bvse market report: plastics, June 2026

1 General economy with reference to the plastics industry

The ifo business climate index has risen, see https://www.ifo.de/fakten/2026-05-22/ifo-geschaeftsklimaindex-gestiegen-mai-2026. After the falls in March and April, the mood among Germany's companies has recovered slightly.
The ifo business climate rose to 84.9 points in May, after 84.5 in April. Companies were somewhat more satisfied with current business. And the outlook to the months ahead was less pessimistic. The German economy is stabilising for now, but the situation remains fragile.

The business climate has improved somewhat in the manufacturing sector. This is due to more positive assessments of the current situation. However, expectations are falling again. The number of new orders is falling.

2 Primary markets– Standard plastics

Following the turbulent previous months, the market for standard plastics calmed down noticeably in May 2026. Growth in demand was slow, whereas supply remained adequate and the feared shortages failed to materialise.

The picture as far as prices were concerned was mixed: Most contract prices were adhered to whereas spot prices came under pressure. Overall, plastics processors were satisfied with their capacity utilisation but reported slackening demand and a quieter order situation. Taking the imminent summer break into account, this is typical for the season.

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 2,342 €/t and was therefore 83 €/t higher than in the previous month (2,259 €/t). In a year-on-year comparison, it can be seen that the average quotes from May 2026 (2,342 €/t) were 959 €/t higher than those of the previous year (1,383 €//t). The prices of standard plastics underwent the following changes in May 2026: LDPE film grade +100 €/t, LLDPE film grade +100 €/t, HDPE injection moulding +100 €/t, HDPE blow moulding +100 €/t, PS crystal clear +55 €/t, PS impact +55 €/t, PVC tube grade +50 €/t and PVC film/cables +50€ /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 tense situation on the European PET market relaxed much faster than expected in May 2026. Falling prices along the Asian production chain resulted in cheaper imports, whereas the stock purchased triggered by fears of material shortages proved to be excessive.
In spite of high season, demand remained subdued meaning that many buyers are now sitting on expensive stocks. Although individual large customers have already been able impose price discounts, there were even moderate price rises, especially at the beginning of the month.

Packaging PET was quoted at an average of 1,545 €/t in May 2026 and had therefore risen by € +15/t in comparison to the previous month, see PIE – Plastic Information Europe www.kiweb.de/.

3 Secondary plastics markets in the plasticker price index

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

3.1 plasticker: Standard plastics

The May price index is characterised by higher demand in comparison to the previous month. In May 2026, standard plastics were quoted at an average price of 705 €/t and thus 93 €/t higher than in the previous month (612 €/t), see table. The average price for May 2026 (705 €/t) was 195 €/t higher than that of the previous year (510 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regranulates € +100/t, PP regranulates € +390/t, PP regranulates € +120/t and PS regranulates € +90/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in June 2026 (712 €/t) is thus 7 €/t higher than in the previous month (705 €/t), see table. The price index June of 15.06.2026 shows similar demand to date in comparison to the previous month.

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

	June[6] 26	**May 26**	**April 26**	**March 26**	**Feb 26**	**May 25**
HDPE regrind[1]	600	570	590	590	570	550
HDPE regranulates[5]	980	1040	940	920	770	840
LDPE bale goods[2]	780*	770*	350*	340*	400*	210*
LDPE regrind[1]	460*	380*	360*	360*	360	380
LDPE regranulates[5]	1190	1120	730	770	710	700
PP bale goods[3]	380*	420*	260*	210*	210*	190
PP regrind[1]	560	540	520	480	520	570
PP regranulates[5]	1100	1120	1000	860	800	750
PS regrind[4]	650*	850	910*	640	780	890
PS regranulates[5]	1050*	1190	1100	880	850	870
PVC_P regrind[1]	670*	690*	760*	730*	680*	0
PVC_U regrind[1]	530*	480*	340*	380*	450*	540*
PET bale goods	680*	340*	350*	280*	330*	260*
PET regrind mixed colours	340*	360*	360*	430	440	390
Average Price	**(712)**	**705**	**612**	**562**	**562**	**510**

*: 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 May 2026, there was an average price of 1,334 €/t, which was 34 €/t higher than that of the previous month (1,300 €/t), see table. The average price for May 2026 (1,334 €/t) was 16 €/t higher than that of the previous year (1,318 €/t).

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There were significant price changes of greater than ±70 €/t for PA regranulates € -70/t, PBT regranulates € +260/t and PA 6.6 regranulates € +160/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The May price index is characterised by a slightly increased demand in comparison to the previous month.

