

bvse market report: plastics, June 2025

1 General economy with reference to the plastics industry

The mood in companies improved in May, see <https://www.ifo.de/fakten/2025-05-22/ifo-geschaeftsklimaindex-gestiegen-mai-2025>. In May, the ifo business climate index rose to 87.5 points, following on from 86.9 points in April. This is due to the less sceptical expectations. By contrast, current business is assessed as somewhat worse. The recently increased uncertainty among companies has diminished slightly. The German economy is slowly gathering pace again.

The index has risen markedly in the manufacturing sector. In particular, the companies corrected their expectations noticeably upwards. They also assess their current situation as slightly better. Incoming orders are stabilising. The upturn in the mood of the food industry was particularly strong, whereas the climate in the chemicals industry deteriorated.

The PlasticsEurope Deutschland e.V. report for the first quarter of 2025 has now been published, which looks at the economic environment of the plastics producing industry in Germany and provides information on the key economic figures of the sector (production, turnover, foreign trade), see <https://plasticseurope.org/de/wp-content/uploads/sites/3/2025/06/Quartalsbericht-Q125-Plastics-Europe.pdf>. The title of the report is “Muted Recovery: The Plastics Industry Records Increased Production”.

Production: The production of plastics in the primary form rose markedly by 4.5 % in the first quarter of 2025 in comparison to the previous quarter. **Producer prices:** The fall in producer prices for plastics in the primary form continued in the new year – it was the third fall in a row. At least the dynamics slowed down somewhat in comparison to the two previous quarters. The prices fell by 0.3 % in comparison to the previous quarter and were 0.7 % below the level of the previous year.

2 Primary markets - standard plastics

All of the quotes for standard plastics fell in May 2025. And the average of the EUWID prices was 1,383 €/t and therefore 52 €/t lower than in the previous month (1,435 €/t), see Tab. 1. In a year-on-year comparison, it can be seen that the average quotes from May 2025 (1,383 €/t) were 90 €/t lower than those of the previous year (1,473 €/t). The prices of standard plastics fell markedly in May 2025. LDPE film grade -70 €/t, LLDPE film grade -65 €/t, HDPE injection moulding -70 €/t, HDPE blow moulding -70 €/t, PS homopolymer clear -65 €/t, PS copolymer -65 €/t, PS crystal -40 €/t, PS impact -40 €/t, PVC tube grade -20 €/t and PVC films/cables -20 €/t.

Here is a reminder of the mean values from market report 01/2024:

“The average current mean value [01/2024] (1,341 €/t) is already in the area of the long-term mean (1,294±146 €/t) from 01/2012 to 12/2020. Or, to put it another way, we may have reached a stable price level for standard plastics at the long-term mean value (1,294 €/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://piweb.plasteurope.com/>.

Table 1: Standard plastics prices according to EUWID over the past five months, listed in €/t.

Prices in €/t	May 2025	April 2025	March 2025	Feb 2025	Jan. 2025
LDPE film grade	1260- 1370	1330- 1440	1330- 1440	1330- 1400	1260- 1320
LLDPE film grade	1230- 1280	1290- 1350	1290- 1350	1290- 1330	1230- 1270
HDPE injection moulding	1250- 1280	1320- 1350	1320- 1350	1320- 1350	1260- 1290
HDPE blow moulding	1250- 1300	1320- 1370	1320- 1370	1320- 1370	1260- 1310

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PS crystal clear	1670- 1720	1710- 1760	1760- 1810	1710- 1760	1660- 1710
PS high impact	1800- 1820	1840- 1860	1890- 1910	1840- 1860	1790- 1810
PP homopolymer	1320- 1390	1380- 1460	1430- 1510	1430- 1510	1380- 1460
PP copolymer	1370- 1440	1430- 1510	1480- 1560	1480- 1560	1430- 1510
PVC tube grade	1110- 1210	1130- 1230	1140- 1240	1140- 1240	1110- 1210
PVC film/cables	1240- 1340	1260- 1360	1270- 1370	1270- 1370	1240- 1340
Average Price	1383 ± 205	1435 ± 203	1457 ± 221	1444 ± 198	1393 ± 203

