bvse market report: plastics, April 2025

0 24 - 25 June 2025 – The Waste Plastic and Recycling Industry Meeting for the 27th International Conference on Plastic Recycling in Dresden

bvse-Fachverband Kunststoffrecycling would like to cordially invite you to the 27th International Conference on Plastic Recycling, held at the Maritim Hotel & International Congress Centre Dresden on 24 and 25 June 2025.

On the conference page https://altkunststofftag.bvse.de/ you will find the online registration, information about booking hotels and organisational tips.

The International Conference on Plastic Recycling is being held under the heading "**Plastic Recycling: Out of the Crisis, Into the Future**". Plastic recycling is in a state of upheaval. The crisis in plastic recycling will be discussed, but what is key is how the industry will renew itself and contribute to resource and climate protection in the future.

Our promise: This year, too, we have an exciting programme for you with lectures, controversial discussions, workshops, product presentations, exhibitors' stands and, naturally, the popular traditional BBQ.

We open the conference on Tuesday 24 June 2025 with a word of welcome from the bvse CEO Eric Rehbock. The keynote speech by Ton Emans will address the motto of the conference. This will be followed by Talk I on "**The New Statutory Framework for Plastic Recycling**". In particular, the new European requirements and perspectives for plastic recycling will be presented. And Talk II "**Plastic Recycling Controversy: Thermal Recovery – Opportunity or Waste?**" is bound to liven up the event.

Finally, there will be two workshops held in parallel. Workshop A will discuss the current situation for "**Plastic Recycling in our Partner Country Poland**". And the subject of Workshop B is "**Quantities, Markets, Prices**".

Visit the two exhibitions on plastic recycling. There is a presentation of products made using recyclates. And there are exhibitors' stands with their offerings and services associated with plastic recycling.

The first day of the event ends with our **traditional BBQ** on the roof of the Congress Center with a view of Dresden and the Elbe. This is an opportunity for networking and socialising with people from the industry.

The conference continues on Wednesday 25 June 2025 with Workshop C, which deals with "**Plastic Product Design in an Interdisciplinary Dialogue**". This year, more than 300 attendees from all over Germany are expected in Dresden again. They include plastic recyclers, as well as experts from business, science and the administration. Feel free to send questions, ideas and suggestions about the International Conference on Plastic Recycling to Dr. Thomas Probst, probst@bvse.de.

1 General economy and reference to the plastics industry

Europe: From the first signs of stability to instability, this time caused by economic policy in the USA. New tariffs of 20 % have been imposed on the EU, and then suspended for a limited period of 90 days. Stock market quotes fell sharply in early April. The drastic price fall in crude oil quotes is also impressive, starting on 2 April 2025 here, https://www.tecson.de/de/oelweltmarkt.html.

In its press release of 13 March 2025, Plastics Europe explained what the tariffs would mean for the European plastics industry, see https://plasticseurope.org/media/statement-on-eus-decision-to-potentially-impose-retaliatory-tariffs-on-u-s-goods-in-response-to-the-recent-increase-in-u-s-tariffs-on-steel-and-aluminium/. The USA is an important trading partner for plastics. In 2023, 11.7% (with a value of 3.4 billion Euro) of EU plastic exports were supplied to the USA. And, in turn, 22.2% of USA plastic exports were sent to the EU (with a value of 5.3 billion Euro). The quotes for crude oil, precursor products and plastics are characterised by great uncertainties: they are highly volatile. Unstable plastic markets are characteristic of April.

Germany: There was good news with the CDU, CSU and SPD arriving at a coalition agreement. And the ministerial line-up has now also been decided. And this means that the parameters, for example an affordable industrial electricity price and the reduction in bureaucracy, have been set so that an economic upturn can be expected.

2 Primary markets - standard plastics

In March 2025, some standard plastics were quoted higher: LDPE film at +10 €/t, LLDPE film at +10 €/t, PS crystal clear at +50 €/t and PS high impact at +50 €/t. In March 2025, the average of the EUWID prices was 1,457 €/t was therefore 13 €/t higher than in the previous month (1,444 €/t), see Tab. 2. In a year-on-year comparison, it can be seen that the average quotes from March 2025 (1,457 €/t) were 43 €/t lower than those of the previous year (1,500 €//t). The current market situation for virgin grade standard plastics is portrayed well in EUWID, see www.euwid-recycling.de, and PIE – Plastic Information Europe, see https://pieweb.plasteurope.com/.

