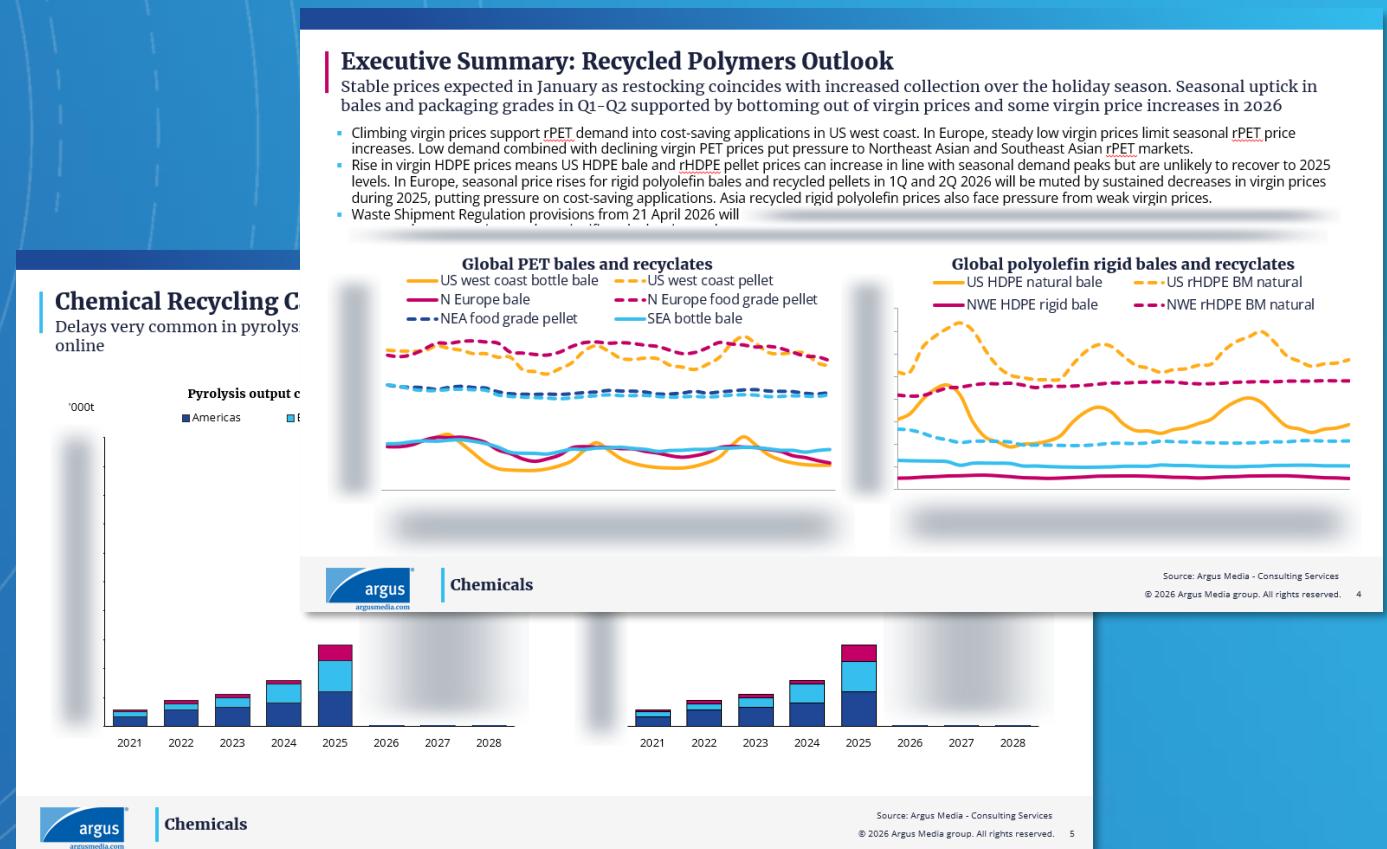


Argus report sample

Argus Recycled Polymers Outlook

December 2025



About this report

The Argus Recycled Polymer Outlook is a 24-month rolling forecast of recycled polymer prices plus data-driven insight for key recycled resins in Europe, America and Asia.