PET: The pricing for PET has been made more difficult due to the upheavals in the markets, which include the debate about future tariffs on the one hand and war-related shortages on the other. The demand for packaging PET remained below expectations in May, too. However, May and June have been much warmer than the preceding months and, as a result, consumption of beverages should rise. In May 2025, packaging PET was quoted on average at 1,085 €/t and thus 10 €/t higher than in the previous month, see PIE – Plastic Information Europe <https://piweb.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 June 2025; they will not become definitive until early July 2025. The two quotes stated for June 2025 below indicate only an interim situation, see the left-hand column in Table 2 and Table 3.

3.1 plasticker: Standard plastics

The May price index shows worse demand for plastic than in the previous month. In May 2025, standard plastics were quoted at an average price of 549 €/t and thus 7 €/t lower than in the previous month (556 €/t), see Tab. 2. The average price for May 2025 (549 €/t) was 72 €/t below that of the previous year (621 €/t). There were significant price changes of more than ±40 €/t for PP regrind -50 €/t and PS regrind +80 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in June 2025 (554 €/t) is thus 5 €/t higher than in the previous month (549 €/t), see Tab. 2. The price index June of 13.06.2025 shows subdued demand in comparison to the previous month.

Table 2: Standard plastics price according to plasticker; listed in €/t.

	June ⁶ 25	May 25	April 25	March 25	Feb. 25	May 24
HDPE regrind ¹	570	550	570	580	580	640
HDPE regrinulates ⁵	840	840	850	890	840	960
LDPE bale goods ²	180*	210*	360	450*	460*	570*
LDPE regrind ¹	310	380	390	450*	400*	430
LDPE regrinulates ⁵	760	700	710	640	650	790
PP bale goods ³	170*	190	180	200	220	180
PP regrind ¹	510	570	560	470	530	580
PP regrinulates ⁵	840	750	800	740	840	890
PS regrind ⁴	890*	890	810	690	680*	760
PS regrinulates ⁵	970	870	850	810	850	850
PVC_P regrind ¹	400*	-	580*	500*	340*	860*

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PVC_U regrind ¹	640*	540*	430*	410*	400*	480*
PET bale goods	240*	260*	270*	230*	310*	320*
PET regrind mixed colours	440*	390	430	430*	430*	390
Average Price	(554)	549	556	535	538	621

*: 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 May 2025, there was an average price of 1,318 €/t, which was 90 €/t lower than that of the previous month (1,408 €/t), see Table 3. The average price for May 2025 (1,318 €/t) was 277 €/t below that of the previous year (1,595 €/t).

There is a great deal of movement in the prices for technical plastics. There were significant price changes of greater than ±70 €/t for: ABS regranulates -120 €/t, PC regranulates -150 €/t, PBT regranulates -380 €/t, PA 6 regrind -160 €/t, PA 6 regranulates -110 €/t and PA 6.6 regranulates -160 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The May price index shows subdued demand for plastic.

The probable average price in June 2025 (1,309 €/t) is thus 9 €/t lower than in the previous month (1,318 €/t). The price index June of 13.06.2025 shows subdued demand in comparison to the previous month.

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

	June ⁶ 25	May 25	April 25	March 25	Feb. 25	May 24
ABS regrind	620	630	650	650	670	680
ABS regranulates ⁵	1260	1250	1370	1290	1270	1420
PC regrind	1060	1120	1070	920	980	1110
PC regranulates ⁵	1500	1920	2070	2440	2520	2110
PBT regrind	600	590	570	610	650	770
PBT regranulates	1700	1770	2150	2070	2140	2000
PA 6 regrind	850	760	920	740	760	780
PA 6 regranulates ⁵	1830	1740	1850	2040	2120	2290
PA 6.6 regrind	1020	1060	1100	1050	1060	950
PA 6.6 regranulates ⁵	2370	2280	2440	2450	2390	3020
POM regrind	870*	690*	650	860*	710*	850
POM regranulates ⁵	2030	2000	2060	2560	2620	3160
Average Price	(1309)	1318	1408	1473	1491	1595

