REINDUSTRIALISING UK ALUMINIUM

A CRITICAL MATERIAL. AN EXISTING INDUSTRIAL BASE.
A CLEAR OPPORTUNITY TO CAPTURE MORE VALUE IN BRITAIN.

Aluminium is recognised by the UK Government as both a Critical Mineral and a Growth Mineral under the UK Critical Minerals Strategy.

Image courtesy of Bridgnorth Aluminium Ltd

ALFED
ALUMINIUM FEDERATION

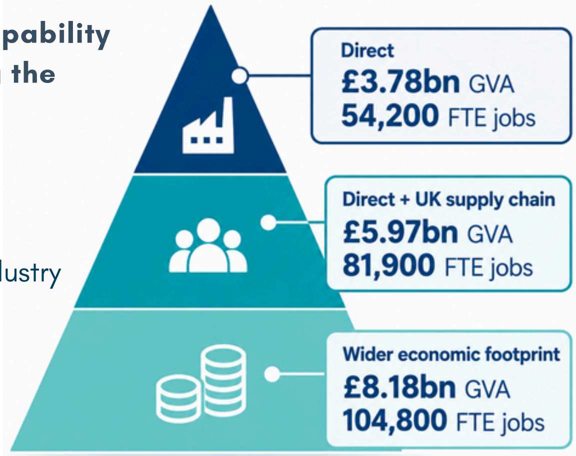
UK ALUMINIUM: CRITICAL TO UK GROWTH AND REINDUSTRIALISATION

Reindustrialising UK aluminium means protecting the capability Britain still has, addressing strategic gaps and creating the conditions for investment in competitive UK production, processing and recycling.

£8.18bn GVA | 104,800 FTE JOBS

The wider UK economic footprint supported by the aluminium industry

From direct aluminium activity to the UK supply chains and wider economic activity it supports, aluminium makes a significant contribution to UK jobs, growth and industrial capability.



ENABLING THE UK'S GROWTH INDUSTRIES

A STRONGER UK ALUMINIUM INDUSTRY SUPPORTS A STRONGER, MORE RESILIENT BRITAIN.

ADVANCED MANUFACTURING
Higher productivity, higher value

CLEAN ENERGY INDUSTRIES
Net zero and energy security

DEFENCE
Security, resilience and sovereign capability

DIGITAL & TECHNOLOGIES
Innovation and a lower-carbon future

Aluminium also underpins automotive, aerospace, construction, infrastructure, packaging and other strategically important UK markets.

THE OPPORTUNITY

A more coordinated approach to aluminium can support UK reindustrialisation by connecting trade policy with energy, carbon, circularity, investment and strategic resilience.

Government does not need to build this industry from scratch. The ecosystem already exists. The opportunity is to create the conditions in which it can invest, compete and grow.

THE ASK

Put aluminium at the centre of the UK's industrial growth agenda and work with the industry from the start to unlock investment, strengthen domestic capability and support high-value UK jobs.

ALFED provides a single, evidence-led route into the UK aluminium ecosystem.

ALFED can provide Government with operational intelligence on production, trade flows, market conditions, cost pressures, regulation and investment – before decisions are made, rather than after their consequences are felt.

THE UK ALUMINIUM ECOSYSTEM – FROM MATERIAL TO MARKET

The UK aluminium industry is an interconnected and globally connected industrial ecosystem – not simply a linear supply chain. Primary metal, scrap, semi-finished products and finished goods move across borders, while within the UK, activities span material recovery and recycling through to processing, stockholding, distribution and advanced manufacturing. Each part influences the next, but gaps in domestic capability mean UK manufacturers also depend on international supply for important inputs. Together, this ecosystem supports some of the UK's most strategically important industries and provides a foundation for future industrial growth.

Aluminium is a globally traded strategic material, and policy decisions affecting one part of the ecosystem can have consequences across the rest. Decisions on trade, energy, carbon, circularity and investment can change where material flows, the competitiveness of UK businesses and, ultimately, where companies choose to invest.