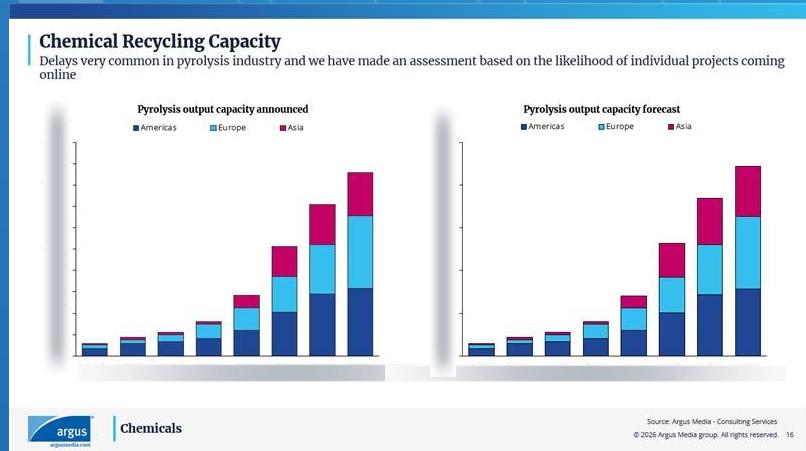
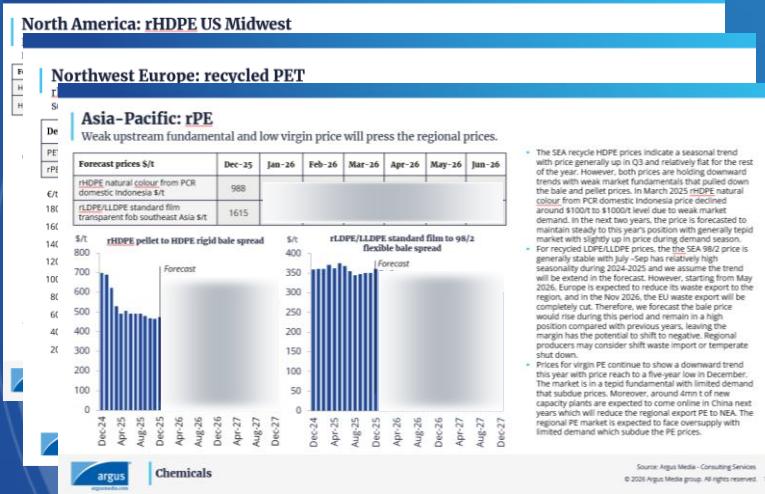
Subscribers receive access to a live interactive workspace, a monthly PowerPoint PDF written by our experts, plus the accompanying Excel data files.

This is a short sample of the full 25-page report only.

[Click here to find out more and get in touch](#)



The full report includes:



Legislation factsheet - Europe

Legislation factsheet - North America

Legislation factsheet - SEA

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- 24-month forecast for key recycled grades covering rPET and rPolyolefins (rPP, rHDPE, rLL/LDPE)
- Snapshots of key resin types per **region** (Europe, America and Asia) with **charts** and **commentary** related to forecast drivers e.g. virgin price, other global markets and legislation.
- 3-year pyrolysis output capacity forecast

- Factsheets **summarising legislation developments** per region to understand key supply and demand drivers in related markets

[Click here to find out more and get in touch](#)