Table 2: Standard plastics prices according to EUWID over the past five months, listed in €/t.

Prices in €/t	March 2025	Feb 2025	Jan. 2025	Dec. 2024	Nov. 2024
LDPE film grade	1330- 1440	1330- 1400	1260- 1320	1260- 1320	1270- 1330
LLDPE film grade	1290- 1350	1290- 1330	1230- 1270	1230- 1270	1240- 1280
HDPE injection moulding	1320- 1350	1320- 1350	1260- 1290	1260- 1290	1260- 1290
HDPE blow moulding	1320- 1370	1320- 1370	1260- 1310	1260- 1310	1260- 1310
PS crystal clear	1760- 1810	1710- 1760	1660- 1710	1630- 1680	1630- 1680
PS high impact	1890- 1910	1840- 1860	1790- 1810	1760- 1780	1760- 1780
PP homopolymer	1430- 1510	1430- 1510	1380- 1460	1380- 1460	1390- 1480
PP copolymer	1480- 1560	1480- 1560	1430- 1510	1430- 1510	1440- 1520
PVC tube grade	1140- 1240	1140- 1240	1110- 1210	1110- 1210	1110- 1210
PVC film/cables	1270- 1370	1270- 1370	1240- 1340	1240- 1340	1240- 1340
Average Price	**1457 ± 221**	**1444 ± 198**	**1393 ± 203**	**1387 ± 191**	**1391 ± 192**

PET: Good PET supply is faced with relatively low demand for PET. The demand for packaging PET remained at a low level in March, too. A small upturn in demand is expected over Easter. Private consumers' loss of purchase power is leading to continued subdued demand for consumer goods. As a consequence, plastics processors are ordering only the quantities that are needed for immediate processing. Moreover, the requirements of the SUPD must be adhered to in the beverages sector - demand for recyclates. And the demand for food-safe recyclates therefore also influences the primary markets.

In March 2025, packaging PET was quoted on average at 1,105 €/t and thus 25 €/t lower than in the previous month, see PIE – Plastic Information Europehttps://pieweb.plasteurope.com/.

3 Secondary plastics markets in the plasticker price index

The plasticker internet platform, see http://plasticker.de, publishes quotes on an hourly basis. The present market report indicates the final monthly prices. It is only possible to represent the preliminary prices for April 2025; they will not become definitive until early May 2025. The two quotes stated for April 2025 below only an interim situation, see the left-hand column in Table 3 and Table 4.

bvse market report: plastics, April 2025

3.1 plasticker: Standard plastics

The March price index shows a slightly better demand for plastic than in the previous month. Standard plastics were quoted at an average 535 €/t in March 2025 and were thus almost identical to the average quote for the previous month of 538 €/t, see Tab. 3. The average price for March 2025 (535 €/t) was 26 €/t below that of the previous year (561 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regranulates +50 €/t, PP regrind -60 €/t and PP regranulates -100 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in April 2025 (572 €/t) is thus 37 €/t higher than in the previous month (535 €/t), see Tab. 3. The price index April of 11.04.2025 shows higher demand in comparison to the previous month.

Table 3: Standard plastics price according to plasticker; listed in €/t.

	April[6] 25	March 25	Feb. 25	January 25	Dec. 24	March 24
HDPE regrind[1]	570	580	580	590	540	620
HDPE regranulates[5]	850	890	840	790	850	960
LDPE bale goods[2]	420	450*	460*	180*	470*	390
LDPE regrind[1]	440*	450*	400*	420*	480*	570*
LDPE regranulates[5]	720	640	650	670	620	810
PP bale goods[3]	190	200	220	230*	210*	310
PP regrind[1]	540	470	530	500	530	660
PP regranulates[5]	810	740	840	850	910	900
PS regrind[4]	820	690	680*	620*	620*	710
PS regranulates[5]	870	810	850	890	920	890
PVC_P regrind[1]	580*	500*	340*	290*	460*	420*
PVC_U regrind[1]	470	410*	400*	450*	440*	480
PET bale goods	270*	230*	310*	340*	270*	380*
PET regrind mixed colours	460	430*	430*	440*	410*	550
Average Price	**(572)**	**535**	**538**	**519**	**552**	**618**

*: Supply figure too low to attain statistical significance; [1]: equivalent to the grade "post-industrial mixed colours"; [2]: equivalent to K49; [3]: equivalent to K59; [4]: equivalent to “standard, mixed colours”; [5]: equivalent to the grade “regranulates, black"; [6]: preview (may be amended by additional quotes)

3.2 plasticker: Technical plastics

For March 2025, there was an average price of 1,473 €/t, which was 18 €/t lower than that of the previous month (1,491 €/t), see Table 4. The average price for March 2025 (1,473 €/t) was 153 €/t below that of the previous year (1,626 €/t).

