bvse market report: plastics, February 2026

1 General economy with reference to the plastics industry

The ifo business climate index is unchanged, see www.ifo.de/fakten/2026-01-26/ifo-geschaeftsklimaindex-unveraendert-januar-2026. The mood among companies in Germany has not changed. The ifo business climate index in January stayed put at 87.6 points. The judgements on the current situation has been adjusted slightly upwards. Expectations worsened slightly. The German economy is starting the new year with no impetus.

The index increased clearly in the manufacturing sector. Companies were more satisfied with current business. And expectations were markedly less sceptical. By contrast, capacity utilisation fell from 78.1 to 77.5 per cent. It is therefore still below the long-term mean value of 83.2 per cent.

Plastics Information published its 50th PIE Dialogue in February 2026, see www.kiweb.de/. Companies' expectations have been bitterly disappointed to date. In recent years, companies have looked at developments with a great deal of hope and then, when looking back, had to unfortunately conceded that developments had been worse than expected. The main problem is still weak demand.

For 58 % of the total 347 companies that took part in the survey in January 2026, business deteriorated in the second half of 2025. For 29 % it remained the same (poor) and one in five of those surveyed referred to their development as better (19 %).

There are increasing numbers of insolvencies and many companies in the plastics industry have been forced to reduce staffing levels. 36 % of the companies questioned had cut staff in the second half of the year.

2 Primary markets - standard plastics

In January 2026, the market for standard plastics is mixed because many processors only started getting active again in the second week of January. The quotes for standard plastics remain almost at the level of the previous month. Above all, demand from the packagings industry had a supportive effect, whereas the construction and automotive sectors remained weak. Note: The average prices stated here are calculated by bvse e.V., based on the EUWID quotes.

Accordingly, the average of the EUWID prices calculated by the bvse was 1,275 €/t and therefore 3 €/t higher than in the previous month (1,272 €/t). In a year-on-year comparison, it can be seen that the average quotes from January 2026 (1,275 €/t) were 118 €/t lower than those of the previous year (1,393 €/t). The prices of standard plastics underwent the following changes in January 2026: LDPE film grade +10 €/t, PS crystal clear +20 €/t, PS high impact +20 €/t, PVC tube grade -10 €/t and PVC films/cables -10 €/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: There was a little movement in the European PET market in January 2026. PET export prices rose, whereas delays in European ports and consolidated production forced large buyers to buy on a precautionary basis with the result that demand reached a normal level again and moderate price rises were implemented. Supply remains strained and many purchasers fear bottlenecks in the event of disruptions to production which is why further price rises and purchases from warehouses are expected for February. In January 2026, packaging PET was quoted on average at 1,015 €/t and thus rose +20 €/t in comparison to the previous month, see PIE – Plastic Information Europewww.kiweb.de/.

bvse market report: plastics, February 2026

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

3.1 plasticker: Standard plastics

The January price index is characterised by a slightly increased demand in comparison to the previous month. Standard plastics were quoted at an average 564 €/t in January 2026 and were thus identical to the average quote for the previous month of 564 €/t, see Tab. The average price for January 2026 (564 €/t) was 45 €/t above that of the previous year (519 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regranulates +60 €/t, PS regrind -90 €/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.

The likely average price in February 2026 (589 €/t) is thus 25 €/t higher than in the previous month (564 €/t), see Table. The price index February of 18.02.2026 shows lower demand in comparison to the previous month.

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

	February[6] 26	Jan 26	Dec 25	Nov 25	Oct 25	Jan 25
HDPE regrind[1]	600	550	540	500	540	590
HDPE regranulates[5]	750	850	790	800	830	790
LDPE bale goods[2]	500*	450*	440*	440*	250*	180*
LDPE regrind[1]	360	300	300*	380*	370*	420*
LDPE regranulates[5]	700	690	700	690	680	670
PP bale goods[3]	210*	210	90*	160*	280*	230*
PP regrind[1]	530	500	490	480	470	500
PP regranulates[5]	780	760	770	790	800	850
PS regrind[4]	780	660	750	740	720	620*
PS regranulates[5]	850	960	940	940	890	890
PVC_P regrind[1]	690*	650*	710*	670*	480*	290*
PVC_U regrind[1]	450*	520*	480*	440	330*	450*
PET bale goods	590*	380*	550*	780*	0*	340*
PET regrind mixed colours	460	420	350	420	380	440*
Average Price	**(589)**	**564**	**564**	**588**	**501**	**519**

*: 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

bvse market report: plastics, February 2026

For January 2026, there was an average price of 1,244 €/t, which was 77 €/t higher than that of the previous month (1,167 €/t), see Table The average price for January 2026 (1,244 €/t) was 2695 €/t below that of the previous year (1,513 €/t).

There were significant price changes of more than ±70 €/t for PC regranulates +480 €/t, PA 6 regranulates +210 €/t and POM regranulates +200 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The January price index reveals a higher demand for plastic over the previous month.

The probable average price February (1,198 €/t) is thus 46 €/t lower than in the previous month (1,244 €/t). The price index February of 18.02.2026 shows lower demand to date in comparison to the previous month.

