

# VEGA DAILY

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## VITAMIN

01

Nicotinamide remained relatively stable recently, with market transactions around USD 5.15/KG. Downstream buyers mainly purchased for immediate needs, while overall trading activity remained moderate. With weak demand expectations, producers are holding prices and adopting a wait-and-see approach. The market is expected to fluctuate slightly on the weaker side in the near term.

## AMINO ACID

02

According to Bluestar Adisseo's 2026 interim results, H1 revenue reached USD 1.44 billion, up 14% YoY, while net profit attributable to shareholders rose 22% to USD 134.5 million. Growth was mainly driven by higher Methionine volumes and prices in Q2. New capacity in Quanzhou and the debottlenecking of the Nanjing liquid Methionine facility are expected to further support Methionine supply.

## API

03

- China's Ministry of Agriculture and Rural Affairs recently approved Fluralaner and Fluralaner + Moxidectin topical solutions as Class II new veterinary drugs, marking further progress in domestically developed antiparasitic products for companion animals.
- Colistin Sulfate producers remain firm, with tight deliveries and most production schedules extending into Q4. Market prices have risen to around USD 15.20–15.85/KG and are expected to remain strong in the near term.

## FOOD ADDITIVE

04

A US precision-fermented dairy protein company, Perfect Day, is shifting its focus toward B2B dairy protein ingredients. Its joint facility with Zydus Lifesciences in India is expected to begin supplying ProFerm whey protein in Q1 2027, with an initial annual output of around 2,000 MT and planned capacity expansion. ProFerm produces  $\beta$ -lactoglobulin through precision fermentation, and the company aims to provide a more stable source of whey protein amid rising prices.

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