bvse market report: plastics, July 2026

1 General economy with reference to the plastics industry

The ifo business climate index has risen, see https://www.ifo.de/fakten/2026-06-24/ifo-geschaeftsklimaindex-gestiegen-juni-2026. The mood among companies in Germany has improved. The ifo business climate rose to 85.6 points in June, after 85.0 in May. Companies assess their current business situation as better. And expectations were also somewhat less sceptical. Companies assess the environment as less uncertain. The German economy is hoping that the international political situation will ease.

The index has risen in the manufacturing sector. This is due to the noticeably improved expectations. The assessments of the current situation were corrected slightly downwards. The number of new orders is falling again.

2 Primary markets– Standard plastics

In June 2026, the market for standard plastics was characterised by a sharp price correction. Both in spot and contract transactions, quotes fell markedly because polymer manufacturers increasingly adjusted their price demands to the weaker market situation. At the same time, demand among processors remained subdued. Many companies initially concentrated on depleting their warehouse stocks that had been built up during the previous price rises. The expectation of further falling raw material and polymer prices also dampened willingness to purchase and overall brought about quiet market activity.

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 2,099 €/t and was therefore 243 €/t lower than in the previous month (2,342 €/t). In a year-on-year comparison, it can be seen that the average quotes from June 2026 (2,099 €/t) were 729 €/t higher than those of the previous year (1,370 €//t). The prices of standard plastics underwent the following changes in June 2026: LDPE film grade -430 €/t, LLDPE film grade -435 €/t, HDPE injection moulding -400 €/t, HDPE blow moulding -400 €/t, PS crystal clear -5 €/t, PS high impact -5 €/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 European PET market lost a great deal of momentum in June. After the end of the stock purchases triggered by the crisis, the warehouses of many processors were full, with the result that demand could be covered without any great difficulties. Although there were signs of a slight recovery in individual end markets, overall seasonal demand remained below expectations. Imports from Asia generated further competitive pressure, as a result of which European providers had to noticeably reduce their price demands.

Packaging PET was quoted at an average of 1,425 €/t in June 2026 and had therefore fallen by € 120/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 July 2026; they will not become definitive until early August 2026. The two quotes stated for July 2026 below therefore reflect only an interim situation, see the left-hand column in the tables.

3.1 plasticker: Standard plastics

The June price index is characterised by lower demand in comparison to the previous month. In June 2026, standard plastics were quoted at an average price of 634 €/t and thus 71 €/t lower than in the previous month (705 €/t), see table. The average price for June 2026 (634 €/t) was 114 €/t higher than that of the previous year (520 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regranulates -150 €/t, LDPE regranulates -80 €/t and PP regrind +40 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in July 2026 (611 €/t) is thus 23 €/t lower than in the previous month (634 €/t), see table. The July price index of 15.07.2026 shows lower demand to date in comparison to the previous month.

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

	July[6] 26	**June 26**	**May 26**	**April 26**	**March 26**	**June 25**
HDPE regrind[1]	570	600	570	590	590	570
HDPE regranulates[5]	830	920	1040	940	920	830
LDPE bale goods[2]	310*	470*	770*	350*	340*	180*
LDPE regrind[1]	540*	570*	380*	360*	360*	280
LDPE regranulates[5]	1110	940	1120	730	770	740
PP bale goods[3]	220*	210	420*	260*	210*	170*
PP regrind[1]	600	540	540	520	480	510
PP regranulates[5]	1080	930	1120	1000	860	820
PS regrind[4]	690*	710*	850	910*	640	870
PS regranulates[5]	1000*	970	1190	1100	880	960
PVC_P regrind[1]	630*	650*	690*	760*	730*	460*
PVC_U regrind[1]	660*	490*	480*	340*	380*	320*
PET bale goods	0*	570*	340*	350*	280*	190*
PET regrind mixed colours	310*	310	360*	360*	430	380*
Average Price	**(611)**	**634**	**705**	**612**	**562**	**520**

*: 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 June 2026, there was an average price of 1,242 €/t, which was 92 €/t lower than that of the previous month (1,334 €/t), see table. The average price for June 2026 (1,242 €/t) was 48 €/t below that of the previous year (1,290 €/t).

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There were significant price changes of greater than ±70 €/t for: ABS regranulates +200 €/t, PC regrind -140 €/t, PC regranulates -130 €/t, PBT regranulates -190 €/t and PA 6.6 regranulates -240 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The June price index is characterised by a slightly lower demand in comparison to the previous month.

The probable average price for July (1,212 €/t) is thus 30 €/t lower than in the previous month (1,242 €/t). The July price index of 15.07.2026 shows lower demand in comparison to the previous month.

