bvse market report: on plastics, October 2026

1 General economy with reference to the plastics industry

The ifo business climate index has risen, see https://www.ifo.de/fakten/2026-09-24/ifo-geschaeftsklimaindex-gestiegen-september-2026. The mood among companies in Germany has improved. The ifo business climate rose to 89.9 points in September, after 88.8 in August. Companies assess their current business situation more positively. And their expectations continued to pick up. The German economy is continuing along the path to recovery.

The index increased markedly in the manufacturing sector. This was due to much better expectations, especially in the electrical and electronics sector. However, companies evaluate the current situation slightly worse. They are still dissatisfied with the incoming order. The automotive sector is operating in a difficult landscape.

2 Primary markets– Standard plastics

After the end of the summer holidays, the market for standard plastics has been a little livelier in September. Although demand gained momentum in comparison to August, overall it remained below expectations. Continuing sufficient supply and falling precursor products led to falling prices for many standard polymers.

Demand developed differently in the various customer sectors. There was still little impetus from the automotive industry. Incoming orders were also sluggish in the construction sector. By contrast, there was a slight improvement in the packagings industry. In the case of flexible packagings in particular, individual manufacturers reported improved incoming orders. Overall, however, demand was not enough to trigger a broader market recovery.

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 1,768 €/t and was therefore 34 €/t lower than in the previous month (1,802 €/t). In a year-on-year comparison, it can be seen that the average quotes from September 2026 (1,768 €/t) were 446 €/t higher than those of the previous year (1,323 €//t). The prices of standard plastics underwent the following changes in September 2026: LLDPE film grade -10 €/t, HDPE injection moulding -20 €/t, HDPE blow moulding -20 €/t, PS crystal clear -140 €/t and PS impact -190 €/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 PET market continued to develop trouble-free. Demand from end markets remained subdues whilst manufacturers were increasingly confronted with rising raw materials costs and limited availability. At the same time, the number of imports from Asia and Turkey fell and became less attractive due to higher prices.

In spite of these developments, the price level remained stable for the time being. In view of the weak demand, larger customers were still able to impose some price concessions. By contrast, smaller processors started to fill their warehouses again after several months of subdued procurement.

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

3.1 plasticker: Standard plastics

The September price index is characterised by similar demand in comparison to the previous month. In September 2026, standard plastics were quoted at an average price of 581 €/t and thus the same as in the previous month (581 €/t), see table. The average price for September 2026 (581 €/t) was 1 €/t higher than that of the previous year (580 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regrind € -60/t, PP regrind € -50/t and PS 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 October 2026 (566 €/t) is thus 15 €/t lower than in the previous month (581 €/t), see table. The October price index of 13.10.2026 shows lower demand to date in comparison to the previous month.

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

	October[6] 26	**Sep 26**	**Aug 26**	**July 26**	**June 26**	**Sep 25**
HDPE regrind[1]	550	550	610	590	600	530
HDPE regranulates[5]	960	970	940	840	920	850
LDPE bale goods[2]	230*	150	120	230*	470*	280*
LDPE regrind[1]	360*	350*	360	370*	570*	430
LDPE regranulates[5]	830	940	970	1060	940	690
PP bale goods[3]	230*	220*	210	220*	210	340*
PP regrind[1]	500	520	570	520	540	480
PP regranulates[5]	1070	1090	1080	1070	930	820
PS regrind[4]	510*	530	530	510*	710*	830
PS regranulates[5]	1000	1030	890	960	970	920
PVC_P regrind[1]	670*	660*	680	650*	650*	630*
PVC_U regrind[1]	570*	610*	650	650*	490*	560*
PET bale goods	170*	230*	230	0*	570*	350*
PET regrind mixed colours	280	290	290	280	310	410
Average Price	**(566)**	**581**	**581**	**568**	**634**	**580**

*: 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 September 2026, there was an average price of 1,164 €/t, which was 121 €/t higher than that of the previous month (1,043 €/t), see table. The average price for September 2026 (1,164 €/t) was 38 €/t below that of the previous year (1,202 €/t).

There were significant price changes of greater than ±70 €/t for: ABS regrind +70 €/t, ABS regranulates -100 €/t, PA 6. regranulates -100 €/t, PA 6.6 regrind +100 €/t and PA 6.6 regranulates -90 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The September price index is characterised by higher demand in comparison to the previous month.

The probable average price for October (1,140 €/t) is thus 24 €/t lower than in the previous month (1,164 €/t). The October price index of 13.10.2026 shows similar demand in comparison to the previous month.