Executive Summary: Recycled Polymers Outlook

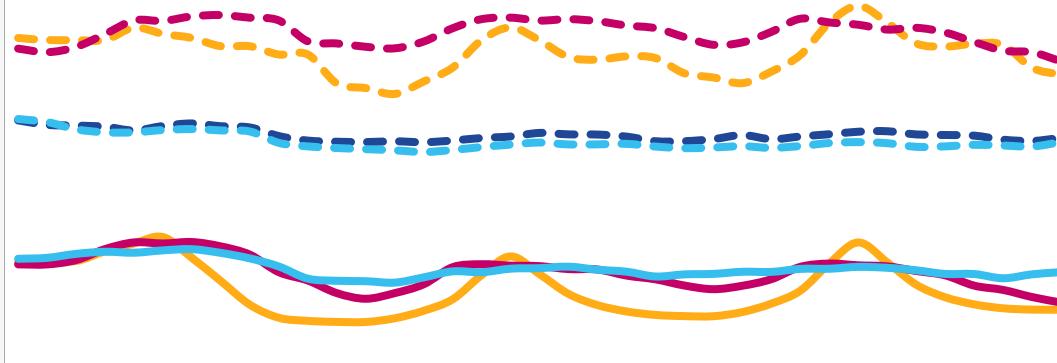
Stable prices expected in January as restocking coincides with increased collection over the holiday season. Seasonal uptick in bales and packaging grades in Q1-Q2 supported by bottoming out of virgin prices and some virgin price increases in 2026

- Climbing virgin prices support rPET demand into cost-saving applications in US west coast. In Europe, steady low virgin prices limit seasonal rPET price increases. Low demand combined with declining virgin PET prices put pressure to Northeast Asian and Southeast Asian rPET markets.
- Rise in virgin HDPE prices means US HDPE bale and rHDPE pellet prices can increase in line with seasonal demand peaks but are unlikely to recover to 2025 levels. In Europe, seasonal price rises for rigid polyolefin bales and recycled pellets in 1Q and 2Q 2026 will be muted by sustained decreases in virgin prices during 2025, putting pressure on cost-saving applications. Asia recycled rigid polyolefin prices also face pressure from weak virgin prices.
- Waste Shipment Regulation provisions from 21 April 2026 will

Global PET bales and recyclates

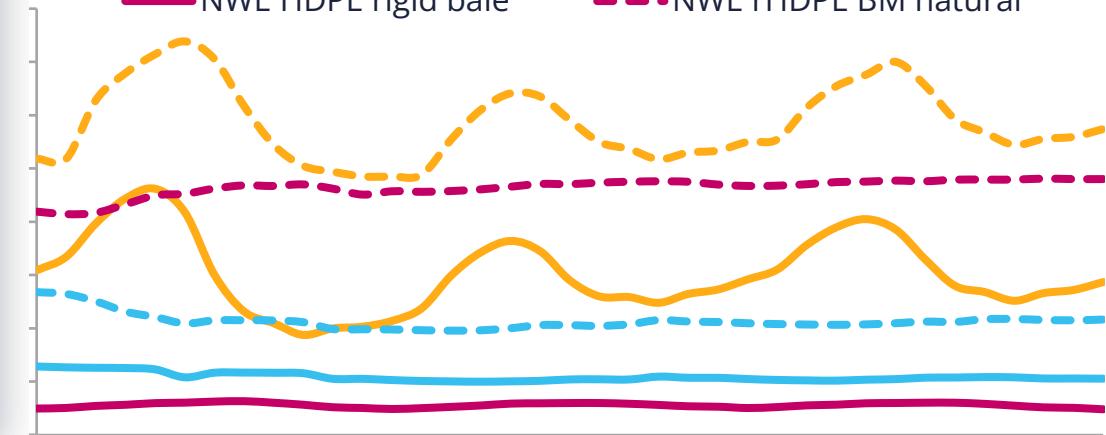
— US west coast bottle bale
— N Europe bale
— NEA food grade pellet

