

bvse market report: plastics, September 2026

1 General economy with reference to the plastics industry

The ifo business climate index has risen, see <https://www.ifo.de/fakten/2026-08-25/ifo-geschaeftsklimaindex-gestiegen-august-2026>. Confidence among companies in Germany has increased. The ifo business climate rose to 88.8 points in August, after 86.7 in July. Companies were more satisfied with their current situation. They also corrected their expectations clearly upwards. Uncertainty continued to decrease. In spite of the further rise in energy prices, the German economy recovered.

The index has risen markedly in the manufacturing sector. Company bosses assessed their current business as much better. And expectations were marked by less scepticism. Production should rise in the next three months. However, companies were still dissatisfied with the order situation.

In mid-September 2026, Plastics Europe published the second quarterly report. An initial revival was also seen in the plastics producing industry in the second quarter. Production rose by 3.5 % in comparison to the previous quarter. Turnover increased by 16.7 % to around Euro 6.9 billion. Foreign trade also developed positively: exports rose by 13.5 %, imports by 20.6 %.

However, we cannot yet talk about a lasting turnaround. Among other things, the development was shaped by precautionary orders and building up stocks as a result of the conflict in the Middle East and temporarily smaller deliveries from Asia and the Middle East. As early as May and June, incoming orders were already starting to fall off. At the same time, high energy and raw materials costs and structural locational disadvantages continued to have a negative impact. In the second quarter the production level was still more than 25 % below the pre-crisis level of 2021. A difficult market environment and subdued demand for plastic from Germany are therefore to be expected for the second half of the year.

2 Primary markets– Standard plastics

After the sharp price movements of recent months, calm returned to the market for standard plastics in August. Sufficient supply was balanced by weak demand due to the holiday season. Accordingly, prices for many standard plastics hardly changed in comparison to July.

Demand as a whole was subdued. At the same time, major customer sectors remained weak. Above all, there was still little impetus from the automotive industry. By contrast, the packaging industry was more stable. The demand for flexible packagings remained stable, whereas standard demand for the season was seen for dimensionally stable plastic packagings. And the higher precursor costs could only be passed on to processors to a limited extent. At first, only minor changes can be seen for the further course of the market.

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 1,802 €/t and was therefore 16 €/t higher than in the previous month (1,786 €/t). In a year-on-year comparison, it can be seen that the average quotes from August 2026 (1,802 €/t) were 453 €/t higher than those of the previous year (1,349 €/t). The prices of standard plastics underwent the following changes in August 2026: HDPE blow moulding 150 €/t, PS crystal clear -80 €/t and PS impact -80 €/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 continued to be calm in August. The holiday season and reduced manufacturing activities by processor had a negative impact on demand. At the same time, supply

bvse market report: plastics, September 2026

remained adequate, with the result that the higher precursor product costs were not translated to rising PET prices.

For September, a sideways movement is emerging, with at most moderate price rises. In particular, there is uncertainty in the development of precursor product costs and international logistics.

Packaging PET was quoted at an average of 1,350 €/t in August 2026 and had therefore fallen by € 40/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 the month of the report, in this case September 2026; they will not become definitive until early October 2026. The two quotes stated for August 2026 below therefore reflect only an interim situation, see the left-hand column in the tables.

3.1 plasticker: Standard plastics

The August price index is characterised by higher demand in comparison to the previous month. In August 2026, standard plastics were quoted at an average price of 581 €/t and thus 13 €/t higher than in the previous month (568 €/t), see table. The average price for August 2026 (581 €/t) was 12 €/t higher than that of the previous year (569 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regrind € 100/t, LDPE regrind € -90/t, PP regrind € 50/t and PS regrind € -70/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in September 2026 (580 €/t) is thus 1 €/t lower than in the previous month (581 €/t), see table. The September price index of 18.09.2026 shows similar high demand to date in comparison to the previous month.

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

	September ⁶ 26	Aug 26	July 26	June 26	May 26	Aug 25
HDPE regrind ¹	580	610	590	600	570	580
HDPE regranulates ⁵	940	940	840	920	1040	790
LDPE bale goods ²	130	120	230*	470*	770*	330*
LDPE regrind ¹	350	360	370*	570*	380*	430*
LDPE regranulates ⁵	940	970	1060	940	1120	680
PP bale goods ³	200	210	220*	210	420*	350*
PP regrind ¹	540	570	520	540	540	490
PP regranulates ⁵	1080	1080	1070	930	1120	770
PS regrind ⁴	530	530	510*	710*	850	930
PS regranulates ⁵	1040	890	960	970	1190	890
PVC_P regrind ¹	680	680	650*	650*	690*	550*
PVC_U regrind ¹	610	650	650*	490*	480*	440*
PET bale goods	230	230	0*	570*	340*	380*
PET regrind mixed colours	270	290	280	310	360*	350
Average Price	(580)	581	568	634	705	569

bvse market report: plastics, September 2026

*: 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 August 2026, there was an average price of 1,043 €/t, which was 135 €/t lower than that of the previous month (1,178 €/t), see table. The average price for August 2026 (1,043 €/t) was 264 €/t below that of the previous year (1,307 €/t).

There were significant price changes of greater than ±70 €/t for: PA 6.6 regranulates -120 €/t and POM regranulates -280 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The August price index is characterised by a lower demand in comparison to the previous month.

The probable average price for September (1,158 €/t) is thus 115 €/t higher than in the previous month (1,043 €/t). The September price index of 18.09.2026 shows higher demand in comparison to the previous month.

