is seeking to substantially expand sovereign manufacture of guided weapons, munitions and rocket motors through GWEO. Thales Australia's Mulwala facility already produces military propellants and explosives, providing an established domestic energetics capability on which this expansion can build.

Australia enters this task with an important upstream advantage. It already mines the bauxite, refines the alumina and smelts the aluminium from which specialised aluminium powders can ultimately be manufactured. Further processing is required to produce powder with the purity, particle size and other characteristics required for propellant applications, but the underlying aluminium supply chain already exists.

These examples demonstrate the value of Australia's existing mine-to-market capability and the need for alignment with strategic partners.



These examples demonstrate the value of Australia's existing mine-to-market capability and the need for alignment with strategic partners. From aluminium components in protected vehicles, to the hulls of naval patrol boats and the material inputs needed for rocket propellants, Australia's aluminium industry can provide domestic defence manufacturing with access to a trusted and resilient material supply chain.

A platform for current and future defence technologies

The strategic importance of this capability will grow as defence systems become increasingly dependent on advanced materials, electronics, sensors and high-performance computing.

Aluminium will remain important in conventional applications, but Australia's aluminium value chain can also provide a pathway into new critical minerals and advanced materials.

The clearest example is gallium. Gallium occurs naturally in bauxite and can be recovered as a by-product of alumina refining. Alcoa is now proceeding with a gallium production plant co-located with its Wagerup alumina refinery in Western Australia, following a final investment decision involving Australia, Japan, the United States and Alcoa in July 2026. The project directly leverages Australia's existing alumina refining capability to create a new trusted source of another critical mineral.

Gallium's defence significance is substantial. Gallium arsenide and gallium nitride are used in specialised semiconductors, integrated circuits, radio-frequency electronics, optoelectronics and high-performance computing. These technologies have applications in advanced communications, radar, satellites, sensors and other defence systems. U.S. Geological Survey (USGS) specifically identifies gallium-based semiconductor technologies as important to defence applications and high-performance computers.

High-purity alumina (HPA) provides another opportunity. HPA and other high-purity aluminium materials are used in synthetic sapphire, semiconductors, advanced optics and electronics, as well as lithium-ion battery technologies. Australian companies such as Alpha HPA are already developing domestic high-purity aluminium production capability for these advanced markets.

These materials are increasingly relevant to defence systems built around sophisticated sensors, optical systems, communications, electronics, autonomous platforms and energy-storage technologies. HPA illustrates how the aluminium industrial base can extend beyond conventional metal production into the high-value advanced materials required by the next generation of defence capability.



ALUMINA REFINING AND THE RISK OF PERMANENT CAPABILITY LOSS



Alumina refining is the essential middle stage of Australia's aluminium value chain.

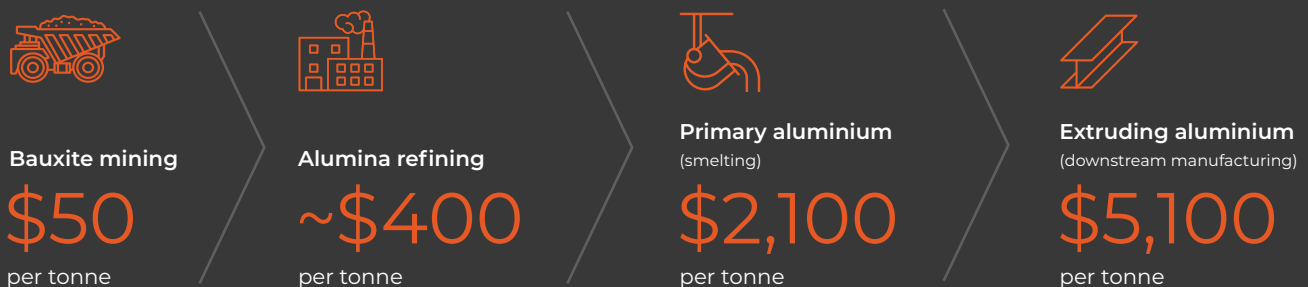
It converts Australian bauxite into the industrial material required to produce primary aluminium, and refining is not a minor intermediate activity. It is the largest source of economic contribution in Australia's aluminium industry. FTI Consulting estimated that alumina refining generated around \$7.9 billion, compared with \$5.4 billion from bauxite mining, \$3.3 billion from aluminium smelting and \$1.4 billion from extrusion and distribution³.

Alumina refining also supports a large employment footprint. FTI estimated that the sector supported around 32,300 full-time-equivalent jobs when direct, supply-chain and household-spending effects are included, comprising around 9,100 direct jobs, 14,000 indirect jobs and 9,200 induced jobs.

The scale of this contribution reflects the value created as Australia moves beyond simply extracting a mineral resource. FTI found that the economic value generated per tonne rises sharply as production moves through the value chain: from about \$50 per tonne for bauxite mining to \$400 for alumina refining, \$2,100 for primary aluminium and \$5,100 for extruded aluminium.

Value added rises sharply as bauxite is processed into higher-value products

Value added per tonne of product (2023)



Source: FTI Consulting, Economic Contribution of the Australian Aluminium Industry, a report for the Australian Aluminium Council, September 2024, p.13.
3. FTI Consulting, Economic Contribution of the Australian Aluminium Industry, a report for the Australian Aluminium Council, September 2024.

This progression illustrates the value of maintaining an integrated industry. Australia gains substantially more when its bauxite is refined domestically and then processed further into aluminium and manufactured products than when the resource is simply exported. Alumina is the pivotal step in that process: it is the bridge between Australia's mineral endowment and its downstream industrial capability.