— US west coast pellet
— N Europe food grade pellet
— SEA bottle bale



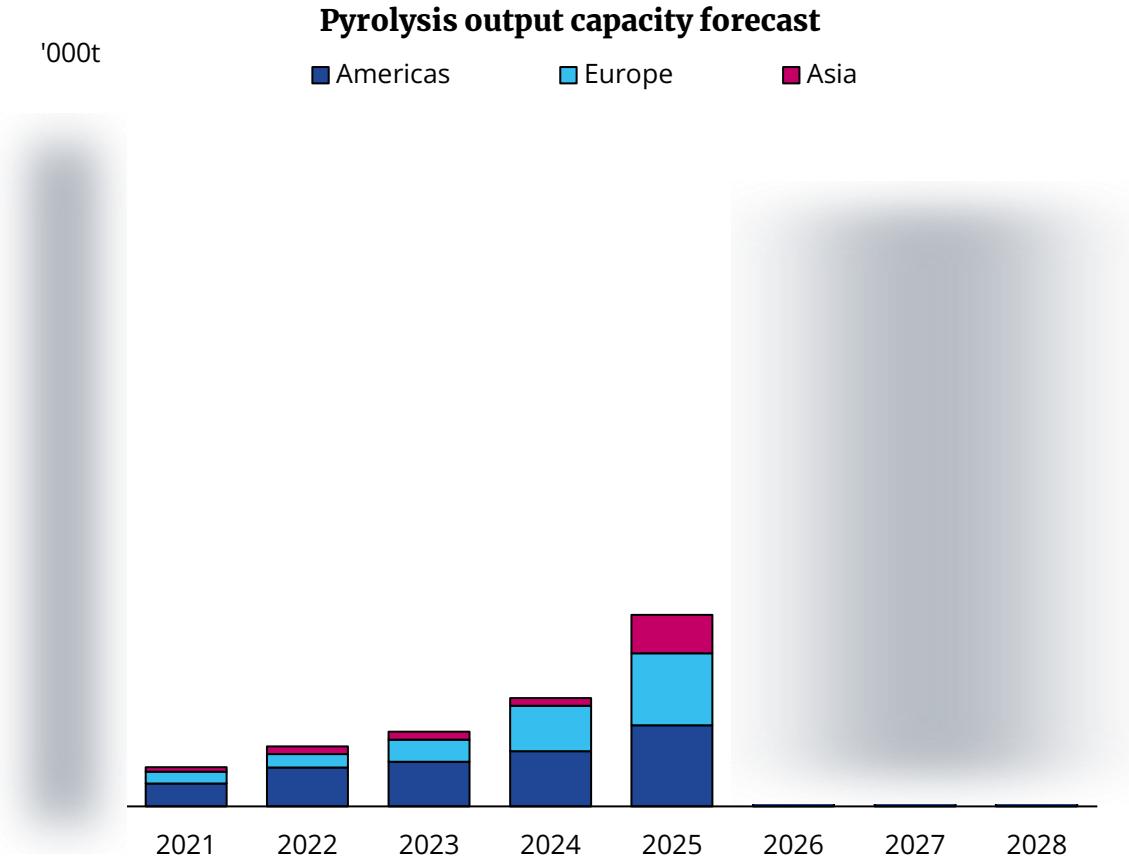
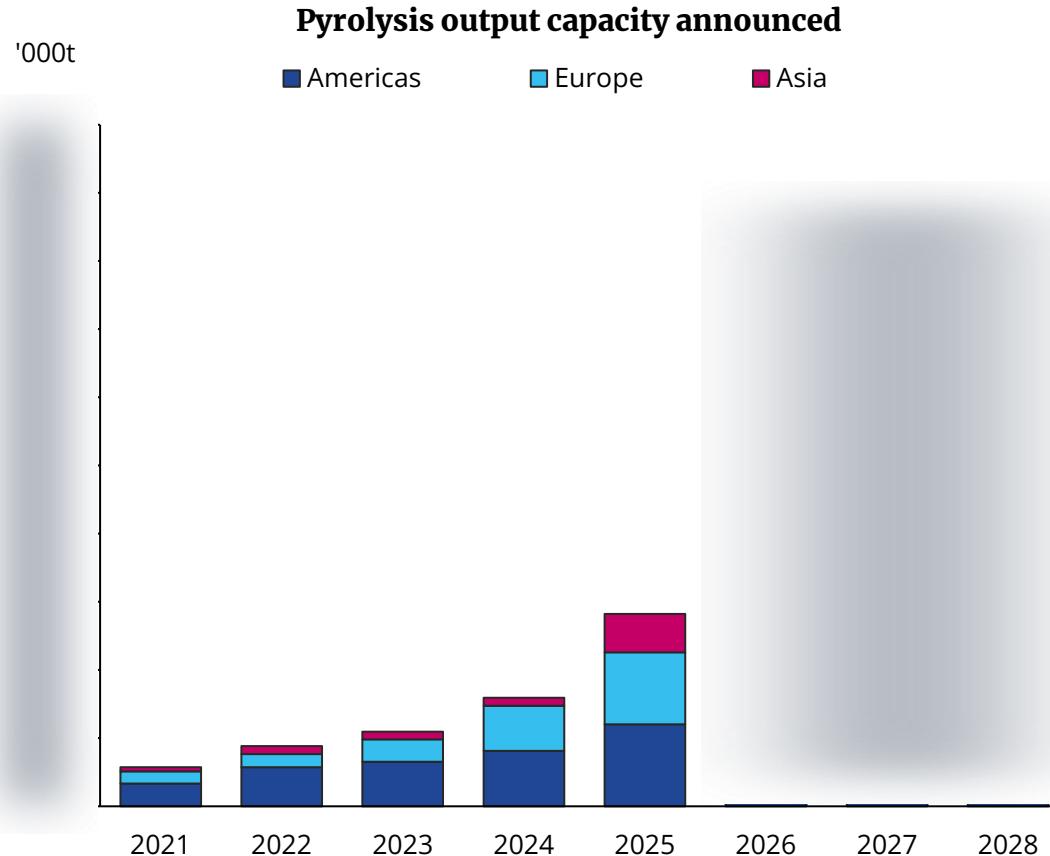
Global polyolefin rigid bales and recyclates