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

	September⁶ 26	Aug 26	July 26	June 26	May 26	Aug 25
ABS regrind	540	490	550	650	680	610
ABS regranulates ⁵	1310	1390	1410	1340	1230	1170
PC regrind	740	730	700	950	840	960
PC regranulates ⁵	1900	1860	1880	2010	1890	1800
PBT regrind	550	490	500	630	600	570
PBT regranulates	1340	1490	1450	1680	1900	1640
PA 6 regrind	560	570	550	590	580	700
PA 6 regranulates ⁵	1680	1840	1800	1810	1990	1850
PA 6.6 regrind	750	670	670	800	770	1060
PA 6.6 regranulates ⁵	2420	2420	2300	2520	2660	2160
POM regrind	560	570	540	570	580*	580*
POM regranulates ⁵	1550	1510	1790	2070	2290	2310
Average Price	(1158)	1043	1178	1242	1334	1307

*: 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 August 2026, the market for secondary plastics remained under pressure overall. Across all of the different types of plastic, there was weak demand, which was additionally dampened by the holiday season. Many processors restricted their orders to their immediate needs. At the same time, adequate warehouse stocks and the continuing cheap virgin grade caused additional competitive and price pressure on recyclates.

bvse market report: plastics, September 2026

Whereas further price falls were seen with standard and technical recyclates, the PET recycling market in particular remained tense. For September, a slight revival after the end of the holiday season is expected, but there are currently no signs of a fundamental improvement in the market situation.

An detailed description of the current situation can be found in EUWID RE 37, 2026, p. 21.

4.1 Recycling standard plastics

In August 2026, the market for secondary raw materials continued to be under pressure. The weak demand during the summer holidays was countered by sufficient warehouse stocks among recyclers. Many processors bought only the quantities that they immediately needed or completely dispensed with orders during factory holidays. In addition, the low price level of virgin grade had a negative impact on the market. For various regranalates, further downward price adjustments were required to be able to sell quantities. For regrinds, some price movements were smaller than in July. The holiday season caused reduced manufacturing activities both for recyclers and processors. In particular, demand from the automotive, electrical and construction industry remained weak.

The continuing difficult economic situation in the plastics recycling sector has now moved further to the fore across Europe. Twenty-eight organisations in the plastics value added chain are demanding immediate actions to stabilise European plastic production and recycling. Among other things, they are demanding fair competitive conditions vis-a-vis imports, investment incentives and stronger and more reliable demand for recyclates produced in Europe, see <https://www.bvse.de/gut-informiert-kunststoffrecycling/pressemitteilungen-kunststoffrecycling/13150-europaeische-kunststoffbranche-fordert-sofortmassnahmen-gegen-industriekrise.html>.

For September, a slight recovery in demand is expected after the end of the holiday season. However, greater impetus is not to be expected for the time being. If the price level of virgin grade stabilises, this could at least limit the price pressure on recyclates.

EUWID: The August price index therefore records lower demand in comparison to July. The arithmetic average is lower for: LDPE film coloured (K49) -10 €/t, LDPE shrink hoods natural (E40) -15 €/t, LDPE shrink hoods coloured (E49) -5 €/t, PE film transparent mixed colours < 70 µm -10 €/t and HPDE blow-moulded bodies coloured (C29) -10 €/t.

plasticker: The price index shows a higher demand for standard plastics in August 2026. In September there is a similarly high demand to date. In August 2026, standard plastics were quoted at an average price of 581 €/t and thus 13 €/t higher than in the previous month (568 €/t). The probable average price for September (580 €/t) is thus 1 €/t lower than in the previous month (581 €/t). The average quotes for standard plastics could settle at around 590 €/t.

PIE – Plastic Information Europe, regranalates: The prices of standard regranalates were largely on a downward trajectory in August. Reductions could be seen for PE-LD in particular. For September, a slight recovery in demand is expected after the end of the holiday season. The price falls are 25 to 90 €/t, see www.kiweb.de/.

bvse market report: plastics, September 2026

4.2 Recycling technical plastics

The market for technical plastics remained characterised by low demand in August. The holiday season in Europe and the continuing weak order situation, in particular in the automotive sector, led to low order quantities. At the same time, recyclers' warehouses were replete and supply to processors was guaranteed at all times.

Slightly better demand can be seen in September. However, the extensive warehouse stocks will probably cover a large part of the additional demand for the time being. A marked revival of the market as a whole is therefore not to be expected. Any price changes should remain small.

plasticter: For August 2026, there was an average price of 1,043 €/t, which was 135 €/t lower than that of the previous month (1,178 €/t). The August price index is characterised by a lower demand in comparison to the previous month. The September price index to date shows higher demand and is at an average 1,158 €/t.

PIE – Plastic Information Europe, regranulates: The market for technical regranulates was largely stable to slightly falling in August. The weak demand and the high warehouse stocks limited the sales opportunities. Commodities reported average price falls of 20 €/t, see www.kiweb.de/.

4.3 PET recycling

The PET recycling market remained under considerable pressure in August. A large seasonal volume of used beverage bottles was countered by overall subdued demand. Whereas clear PET flakes sold comparatively well, the marketing of coloured grades remained difficult. The spot market for PET regranulates continued to develop especially poorly.

The high volumes of used PET single-use beverage bottles also caused further price pressure. In some cases, supply exceeded the recyclers' available storage capacities. At the same time, the small price difference to PET virgin grade made marketing recyclates more difficult.

As a consequence, the prices for used PET single-use beverage bottles once again fell markedly in comparison to the previous month: PET transparent € -60/t, PET mixed € -60/t and PET coloured € -40/t, see EUWID.

For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,350 €/t, which has fallen by € 40/t in comparison to the previous month.

There were also falls for flakes and regranulates: Regranulates are valued at 1,750 €/t on average in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,380 €/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.

bvse market report: plastics, September 2026

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, Wednesday, 23 September 2026

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