THE CHALLENGE

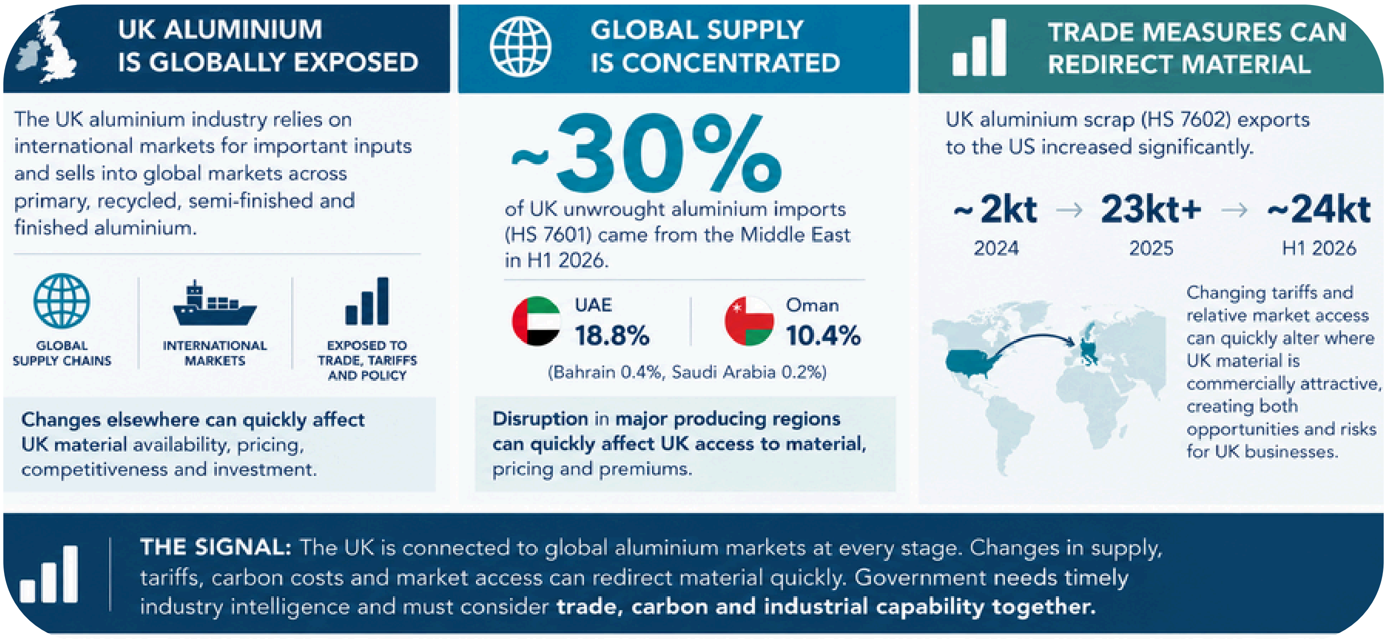
UK competitiveness is shaped not only by domestic policy, but by tariffs, carbon costs, trade remedies, international capacity and policy decisions taken by major trading partners.
UK trade policy needs to anticipate these changes – not simply respond after material flows, investment or market access have shifted.

TO SUPPORT UK ALUMINIUM GROWTH, TRADE POLICY SHOULD:

- ENGAGE INDUSTRY EARLY – Consult ALFED and industry before trade, market-access and trade-defence positions are fixed.
- ASSESS THE WHOLE ECOSYSTEM – Assess impacts across primary and recycled metal, semi-finished and finished products, UK capability and downstream users.
- ALIGN TRADE & CARBON POLICY – Assess the combined impact of trade measures, UK CBAM and carbon policy on UK competitiveness and industrial capability.
- PROTECT ACCESS TO MARKETS & MATERIAL – Recognise stockists and distributors, and monitor how UK-EU and global measures affect access to material, customers and strategic markets.

A GLOBAL MARKET IS RESHAPING UK ALUMINIUM FLOWS

Global aluminium markets are moving quickly. ALFED's H1 2026 analysis reinforces the need to consider trade flows, carbon exposure and domestic capability together – and for industry intelligence to reach Government before decisions are fixed.



WHERE GOVERNMENT CAN ACT NOW

1. ENGAGE EARLIER

Involve ALFED before trade agreements, market-access and trade-defence positions are fixed, assessing impacts. Aluminium should be treated as a globally traded strategic material.

2. ALIGN TRADE, CBAM AND UK-EU POLICY

Provide clear and practical UK CBAM implementation, assess its impact on UK industrial competitiveness and prioritise effective UK-EU carbon and trade alignment where this protects UK manufacturers and market access.

3. REBUILD STRATEGIC UK CAPABILITY

Create the conditions for investment in advanced sorting, recycling and remelting, rolling, extrusion, finishing and other areas where stronger domestic capacity can support resilience and growth.

