bvse market report: plastics, August 2025

1 General economy with reference to the plastics industry

The ifo business climate index has risen, see https://www.ifo.de/fakten/2025-07-25/ifo-geschaeftsklimaindex-leicht-gestiegen-juli-2025. The mood among companies in Germany has improved slightly. The ifo business climate index rose to 88.6 points in July, following on from 88.4 points in June. Companies were slightly more satisfied with current business. However, their expectations remained more or less unchanged. The upturn in the German economy remains anaemic.

The index has risen in the manufacturing sector. Companies assess their current business situation as much better. And their expectations brightened. But there is still a lack of dynamism in order development.

2 Primary markets - standard plastics

A few selected quotes for standard plastics fell in July 2025. The calculated average price of the EUWID quotes is 1,356 €/t. And this average price is 14 €/t lower than in the previous month (1,370 €/t), see Tab. 1. In a year-on-year comparison, it can be seen that the average quotes from July 2025 (1,356 €/t) were 67 €/t lower than those of the previous year (1,423 €/t). The prices of standard plastics changed only slightly in July 2025: PS crystal clear -70 €/t and PS high impact -70 €/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 1: Standard plastics prices according to EUWID over the past five months, listed in €/t.

Prices in €/t	July 2025	June 2025	May 2025	April 2025	March 2025
LDPE film grade	1250- 1360	1250- 1360	1260- 1370	1330- 1440	1330- 1440
LLDPE film grade	1210- 1250	1210- 1250	1230- 1280	1290- 1350	1290- 1350
HDPE injection moulding	1250- 1280	1250- 1280	1250- 1280	1320- 1350	1320- 1350
HDPE blow moulding	1250- 1300	1250- 1300	1250- 1300	1320- 1370	1320- 1370
PS crystal clear	1550- 1610	1620- 1680	1670- 1720	1710- 1760	1760- 1810
PS high impact	1680- 1710	1750- 1780	1800- 1820	1840- 1860	1890- 1910
PP homopolymer	1320- 1390	1320- 1390	1320- 1390	1380- 1460	1430- 1510
PP copolymer	1370- 1440	1370- 1440	1370- 1440	1430- 1510	1480- 1560
PVC tube grade	1110- 1210	1110- 1210	1110- 1210	1130- 1230	1140- 1240
PVC film/cables	1240- 1340	1240- 1340	1240- 1340	1260- 1360	1270- 1370
Average Price	**1356 ± 164**	**1370 ± 190**	**1383 ± 205**	**1435 ± 203**	**1457 ± 221**

PET: In July 2025, there was a divided picture for the European PET market: whereas the heatwave drove demand in the south, there was weaker demand in the north. In other markets, however, the demand was more constant. Overall, in July there was a slight upturn in regular purchases. In July 2025, packaging PET was quoted on average at 1,080 €/t and thus 10 €/t higher 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 August 2025 here; they will not become definitive until early September 2025. The two quotes stated for August 2025 below indicate only an interim situation, see the left-hand column in Table 2 and Table 3.

bvse market report: plastics, August 2025

3.1 plasticker: Standard plastics

The July price index shows higher demand for plastic than in the previous month. In July 2025, standard plastics were quoted at an average price of 569 €/t and were thus 49 €/t higher than in the previous month (520 €/t), see Tab. 2. The average price for July 2025 (569 €/t) was 36 €/t below the price of the previous year (605 €/t). There were significant price changes of greater than ±40 €/t for: LDPE regrind +90 €/t and PS regranulates -110 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in August 2025 (582 €/t) is thus 13 €/t higher than in the previous month (569 €/t), see Tab. 2. The price index August of 14.08.2025 shows slightly better demand in comparison to the previous month.

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

	August[6] 25	July 25	June 25	May 25	April 25	July 24
HDPE regrind[1]	580	590	570	550	570	560
HDPE regranulates[5]	800	830	830	840	850	950
LDPE bale goods[2]	380*	390*	180*	210*	360	410*
LDPE regrind[1]	430*	370	280	380	390	520*
LDPE regranulates[5]	700	740	740*	700	710	780
PP bale goods[3]	350*	250	170	190	180	190
PP regrind[1]	510	530	510	570	560	540
PP regranulates[5]	780	800	820	750	800	970
PS regrind[4]	920	870	870	890	810	650
PS regranulates[5]	930	850	960	870	850	970
PVC_P regrind[1]	600*	610*	460*	-	580*	730*
PVC_U regrind[1]	420*	400*	320*	540*	430*	580
PET bale goods	380*	330*	190*	260*	270*	190*
PET regrind mixed colours	370	400	380*	390	430	430*
Average Price	**(582)**	**569**	**520**	**549**	**556**	**605**

*: 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 July 2025, there was an average price of 1,358 €/t, which was 68 €/t higher than that of the previous month (1,290 €/t), see Table 3. The average price for July 2025 (1,358 €/t) was 220 €/t below that of the previous year (1,578 €/t).

There were significant price changes of greater than ±70 €/t for PC regranulates at +400 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The July price index shows higher demand for plastic.

The probable average price in August 2025 (1,357 €/t) is thus 1 €/t lower than in the previous month (1,358 €/t). The price index August of 14.08.2025 shows similar demand in comparison to the previous month.