There were significant price changes of greater than ±70 €/t for: PC regranulates -80 €/t and PA 6 regranulates -80 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The March price index reveals a slightly improved demand over the previous month.

The probable average price in April 2025 (1,473 €/t) is thus almost identical to that of the previous month (1,468 €/t). The price index April of 11.04.2025 shows better demand in comparison to the previous month.

Table 4: Technical plastics price according to plasticker; listed in €/t.

	April[6] 25	March 25	Feb. 25	January 25	Dec. 24	March 24
ABS regrind	650	650	670	620	610	750
ABS regranulates[5]	1380	1290	1270	1270	1300	1460
PC regrind	1060	920	980	1000	990	1250
PC regranulates[5]	2270	2440	2520	2650	2560	2170
PBT regrind	590	610	650	660	600*	790
PBT regranulates	2450	20700	2140	1980	1740	2310
PA 6 regrind	950	740	760	770	820	930
PA 6 regranulates[5]	1930	20400	2120	2270	2440	2380
PA 6.6 regrind	1090	1050	1060	1130	1060	1030
PA 6.6 regranulates[5]	2490	2450	2390	2540	2550	2900
POM regrind	640*	860*	710*	800*	860*	860
POM regranulates[5]	2120	2560	2620	2470	2170	2680
Average Price	**(1468)**	**1473**	**1491**	**1513**	**1475**	**1626**

*: Supply figure too low to attain statistical significance; [5.] equivalent to the grade "regranulates, black"; [6.] preview (may be amended by additional quotes)

4 Secondary plastics markets

Uncertainty is rising due to US economic policy. The fear or recession and stagflation is unsettling consumers, which is resulting in reticence in consumption. The current economic upheavals are not only influencing primary markets; secondary markets are also floundering.

Recyclers are fighting for survival. Plastics recyclers are working with low capacity utilisation in production. Facilities are often only running on part load. There are reports of longer Easter breaks. On top of all this, reports of insolvency are increasing. There are also increasing reports of insolvencies among plastics recyclers in the Netherlands and Poland.

4.1 Recycling standard plastics

EUWID: Flexibles: There is a still a shortage of PE film. The higher demand for PE films has resulted in moderate price rises. Rigids: A shortage is also noticeable in PP plastics, in this case of blow-moulded bodies. The quotes for many commodities changed in the March price index. The price rises are on average 2.50 €/t to 15 €/t. The price changes are often only one-sided.

For PE production waste, all regrinds were quoted higher, as follows: HDPE coloured at 220 €/t - 320 €/t, HDPE natural at 320 €/t - 430 €/t, LDPE coloured at 220 €/t - 310 €/t and LDPE natural at 340 €/t - 440 €/t. Bale goods is quoted higher for LDPE film natural (K40) at 280 €/t – 340 €/t.

For PE post user, almost all commodities are quoted higher: LDPE shrink hoods natural 520 €/t – 580 €/t, LDPE shrink hoods coloured 80 €/t – 120 €/t, film transparent natural <70 µm 290 €/t – 320 €/t, commercial mixed film transparent (90/10) 185 €/t – 215 €/t, HDPE blow-moulded bodies coloured 60 €/t – 130 €/t, HDPE crates sorted according to colour 350 €/t – 390 €/t and HDPE crates coloured 260 €/t – 320 €/t.

For PP production wastes, almost all commodities are quoted higher: PP film natural (K50) at 50 €/t – 110 €/t, homopolymer coloured 180 €/t – 240 €/t, homopolymer natural 260 €/t – 400 €/t, copolymer coloured 180 €/t – 240 €/t and copolymer natural 260 €/t – 400 €/t.