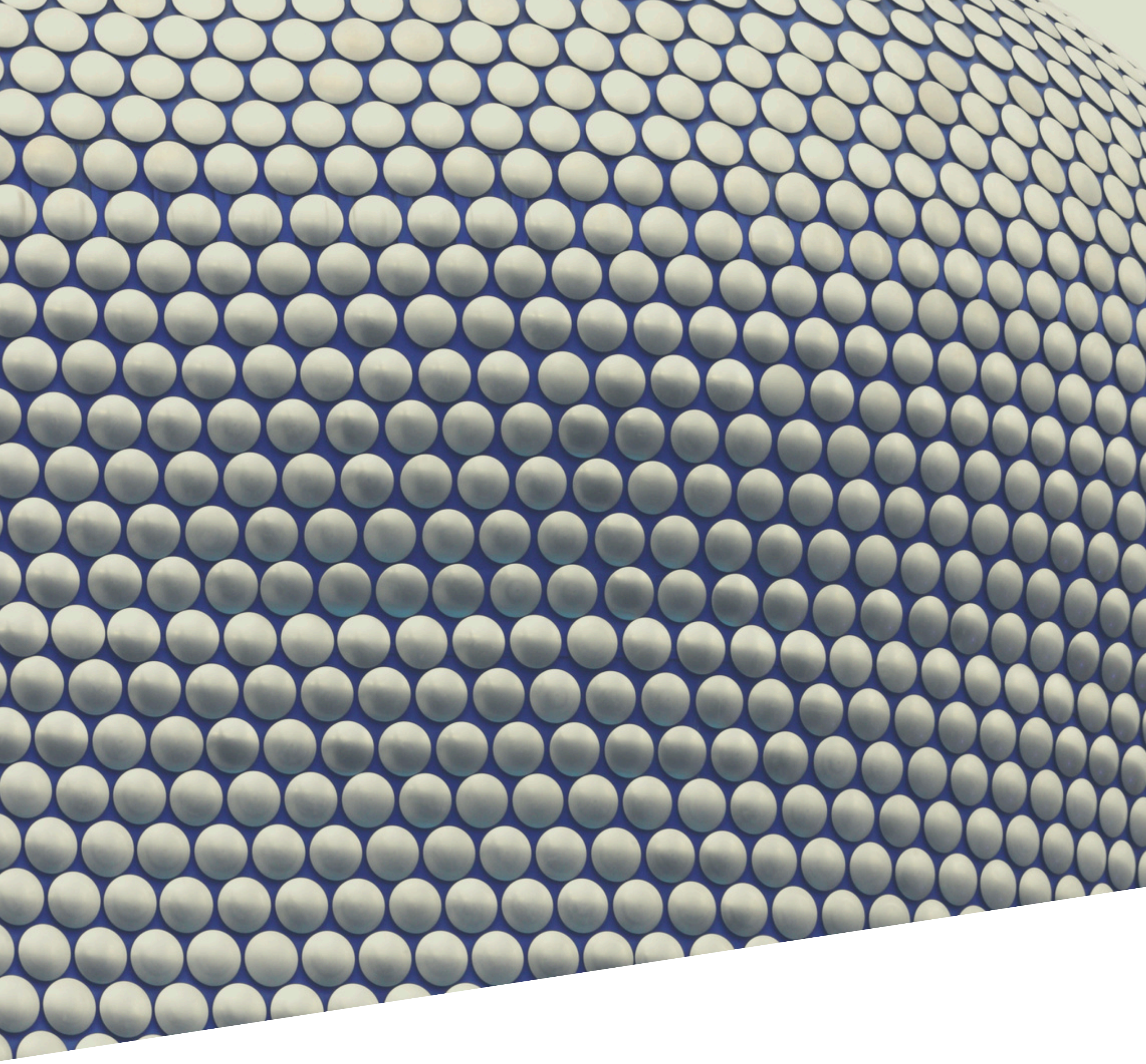
4. INDUSTRIAL AND PROCUREMENT POLICY

Align trade, industrial, critical-minerals and procurement policy to unlock investment, strengthen strategic capability and create competitive conditions for British manufacturers and domestic supply chains.

GOVERNMENT HAS ALREADY IDENTIFIED THE OPPORTUNITY

Aluminium is recognised as a UK Critical Mineral and Growth Mineral, while aluminium-intensive sectors including advanced manufacturing, clean energy and defence sit at the heart of the UK's Industrial Strategy.

The next step is translating that recognition into stronger UK industrial capability and growth.



This briefing provides a snapshot of the immediate trade and industrial priorities identified by the ALFED Trade Committee. The forthcoming ‘Reindustrialising UK Aluminium White Paper’ will bring together ALFED’s updated economic model with a clear evidence-led narrative on the scale, capability and strategic importance of UK aluminium.

Evidence base: ALFED Economic Contribution Model 2026; ONS 2023 industry-by-industry Input-Output Analytical Tables; ONS Employment Multipliers and Effects 2023; ALFED Trade Committee market intelligence; and ALFED Positions & Strategic Priorities 2026-2027.

Aluminium Federation

Bragborough Hall Business Centre, Welton Road,

Braunston, Daventry, Northamptonshire NN11 7JG

Tel: 0333 240 9735

E: alfed@alfed.org.uk

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