

bvse market report: plastics, April 2026

0 28th bvse Circular Plastic Day in Bad Neuenahr

bvse Fachverband Kunststoffrecycling would like to cordially invite you to the 28th bvse Circular Plastic Day, held at the Steigenberger Hotel in Bad Neuenahr on 9 and 10 June 2026.

On the conference page <https://altkunststofftag-bvse.de/> you can already find the online registration, information about booking hotels and organisational tips.

The 28th bvse Circular Plastic Day is being held under the heading **“Plastic Recycling 2026: Changing Markets – Shaping the Future with the PPWR”**.

We will open the conference on Tuesday, 9 June, with a welcome from bvse Vice President Dr. Herbert Snell and bvse Chairman of the Board Dr Dirk Textor. This will be followed by a key note speech by D. Henning Wilts (Head of Circular Economy Department of the Wuppertal Institute) on the motto of this year’s Circular Plastic Day. There will then be two fascinating talks: Talk 1 on **“Regulation as Engine or Brake – Which Markets Do We Need?”** and Talk 2 on **“Nordic Circularity – What Scandinavia Does Differently Today”**.

There will be two parallel workshops in the afternoon. Workshop A will contain inspiration on **“Innovation Makes the Circular Economy Possible: Technical Solutions for the Market”**. By contrast, Workshop B will highlight the **“Strengthening of the Circular Economy by a ‘Level Playing Field’ and Qualified Use of Recyclates”**. In the evening, it will be possible to network and chat to sector specialists at the traditional BBQ.

On Wednesday, 10 June, the conference will open and end with Workshop C, which will deal with **“Plastic Product Design in the Interdisciplinary Dialogue”**.

This year, more than 300 attendees from all over Germany, Europe and the world are expected in Bad Neuenahr again: plastic recyclers, as well as experts from business, science and administration.

We would be delighted to see you there, too.

1 General economy with reference to the plastics industry

The ifo business climate index has fallen, see <https://www.ifo.de/fakten/2026-03-25/ifo-geschaeftsklimaindex-gesunken-maerz-2026>. The mood among companies in Germany has deteriorated markedly. The ifo business climate index fell to 86.4 points in March, after 88.4 points in February. This is due to much more pessimistic expectations. By contrast, assessments of the current situation are unchanged. Uncertainty among companies increased noticeably. The war in Iran has brought the hopes for an upturn to an end for the time being.

In the manufacturing sector, the index has fallen, after the rises in previous months. In particular, expectations deteriorated markedly. Companies also assess their current business situation as worse. Energy-intensive industries have been most severely affected.

2 Primary markets– Standard plastics

In March 2026, the standard plastics market clearly turned into a sellers’ market due to the escalation in the Middle East. Many manufacturers issued order stops and closed their order books early. Prices rose noticeably and some of them were well above the development of monomer costs, whereby some existing price agreements were set aside. The previous supply surplus disappeared within a very short time. In addition, force majeure reports from European polyolefin plants brought

bvse market report: plastics, April 2026

about further shortages and increased pressure on prices. Note: The average prices cited here are calculated by bvse e.V. on the basis of the EUWID quotes.

Accordingly, the average of the EUWID prices was 1,556 €/t was therefore 252 €/t higher than in the previous month (1,304 €/t). In a year-on-year comparison, it can be seen that the average quotes from March 2026 (1,556 €/t) were 99 €/t higher than those of the previous year (1,457 €/t). The prices of standard plastics underwent the following changes in March 2026. LDPE film grade +300 €/t, LLDPE film grade +290 €/t, HDPE injection moulding +300 €/t, HDPE blow moulding +300 €/t, PS crystal clear +275 €/t, PS impact +275 €/t, PVC tube grade +90 €/t and PVC film/cables +90 €/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 March 2026, the European PET market was also greatly disrupted by the conflict in the Middle East. A noticeable shortage of raw materials led to a veritable run on available quantities. After the first force majeure reports, existing medium and long-term supply contracts were actually renegotiated. Market conditions exacerbated further over the course of the month, negotiations were carried out at ever shorter notice and some prices even changed daily. Overall, there were marked price rises of at least 100 to more than 500 €/t. Packaging PET was quoted at an average of 1,275 €/t in March 2026 and had therefore risen by +245 €/t 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 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 April 2026; they will not become definitive until early May 2026. The two quotes stated for April 2026 below only an interim situation, see the left-hand column in the tables.