*: 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

To put it very clearly, the recycling of standard plastics is still in trouble. The upheavals have a number of causes. For example, imported virgin grade is on sale so cheaply that recyclates are becoming ever more expensive in comparison. In addition, ever more off-spec goods or B-goods are arriving on the European markets from Asia, which further suppress recyclates. What's more, recycling locations in Germany are encumbered with extremely high costs for energy, transport, staff, approvals and ad-

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ministration. In addition to the war between Russia and Ukraine, the conflict between Israel and Iran is also affecting the world economy.

After years of falling exports of waste plastics, movement is returning to the international exchange. Both German exports and imports of waste plastics rose sharply in the 1st quarter of 2025. As far as exports are concerned, 168,500 t were reported for the 1st quarter of 2024 and 208,800 t in the 1st quarter of 2025. As far as imports are concerned, 113,900 t were reported for the 1st quarter of 2024 and 124,300 t in the 1st quarter of 2025, see EUWID RE 24, 2025, p. 25..

4.1 Recycling standard plastics

EUWID: In the May price index there were changes for only a few commodities. Price rises can be seen in some PE post-user films. The arithmetic average is higher for: LDPE shrink hoods natural +25 €/t, LDPE shrink hoods coloured +10 €/t and PE film transparent natural +13 €/t. The following should also be mentioned here: HDPE blow-moulded bodies coloured (C29) +35 €/t. Or, in other words, there is very little movement on the markets for secondary plastics.

plasticker: The price index shows only low demand for standard plastics in May and June. In May 2025, standard plastics were quoted at an average price of 549 €/t and thus 7 €/t lower than in the previous month (556 €/t) - price stability. The probable average price in June 2025 (554 €/t) is thus 5 €/t higher than in the previous month (549 €/t) - price stability.

PIE – Plastic Information Europe, regranulates: In May 2025, the regranulates of standard plastics were inconsistent in comparison to the previous month. PE films are quoted average 5 €/t to 25 €/t higher. PE blow-moulded grade fell by 10 €/t. The two PP grades were also quoted an average 10 €/t and 20 €/t lower. However, PS was quoted 15 €/t higher, see <https://pieweb.plasteurope.com/>.

4.2 Recycling technical plastics

The recycling of technical plastics is suffering from the low demand. Markets still haven't stabilised. And this indicates that the economy is still very weak in the technical sectors, i.e., motor vehicles, electricals and electronics and IT.

plasticker: The continuing fall in prices shows that the lower price level has still not been found. For May 2025, there an average price of 1,318 €/t, which was 90 €/t lower than that of the previous month (1,408 €/t). The May and June price indices show low purchase demand.

PIE – Plastic Information Europe, regranulates: Technical plastics were quoted much lower in May 2025. Commodities reported average price falls of 10 €/t to 25 €/t, see <https://pieweb.plasteurope.com/>. The lower price level has thus not yet been reached. Demand for technical plastics is still relatively low.

4.3 PET recycling

There is a lot of positive movement in PET recycling: on the one hand, there is strong demand for food-safe recyclates for bottles, trays and films. On the other hand, recyclate prices are now so high that fillers are ordering slowly. Some experts are expecting recyclate prices to fall. This is also because the trend in the quotes for virgin grade is falling – ever more imports from outside Europe are suppressing the prices of virgin grade in Europe.

The warm days in May and June greatly increase drinks sales. And this means that the volume of used PET single-use deposit bottles is high. The PET recyclers have built up sufficient warehouse

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stocks. In June, the bottle prices therefore fell. In May 2025, the relevant price changes for used PET single-use deposit bottles are: PET transparent +15 €/t, PET mixed +10 €/t and PET coloured +10 €/t, see EUWID. But the hot summer months of July and August are still to come.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,085 €/t. Regranulates are valued at 1,660 €/t on average in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,365 €/t in PIE – Plastic Information Europe.

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

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. Piweb 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, Tuesday, 8. July 2025

Dr. Thomas Probst, bvse