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

	February[6] 26	**Jan 26**	**Dec 25**	**Nov 25**	**Oct 25**	**Jan 25**
ABS regrind	660	620	620	620	620	620
ABS regranulates[5]	1140	1160	1150	1240	1170	1270
PC regrind	840	870	890	920	1000	1000
PC regranulates[5]	2020	2200	1720	1620	1460	2650
PBT regrind	530	520	500	470	620	660
PBT regranulates	1610	1590	1610	1640	1550*	1980
PA 6 regrind	600	660	620	620	710	770
PA 6 regranulates[5]	1630	1740	1530	1630	1460	2270
PA 6.6 regrind	810	920	900	860	940	1130
PA 6.6 regranulates[5]	2180	2270	2260	2100	1970	2540
POM regrind	570*	640	660	590	610	800*
POM regranulates[5]	1780	1740	1540	1900	1900	2470
Average Price	**(1198)**	**1244**	**1167**	**1184**	**1168**	**1513**

*: 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

In January 2026, the secondary plastics market continued to be shaped by difficult conditions. At the start of the year, it became apparent that the anticipated recovery in demand had so far failed to materialise. The PET recycling market was more stable in January than in the previous month. The market remains well supplied. An excellent summary of the difficult situation for plastics recycling can be found in EUWID RE 7, 2026, p. 21.

4.1 Recycling standard plastics

The sluggish demand continued to be the biggest challenge for plastics recyclers in Germany in January. Although many buyers started production again in the new year, a marked rise in sales quantities failed to materialise. Instead, the market participants were still faced with warehouse reduction. Sales were cancelled or deferred. There were sales difficulties across nearly every grade.

bvse market report: plastics, February 2026

The economic situation of the plastics recycling sector is still extremely strained. The year 2025 has clearly left its mark on recyclers and plastics processors: plant closures, insolvencies and continuing high losses. At that start of the new year, hardly anything changed in this situation.

The package of measures for plastics announced by the EU Commission will still not help the sector as a short-term incentive for rising demand. There is still a lack of political support for encouraging the use of recyclates.

At the start of the year, there was positive news about rising recycling rates in Germany (71 % for 2024). However, this says nothing about a functioning circular economy and thus does not provide any information about the substitution of virgin grade, see www.bvse.de/gut-informiert-kunststoffrecycling/pressemitteilungen-kunststoffrecycling/12525-dr-dirk-textor-steigende-recyclingquote-darf-nicht-ueber-strukturelle-krise-hinwegtaeuschen.html

The demand for recyclates must be urgently increased before the PPWR takes effect with its recyclate usage quotas. Otherwise, there is the risk of a collapse of the plastics recycling sector in Europe, see
www.bvse.de/gut-informiert-kunststoffrecycling/pressemitteilungen-kunststoffrecycling/12528-ohne-politischen-kurswechsel-droht-der-industrielle-abstieg.html

EUWID: The January price index shows continued sluggish demand. The arithmetic mean is lower for: HDPE mixed colours -10 €/t, LDPE mixed colours -25 €/t, LDPE natural -25 €/t, LDPE film mixed colours (K49) -5 €/t, LDPE film natural (K40) -15 €/t, LDPE shrink hoods natural (E40) -20 €/t, LDPE shrink hoods mixed colours (E49) -5 €/t, PE film transparent natural < 70 µm -10 €/t, PE film transparent coloured < 70 µm -5 €/t, PE commercial mixed film (90/10) -10 €/t, PE commercial mixed film (80/20) -10 €/t and HDPE blow-moulded bodies coloured (C29) -10 €/t.

plasticker: The price index for January 2026 shows a slightly increased purchase demand for standard plastics. In February, by contrast, a lower purchase demand can be seen. In January 2026, standard plastics were quoted at an average price of 564 €/t and exactly the same as the previous month (564 €/t). The probable average price February (589 €/t) is thus 25 €/t higher than in the previous month (564 €/t). The average quotes for standard plastics could settle at around 596 €/t.

PIE – Plastic Information Europe, regranulates: in January 2026, standard plastics regranulates were quoted lower. The price fall were 5 to 40 €/t on average. Whereas the usage quotas that entered into force resulted in a price rise in the previous year, a similar effect did not occur in 2026. This often led to downward price adjustments. Demand remains low in comparison to virgin grade, see www.kiweb.de/.

4.2 Recycling technical plastics

The price development of technical plastics was inconsistent at the start of the year: whereas the prices of individual commodities stabilised, discounts were needed with others to generate sales. In spite of lines being booted and sufficient availability, demand remained weak because processors were slow in topping up their stocks. The further shrinking difference from the prices of virgin grade is also affecting demand for recyclates because processors are increasingly expecting a change to primary materials.

plasticker: For January 2026, there was an average price of 1,244 €/t, which was 77 €/t lower than that of the previous month (1,167 €/t). The January price index reveals a higher demand for plastic over the previous month. The February price index, by contrast, is lower.

PIE – Plastic Information Europe, regranulates: Technical plastics were still quoted lower in January 2026 than in the previous month. Commodities reported average price falls of 10 €/t to 30 €/t, see www.kiweb.de/.

4.3 PET recycling

At the start of the year, in January 2026, the European PET market noticeably picked up, triggered by rising Asian export prices and delays in imports as a consequence of port disputes. Against the background of European production that is already consolidated, large buyers secured additional quantities to forestall possible price rises. As a result, demand reached a level that is standard for the season, although there was still hardly any impetus from the end markets, which enabled suppliers to impose moderate price rises.

Consequently, the trend of falling bottle prices for used PET single-use deposit bottles continued. There were the following changes in comparison to the previous month: PET transparent -20 €/t, PET mixed -20 €/t and PET coloured -10 €/t, see EUWID.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,015 €/t, which rose by +20 €/t in comparison to the previous month.
By contrast, there were price falls for flakes and regranulates: Regranulates are valued at 1,530 €/ on average in PIE – Plastic Information Europe. Nd clear, food-safe flakes are quoted at an average 1,160 €/t in PIE – Plastic Information Europe. Both prices are lower than in the previous month.

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, Wednesday, 18 February   Anna Roeb, bvse