3.1 plasticker: Standard plastics

The March price index is characterised by a slightly increased demand in comparison to the previous month. In March 2026, standard plastics were quoted at an average price of 562 €/t and is thus at the same level as in the previous month (562 €/t), see table. The average price for March 2026 (562 €/t) was 27 €/t higher than that of the previous year (535 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regranulates +150 €/t, LDPE regranulates +60 €/t, PP regrind -40 €/t, PP regranulates +60 €/t and PS regrind -140 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in April 2026 (621 €/t) is thus 59 €/t higher than in the previous month (562 €/t), see table. The price index April of 17.04.2025 shows better demand in comparison to the previous month.

bvse market report: plastics, April 2026

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

	April ⁶ 26	March 26	Feb 26	Jan 26	Dec 25	March 25
HDPE regrind ¹	590	590	570	550	540	580
HDPE regranulates ⁵	960	920	770	850	790	890
LDPE bale goods ²	350*	340*	400*	450*	440*	450
LDPE regrind ¹	360*	360*	360	300	300*	450*
LDPE regranulates ⁵	790	770	710	690	700	640
PP bale goods ³	420*	210*	210*	210	90*	200
PP regrind ¹	510	480	520	500	490	470
PP regranulates ⁵	980	860	800	760	770	740
PS regrind ⁴	770*	640	780	660	750	690
PS regranulates ⁵	1080	880	850	960	940	810
PVC_P regrind ¹	750*	730*	680*	650*	710*	500*
PVC_U regrind ¹	330*	380*	450*	520*	480*	410*
PET bale goods	420*	280*	330*	380*	550*	230*
PET regrind mixed colours	390*	430	440	420	350	430*
Average Price	(621)	562	562	564	564	535

*: 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 March 2026, there was an average price of 1,248 €/t, which was 66 €/t higher than that of the previous month (1,182 €/t), see table. The average price for March 2026 (1,248 €/t) was 225 €/t below that of the previous year (1,473 €/t).

There were significant price changes of greater than ±70 €/t for PA 6 regranulates +80 €/t, PA 6.6 regranulates +480 €/t and POM regrind +220 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The March price index is characterised by an increased demand in comparison to the previous month.

The probable average price April (1,291 €/t) is thus 43 €/t higher than in the previous month (1,248 €/t). The price index April of 17.04.2025 shows increased demand in comparison to the previous month.

bvse market report: plastics, April 2026

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

	April ⁶ 26	March 26	Feb 26	Jan 26	Dec 25	March 25
ABS regrind	680	670	660	620	620	650
ABS regranulates ⁵	1170	1080	1110	1160	1150	1290
PC regrind	840	840	820	870	890	920
PC regranulates ⁵	1990	2100	1980	2200	1720	2440
PBT regrind	570	580	530	520	500	610
PBT regranulates	1510	1530	1570	1590	1610	2070
PA 6 regrind	640	610	610	660	620	740
PA 6 regranulates ⁵	1810	1730	1660	1740	1530	2040
PA 6.6 regrind	800	720	910	920	900	1050
PA 6.6 regranulates ⁵	2670	2580	2100	2270	2260	2450
POM regrind	550	540*	560	640	660	860*
POM regranulates ⁵	2260	1990	1770	1740	1540	2560
Average Price	(1291)	1248	1190	1244	1167	1473

*: 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 March 2026, the market for secondary plastics was characterised by slightly rising demand due to the disruptions on the primary plastics market, without this already having become a clear change in the trend. The PET recycling market was stable in comparison to the previous month of February. An excellent summary of the difficult situation for plastic recycling can be found in EUWID RE 15, 2026, p. 20.

