

VEGA DAILY

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August 12, 2026

VITAMIN

01

- Following the rise in China's domestic Vitamin E spot prices last week, export prices also moved higher this week. International inquiries and transaction activity have increased significantly, with mainstream prices now reaching around USD 9/KG.
- Vitamin E is one of the industry's most supply-driven products, and inventories have fallen to critically low levels, with spot availability extremely tight. Under such conditions, the market remains highly sensitive to supply changes, leaving a strong possibility of a rapid price increase in the near term.

AMINO ACID

02

Major Lysine HCl producers have recently reduced production, tightening supply from some brands, with delivery schedules extending into October. Prices now vary by brand, with first- and second-tier brands showing signs of recovery. L-Lysine HCl 98.5% is currently around USD 850–870/MT, and the market is expected to remain stable to firm in the near term.

API

03

- Tilmicosin Phosphate and Tylosin Tartrate producers continued to raise prices cautiously this week, while inquiries increased alongside the recovery in pork prices. Prices are expected to rise gradually. Current reference prices are USD 30.4-31.00/KG for Tylosin Tartrate powder and USD 35.00-35.70/KG for Tilmicosin Phosphate.
- Jiangxi Synergy Pharmaceutical Co., Ltd. recently received an FDA approval letter for its Mirabegron API DMF (No. 031661), confirming completion of the technical review and supporting future ANDA submissions by associated formulation customers.

FOOD ADDITIVE

04

P&G recently announced an agreement to acquire Thorne from L Catterton for USD 3.8 billion, further expanding its presence in the health and wellness sector. Thorne will complement P&G's existing supplement portfolio, including Metamucil dietary fiber, Align probiotics, and New Chapter Vitamins, strengthening its position in the growing consumer health market.

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