bvse market report: plastics, September 2025

0 Introducing Anna Roeb

Dear Readers

Since 1 August 2025, this market report has been written by my colleague, Ms Anna Roeb, roeb@bvse.de, Tel: +49 228 98849-29. After 23 years at bvse, I will retire on 31 December 2025. Handing over the reins is also an opportunity to change the content and text and for a redesign.

In the plastics market report, I had the opportunity to report neutrally on prices, quantities and markets, and also to add occasional personal assessments, mainly on plastic recycling. For example, I sometimes critically questioned trends or behaviours, see my comments below on “General economy and reference to the plastics industry”.

The market report plastics is published monthly: both in the the bvse-Branchenjournal and in plasticker. In plasticker, the market report is published in German and English.

I would like to extend my warmest thanks to my two translators of the market report, Ms Kennepohl-Vetter up to 12/2018 and, from then onwards, Ms Cox, for their tremendous efforts. The two translators often translated the content so brilliantly that the English text was better than the German original.

I was very happy to receive reader feedback on individual reports. Thank you very much for your interest in this market report; I remain

Thomas Probst, bvse e.V.

1 General economy with reference to the plastics industry

The ifo business climate index rose, see https://www.ifo.de/fakten/2025-08-25/ifo-geschaeftsklimaindex-leicht-gestiegen-august-2025. The mood among companies in Germany has improved slightly. The ifo business climate index rose to 89.0 points in August, following on from 88.6 points in July. The rise is due to improved expectations in companies. By contrast, the current situation was assessed as slightly worse. The recovery of the German economy remains weak.

The index has fallen slightly in the manufacturing sector. Companies were slightly less satisfied with current business. Expectations have also been downgraded slightly. The order development situation has still not picked up. The mood among manufacturers of capital goods has brightened considerably.

In mid-September 2025, PlasticsEurope published its second Quarterly Report. The report is titled “Setback for plastic production – Sector records falling revenue”.

After production of plastics in primary form rose by 4.5 % in the first quarter of 2024 in comparison to the same quarter of the previous year, unfortunately, the trend did not continue in the second quarter. Production fell by 4.3 % and was 6.2 % below the level of the previous year. Many industrial buyers in Germany have cut their production and thus their demand for plastics. At the same time, the fall in exports indicates weaker demand from abroad.

After a positive start to the year, the plastics producing industry in Germany recorded a clear drop in the second quarter of 2025. Incoming orders also fell by around 7 % – both in domestic and foreign business. Added to this is the fact that rising plastics imports are putting domestic production under more pressure. In brief: there are not enough orders in German plastic production.

Comment by T. Probst:

The failure of the UN Plastics Treaty in Geneva in August 2025 has been widely reported. However, it has hardly been reported that one of the causes of worldwide littering is the fact that many states have not established a functioning waste management system. If there are no well ordered systems to collect and dispose of waste, rivers and seas are filled with litter. And plastic waste from “land-sourced littering” ends up in lakes, rivers and seas.

Unfortunately, many states are still barely interested in setting up functioning collection systems and disposal facilities. For many years, the numerous financial aid schemes for establishing an orderly waste management system have been used by the recipients for other purposes. And the existing environmental engineering services concerning the environmentally friendly and sustainable use of water, air and soil are barely observed in many countries. Ultimately, pollutants in the environmental media result in the poisoning of all of the citizens, rich or poor, in a country.

Every two years, the IFAT with its worldwide spin-offs provides interested parties with the opportunity to learn and use techniques to keep water, air and soil free of rubbish. With appropriate techniques, rubbish can be processed into secondary raw materials suitable for industry. That’s why I am already reminding you of IFAT 2026 in Munich from 4 to 7 May 2026. The bvse will be happy to see you at the IFAT.