4.1 Recycling standard plastics

In March 2026, the first impacts of the Middle East crisis were felt on the market for secondary plastics. Although it was mainly the primary plastics that were affected at first, the strong price rises also brought noticeable impetus to the recycling market. In particular, for the polyolefins PP and PE.

However, a clear change in trend in favour of recyclates failed to materialise. Nevertheless, interest among processors rose, who made more inquiries about available quantities and prices. The background to this was the uncertainty and disruptions to the market for virgin grade.

EUWID: The March price index is characterised by a slightly increased demand in comparison to February. The arithmetic average is higher for: LDPE natural +5 €/t, LDPE film mixed (K49) +10 €/t, LDPE film natural (K40) +10 €/t, LDPE shrink hoods natural (E40) +10 €/t, LDPE shrink hoods coloured (E49) +10 €/t, PE film transparent natural < 70 µm +12.5 €/t, PE film transparent coloured < 70 µm +10 €/t, PE commercial mixed film (90/10) +10 €/t, PE commercial mixed film (80/20) +10 €/t, PP film coloured (K59) +10 €/t and PP film natural (K50) +5 €/t.

plasticker: The price index shows a slightly increased demand for standard plastics in March 2026. In April, there was also increased demand in comparison to this. In March 2026, standard plastics were quoted at an average price of 562 €/t, thus the same level as the previous month (562€/t). The

bvse market report: plastics, April 2026

probable average price April (621 €/t) is thus 59 €/t higher than in the previous month (562 €/t). The average quotes for standard plastics could settle at around 600 €/t.

PIE – Plastic Information Europe, regranulates: In March 2026, regranulates of standard plastics were quoted higher. The price rises are 20 to 80 €/t. Regranulators have slightly increased their prices due to the Iran war. In the face of the higher prices for virgin grade, many companies have turned to the cheaper alternative, recyclates, see www.kiweb.de/.

4.2 Recycling technical plastics

In March, demand for technical plastics also increased noticeably because the prices of virgin grade had risen sharply. Regranulators reacted with a greater price differentiation. Existing customers with monthly or quarterly contracts received more favourable terms, whereas new and ad-hoc customers had to accept surcharges of up to 150 €/t. Overall, supply was still at a normal level.

plasticker: For March 2026, there was an average price of 1,248 €/t, which was 66 €/t higher than that of the previous month (1,182 €/t). The March price index is characterised by a increased demand in comparison to the previous month. This is also the case for the April price index to date, which is at an average 1,291 €/t.

PIE – Plastic Information Europe, regranulates: Technical plastics were quoted higher than in the previous month in March 2026. Commodities reported average price rises of 30 €/t to 65 €/t, see www.kiweb.de/.

4.3 PET recycling

In March, the PET recycling market remained largely constant with stable demand because many contracts had been concluded prior to the current market disruptions. However, over the course of the month, demand rose noticeably, in particular from PET processors and, in some cases, from the film industry, which had previously procured only small amounts of or no recyclates because of low prices for virgin grade.

Consequently, there was a slight increase in the bottle prices for used PET single-use deposit bottles. There were the following changes in comparison to the previous month: PET transparent +5 €/t, PET mixed $\pm 5 \pm$ €/t and PET coloured ± 0 €/t, see EUWID.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,275 €/t, which has risen by +245 €/t in comparison to the previous month. There were also rises for flakes and regranulates: Regranulates are valued at 1,600 €/ on average in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,215 €/t in PIE – Plastic Information Europe.

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.

bvse market report: plastics, April 2026

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, Friday, 17 April

Anna Roeb, bvse