bvse market report: plastics, March 2026

1 General economy with reference to the plastics industry

The ifo business climate index has risen, see www.ifo.de/fakten/2026-02-23/ifo-geschaeftsklimaindex-gestiegen-februar-2026. The mood among companies in Germany has improved. The ifo business climate index rose to 88.6 points in February, following on from 87.6 in January. Companies were more satisfied with their current business. And expectations have also brightened. The German economy is showing the first signs of revival.

The index has risen again in the manufacturing sector. This was due to the noticeably improved assessments of the current business situation. Although expectations worsened, the order situation was developing positively and production plans were being revised upwards.

2 Primary markets - standard plastics

In February 2026, demand for standard plastics remained weak, an expected upturn failed to materialise. Supply was adequate and there was a turnaround for some prices. Overall, demand was rather subdued but not as bad as had been feared. Some suppliers posted slight improvements in orders and were able to end the month on schedule. 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 1,304 €/t and therefore 29 €/t higher than in the previous month (1,275 €/t). In a year-on-year comparison, it can be seen that the average quotes from February 2026 (1,304 €/t) were 140 €/t lower than those of the previous year (1,444 €//t). The prices of standard plastics underwent the following changes in February 2026: LDPE film grade +30 €/t, LLDPE film grade +10 €/t, HDPE injection moulding +10 €/t, HDPE blow moulding +10 €/t, PS crystal +105 €/t and PS impact +105 €/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: In February 2026, developments in the European PET market continued as in the previous month: delayed imports and lower supply in the eastern Mediterranean area. Uncertainties (including the USA-Iran conflict and weak signals from China) led to increased warehouse purchases in spite of weak end demand, whereby limited European product was available. As a result, the rise in prices for larger quantities was somewhat stronger. In February 2026, packaging PET was quoted on average at 1,030 €/t and thus rose +15 €/t in comparison to the previous month, see PIE – Plastic Information Europewww.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 March 2026; they will not become definitive until early April 2026. The two quotes stated for March 2026 below therefore indicate only an interim situation, see the left-hand column in the tables.

3.1 plasticker: Standard plastics

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The February price index is characterised by a slightly lower demand in comparison to the previous month. In February 2026, standard plastics were quoted at an average price of 562 €/t and thus 2 €/t lower than in the previous month (564 €/t), see Table. The average price for February 2026 (562 €/t) was 24 €/t above that of the previous year (538 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regranulates -80 €/t, LDPE regranulates +60 €/t, PP regranulates +40 €/t, PS regrind +120 €/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 March 2026 (558 €/t) is thus 4 €/t lower than in the previous month (562 €/t), see Table. The price index March of 17.03.2026 shows similar demand in comparison to the previous month.

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

	March[6] 26	**Feb 26**	**Jan 26**	**Dec 25**	**Nov 25**	**Feb 25**
HDPE regrind[1]	550	570	550	540	500	580
HDPE regranulates[5]	880	770	850	790	800	840
LDPE bale goods[2]	440*	400*	450*	440*	440*	460*
LDPE regrind[1]	360*	360	300	300*	380*	400*
LDPE regranulates[5]	740	710	690	700	690	650
PP bale goods[3]	210*	210*	210	90*	160*	220
PP regrind[1]	460	520	500	490	480	530
PP regranulates[5]	810	800	760	770	790	840
PS regrind[4]	700	780	660	750	740	680*
PS regranulates[5]	880	850	960	940	940	850
PVC_P regrind[1]	720*	680*	650*	710*	670*	340*
PVC_U regrind[1]	380*	450*	520*	480*	440	400*
PET bale goods	290*	330*	380*	550*	780*	310*
PET regrind mixed colours	390	440	420	350	420	430*
Average Price	**(558)**	**562**	**564**	**564**	**588**	**538**

*: 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 February 2026, there was an average price of 1,190 €/t, which was 54 €/t lower than that of the previous month (1,244 €/t), see Table And the average price for February 2026 (1,190 €/t) was 301 €/t below that of the previous year (1,491 €/t).

There were significant price changes of more than ±70 €/t for PC regranulates -220 €/t, PA 6 regranulates -80 €/t, PA 6.6 regranulates -170 €/t and POM regrind -80 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The February price index reveals a lower demand for plastic in comparison to the previous month.

The probable average price for March (1,231 €/t) is thus 41 €/t higher than in the previous month (1,190 €/t). The price index March of 17.03.2026 shows lower demand to date in comparison to the previous month.