Australia is already the second largest alumina producer. Australian refineries produced more than 18 million tonnes of alumina from domestic bauxite, with around 2.6 million tonnes retained for Australian aluminium smelting and the remainder exported. The sector generated approximately \$7 billion in export revenue in FY26⁴.

Australian refineries are closely integrated with particular domestic bauxite mines. Refineries are designed around specific grades and characteristics of bauxite; in south-west Western Australia, for example, specialised equipment is required to process the region's low-reactive-silica ores. Therefore bauxite mining and alumina refining are highly interdependent sectors in which disruption to one can quickly affect the other.

The economic consequences of that interdependence can be substantial. FTI modelled a scenario in which bauxite production in Western Australia fell by one-third. The result was an estimated 15 per cent reduction in the aluminium industry's national value added and a 14 per cent reduction in employment⁵. Total industry-wide employment losses were around 17 times greater than the direct employment loss in bauxite mining alone.

This is a central vulnerability in Australia's alumina industry. A delay or failure in securing access to the bauxite required by a refinery is not only a problem for a mine. It can undermine the economics of the refinery, the downstream aluminium production that relies upon it, regional suppliers and contractors, and ultimately Australia's ability to maintain an integrated domestic aluminium value chain.

The risk of permanent capability loss

The danger is more than merely that an individual refinery becomes temporarily less profitable. The greater risk is that deteriorating competitiveness changes long-term investment decisions.

4. Department of Industry, Science and Resources, Commonwealth of Australia, Resources and Energy Quarterly, June 2026.

5. FTI Consulting, Economic Contribution of the Australian Aluminium Industry, a report for the Australian Aluminium Council, September 2024. CM Group, Vulnerabilities and Opportunities in Australia's Upstream Aluminium Sectors, a report for the Australian Aluminium Council, September 2024.

A real risk is that once replacement capacity is built elsewhere, future capital, customers, technical capability and supply-chain relationships begin to follow it.

Refineries require continuing investment in sustaining capital, maintenance, emissions reduction, technology and workforce capability. If an asset becomes progressively less competitive, the business case for each investment decision become more marginal.

A real risk is that once replacement capacity is built elsewhere, future capital, customers, technical capability and supply-chain relationships begin to follow it. This is not just about the individual mine, refinery or smelter, but the broader industrial system that supports each of these stages.

A refinery is an industrial ecosystem. It incorporates chemical engineers, metallurgists, process engineers, operators, electricians, maintenance specialists, environmental professionals, laboratory technicians, suppliers, contractors, logistics providers and specialist service businesses. It also contains decades of accumulated operating knowledge about particular ore bodies, refining processes and equipment. Importantly, the majority of these ecosystems exist primarily in regional Australia – in South West Western Australia and Gladstone, Queensland. The communities in these regions rely on these industrial ecosystems.

When a refinery closes, that regional ecosystem begins to disperse.

When a refinery closes, the whole ecosystem begins to disperse



People

Skilled workers retire, relocate or move into other industries. Apprenticeship and graduate pathways weaken.



Suppliers

Suppliers lose specialist capability. Local contractors redeploy equipment and people.



Knowledge

Universities and training providers receive weaker demand signals.



Customers

Customers form new supply relationships.



Institutions

Governments lose the practical institutional knowledge that comes from regulating and supporting operating facilities.

Skilled workers retire, relocate or move into other industries. Apprenticeship and graduate pathways weaken. Specialist suppliers lose customers and capability. Contractors redeploy people and equipment. Universities and training providers receive weaker signals to maintain relevant expertise. Customers develop alternative supply relationships. Governments lose practical institutional knowledge associated with regulating and supporting complex operating facilities. The impacts flow to the social structure of regional communities.

These effects help explain why industrial capability can be lost much faster than it can be rebuilt.

Lessons from the United States rare earths and aluminium sectors

The United States was once a leader in aluminium production. As recently as the year 2000 it was the world's largest producer of aluminium with 24 smelters – today it has just 4⁷.

The United States' experience with rare earths provides another useful warning. It once possessed a leading domestic rare earth mining and processing industry. Over time, however, lower-cost overseas production, changing commercial conditions and environmental and regulatory pressures contributed to the decline of US production and processing capacity.

7. The Aluminum Association, Powering Up American Aluminum: A Roadmap for Next Generation Supply Chain Resilience, May 2025.



These effects help explain why industrial capability can be lost much faster than it can be rebuilt.

Australia could continue to possess world-class bauxite resources while progressively losing the capacity to refine them competitively.

The important lesson was not that the United States had lost its geology – the rare earth element deposits remained. What had been lost was industrial capability: processing capacity, specialist knowledge, supplier networks, technical expertise and the commercial ecosystem required to transform resources into usable strategic materials.

As processing activity shifted to Asia, expertise and downstream capability shifted with it. Rebuilding that capacity has subsequently required substantial new investment, government support, new processing infrastructure, technology development and renewed workforce capability.

The analogy for Australia's alumina industry is direct.

Australia could continue to possess world-class bauxite resources while progressively losing the capacity to refine them competitively. Once a refinery closes, it cannot simply be restarted years later because commodity prices improve or government policy changes. New approvals, new capital, new energy arrangements, new environmental systems, new customers, new workforce pipelines and new technical teams may all be required. Some of the workers, suppliers and knowledge that supported the original operation may no longer be available.

That makes the preservation of alumina refining a strategic issue, not simply a question of short-term plant economics.

Alumina refining is the economic and industrial hinge in Australia's aluminium value chain.





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