

bvse market report: plastics, January 2026

1 General economy with reference to the plastics industry

The ifo business climate index has fallen, see <https://www.ifo.de/fakten/2025-12-17/ifo-geschaeftsklimaindex-gesunken-dezember-2025>. The mood among companies in Germany has worsened again. The ifo business climate index fell to 87.6 points in December, following on from 88.1 points in November. Companies are also more pessimistic about the first half of 2026. The indicator of the current situation remains unchanged. The year ended without an optimistic mood.

The index has fallen in the manufacturing sector. Hardly any sector remains untouched by this. This development was driven by pessimistic expectations. Assessments of the current situation were slightly better, albeit at a low level. The number of new orders fell. Companies are also planning to cut back on production.

2 Primary markets - standard plastics

In December 2025, the quotes for standard plastics remained at the level of the previous month. The market is unchanged and demand remained low, which is hardly surprising due to the public holidays. There is a pause in the downwards trend. Note: the average prices stated here are calculated by bvse e.V. based on the EUWID quotes.

Consequently, the average of the EUWID prices calculated by bvse was 1,272 €/t and therefore 4 €/t higher than in the previous month (1,268 €/t). In a year-on-year comparison, it can be seen that the average quotes from December 2025 (1,272 €/t) were 115 €/t lower than those of the previous year (1,387 €/t). The prices of standard plastics underwent the following changes in December 2025: PS crystal clear +20 €/t and PS high impact +20 €/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 www.kiweb.de/.

PET: The European PET market remained characterised by weak demand in December 2025. Business was sluggish here, too. Many are already looking ahead to the new year of 2026. In December 2025, packaging PET was quoted on average at 995 €/t and thus unchanged in comparison to the previous month, see PIE – Plastic Information Europe www.kiweb.de/.

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 January 2026; they will not become definitive until early February 2026. The two quotes stated for January 2026 below indicate only an interim situation, see the left-hand column in the tables.

3.1 plasticker: Standard plastics

The December price index again shows lower demand in comparison to the previous month. In December 2025, standard plastics were quoted at an average price of 564 €/t and were thus 24 €/t lower than in the previous month (588 €/t), see table. The average price for December 2025 (564 €/t) was 12 €/t above that of the previous year (552 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regrind +40 €/t and PET regrind mixed colours -70 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

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The likely average price in January 2026 (579 €/t) is thus 15 €/t higher than in the previous month (564 €/t), see table. The price index January of 14.01.2026 shows worse demand so far in comparison to the previous month.

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

	January ⁶ 25	Dec 25	Nov 25	Oct 25	Sept 25	Dec 24
HDPE regrind ¹	520	540	500	540	530	540
HDPE regranulates ⁵	760	790	800	830	850	850
LDPE bale goods ²	490*	440*	440*	250*	280*	470*
LDPE regrind ¹	300*	300*	380*	370*	430	480*
LDPE regranulates ⁵	700	700	690	680	690	620
PP bale goods ³	160*	90*	160*	280*	340*	210*
PP regrind ¹	550	490	480	470	480	530
PP regranulates ⁵	780	770	790	800	820	910
PS regrind ⁴	730	750	740	720	830	620*
PS regranulates ⁵	970	940	940	890	920	920
PVC_P regrind ¹	710*	710*	670*	480*	630*	460*
PVC_U regrind ¹	530*	480*	440	330*	560*	440*
PET bale goods	550*	550*	780*	0*	350*	270*
PET regrind mixed colours	360	350	420	380	410	410*
Average Price	(579)	564	588	501	580	552

*: 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 December 2025, there was an average price of 1,167 €/t, which was 17 €/t lower than that of the previous month (1,184 €/t), see table. The average price for December 2025 (1,167 €/t) was 308 €/t below that of the previous year (1,475 €/t).

There were significant price changes of greater than ±70 €/t for ABS regranulates -90 €/t, PC regranulates +100 €/t, PA 6 regranulates -100 €/t, PA 6.6 regranulates +160 €/t, POM regrind +70 €/t and POM regranulates -360 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The December price index shows purchase demand lower than in the previous month.

The probable average price for January 2026 is quoted at 1,256 €/t and thus 89 €/t higher than in the previous month (1,167 €/t). The price index January of 14.12.2025 shows lower demand in comparison to the previous month.