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

	March[6] 26	Feb 26	Jan 26	Dec 25	Nov 25	Feb 25
ABS regrind	670	660	620	620	620	670
ABS regranulates[5]	1070	1110	1160	1150	1240	1270
PC regrind	850	820	870	890	920	980
PC regranulates[5]	2080	1980	2200	1720	1620	2520
PBT regrind	590	530	520	500	470	650
PBT regranulates	1550	1570	1590	1610	1640	2140
PA 6 regrind	610	610	660	620	620	760
PA 6 regranulates[5]	1790	1660	1740	1530	1630	2120
PA 6.6 regrind	710	910	920	900	860	1060
PA 6.6 regranulates[5]	2370	2100	2270	2260	2100	2390
POM regrind	560	560	640	660	590	710*
POM regranulates[5]	1920	1770	1740	1540	1900	2620
Average Price	**(1231)**	**1190**	**1244**	**1167**	**1184**	**1491**

*: 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 February 2026, the market for secondary plastics is still affected by no strong demand, but a slight upturn can be discerned. The PET recycling market is stable overall in comparison to the previous month of January. An excellent summary of the difficult situation for plastics recycling can be found in EUWID RE 11, 2026, p. 20.

4.1 Recycling standard plastics

In February, the prices for waste plastics developed differently, depending on the type, but overall they were stable to falling in comparison to January. Some recyclers deliberately forwent price rises in an attempt to prevent the recent slightly improved demand from coming to a halt.

Although the market in Europe has stabilised somewhat and is no longer in a strong downwards trend, there is still no surge in demand. Many recycling companies are working with low capacity utilisation of their facilities and some planned investments in new capacities have been postponed.

The continuing low prices for virgin grade are a major reason for the tense situation because they make recycled materials less competitive in many applications and thus exert additional pressure on the market.

EUWID: The February price index reports the same subdued demand as in January. The arithmetic mean is lower for: LDPE shrink hoods natural (E40) -5 €/t, PE film transparent coloured < 70 µm -5 €/t, PE commercial mixed film (90/10) +10 €/t and PE commercial mixed film (80/20) +7,5 €/t.

plasticker: The price index for February 2026 shows a slightly lower purchase demand for standard plastics. In March, a similar purchase demand can be seen. In February 2026, standard plastics were quoted at an average price of 562 €/t and thus 2 €/t lower than in the previous month (564 €/t). The probable average price March (558 €/t) is thus 4 €/t lower than in the previous month (562 €/t). The average quotes for standard plastics could settle at around 570 €/t.

PIE – Plastic Information Europe, regranulates: in February 2026, standard plastics regranulates were quoted lower. The price fall were 5 to 20 €/t on average. Regranulators are forgoing increasing prices so that they don't bring the slight revival in demand to a halt and are preferring to rely on sales volumes at the expense of margins. Little has changed with respect to the fundamental market conditions, see www.kiweb.de/.

4.2 Recycling technical plastics

In February, manufacturers were able to impose slightly higher prices in spite of weak demand, however, these were not across the board and not for all types of plastics. Manufacturers continued to keep their production reduced. The production rates, which have been reduced since last summer at the latest, now seem to be the new normality without jeopardising supply . Demand has stabilised at a low level.

plasticker: For February 2026, there was an average price of 1,190 €/t, which was 54 €/t lower than that of the previous month (1,244 €/t). The February price index reveals a lower demand for plastic in comparison to the previous month. As does the March price index to date.

PIE – Plastic Information Europe, regranulates: Technical plastics were still quoted lower in February 2026 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 February, the PET recycling market remained stable as a whole. The supply of used PET bottles was adequate and many recyclers still had large stocks of raw materials. The prices for bales of bottles remained largely stable in comparison to January. There were slight price falls only for coloured bales, which, among other things, is due to the continuing weak demand in some areas of application.

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 ±0 €/t, PET mixed ±0 €/t and PET coloured -10 €/t, see EUWID.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,030 €/t, which rose by +15 €/t in comparison to the previous month.
There was also price stability and rises for flakes and regraulates: Regranulates are valued at 1,530 €/t on average in PIE – Plastic Information Europe. And clear, food-safe flakes are quoted at an average 1,170 €/t in PIE – Plastic Information Europe. Both prices are the same as or 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

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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.

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