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

	October[6] 26	**Sep 26**	**Aug 26**	**July 26**	**June 26**	**Sep 25**
ABS regrind	540	560	490	550	650	620
ABS regranulates[5]	1310	1290	1390	1410	1340	1120
PC regrind	710	740	730	700	950	970
PC regranulates[5]	1840	1860	1860	1880	2010	1500
PBT regrind	500	530	490	500	630	570
PBT regranulates	1270	1470	1490	1450	1680	1680
PA 6 regrind	580	570	570	550	590	700
PA 6 regranulates[5]	1810	1740	1840	1800	1810	1570
PA 6.6 regrind	740	770	670	670	800	940
PA 6.6 regranulates[5]	2240	2330	2420	2300	2520	2000
POM regrind	540	560	570	540	570	580
POM regranulates[5]	1600	1550	1510	1790	2070	2170
Average Price	**(1140)**	**1164**	**1043**	**1178**	**1242**	**1202**

*: 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 September, the secondary raw materials market only experienced a slight revival after the summer holidays. Demand remained weak overall, whereas high warehouse stocks and competition with cheap virgin grade further limited the recyclers’ sales opportunities. In spite of comparatively stable demand for clear grades, the PET recyclate market also remained under pressure. To date, no fundamental improvement in the market situation is developing for October.

A detailed description of the current situation can be found in EUWID RE 42, 2026, p. 25.

4.1 Recycling standard plastics

The market for secondary raw materials developed somewhat more buoyantly than in the previous month. After the end of the summer holidays, requests from processors rose again to a certain extent. However, a broad market recovery failed to materialise. Demand developed differently depending on the type of plastic and grade, while many recyclers’ warehouses were still full. In the case of high-quality film grades in particular, there was slightly improved demand. Well sorted and transparent PE film grades could sometimes be marketed at higher prices.

The economic situation of recyclers remained tense. In spite of rising wage, transport and energy costs, higher sales prices are hard to impose on the market. Many companies therefore continue to operate with low margins. Added to this are the difficult export conditions. While deliveries to Indonesia and Malaysia are possible again in some cases, there is still uncertainty in other markets. The digital processes for the cross-border transport of waste are also causing additional challenges.

For October there is the hope of slight stabilisation. Delayed import deliveries and uncertainties in international supply chains could limit price falls. However, there is still no expectation of a revival in demand.

EUWID: The September price index therefore records more stable demand in comparison to August. The arithmetic average of the prices is therefore as follows: HDPE coloured +5 €/t, HDPE natural +10 €/t, LDPE coloured +5 €/t, LDPE natural +10 €/t, LDPE film coloured (K49) +15 €/t, LDPE shrink hoods natural (E40) +22.5 €/t, LDPE shrink hoods coloured (E49) +5 €/t, PE film transparent natural < 70 µm +20 €/t, PE film transparent mixed colours < 70µm +15 €/t, PE commercial mixed film (90/10) +15 €/t, PE commercial mixed film (80/20) +15 €/t and HPDE bow-moulded bodies coloured (C29) +10 €/t.

plasticker: The price index shows similar demand for standard plastics in September 2026. In October so far, there has been lower demand. In September 2026, standard plastics were quoted at an average price of 581 €/t and thus the same as in the previous month (581 €/t). The probable average price for October (566 €/t) is thus 15 €/t lower than in the previous month (581 €/t). The average quotes for standard plastics could settle at around 575 €/t.

PIE – Plastic Information Europe, regranulates: The prices of standard regranulates were still on a downward trajectory in August. A stabilisation is expected in October. The price falls are 10 to 35 €/t, see www.kiweb.de/.

4.2 Recycling technical plastics

The market for technical regranulates remained characterised by weak demand in September. The hoped-for revival after the end of the summer holidays was much lower than expected. Many processors refrained from ordering while recyclers' warehouse stocks continued to increase.

Subdued demand is also expected for October. The high warehouse stocks and the lack of a surge in sales limit the possibilities for increasing prices. For many materials, the prices will probably therefore remain stable or fall again slightly.

plasticker: For September 2026, there was an average price of 1,164 €/t, which was 121 €/t higher than that of the previous month (1,043 €/t). The September price index is characterised by higher demand in comparison to the previous month. The October price index to date shows similar demand and is at an average 1,140 €/t.

PIE – Plastic Information Europe, regranulates: The market for technical regranulates continued to fall in September and did not gain momentum as expected. Commodities reported average price falls of 15 €/t, see www.kiweb.de/.

4.3 PET recycling

The PET recycling market remained under considerable pressure in August. The supply of used beverage bottles was still high, whereas demand for recyclates developed only slowly. Marketing remained difficult for coloured flakes and additional spot quantities.

Clear PET flakes still sold comparatively well, especially for bottle-to-bottle applications. However, demand for coloured grades remained weak. Even the manufacturers of packaging films held back with orders. At the same time, cheap imported supplies increased the price pressure on European recyclers.

As a consequence, the prices for used PET single-use beverage bottled once again fell markedly in comparison to the previous month: PET transparent € -50/t, PET mixed € -50/t and PET coloured € -20/t, see EUWID.

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

There were also falls for flakes and regranulates: Regranulates are valued at 1,730 €/ on average in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,345 €/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, Wednesday, 21 October 2026 Anna Roeb, bvse