— US HDPE natural bale
— NWE HDPE rigid bale
— US rHDPE BM natural
— NWE rHDPE BM natural



Chemical Recycling Capacity

Delays very common in pyrolysis industry and we have made an assessment based on the likelihood of individual projects coming online



Legislation factsheet – SEA

Legislation name	Key mandate(s)	Polymers impacted include	Key impact on recycled markets	Enactment date	Status
Singapore- Resource Sustainability Act					
Malaysia- National Roadmap Towards Zero Single-Use Plastics 2018-2030					
Thailand- Roadmap on plastic waste management 2018-2030					
Indonesia- Road Map of Waste Production by Producer					
Vietnam- Law on Environmental Protection					
Philippines- Extended Producer Responsibility ACT (RA 11898)					

Excel Data Export - Sample

12 months history + 24 months forecast, refreshed every month

B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL	AM	AN								
1	Argus direct																																													
2	Copyright © 2025 Argus Media																																													
3	Recycled PET and recycled polyolefins price page																																													
4	Region	Price	Dec 24	Jan 25	Feb 25	Mar 25	Apr 25	May 25	Jun 25	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Sep 26	Oct 26	Nov 26	Dec 26	Jan 27	Feb 27	Mar 27	Apr 27	May 27	Jun 27	Jul 27	Aug 27	Sep 27	Oct 27	Nov 27	Dec 28							
5	US	PET bottle bale A grade US west coast ex-works \$/lb	26	26	26	28	30	32																																						
6	US	PET bottle bale A grade US west coast ex-works \$/t	568	582	573	626	667	701																																						
7	US	rPET flake colourless US west coast ex-works \$/lb	60	58	58	58	63	62																																						
8	US	rPET flake colourless US west coast ex-works \$/t	1,323	1,279	1,279	1,279	1,389	1,367																																						
9	US	rPET pellet US west coast ex-works \$/lb	79	79	79	79	82	80																																						
10	US	rPET pellet US west coast ex-works \$/t	1,764	1,753	1,753	1,753	1,819	1,786																																						
11	US	HDPE bottle bale natural PCR ex-works US midwest \$/lb	69	75	83	100	104	94																																						
12	US	HDPE bottle bale natural PCR ex-works US midwest \$/t	1,543	1,611	1,964	2,216	2,309	2,030																																						
13	US	HDPE bottle bale natural PCR ex-works US midwest \$/t	10	8	9	11	12	6																																						
14	US	HDPE bottle bale coloured PCR ex-works US midwest \$/lb	220	185	196	247	265	139																																						
15	US	HDPE bottle bale coloured PCR ex-works US midwest \$/t	117	117	141	153	161	166																																						
16	US	HDPE BM FDA approved natural PCR ex-works US midwest \$/t	2,530	2,530	3,142	3,335	3,511	3,633																																						
17	US	HDPE BM non-FDA approved light grey PCR ex-works US midwest \$/t	46	44	47	47	47	47																																						
18	US	HDPE BM non-FDA approved light grey PCR ex-works US midwest \$/t	1,025	981	1,047	1,047	1,047	1,047																																						
19	US	HDPE general purpose block/dark ex-works US midwest \$/lb	35	35	36	38	38	38																																						
20	US	HDPE general purpose block/dark ex-works US midwest \$/t	783	783	838	838	843	838																																						
21	US	HDPE general purpose block/dark ex-works US midwest \$/t	1,300	1,300	1,324	1,340	1,360	1,359																																						
22	Europe	PET bottle bale colourless del N Europe \$/t	530	536	555	583	600	591																																						
23	Europe	PET bottle bale colourless del N Europe \$/t	555	555	578	637	672	667																																						
24	Europe	rPET flake colourless del N Europe \$/t	1,361	1,341	1,379	1,443	1,524	1,533																																						
