

VEGA DAILY

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April 21, 2026

VITAMIN

01

Based on recent industry patterns, maintenance announcements typically begin in May, with peak shutdowns from June to September (lasting 6–10 weeks), marking the start of a VE price upcycle. Beyond pre-maintenance stocking pressure, producers are currently burdened with significant outstanding orders and limited inventory buffers. Combined with sharp increases and tight supply of raw materials, the supply-demand imbalance has intensified, exceeding the impact of the 2024 BASF incident. VE quotations are expected to reach USD 23.43–26.1/KG by late April to early May, with transaction prices rising to USD 19.52–20.82/KG in May.

Meanwhile, Garden Biopharmaceutical has postponed several projects: VB6 to June 2027, biotin to December 2026, and L-alanine to September 2027.

AMINO ACID

02

On April 20, Meihua Group, Dacheng Industrial Group, and Eppen Biotech announced maintenance plans: Meihua will conduct maintenance in May; Dacheng plans boiler system upgrades in June–July with downtime exceeding one month; Eppen will carry out maintenance at its Inner Mongolia site for approximately 2–3 weeks.

API

03

- Florfenicol prices remain firm supported by costs, with some producers still suspending quotations and tight supply; current prices are around USD 21.5-22.2/KG, expected to stay stable-to-firm in the short term.
- Apelo Pharmaceutical Co., Ltd. reported Q1 2026 revenue of USD 358.80 million (-10.36% YoY) and net profit of USD 36.51 million (+0.19% YoY), up ~30% QoQ.

FOOD ADDITIVE

04

Chengdu Okay Pharmaceutical reported 2025 revenue of USD 48.68 million (+6.92% YoY) and net profit of USD 1.69 million (-48.79% YoY). The company focuses on natural vitamin P compounds (e.g., quercetin, rutin), serving food, nutraceutical, and pharmaceutical applications.

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Reported by Candice, Shea and Sharon

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