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

	July[6] 26	June 26	May 26	April 26	March 26	June 25
ABS regrind	640	650	680	670	670	620
ABS regranulates[5]	1420	1340	1230	1240	1080	1240
PC regrind	770	950	840	830	840	1050
PC regranulates[5]	1870	2010	1890	1960	2100	1490
PBT regrind	590	630	600	550	580	540
PBT regranulates	1340	1680	1900	1640	1530	1700
PA 6 regrind	590	590	580	640	610	840
PA 6 regranulates[5]	1760	1810	1990	1940	1730	1800
PA 6.6 regrind	800	80	770	810	720	1040
PA 6.6 regranulates[5]	2320	2520	2660	2500	2580	2300
POM regrind	550	570	580*	560	540*	830*
POM regranulates[5]	1890	2070	2290	2260	1990	2030
Average Price	**(1212)**	**1242**	**1334**	**1300**	**1248**	**1290**

*: 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

After the price rises of the previous months, the market for secondary plastics cooled sharply in June 2026. Falling prices for virgin grade increased the competitive pressure on recyclates, whereas demand from many processors weakened due to high stocks in warehouses and seasonal reticence. At the same time, uncertainties in the export trade and the implementation of new regulations on cross-border waste transports placed additional stresses on market development. An detailed description of the current situation can be found in EUWID RE 29, 2026, p. 24.

4.1 Recycling standard plastics

The market for secondary plastics developed slowly in June 2026. The falling prices for primary plastics increased the competitive pressure on regranulates and regrinds, as a result of which price adjustments were inevitable in many cases. At the same time, demand among processors remained weak. Whereas high-quality and unmixed grades were still in comparatively high demand, cheap offers of virgin grade and weak export markets made the sales of recycled material more difficult. Overall, cautious buying strategies and low market activity predominated.

EUWID: The June price index is characterised by lower demand in comparison to May. The arithmetic average is lower for: LDPE film coloured (K49) -10 €/t, PE film transparent mixed colours < 70 µm -25 €/t, LDPE agricultural film black or white > 70 µm (B41) -10 €/t and HDPE crates coloured -10 €/t.

plasticker: The price index shows a lower demand for standard plastics in June 2026. In July so far, there has also been lower demand in comparison to this. In June 2026, standard plastics were quoted at an average price of 634 €/t and thus 71 €/t higher than in the previous month (705 €/t). The probable average price for July (611 €/t) is thus 23 €/t lower than in the previous month (634 €/t). The average quotes for standard plastics could settle at around 640 €/t.

PIE – Plastic Information Europe, regranulates: The price pressure continued in June for standard regranulates. In spite of predominantly good sales rates, cheap offers of virgin grade and low demand resulted in large price rises. Market participants are expecting a quiet development for the summer months. The price falls are 10 to 35 €/t, see www.kiweb.de/.

The current discussions about the Packaging Implementation Act and the increased use of recyclates also emphasise the strategic importance of plastic recycling for supplying industry with raw materials. In particular, the bvse welcomed the possibility of greater consideration of the use of recyclates within the context of eco-modelling and the recognition of recyclates as a strategic raw material for Europe, see bvse press release „Neues VerpackDG: Last-Minute-Regelung für Rezyklateinsatz“

4.2 Recycling technical plastics

The market for technical recyclates lost a great deal of momentum in June. Contrary to what many market participants had been expecting, the drop in demand started as early as June. As incoming order fell, quotes also came under pressure and, in some cases, fell more than those of standard regranulates. Material supply remained adequate overall, while the start of the summer holiday period further dampened demand. In the short term, therefore, no major demand stimulus is to be expected.

plasticker: For June 2026, there was an average price of 1,242 €/t, which was 92 €/t lower than that of the previous month (1,334 €/t). The June price index is characterised by a slightly lower demand in comparison to the previous month. The July price index to date shows lower demand and is at an average 1,212 €/t.

PIE – Plastic Information Europe, regranulates: The demand for technical regranulates fell sharply in June earlier than expected. Quotes also fell correspondingly. Due to the start of the holiday season, a continuing quiet market development is expected for the summer months. Commodities reported average price rises of 30 €/t to 50 €/t, see www.kiweb.de/.

4.3 PET recycling

The PET recyclate market noticeably lost momentum in June after the strong price rises of the previous months. Although sales of flakes and regranulates remained at a decent level overall, the price development tailed off markedly. Falling prices for virgin grade reduced the price gap between primary and recycled material and thus increased the competitive pressure on recyclates. At the same time, demand was quieter for seasonal reasons. High-quality, food-safe grades remained in demand, however the “wait and see” attitude of market participants prevailed.

Consequently, there was a slight fall in the bottle prices for used PET single-use deposit bottles. There were the following changes in comparison to the previous month: PET transparent € -10/t, PET mixed € -10/t and PET coloured € -10/t, see EUWID.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,425 €/t, which has fallen by € 120/t in comparison to the previous month.

There were also falls for flakes and regranulates: Regranulates are valued at 1,925 €/ on average in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,500 €/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.

Bonn, Thursday, 16 July 2026 Anna Roeb, bvse