The probable average price for June (1,328 €/t) is thus 6 €/t lower than in the previous month (1,334 €/t). The June price index of 15.06.2026 shows lower demand in comparison to the previous month.

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

	June[6] 26	**May 26**	**April 26**	**March 26**	**Feb 26**	**May 25**
ABS regrind	660	680	670	670	660	630
ABS regranulates[5]	1220	1230	1240	1080	1110	1250
PC regrind	910	840	830	840	820	1120
PC regranulates[5]	2000	1890	1960	2100	1980	1920
PBT regrind	660*	600	550	580	530	590
PBT regranulates	1530	1900	1640	1530	1570	1770
PA 6 regrind	600	580	640	610	610	760
PA 6 regranulates[5]	1780	1990	1940	1730	1660	1740
PA 6.6 regrind	800	770	810	720	910	1060
PA 6.6 regranulates[5]	2560	2660	2500	2580	2100	2280
POM regrind	550*	580*	560	540*	560	690*
POM regranulates[5]	2670	2290	2260	1990	1770	2000
Average Price	**(1328)**	**1334**	**1300**	**1248**	**1190**	**1318**

*: 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 May 2026, the market for secondary plastics was stable overall. The uncertainties and price impulses that were triggered by the crisis in the Middle East temporarily sustained the demand for recyclates, but have now recently lost influence. The PET recycling market continued to be robust in comparison to the previous month. An excellent summary of the difficult situation for plastic recycling can be found in EUWID RE 24, 2026, p. 17.

4.1 Recycling standard plastics

In May 2026, the prices on the market for secondary raw materials remained largely stable in spite of sound demand. After the strong rises following on from the Middle East crisis, it was very difficult to impose further price hikes for recyclates and ground materials, especially as the prices for virgin grade are already falling again. Market participants are expecting a stable to slightly weaker development for June.

Supply to processors is deemed adequate, demand is falling due to the season and additional imports of virgin grade could increase the price pressure. Although high-quality, light-coloured and unmixed grades remain in demand, overall purchasers were more reticent. The impacts of the Middle East crisis are increasingly becoming less important and are now seen more as a short-term impulse for the recycling market.

But the current political situation also shows how large parts of industry are still heavily dependant on fossil raw materials, see https://www.bvse.de/gut-informiert-kunststoffrecycling/pressemitteilungen-kunststoffrecycling/12810-kunststoffrecycling-staerkt-resilienz-kreislaufwirtschaft-als-antwort-auf-volatile-rohstoffmaerkte.html

EUWID: The May price index is characterised by increased demand in comparison to April. 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 higher demand for standard plastics in May 2026. In June so far, there has been similar demand in comparison to this. In May 2026, standard plastics were quoted at an average price of 705 €/t and thus 93 €/t higher than in the previous month (612 €/t). The probable average price for June (712 €/t) is thus 7 €/t higher than in the previous month (705 €/t). The average quotes for standard plastics could settle at around 720 €/t.

PIE – Plastic Information Europe, regranulates: In May 2026, standard plastic regranulates were quoted higher again, but not as high as in the previous month. The price rises are 55 to 100 €/t. In spite of higher quotes, the existential pressure on recyclers remains, see www.kiweb.de/.

4.2 Recycling technical plastics

In May 2026, the prices for recycled technical plastics rose considerably due to limited supply and continuing high demand. Many processors had to accept noticeable surcharges to ensure their material supply.

Since the available quantities were scarce, recyclers often concentrated on supplying existing customers. A continuing upward trend is expected in the weeks ahead because the supply of raw materials remains limited and demand is stable. At the same time, some processors are increasingly reaching their limits in financing higher material costs.

plasticker: For May 2026, there was an average price of 1,334 €/t, which was 34 €/t higher than that of the previous month (1,300 €/t). The May price index is characterised by a slightly increased demand in comparison to the previous month. The June price index to date shows lower demand and is at an average 1,328 €/t.

PIE – Plastic Information Europe, regranulates: Technical plastics were again quoted higher than in the previous month in May 2026. Commodities reported average price rises of 85 €/t to 120 €/t, see www.kiweb.de/.

4.3 PET recycling

The PET recycling market continued to be robust in May. Continuing good demand for flakes and lasting problems in transport logistics with high freight costs and delays were a problem for the market participants. Against this backdrop, prices could rise again.

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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 € +50/t, PET mixed € +40/t and PET coloured +30 €/t, see EUWID.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,545 €/t, which has risen by € +15/t in comparison to the previous month.

There were also rises for flakes and regranulates: Regranulates are valued at 1,945 €/ on average in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,525 €/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 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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