

Invitation to the 105. AMAP Colloquium

Presentation by
Nicole Voigt

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The New Reality of Aluminum: How Policy and Geopolitics Are Reshaping the Industry

on Wednesday, **June 17th, 2026 at 1.00 pm**
with subsequent discussion.

PLEASE NOTE: The 105th Colloquium will take place on Wednesday, as part of our Tri-annual AMAP Joint Innovation Meeting at TRIMET. **External participants are warmly invited to join the talk via Zoom.**

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The New Reality of Aluminum: How Policy and Geopolitics Are Reshaping the Industry

Nicole Voigt,

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Abstract

Aluminum markets are entering a new reality. Long-standing assumptions—such as globally efficient material flows, stable access to primary supply, and market-driven allocation of resources—are increasingly being challenged by geopolitical disruptions, decarbonization pressures, and more interventionist industrial policies.

Recent developments, including supply disruptions in key primary aluminum regions (Middle East) and new policy initiatives such as the European Industrial Accelerator Act, as well as the increasing use of tariffs and trade measures, highlight a broader shift toward regionalization and strategic control of material flows. These dynamics are not only affecting primary supply, but are increasingly reshaping global scrap flows.

As a result, scrap is evolving from a globally traded commodity into a strategically managed resource. This creates rising competition for high-quality material, increasing price volatility, and growing uncertainty around long-term access—particularly for European players.

This presentation provides an overview of these structural shifts and explores how policy-driven demand is redefining global aluminum markets. It further outlines the implications for producers and recyclers, and highlights the strategic choices required to remain competitive in a more constrained and regionalized industry environment.