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

	August[6] 25	July 25	June 25	May 25	April 25	July 24
ABS regrind	640	660	620	630	650	650
ABS regranulates[5]	1250	1260	1240	1250	1370	1360
PC regrind	980	1020	1050	1120	1070	1010
PC regranulates[5]	1810	1890	1490	1920	2070	2570
PBT regrind	570	570	540	590	570	730
PBT regranulates	1720	1710	1700	1770	2150	2110
PA 6 regrind	710	780	840	760	920	920
PA 6 regranulates[5]	1950	1950	1800	1740	1850	2410
PA 6.6 regrind	1050	1010	1040	1060	1100	970
PA 6.6 regranulates[5]	2250	2180	2300	2280	2440	2690
POM regrind	880*	820*	830*	690*	650	730
POM regranulates[5]	2470	2440	2030	2000	2060	2790
Average Price	**(1357)**	**1358**	**1290**	**1318**	**1408**	**1578**

*: 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

The current situation for secondary plastics is facing acute market pressures. Even though the infrastructure and demand are growing due to regulatory drivers, the profitability of many companies remains fragile, as the following press reports show, see https://www.bvse.de/gut-informiert-kunststoffrecycling/pressemitteilungen-kunststoffrecycling/11984-wir-stehen-mit-dem-ruecken-zur-wand.html. PET recycling is under a little pressure due to the summer break. Moreover, mixed plastics recycling in combination with the seasonal summer lull are leading to increasingly fuller warehouses. Demand in Europe has therefore fallen in part. An excellent summary of the difficult situation for plastics recycling can be found in EUWID RE 33, 2025, p. 17.

4.1 Recycling standard plastics

The economic situation of plastics recyclers remains extremely tense: rising manufacturing costs, hardly any requests and a noticeable summer slump are making themselves felt in the sector. Overall, cheap off-spec virgin grade and over-supply are putting pressure on the markets, while the summer holidays are also having a throttling effect. Nevertheless, demand has risen slightly. It remains to be seen how the markets will develop after the summer holidays. New impetus for the manufacturing, processing and recycling of plastics is expected from the K trade fair in Düsseldorf.

EUWID: In the July price index there were changes for just a few commodities. Slight price falls can be seen in some PE post-user films. The arithmetic average is lower for: PE film transparent natural < 70 µm -15 €/t, PE film transparent coloured < 70 µm -10 €/t, PE commercial mixed film (90/10) -15 €/t and PE commercial mixed film (80/20) -17 €/t. For PE production wastes, there were price falls for: HPDE coloured -10 €/t, HDPE natural -3 €/t, LDPE coloured -3 €/t, LDPE film coloured (K49) -10 €/t and LDPE film natural (K49) - 10 €/t. The following should also be mentioned: HDPE blow-moulded bodies coloured (C29) -10 €/t, HDPE crates mixed colours -5 €/t and HDPE crates coloured -5 €/t.

plasticker: The price index shows somewhat higher demand for standard plastics in July and August. In July 2025, standard plastics were quoted at an average price of 569 €/t and thus 49 €/t higher than in the previous month (520 €/t). The probable average price in August 2025 (582 €/t) is thus 13 €/t higher than in the previous month (569 €/t). The average quotes for standard plastics could settle at around 510 €/t.

PIE – Plastic Information Europe, regranulates: In July 2025, the regranulates of standard plastics were quoted at the same level as the previous month. Whereas PP grades were quoted 10 €/t lower, PE-HD pipes experienced a price rise of 10 €/t, see https://pieweb.plasteurope.com/.

4.2 Recycling technical plastics

The technical plastics markets continue to experience weak demand and price fall, whereas aggressive imports from China and weak signals from the automotive sector represent additional pressure. In spite of reduced production, warehouse stocks are rising and the summer break continues to dampen demand. The market will probably continue to face further falling prices and growing oversupply.

plasticker: For July 2025, there is an average price of 1,358 €/t, which is 68 €/t higher than that of the previous month (1,290 €/t). The July and August price indices show slightly increased demand, but are almost as low as in the previous months.

PIE – Plastic Information Europe, regranulates: The prices for technical plastics are continuously falling in slightly bigger steps. Technical plastics were quoted lower in July 2025. Commodities reported average price falls of 35 €/t to 50 €/t, see https://pieweb.plasteurope.com/. The demand for technical plastics recyclates remains weak and warehouse stocks are increasing.

4.3 PET recycling

In July, there was a noticeable weakening of the PET recycling market following on from two stable quarters: the prices for PET flakes and used bottles continued to fall. Although there is still demand for flakes, many processors prepared for a longer summer break, while the end of the beverages season and the cooler weather will also dampen demand.

As expected, the trend for falling bottle prices for used PET single-use deposit bottles continued accordingly: PET transparent -25 €/t, PET mixed -25 €/t and PET coloured -25 €/t, see EUWID. Continuing falling purchase activities are expected since warehouses have been sufficiently filled over the summer break.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,080 €/t, which is 10 €/t above the value of the previous month. Price stability for flakes and regranulates: regranulates are valued at 1,670 €/ on average in PIE – Plastic Information Europe. And clear, food-safe flakes are quoted at an average 1,365 €/t in PIE – Plastic Information Europe.

Pricing in EUWID quotes price falls of 10 €/t to 30 €/t for flakes. Even now, it can be seen that there will be further, small price falls in August.

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, August 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, Thursday, 4. September 2025 Anna Roeb, bvse