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

	January⁶ 26	Dec 25	Nov 25	Oct 25	Sept 25	Dec 24
ABS regrind	640	620	620	620	620	610
ABS regranulates ⁵	1160	1150	1240	1170	1120	1300
PC regrind	860	890	920	1000	970	990
PC regranulates ⁵	2200	1720	1620	1460	1500	2560
PBT regrind	520	500	470	620	570	600*
PBT regranulates	1670	1610	1640	1550*	1680	1740
PA 6 regrind	630	620	620	710	700	820
PA 6 regranulates ⁵	1550	1530	1630	1460	1570	2440
PA 6.6 regrind	950	900	860	940	940	1060
PA 6.6 regranulates ⁵	2340	2260	2100	1970	2000	2550
POM regrind	670	660	590	610	580	860*
POM regranulates ⁵	1880*	1540	1900	1900	2170	2170
Average Price	(1256)	1167	1184	1168	1202	1475

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

4 Secondary plastics markets

Demand for secondary plastics remained subdued in December, while the existing market pressure continued unabated and there was still no political stimuli. The picture on the PET market was similar. Demand is weak, whereas affordable virgin grade and cheap imported recyclates are also increasing competitive pressure. This year, too, many recyclers will have a longer Christmas break. An excellent summary of the difficult situation for plastics recycling can be found in EUWID RE 3, 2026, p. 22.

4.1 Recycling standard plastics

The continuing weak demand is still the biggest challenge for the secondary raw materials market. In December, the sales volumes remained at a low level, partly due to the sometimes longer company holidays of many customers over the Christmas and new year period. Overall, the last year was characterised by plant closures, insolvencies and heavy losses. Expectations for the new year are correspondingly subdued.

The EU Commission's package of measures to support the plastics recycling sector is not noticeably reviving demand or the situation in the estimation of the industry. From the recyclers' point of view, there is still a lack of meaningful political support, see

<https://www.bvse.de/recycling/pressemitteilungen/12464-eu-massnahmenpaket-fuer-kunststoffe-richtiger-ansatz-aber-kein-durchbruch-fuer-den-mittelstand.html>

EUWID: In the December price index, the situation for plastics recyclers in Germany and Europe remains tense. Weak demand is still the main problem. Long company holidays due to the public holidays and thus hardly any transactions. The arithmetic average is lower for:

LDPE film coloured (K49) -7.5 €/t, LDPE film natural (K40) -25 €/t, LDPE shrink hoods natural (E40) -25 €/t, LDPE shrink hoods coloured (E49) -10 €/t, PE film transparent natural < 70 µm -25 €/t, PE film

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transparent coloured < 70 µm -7.5 €/t, PE mixed commercial film (90/10) -25 €/t, PE mixed commercial film (80/20) -20 €/t and HDPE blow-moulded bodies coloured (C29) -10 €/t.

plasticker: The price index records slightly lower purchase demand for standard plastics in December. In January, demand was also lower in comparison to this. In December 2025, standard plastics were quoted at an average price of 564 €/t and thus 24 €/t lower than in the previous month (588 €/t). The probable average price in January 2026 (579 €/t) is thus 15 €/t higher than in the previous month (564 €/t). The average quotes for standard plastics settled around 584 €/t.

PIE – Plastic Information Europe, regranulates: In December 2025, most standard plastic regranulates were quoted lower. The average price falls were in the range of 10 €/t to 30 €/t. In spite of reduced or stagnant demand, the market remained oversupplied in December. The situation was characterised by high warehouse stocks, a weak order situation and company holidays brought forward. No quick easing is to be expected at the start of the new year, either, see www.kiweb.de/.

4.2 Recycling technical plastics

Falling prices for primary grade increased the pressure of technical plastic recyclates and resulted in price corrections across the sector. Demand fell markedly in December due to greatly reduced production and early shutdowns by the user industry. Although the first advance orders for January indicate a slight top-up effect, more orders would be needed for a return to a normal demand level.

plasticker: For December 2025, there was an average price of 1,167 €/t, which was 17 €/t lower than that of the previous month (1,184 €/t). The December price index shows purchase demand lower than in the previous month. The same is true for the January price index.

PIE – Plastic Information Europe, regranulates: In December 2025, technical plastics are still quoted lower than in the previous month. Commodities reported average price falls of 10 €/t to 20 €/t, see www.kiweb.de/.

4.3 PET recycling

In December, the market for used PET bottles remained tense due to the shortened production period. This had a dampening effect on the price development of flakes and bottles. At the same time, purchase interest remained low, with the result that some recycler built up additional stocks. Expectations with respect to a recovery in demand diverge here: some of the market participants can already see the first positive signals in January, others aren't expecting noticeable recovery until February.

Consequently, the trend of falling bottle prices for used PET single use deposit bottles is continuing and rose in comparison to the previous month as follows: PET transparent -40 €/t, PET mixed -35 €/t and PET coloured -20 €/t, see EUWID. Here, too, recyclers are reacting with production cut-backs or early company holidays. A ramp-up is expected in the second calendar week of 2026.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 995 €/t, remaining at the same level as the previous year. Price fall for flakes and regranulates: Regranulates are valued at 1,550 €/t in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,200 €/t in PIE – Plastic Information Europe. Both prices are lower than in the previous month.

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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 und Entsorgung 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.

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