25	Europe	rPET food grade pellet del N Europe \$/t	1,630	1,630	1,648	1,650	1,658	1,644																																						
26	Europe	rPET food grade pellet del N Europe \$/t	1,707	1,688	1,716	1,785	1,857	1,855																																						
27	Europe	rPET food grade pellet del N Europe \$/t	235	243	260	260	265	267																																						
28	Europe	HDPE rigid bale (D329 or equivalent) del N Europe \$/t	246	252	271	281	297	301																																						
29	Europe	HDPE rigid bale (D329 or equivalent) del N Europe \$/t	2,000	2,000	2,000	2,000	2,005	2,005																																						
30	Europe	HDPE BM natural from PCR deodorised del N Europe \$/t	2,034	2,071	2,083	2,150	2,247	2,262																																						
31	Europe	HDPE BM natural from PCR deodorised del N Europe \$/t	1,800	1,800	1,800	1,800	1,810	1,810																																						
32	Europe	HDPE BM white from PCR deodorised del N Europe \$/t	1,685	1,685	1,785	1,947	2,028	2,042																																						
33	Europe	HDPE BM white from PCR deodorised del N Europe \$/t	1,685	1,685	1,785	1,785	1,785	1,770																																						
34	Europe	HDPE pipe dark/block del N Europe \$/t	796	785	785	785	785	770																																						
35	Europe	HDPE pipe dark/block del N Europe \$/t	834	813	818	843	880	869																																						
36	Europe	38/2 flexible PE bale post-commercial del N Europe \$/t	363	375	403	418	422	450																																						
37	Europe	38/2 flexible PE bale post-commercial del N Europe \$/t	386	396	426	452	480	508																																						
38	Europe	rLDPE/LLDPE standard film transparent del N Europe \$/t	1,021	1,028	1,050	1,064	1,084	1,095																																						
39	Europe	rLDPE/LLDPE standard film transparent del N Europe \$/t	1,063	1,064	1,094	1,150	1,215	1,235																																						
40	Europe	PP rigid bale PCR (D324 or equivalent) del N Europe \$/t	80	96	153	181	205	201																																						
41	Europe	PP rigid bale PCR (D324 or equivalent) del N Europe \$/t	84	93	165	207	230	227																																						
42	Europe	rPP IM dark/block del N Europe \$/t	725	725	740	768	803	805																																						
43	Europe	rPP IM dark/block del N Europe \$/t	753	751	771	830	833	308																																						
44	Europe	rPP light packaging deodorised del N Europe \$/t	1,675	1,673	1,695	1,695	1,695	1,695																																						
45	Europe	rPP light packaging deodorised del N Europe \$/t	1,754	1,733	1,766	1,833	1,900	1,912																																						
46	Asia-Pacific	rPET flakes domestic China \$/t	696	879	873	863	811	821																																						
47	Asia-Pacific	rPET food grade pellet 100pc recycled fob northeast Asia \$/t	1,324	1,300	1,295	1,290	1,270	1,234																																						
48	Asia-Pacific	PET bottle bale colourless domestic Indonesia \$/t	585	593	611	623	618	630																																						
49	Asia-Pacific	rPET food grade flakes colourless fob southeast Asia \$/t	375	367	341	330	341	362																																						
50	Asia-Pacific	rPET pellets fob southeast Asia \$/t	1,331	1,315	1,276	1,260	1,260	1,273																																						
51	Asia-Pacific	HDPE rigid bale PCR domestic Indonesia \$/t	641	633	623	626	614	539																																						
52	Asia-Pacific	HDPE natural colour from PCR domestic Indonesia \$/t	1,333	1,322	1,253	1,156	1,105	1,045																																						
53	Asia-Pacific	38/2 flexible PE bale post commercial fob southeast Asia \$/t																																												