2 Primary markets - standard plastics

A few selected quotes for standard plastics fell in August 2025. The calculated average price of the EUWID quotes is 1,349 €/t. And this average price is 7 €/t lower than in the previous month (1,356€/t), see Tab. 1. In a year-on-year comparison, it can be seen that the average quotes from August 2025 (1,349 €/t) were 104 €/t lower than those of the previous year (1,453 €/t). The prices of standard plastics recorded slight changes in August 2025: LDPE film -15 €/t, LLDPE film -10 €/t, HDPE injection moulding -10 €/t, HDPE blow moulding -10 €/t, PVC crystal -30 €/t and PVC high impact -35 €/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	August 2025	July 2025	June 2025	May 2025	April 2025
LDPE film grade	1240 - 1340	1250- 1360	1250- 1360	1260- 1370	1330- 1440
LLDPE film grade	1200 - 1240	1210- 1250	1210- 1250	1230- 1280	1290- 1350
HDPE injection moulding	1240 - 1270	1250- 1280	1250- 1280	1250- 1280	1320- 1350
HDPE blow moulding	1240 - 1290	1250- 1300	1250- 1300	1250- 1300	1320- 1370
PS crystal clear	1510 - 1580	1550- 1610	1620- 1680	1670- 1720	1710- 1760
PS high impact	1640 - 1680	1680- 1710	1750- 1780	1800- 1820	1840- 1860
PP homopolymer	1310 - 1380	1320- 1390	1320- 1390	1320- 1390	1380- 1460
PP copolymer	1360 - 1430	1370- 1440	1370- 1440	1370- 1440	1430- 1510
PVC tube grade	1100 – 1200	1110- 1210	1110- 1210	1110- 1210	1130- 1230
PVC film/cables	1230 - 1330	1240- 1340	1240- 1340	1240- 1340	1260- 1360
Average Price	**1349 ± 160**	**1356 ± 164**	**1370 ± 190**	**1383 ± 205**	**1435 ± 203**

PET: In August 2025, there was little change to the weak PET manufacture in Europe. Warehouses are still full from previous months and activities are very subdued, with the result that producers cannot charge higher prices. However, in spite of cheap imports, there was no reason for a further and larger price reduction. In August 2025, packaging PET was quoted on average at 1,070 €/t and thus

10 €/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 the month of the report, in this case September 2025; they will not become definitive until early October 2025. The two quotes stated for September 2025 below indicate only an interim situation, see the left-hand column in Table 2 and Table 3.

3.1 plasticker: Standard plastics

The August price index shows similar demand for plastic as in the previous month. In August 2025, standard plastics were quoted at an average price of 569 €/t and were thus the same as in the previous month (569 €/t), see Tab. 2. The average price for August 2025 (569 €/t) was 25 €/t below that of the previous year (594 €/t). There were significant price changes of greater than ±40 €/t for: LDPE regranulates -60 €/t and PS regrind +60 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in September 2025 (565 €/t) is thus 4 €/t lower than in the previous month (569 €/t), see Tab. 2. The price index September of 15.09.2025 shows slightly lower demand in comparison to the previous month.

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

	September[6] 25	Aug 25	July 25	June 25	May 25	Aug 24
HDPE regrind[1]	520	580	590	570	550	560
HDPE regranulates[5]	770	790	830	830	840	950
LDPE bale goods[2]	260*	330*	390*	180*	210*	460*
LDPE regrind[1]	420*	430*	370	280	380	440*
LDPE regranulates[5]	590	680	740	740*	700	820
PP bale goods[3]	450*	350*	250	170	190	190
PP regrind[1]	410	490	530	510	570	550
PP regranulates[5]	780	770	800	820	750	950
PS regrind[4]	860	930	870	870	890	630*
PS regranulates[5]	900	890	850	960	870	1000
PVC_P regrind[1]	540*	550*	610*	460*	-	690*
PVC_U regrind[1]	440*	440*	400*	320*	540*	530*
PET bale goods	-	380*	330*	190*	260*	170*
PET regrind mixed colours	410	350	400	380*	390	400*
Average Price	**(565)**	**569**	**569**	**520**	**549**	**594**

***: 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, which may change due to additional quotes.**

3.2 plasticker: Technical plastics

bvse market report: plastics, September 2025

For August 2025, there was an average price of 1,307 €/t, which was 51 €/t lower than that of the previous month (1,358 €/t), see Table 3. The average price for August 2025 (1,307 €/t) was 286 €/t below that of the previous year (1,593 €/t).

There were significant price changes of more than ±70 €/t for ABS regranulates -90 €/t, PC regranulates -90 €/t, PA 6 regrind -80 €/t, PA 6 regranulates -100 €/t and POM regranulates -130 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The August price index shows that demand for plastic has risen.

The probable average price in September 2025 (1,223 €/t) is thus 84 €/t lower than in the previous month (1,307 €/t). The price index September of 15.09.2025 shows worse demand in comparison to the previous month.

