

# VEGA DAILY

Vitamins to VEGA!

18th. October. 2024

## VITAMIN

01

On October 17, BASF released the latest developments of the Ludwigshafen incident.

1. Production recovery plan for aromatic ingredients Pyranol, methyl iodone 70 and DL-menthol FG: Production is initially expected to start in the last week of October 2024. Once successfully restarted, BASF plans to inform the new allocation in late November 2024. The remaining flavor products: It is expected to resume production in a staggered manner between April and June 2025, starting with  $\beta$ -ionone R.

2. Nutritional product production recovery plan Vitamin A: Production is expected to resume in early April 2025. Vitamin E and carotenoids: Production is planned to resume in early July 2025.

3. Inventory replenishment and supply guarantee BASF said that after production resumes, it will take at least several months to ensure supply, including replenishing global, regional and local inventory levels. The expected recovery time may be adjusted according to the progress of maintenance.

Choline chloride: the current market price of 60% powder is around USD565-570/MT. The price is expected to remain stable in the future.

## AMINO ACID

02

Tryptophan: There are not many inquiries in the market, and the price remains stable. At present, the terminal demand is weak, users are cautious in signing orders, the price of soybean meal remains low, and the overall market transaction is general. It is expected that the price of tryptophan will be stable in the short term.

## API

03

Huahai Pharmaceutical announced that the company's new drug abbreviated application for empagliflozin metformin tablets submitted to the US FDA has been temporarily approved. The drug is mainly used to treat type II diabetes, with specifications of 5mg/500mg, 5mg/1000mg, 12.5mg/500mg, and 12.5mg/1000mg. As of now, the company has invested approximately RMB 12.95 million in research and development costs in the US project of empagliflozin metformin tablets.

Florfenicol, most factories have stopped reporting during the recent API period. Previously, the factories suffered a lot of losses, prices rebounded from the bottom, and some brands were in short supply, with delivery dates until December.

## FOOD ADDITIVE

04

Recently, the environmental impact assessment report of the "Nestlé Health Science (China) Co., Ltd. Health Food R&D and Production Lily Project (Phase I)" was published on relevant websites. The project plans to invest 148.1 million yuan and plans to build production lines in two phases at the company's current site, using the idle workshops of the original cosmetics manufacturing business of the Nestlé factory. The first phase will build two dry mixing lines for protein powder and probiotics, as well as supporting R&D, warehousing, quality inspection and other auxiliary facilities. After completion, it will form an annual production capacity of 36.5 million protein powder strips and 36.5 million probiotic strips.

Reported by Shea & Livia & Lexie & Oliva & Hannah

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