Contact us



Anna Fittock Analyst, Chemicals

Anna is an analyst in the London office focusing on olefins and co-products modelling. Her experience includes working at Ovation Data where she managed and analyzed seismic data and deliverables on behalf of a global geophysical company. She holds a BA in geography with international study from the University of Manchester.

anna.fittock@argusmedia.com



Elizabeth Zhang Analyst, Polymers

Elizabeth is an analyst in the Shanghai office, focusing on the polymer market. Her experience includes working at Ernst & Young as a business consultant, focusing on commercial bank markets. Elizabeth holds a BA in business economics, and a master's in quantitative economics from the University of California, Los Angeles.

elizabeth.zhang@argusmedia.com



Terry Glass Vice President Polymers

Terry is responsible for the expansion of Polymer Report services in strategic regions. He has over 40 years' experience relating to the plastics industry, working with converters, brand owners, and resin producers. Before joining Argus, Terry worked at Dow Chemical, Braskem, and Sasol. He holds a Chemistry degree from the University of Houston and 26 patents across a variety of market applications.

terry.glass@argusmedia.com



Chemicals

Chloe Kinner Editor, Recycled Polymers and Petrochemicals

Chloe is an Editor of Argus Recycled Polymers and the PET value chain. She started with Argus in April 2022. Previously Chloe previously held the position of PET and rPET analyst at a consultancy company for 5 years, responsible for global reports and research and analysis of the EMEARC region. Chloe holds a BA in English Literature from Queen Mary, University of London.

chloe.kinner@argusmedia.com

Jacky Wang (王未栋) Team Leader, Chemicals

Jacky serves as the Team Leader for Chemicals at Argus, based in Shanghai. He oversees the China team responsible for petrochemical products and has regional market coverage across Northeast Asia, with a strategic focus on recycled plastics and propylene. With over a decade of experience in the petrochemical industry, Jacky brings deep expertise in the polyester value chain and olefin markets. Prior to joining Argus, he held senior sales and marketing roles at leading international trading houses and petrochemical producer.

jacky.wang@argusmedia.com

Sihan Long (龙思涵) Senior Market Reporter, Chemicals

Sihan is a senior market reporter in the Singapore office, focusing on Methanol and Recycled Polymers markets. Her experience includes working in S&P Global Energy where she focused on Asia Chemicals and LNG markets. She holds a BEng degree from Singapore Institute of Technology-Newcastle University.

sihan.long@argusmedia.com

Will Collins Global Editor, Recycled Polymers

Will is the global editor and r-polyolefins specialist responsible for the Argus Recycled Polymers service' He works with a global team of sector-specific reporters in London, Houston and Singapore. Will has worked with Argus for over 12 years including six years covering the European and Turkish virgin polymers industry. Will graduated with a first in psychology from the University of Northampton.

will.collins@argusmedia.com

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Registered office

Lacon House, 84 Theobald's Road, London, WC1X 8NL
Tel: +44 20 7780 4200
Email: Sales@argusmedia.com

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Publisher

Adrian Binks

Global compliance officer

Vladas Stankevicius

Chief commercial manager

Martin Gijssel

Consulting Services, SVP

Lloyd Thomas

Chemicals, SVP

Chuck Venezia

Customer support and sales

Technical queries
technicalsupport@argusmedia.com
All other queries
support@argusmedia.com

London, UK Tel: +44 20 7780 4200

Houston, US Tel: +1 713 968 0000

Singapore Tel: +65 6496 9966