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

	Sept[6] 25	**Aug 25**	**July 25**	**June 25**	**May 25**	**Aug 24**
ABS regrind	660	610	660	620	630	640
ABS regranulates[5]	1140	1170	1260	1240	1250	1380
PC regrind	860	960	1020	1050	1120	1010
PC reranulates[5]	1630	1800	1890	1490	1920	2420
PBT regrind	610	570	570	540	590	710
PBT regranulates	1640	1640	1710	1700	1770	2360
PA 6 regrind	650	700	780	840	760	900
PA 6 regranulates[5]	1680	1850	1950	1800	1740	2380
PA 6.6 regrind	1030	1060	1010	1040	1060	980
PA 6.6 regranulates[5]	2070	2160	2180	2300	2280	2940
POM regrind	670	850	820*	830*	690*	800*
POM regranulates[5]	2040	2310	2440	2030	2000	2590
Average Price	**(1223)**	**1307**	**1358**	**1290**	**1318**	**1593**

***: Supply figure too low to attain statistical significance; [5]: equivalent to the grade "regranulates, black"; [6]: Preview, which may change due to additional quotes**

4 Secondary plastics markets

The current situation for secondary plastics is at a turning point. According to current predictions, more recycling facilities with capacities of around a million tonnes could be lost by the end of 2025, as made clear by the press reports below, see https://www.bvse.de/gut-informiert-kunststoffrecycling/nachrichten-recycling/12105-europas-kunststoffindustrie-am-scheideweg.html. There is still weak demand for PET recycling and warehouses are still full. Furthermore, the situation for mixed plastics recycling is still difficult due to low demand and price pressure. An excellent summary of the difficult situation for plastics recycling can be found in EUWID RE 37, 2025, p. 20.

4.1 Recycling standard plastics

Against the backdrop of the continuing very difficult situation, several industry associations, manufacturers, recyclers and processors have come together to draw attention to the tough situation in Europe and in Brussels. Because without adequate political measures, there is a risk of further drops in production and insolvencies. Therefore, the associations are calling for an end to the distortion of competition with respect to cheap imports, measures to cushion high energy prices and to expand the use of recyclates and to protect a functioning circular economy.

bvse market report: plastics, September 2025

EUWID: In the August price index there were changes for some 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 -12.5 €/t, PE film transparent coloured < 70 µm -7.5 €/t, PE commercial mixed film (90/10) -20 €/t and PE commercial mixed film (80/20) -20 €/t. In PE production waste, there are price fall for: HPDE coloured -10 €/t, HDPE natural -15 €/t, LDPE coloured -10 €/t, LDPE film coloured (K49) -10 €/t and LDPE film natural (K49) -10 €/t. The following should also be mentioned: HDPE crates sorted according to colour and HDPE crates coloured -10 €/t.

plasticker: The price index shows only low demand for standard plastics in August and September. In August 2025, standard plastics were quoted at an average price of 569 €/t and the same as the previous month (569 €/t). The probable average price in September 2025 (565 €/t) is thus 4 €/t lower than in the previous month (569 €/t). The average quotes for the standard plastics could settle around 550 €/t.

PIE – Plastic Information Europe, regranulates: In August 2025, most standard regranulates were quoted at the same level as the previous month. No price rises were recorded. Instead, there was a price drop of 10 €/t for PE-HD pipes and of 20 €/t for PS-HI black, see https://pieweb.plasteurope.com/.

4.2 Recycling technical plastics

The technical plastics markets continue to record low demand and a price fall because imports of virgin grade from Asia are forcing many companies to adjust their prices down accordingly. The first indications are that demand could slowly rise again after the holiday months. Nevertheless, imports are still on the market in significant quantities.

plasticker: For August 2025, there an average price of 1,307 €/t, which was was 51 €/t lower than that of the previous month (1,358 €/t). The August price index shows increased demand, whereas the September price index records lower demand than in the previous months.

PIE – Plastic Information Europe, regranulates: The prices of technical plastics continue to fall. In August 2025, technical plastics were quoted lower than in the previous month. Commodities reported average price falls of 10 €/t to 50 €/t, see https://pieweb.plasteurope.com/. Demand for technical plastics recyclates remains weak and warehouse stocks are increasing.

4.3 PET recycling

In August, demand remained weak and PET recyclers had to adjust to hard times. The last two years had a good order situation, however the short-term prospects are currently not positive. PET bottle recycling came under more pressure than previously assumed in August. The stocks of bottle bales, flakes and regranulates increased over the last few weeks in high summer and, at the same time, strong demand failed to materialise.

Thus, the trend of falling bottle prices for used PET single-use deposit bottles remained: PET transparent -30 €/t, PET mixed -30 €/t and PET coloured -30 €/t, see EUWID. Falling purchase activities are still expected because the warehouses filled up sufficiently during the summer break.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,070 €/t, which is 10 €/t below the value of the previous month. Price stability for flakes are regranulates: regranulates are valued at 1,660 €/ on average in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,345 €/t in PIE – Plastic Information Europe.

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

bvse market report: plastics, September 2025

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. 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, Tuesday, 4. November 2025 Anna Roeb, bvse