For PS production wastes, all commodities are quoted higher: standard mixed colours 280 €/t – 390 €/t, standard crystal clear 350 €/t – 500 €/t, standard white 350 €/t – 500 €/t, high-impact mixed colours 300 €/t – 400 €/t, high-impact black 290 €/t – 420 €/t and high-impact white 370 €/t – 520 €/t.

plasticker: The March price index shows a slightly better demand for plastic than in the previous month. In March 2025, standard plastics were quoted at an average price of 538 €/t and almost the same as the previous month (538 €/t). Maybe prices around 535 €/t mean that the new lower price range has been found? Slight price rises will probably take effect in April.

PIE – Plastic Information Europe, regranulates: In March 2025, almost all regranulates of standard plastics were higher in comparison to the previous month. The average price rises are in the range of 10 €/t to 30 €/t. High-quality regranulates are finding their markets, mainly film regranulates. The demand for regranulates improved somewhat in March, see https://pieweb.plasteurope.com/.

4.2 Recycling technical plastics

plasticker: Since October 2024, the prices for technical plastics have been hovering around a mean value of 1,481 €/t. It may be the case that the lower price threshold has not yet been reached here. For March 2025, there was an average price of 1,473 €/t, which was 18 €/t lower than that of the previous month (1,491 €/t). The March price index reveals a slightly improved demand over the previous month. And the April price index shows higher demand for plastic. Or, to put it another way, April gives rise to hope for stabilisation in the market for technical plastics.

PIE – Plastic Information Europe, regranulates: Technical plastics are quoted as almost unchanged. Only PC commodities show slight price rises of around 5 €/t to 10 €/t. Although technical plastics stabilised somewhat in March, demand is still relatively low. The hoped-for spring revival has yet to materialise, see https://pieweb.plasteurope.com/.

4.3 PET recycling

Unlike the primary markets, PET recycling held its own in March and April. There is now also improved demand for PET recyclates than in previous months. Demand for PET recyclates, in this case flakes and regranulates, is rising for seasonal reasons. Warehouses for used beverage bottles are emptying slowly. Due to the higher demand, the supply of beverage bottles on the markets is falling. In March 2025, the relevant price changes for used PET single-use deposit bottles were: PET transparent +20 €/t, PET mixed +20 €/t and PET coloured +15 €/t, see EUWID. For PET recycling there is a balancing of volumes in Europe, both for used beverage bottles and recyclates – imports and exports.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,105 €/t. Regranulates are valued at 1,590 €/ on average in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,320 €/t in PIE – Plastic Information Europe. EUWID reports a calculated mean of 1,325 €/t for clear flakes. Regranulates are quoted at a calculated average of 1,640 €/t. Virgin grade are quoted at around 1,060 €/t.

Reporting on PET markets is of central importance in EUWID and PIE – Plastic Information Europe. Detailed monthly reports on the PET prices for virgin grade, and for used beverage bottles and market assessments can be found in EUWID and PIE - Plastics Information Europe.

5 Explanation on the price quotes

bvse market report: plastics, April 2025

A detailed discussion with information of price indices for virgin grades and waste plastics as well as precursor products can be found in EUWID Recycling and Disposal see www.euwid.de. EUWID: No guarantee for any of the prices here; prices ex station. As a rule, the prices quoted refer to quantities in excess of 20 tons.

The quotes for secondary prices, which are updated on an hourly basis, can be calculated using the price lists that are derived from the quotations published in the raw material exchange plasticker, see www.plasticker.de. The prices listed in this index are quoted without reservation - as the majority of the quotes submitted are not necessarily equivalent to the sales prices. Plasticker offers the quality grades regrind and regranulates both as virgin materials and as secondary goods. The term 'bale goods' refers to waste plastics only. Furthermore, plasticker does not distinguish between the following grades: transparent, mixed colours or colour-separated. Therefore, the information provided by plasticker may indicate different market behaviour than the prices quoted by EUWID

A detailed discussion with information of price indices for virgin grades and waste plastics as well as precursor products can be found in PIE – Plastics Information Europe, see www.kiweb.de. For virgin grades, the indices for standard plastics (Plastixx ST) and technical plastics (Plastixx TT) provide a good overview of the price trends. Pieweb quotes the monthly regranulates prices for standard plastics and technical plastics in the secondary markets. For secondary plastics, there are also details on PET, in this case flakes (flakes transparent, flakes mixed colours) as well as transparent regranulates.

Bonn, Monday, 28. April 2025 Dr. Thomas Probst, bvse