

Ford hit again by layoffs as a second major fire erupts at critical aluminum plant in New York state

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24 November 2025

A major fire at the Novelis aluminum plant in Oswego County, New York, has exposed the extreme fragility of US supply chains, especially with respect to the auto industry. This disaster, which occurred less than three months after a previous fire at the same facility, has reverberated through the entire auto sector, threatening jobs, worker incomes, and the ability of the industry to deliver vehicles to dealerships.

The fire erupted shortly before 9 am November 20 in the hot mill area of the Novelis plant just outside Oswego, New York. Thick smoke and flames prompted a five-alarm response from local fire departments and the emergency evacuation of more than 1,100 workers and support staff. Miraculously, no workers, firefighters, or contractors were injured in the event.

Ford and Novelis released coordinated statements assuring that shipments would resume and that unaffected parts of the plant were operating. Their priority was clear: reassure investors that losses would be contained.

The company claimed that the latest fire was swiftly contained and the site was made safe. Despite this, the efforts to restore full production have been set back. The hot mill segment, where the incident occurred, was shut down; shipment of finished aluminum sheet was temporarily suspended; and supply to customers such as Ford, General Motors, and Stellantis was disrupted, reported the *Detroit Free Press*.

The Novelis facility produces roughly 40 percent of the specialized aluminum sheet used in automobile production across the United States. Ford, the largest customer for Novelis' Oswego aluminum, faces the most drastic consequences. The Ford F-150 light truck, nicknamed "the backbone of American industry," is

especially dependent on lightweight, wide-gauge aluminum sheet supplied almost exclusively from the Oswego plant.

Ford's assembly lines in Tennessee and Michigan were idled for two days in the immediate aftermath of the most recent fire. Estimates from within the company project that the supply chain disruption could cost Ford up to \$1 billion in lost revenue this quarter alone, with the potential figure ballooning to \$2 billion if further delays ensue. An analyst from Evercore ISI called the event a "critical material supply constraint" with the potential to upend North American manufacturing schedules for months.

In September another severe fire had struck the same facility, causing major operational disruption and focusing scrutiny of Novelis' safety protocols and fire protection infrastructure. The recurrence of such a disaster within months underscores the hazardous, high-pressure environments characteristic of aluminum production, where molten metal, massive rolling machinery, and enormous thermal loads intersect—conditions made still more dangerous by the relentless drive for increased productivity and cost-cutting.

Workers at the Ford Rouge Truck Plant in Dearborn, Michigan drew different conclusions. On Facebook workers exchanged photos of fire-fighters rushing to the scene and black smoke billowing from the Oswego plant on their Facebook pages while expressing shock and anger at the reckless drive for profit revealed in this disaster. "They didn't learn from the last time," wrote one worker from the afternoon shift.

"Ford is the stupidest auto maker." To which more than one co-worker replied, "At this point we need a

full investigation done.”

Workers also pointed out that Ford and Novelis have reportedly been flying aluminum coils in from Europe to keep F-series production running. They expressed concern over a rushed and unsafe scramble to restore operations. One worker speculated that “carelessness trying to work fast” may have played a role in the fires at Novelis. Others noted that Novelis has been diverting output from its Brazil facilities to the US. “The American infrastructure is falling apart right in front of our faces,” a worker wrote.

Another co-worker added, “There's so many people working 24 hours a day to get it back in operation, things happen.”

A leaked internal memo shows that injuries have soared at the Stellantis Toledo Jeep complex following the imposition of mandatory overtime to make up for downtime due to parts shortages. Over the past 10 weeks the plant has seen 25 out of 87 injuries across all 75 of Stellantis’ plants in North America. The company claims that a fire at a local auto part supplier plant was responsible for the shortage, but word in the plant is that it is related to the Novelis fire.

The recent rise in injuries at the Jeep complex follows the death in August 2024 of Antonio Gaston, who was crushed to death under circumstances that have still not been fully explained. The family has sued Stellantis for wrongful death. In April this year skilled trades worker Ronald Adams Sr. was killed at the Stellantis Dundee Engine Plant in a preventable tragedy.

For its part the United Auto Workers bureaucracy has collaborated in imposing conditions of forced overtime and speed up and worked to block any real investigation into the death of Antonio Gaston or Ronald Adams Sr.

The fragile architecture exposed by the twin aluminum plant fires is the outcome of decades of “lean” production, deregulation, offshoring, and consolidation. As cost pressures increased, the number of U.S. producers capable of manufacturing automotive-grade aluminum sheet collapsed. Novelis is now one of only a few suppliers with the necessary capabilities. While this system maximizes profit in stable conditions, even a small disturbance pushes the entire network toward paralysis.

Ford’s stamping plants, for example, are tooled specifically for the physical and chemical properties of

Oswego’s aluminum. Alternative materials—if available at all—require long lead times and rigorous testing to avoid defects and production chaos. Thus any disruption can bring the entire system to the brink.

Outdated machinery and chronic understaffing make catastrophic incidents like the Oswego fire inevitable. While swift evacuation prevented loss of life in Oswego, multiple recent aluminum plant disasters have ended in deaths and life-changing injuries. The “lost time accident rate” in global aluminum smelting and refining reaching its highest level in six years as of 2024.

The Novelis fires are only one sign of mounting danger for workers across North American industry. It follows the explosion at the Clairton, Pennsylvania US Steel coke works on August 11 that killed two workers and injured 11 others and on October 10 a massive explosion obliterated a building at Accurate Energetic Systems, killing 16 workers. Earlier this month 13 workers and air crew were killed in the crash of a UPS cargo plane in an industrial area outside Louisville’s Muhammad Ali International Airport.

Any real solution requires the independent organization of workers themselves. Rank-and-file committees—outside the control of the union apparatus, corporations, and political establishment—are essential for defending jobs, safety, and working conditions. The International Workers Alliance of Rank-and-File Committees (IWA-RFC) organized a hearing last summer into the death of Ronald Adams Sr. In the same way, the IWA-RFC stands ready to assist workers anywhere in forming independent committees to take control of workplace safety and defend their lives and livelihoods.



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