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1 General economy with reference to the plastics industry

The ifo business climate index has risen, see https://www.ifo.de/fakten/2026-07-27/ifo-geschaeftsklimaindex-gestiegen-juli-2026. The mood among companies in Germany has improved. The ifo business climate index rose to 86.6 points in July, following on from 85.7 in June. This is due to much better expectations. But companies were somewhat less satisfied with current business. In spite of the uncertain situation in the Persian Gulf, the German economy was less pessimistic.

The index has risen noticeably in the manufacturing sector. In particular, expectations jumped. The assessments of the current situations, however, were slightly worse. Demand revived, the materials shortage diminished.

2 Primary markets - standard plastics

In July 2026, the market for standard plastics continued to be characterised by falling prices and subdued demand. After the quotes had already fallen sharply in the previous month, the downwards trend continued. There were marked price falls for polyethylene in particular. Overall, supply was extensive and was easily sufficient to meet the processors' needs. In addition, imports from Asia, the Middle East and North America were available.

By contrast, demand continued to develop sluggishly. Many processors still had enough inventory and restricted their purchases to their immediate needs. Holiday periods and weak incoming orders from major customer sectors also dampened market activity. The downwards trend was more moderate for polypropylene, while falling costs caused marked price falls for polystyrene. Demand for PVC was also weak. A quiet market is expected for August due to the summer holidays.

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 1,786 €/t and therefore 313 €/t lower than in the previous month (2,099 €/t). In a year-on-year comparison, it can be seen that the average quotes from July 2026 (1,786 €/t) were 430 €/t higher than those of the previous year (1,356 €//t). The prices of standard plastics underwent the following changes in July 2026: LDPE film grade -400 €/t, LLDPE film grade -375 €/t, HDPE injection moulding -300 €/t, HDPE blow moulding -300 €/t, PS crystal clear -370 €/t, PS impacts -370 €/t, PVC tube grade -160 €/t and PVC film/cables -160 €/t.

The current market situation for virgin grade standard plastics is portrayed well in EUWID, see www.euwid-recycling.de, and PIE – Plastics Information Europe, see www.kiweb.de/.

PET: The European PET market continued to be subject to price pressure in July. After the quotes had fallen sharply in June, they fell again. In spite of changing geopolitical conditions, there was no sustained counter movement. Processors' warehouses were sufficiently stocked and demand from end markets developed modestly in spite of the summer temperatures.

At the same time, supply was adequate. In addition to European production, imports were also available, meaning that there were no bottlenecks. For August, market participants are mainly expecting a sideways movement or only slight price changes. A noticeable revival in demand is anticipated more in September and October.

In July 2026, packaging PET was quoted on average at 1,390 €/t and thus fell by 35 €/t in comparison to the previous month, see PIE – Plastic Information Europe www.kiweb.de/.

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

3.1 plasticker: Standard plastics

The July price index is characterised by lower demand in comparison to the previous month. In July 2026, standard plastics were quoted at an average price of 568 €/t price is thus 66 2 €/t lower than in the previous month (634 €/t), see Table. The average price for July 2026 (568 €/t) was 1 €/t below that of the previous year (569 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regranulates -80 €/t, LDPE regranulates +120 €/t and PP regranulates +140 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in August 2026 (579 €/t) is thus 11 €/t higher than in the previous month (568 €/t), see Table. The price index August of 07.08.2026 shows lower demand in comparison to the previous month.

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

	August[6] 26	July 26	June 26	May 26	April 26	July 25
HDPE regrind[1]	640	590	600	570	590	590
HDPE regranulates[5]	860	840	920	1040	940	830
LDPE bale goods[2]	210*	230*	470*	770*	350*	390*
LDPE regrind[1]	360*	370*	570*	380*	360*	370
LDPE regranulates[5]	950*	1060	940	1120	730	740
PP bale goods[3]	210*	220*	210	420*	260*	250
PP regrind[1]	520	520	540	540	520	530
PP regranulates[5]	1090	1070	930	1120	1000	800
PS regrind[4]	500*	510*	710*	850	910*	870
PS regranulates[5]	870*	960	970	1190	1100	850
PVC_P regrind[1]	680*	650*	650*	690*	760*	610*
PVC_U regrind[1]	730*	650*	490*	480*	340*	400*
PET bale goods	240*	0*	570*	340*	350*	330*
PET regrind mixed colours	250*	280	310	360*	360*	400
Average Price	**(579)**	**568**	**634**	**705**	**612**	**569**

*: 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

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For July 2026, there was an average price of 1,178 €/t, which was 64 €/t lower than that of the previous month (1,242 €/t), see Table And the average price for July 2026 (1,178 €/t) was 180 €/t below that of the previous year (1,258 €/t).

There were significant price changes of greater than ±70 €/t for: ABS regrind -100 €/t, ABS regranulates +70 €/t, PC regrind -140 €/t, PC regrind -250 €/t, PC regranulates -130 €/t, PBT regrind -130 €/t, PBT regranulates -230 €/t, PA 6.6 regrind -130 €/t, PA 6.6 regranulates -220 €/t and POM regranulates -280 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The July price index reveals a slightly lower demand for plastic in comparison to the previous month.

The probable average price for August (1,183 €/t) is thus 5 €/t higher than in the previous month (1,178 €/t). The price index August of 07.08.2026 shows lower demand to date in comparison to the previous month.

