

bvse market report: plastics, May 2026

0 9 - 10 June – 28th Internationaler bvse-Altkunststofftag | bvse Circular Plastic Day

The 28th Bvse Circular Plastic Day, in the Steigenberger Hotel in Bad Neuenahr on 9 and 10 June 2026, offers a varied and fascinating programme, see <https://altkunststofftag-bvse.de/>. On the conference page you will find the online registration, information about booking hotels and organisational tips..

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

On Tuesday, 9 June, there will be a Key Note speech by Dr Henning Wilts (Head of the Circular Economy Department at the Wuppertal Institute), titled “**General Conditions for a Viable Recycles Market: Out of the Crisis Mode.**”. 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**”.

1 General economy with reference to the plastics industry

The ifo business climate index has fallen, see <https://www.ifo.de/fakten/2026-04-25/ifo-geschaeftsklimaindex-gesunken-april-2026>. The mood among companies in Germany has deteriorated markedly. The ifo business climate index fell to 84.4 points in April, after 86.3 in March. This is the lowest value since May 2020. Companies are increasingly pessimistic about the months ahead. They also assess their current business situation as worse. The Iran crisis is hitting the German economy hard.

The business climate has deteriorated in the manufacturing sector. This was due to much more pessimistic expectations, in the chemicals industry in particular. However, companies evaluate their current situation as contrast slightly better. Nevertheless, they are increasingly reporting supply bottlenecks for precursor products.

2 Primary markets– Standard plastics

In April 2026, the market for standard plastics was largely stable. The previously marked uncertainty abated and the processes appeared more orderly overall. The supply side remained tense, whereby the seller dominance that arose in March continued. In spite of limited availabilities, supply was still assessed as adequate. Impetus mainly came from rising prices and fears of possible supply bottlenecks as a result of geopolitical developments in the Middle East. This resulted in increased demand, especially at the start of the month.

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 2,259 €/t and was therefore 703 €/t higher than in the previous month (1,556 €/t). In a year-on-year comparison, it can be seen that the average quotes from April 2026 (2,259 €/t) were 824 €/t higher than those of the previous year (1,435 €/t). The

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prices of standard plastics underwent the following changes in April 2026: LDPE film grade +875 €/t, LLDPE film grade +900 €/t, HDPE injection moulding +925 €/t, HDPE blow moulding +925 €/t, PS crystal clear € +600/t, PS impact € +600/t, PVC tube grade € +375/t and PVC film/cables € +375/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 April 2026, the European PET market was still ruled by the tense situation at the Strait of Hormuz. In spite of weak demand, the purchase pressure remained high. At the same time, there was limited production and empty warehouses, with the result that transactions could largely be processed at short notice. Imports became more important again, but could not close the supply gaps. Due to the shortages, there were marked price rises in the three-figure range. No noticeable relief is in sight for May: more price surcharges are expected, although not as high as in April. Packaging PET was quoted at an average of 1,530 €/t in April 2026 and had therefore risen by € +255/t in comparison to the previous month, see PIE – Plastic Information Europe see 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 May 2026 here; they will not become definitive until early June 2026. The two quotes stated for May 2026 below therefore reflect only an interim situation, see the left-hand column in the tables.

3.1 plasticker: Standard plastics

The April price index is characterised by a slightly increased demand in comparison to the previous month. In April 2026, standard plastics were quoted at an average price of 612 €/t and thus 50 €/t higher than in the previous month (562 €/t), see table. The average price for April 2026 (612 €/t) was 56 €/t higher than that of the previous year (556 €/t). There were significant price changes of greater than ±40 €/t for: LDPE regranulates -40 €/t, PP regrind € +40/t, PP regranulates +140 €/t and PS regranulates € +220/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in May 2026 (639 €/t) is thus 27 €/t higher than in the previous month (612 €/t), see table. The price index May of 15.05.2026 shows lower demand to date in comparison to the previous month.

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

	May ⁶ 26	April 26	March 26	Feb 26	Jan 26	Apr 25
HDPE regrind ¹	560	590	590	570	550	570
HDPE regranulates ⁵	1110	940	920	770	850	850
LDPE bale goods ²	0	350*	340*	400*	450*	360
LDPE regrind ¹	360*	360*	360*	360	300	390
LDPE regranulates ⁵	1080	730	770	710	690	710
PP bale goods ³	280*	260*	210*	210*	210	180
PP regrind ¹	550	520	480	520	500	560
PP regranulates ⁵	1130	1000	860	800	760	800
PS regrind ⁴	950*	910*	640	780	660	810
PS regranulates ⁵	1210	1100	880	850	960	850
PVC_P regrind ¹	670*	760*	730*	680*	650*	580*
PVC_U regrind ¹	480*	340*	380*	450*	520*	430*
PET bale goods	170*	350*	280*	330*	380*	270*
PET regrind mixed colours	390*	360*	430	440	420	430
Average Price	(639)	612	562	562	564	556

*: 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 April 2026, there was an average price of 1,300 €/t, which was 52 €/t higher than that of the previous month (1,248 €/t), see table. The average price for April 2026 (1,300 €/t) was 108 €/t below that of the previous year (1,408 €/t).