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

	August[6] 26	July 26	June 26	May 26	April 26	July 25
ABS regrind	450	550	650	680	670	660
ABS regranulates[5]	1520	1410	1340	1230	1240	1260
PC regrind	620	700	950	840	830	1020
PC regranulates[5]	1870	1880	2010	1890	1960	1890
PBT regrind	490*	500	630	600	550	570
PBT regranulates	1570	1450	1680	1900	1640	1710
PA 6 regrind	560	550	590	580	640	780
PA 6 regranulates[5]	2000	1800	1810	1990	1940	1950
PA 6.6 regrind	650	670	800	770	810	1010
PA 6.6 regranulates[5]	2430	2300	2520	2660	2500	2180
POM regrind	570	540	570	580*	560	820*
POM regranulates[5]	1470	1790	2070	2290	2260	2440
Average Price	**(1183)**	**1178**	**1242**	**1334**	**1300**	**1358**

*: 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

The market for secondary plastics remained weak overall in July 2026. Low demand, increasing export problems and the continuing competitive pressure from cheap virgin grade affected the recycling markets. In spite of the low sales, the prices of many regrinds and regranulates initially remained comparatively stable in comparison to the previous month. However, the summer holidays and production pauses of many processors caused additional reticence.

The market participants are not anticipating any fundamental revival in August. Many processors have cut or temporarily stopped production and will probably not increase their orders again until after the holiday season. At the same time, stagnant export opportunities are making the sale of plastic waste and recyclates more difficult.

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A detailed analysis of the current situation can be found in EUWID RE 33, 2026, p. 22.

4.1 Recycling standard plastics

The market for secondary raw materials continued its subdued development in July. The processors' demand remained low and was often limited to quantities required at short notice. The holiday season and reduced production activities strengthened this development. At the same time, cheap virgin grade offers often prevented stronger demand for regrinds and regranulates.

Additional pressure generated difficulties in export business. With film waste in particular, administrative problems associated with the new regulations on international waste trafficking continued to hamper sales opportunities. At the same time, additional imports of virgin grade from the USA further sharpened competition on the European market. Further quiet developments are expected for August.

The difficult market situation also underlines the need for reliable political conditions for plastic recycling. bvse therefore supports the demands of Recycling Europe for stable markets for recyclates, fair competitive conditions versus imports and long-term investment-friendly conditions, see bvse press release "Recycling braucht verlässliche Rahmenbedingungen – bvse unterstützt Forderungen von Recycling Europe [Recycling needs reliable conditions - bvse supports Recycling Europe demands]".

EUWID: The July price index is characterised by lower demand in comparison to June. The arithmetic mean is lower for: PE film transparent coloured < 70 µm
-30 €/t, LDPE agricultural film black or white > 70 µm (B41) -30 €/t, PE commercial mixed film (90/10) -10 €/t and PE commercial mixed film (80/20) -20 €/t.

plasticker: The price index for July 2026 shows a lower purchase demand for standard plastics. In August, lower purchase demand can also be seen so far. In July 2026, standard plastics were quoted at an average price of 568 €/t and thus 66 €/t lower than in the previous month (634 €/t). The probable average price for August (579 €/t) is thus 11 €/t higher than in the previous month (568 €/t). The average quotes for standard plastics could settle at around 600 €/t.

PIE – Plastic Information Europe, regranulates: The virgin grade prices of standard regranulates once again exerted more pressure on prices in July. Many suppliers felt they were forced into large price reductions. A downwards trend is also expected for August. The price falls were 50 to 150 €/t, see www.kiweb.de/.

4.2 Recycling technical plastics

The market for technical plastics was weak in July. Demand was well below the usual level due to the holiday season, higher warehouse stocks at processors' premises and an overall quiet orders situation. At the same time, there was enough starting material available meaning that supply met demand. For some grades, this resulted in a slight surplus.

plasticker: For July 2026, there was an average price of 1,178 €/t, which was 64 €/t lower than that of the previous month (1,242 €/t). The July price index reveals a slightly lower demand for plastic in comparison to the previous month. The August price index shows lower demand so far and is at an average 1,183 €/t.

PIE – Plastic Information Europe, regranulates: In July, the market for technical regranulates was characterised by low demand and an adequate supply of materials. Prices remained stable for most grades. Only some quotes fell slightly. Slight changes are also expected for August. The commodities recorded average price reductions of 10 €/t, see www.kiweb.de/.

4.3 PET recycling

The PET recycling market came under greater pressure in July. An unusually large volume of used beverage bottles was countered by falling demand for flakes and regranulates. Whereas clear flakes were still in relatively high demand, the sales of coloured grades in particular was increasingly difficult. At the same time, recyclers came under growing competitive pressure from cheaper PET virgin grade.

And with used PET single-use beverage bottles, the high volumes led to falling prices. Many recyclers had well stocked warehouses, whereas individual customers cut their orders or partially returned to primary PET. This increased the price pressure along the recycling chain. Increasing supply and subdued demand is continued to be expected for the weeks ahead.

Consequently, a slight fall in bottle prices for used PET single-use deposit bottles was seen. There were the following changes in comparison to the previous month: PET transparent -35 €/t, PET mixed -35 €/t and PET coloured -40 €/t, see EUWID.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,390 €/t, which fell by -35 €/t in comparison to the previous month.

There were also falls for flakes and regraulates: Regranulates are valued at 1,775 €/t on average in PIE – Plastic Information Europe. And clear, food-safe flakes are quoted at an average 1,440 €/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 and Disposal see www.kiweb.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, Friday, 21 August 2026 Anna Roeb, bvse