There were significant price changes of more than ±70 €/t for: ABS regranulates +160 €/t, PC regranulates +140 €/t, PBT regranulates +110 €/t, PA 6 regranulates +210 €/t, PA 6.6 regrind +90 €/t, PA 6.6 regranulates -80 €/t and POM regranulates +270 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The April price index is characterised by a increased demand in comparison to the previous month.

The probable average price for May (1,360 €/t) is thus 60 €/t higher than in the previous month (1,300 €/t). The May price index of 15.05.2026 shows similar demand in comparison to the previous month.

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

	May ⁶ 26	Apr 26	March 26	Feb 26	Jan 26	Apr 25
ABS regrind	670	670	670	660	620	650
ABS regranulates ⁵	1250	1240	1080	1110	1160	1370
PC regrind	810	830	840	820	870	1070
PC regranulates ⁵	1990	1960	2100	1980	2200	2070
PBT regrind	610	550	580	530	520	570
PBT regranulates	1920	1640	1530	1570	1590	2150
PA 6 regrind	600	640	610	610	660	920

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PA 6 regranulates ⁵	2140	1940	1730	1660	1740	1850
PA 6.6 regrind	790	810	720	910	920	1100
PA 6.6 regranulates ⁵	2690	2500	2580	2100	2270	2440
POM regrind	580	560	540*	560	640	650
POM regranulates ⁵	2270	2260	1990	1770	1740	2060
Average Price	(1360)	1300	1248	1190	1244	1408

*: 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 April 2026, the market for secondary plastics was still marked by the rising prices for virgin grade. The PET recycling market was also stable in comparison to the previous month. An excellent summary of the difficult situation for plastic recycling can be found in EUWID RE 19, 2026, p. 27.

4.1 Recycling standard plastics

The marked rise in prices for virgin grade noticeably affected the market for secondary raw materials more in April than in March. In particular, the rising primary prices for regranulates from films, high-quality mixed commercial films and selected PP grades led to increased demand and more stable price developments.

In spite of these positive signals, market participants are still not talking about a lasting or comprehensive market recovery.

EUWID: The April price index is characterised by increased demand in comparison to March. The arithmetic average is higher for: HDPE coloured +25 €/t, HDPE natural +25 €/t, LDPE coloured +30 €/t, LDPE natural +30 €/t, LDPE film coloured (K49) -2.5 €/t, LDPE film natural (K40) +20 €/t, LDPE shrink hoods natural (E40) +25 €/t, PE film transparent natural < 70 µm +17.5 €/t, PE film transparent mixed colours < 70 µm -5 €/t, PE commercial mixed film (80/20) -2.5 €/t and PP film natural (K50) +10 €/t.

plasticker: The price index shows a slightly increased demand for standard plastics in April 2026. In May so far, there has been lower demand in comparison to this. In April 2026, standard plastics were quoted at an average price of 612 €/t and thus 50 €/t higher than in the previous month (562 €/t). The probable average price for May (639 €/t) is thus 27 €/t higher than in the previous month (612 €/t). The average quotes for standard plastics could settle at around 620 €/t.

PIE – Plastic Information Europe, regranulates: In April 2026, regranulates of standard plastics were quoted markedly higher. The price rises are 85 to 250 €/t. The increased prices of the virgin grade are making many processors turn to regranulates and the trend is continuing to rise, see www.kiweb.de/.

4.2 Recycling technical plastics

In April, material bottlenecks caused the prices for recycled technical plastics to rise across practically all types. Processors were seeking out regranulates more frequently, whereby the prices was increasingly of less importance.

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Recycling companies have recently been able to pass on the increased costs for base materials to the market, which is having a positive impact on their margins.

At the same time, the low availabilities and the falling stocks of additives and other aggregates are limiting the opportunities for recyclers to expand their production.

plasticker: For April 2026, there was an average price of 1,300 €/t, which was 52 €/t higher than that of the previous month (1,248 €/t). The April price index is characterised by a increased demand in comparison to the previous month. This is also the case for the May price index to date, which is at an average 1,360 €/t.

PIE – Plastic Information Europe, regranulates: Technical plastics were quoted higher than in the previous month in April 2026. Commodities reported average price rises of 120 €/t to 210 €/t, see www.kiweb.de/.

4.3 PET recycling

PET recycling picked up speed greatly in April. After several weak months, the high price rises for PET virgin grade, the start of the beverages season and high volumes of bottles led to rising quotes for PET recyclates. There is particular demand for clear flakes.

Additional impetus came from the virgin grade side: the crisis in the Middle East and uncertainties along the transport routes have resulted in much higher costs for feedstock, energy and primary materials on the European plastics market.

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 € +70/t, PET mixed +60 €/t and PET coloured +30 €/t, see EUWID.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,530 €/t, which has risen by € +255/t in comparison to the previous month. There were also rises for flakes and regranulates: Regranulates are valued at 1,850 €/ on average in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,450 €/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.

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

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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

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