Global Industrial Starch Market - Focused Insights 2025-2030

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Report description:

The global industrial starch market is expected to grow at a CAGR of 5.42% from 2024 to 2030.

RECENT VENDOR ACTIVITIES

-August 6, 2024 - Roquette Freres announced the expansion of its texturizing solutions portfolio with the launch of four new tapioca-based cook-up starches: CLEARAM TR 2010, CLEARAM TR 2510, CLEARAM TR 3010, and CLEARAM TR 4010. These newly developed starches cater to the specific textural requirements of food manufacturers and enhance the versatility of botanical-based solutions within Roquette's existing product range.
-February 6, 2024 - Ingredion Incorporated introduced NOVATION Indulge 2940 starch, expanding its portfolio of clean-label texturizers. This marks the launch of the first non-GMO functional native corn starch, designed to deliver a distinct texture for gelling and co-texturizing applications, particularly in dairy, alternative dairy products, and desserts.

KEY TAKEAWAYS

-By Product Type: The native starches segment holds the largest market share in 2024. Growing interest in gluten-free and plant-based diets has grown demand for native starches.
-By Source: The cassava segment shows the highest growth of 6.79%, driven by its high carbohydrate content, tolerance to adverse environmental conditions, and relatively low cost of production.
-By Application: The food & beverage sector segment accounts for the largest market share, as they are the biggest users of industrial starch owing to the increased demand for processed, convenient, and functional food products.
-By Geography: North America dominates the global industrial starch market in 2024. North America is one of the largest producers and consumers of industrial starch, with corn being the primary source due to the region's abundant maize cultivation.
-Growth Factor: The global industrial starch market is set to grow due to the growth of the food & beverage industry and expansion of the pharmaceutical sector.

SEGMENTATION & FORECASTS

-By Product Type
oNative Starches
oModified Starches
oOthers
-By Source
oCorn
oPotato
oCassava
oWheat
oOthers
-By Application
oFood & Beverage Sector
oNon-Food & Beverage Sector
-By Geography
-North America
oUS
oCanada
-APAC
oChina
oJapan
oIndia
-Europe
oGermany
oFrance
oRussia
oUK
-Latin America
oBrazil
oMexico
oArgentina
-Middle East & Africa
oTurkey
oSouth Africa

MARKET TRENDS

Expansion of The Pharmaceutical Sector

Growth in the pharmaceutical sector is impacting the growth of the industrial starch market considerably, especially in the excipients segment. Starch is being extensively used as a disintegrant, binder, and filler for tablet and capsule formulations, providing controlled release and increased drug stability. Owing to the growing demand for generic drugs, over-the-counter medicines, and sustained-release products, pharmaceutical companies are adopting high-quality starch derivatives. Pregelatinized starch has a wide range of applications in tablet formulations, such as better compressibility and enhanced flow characteristics, and it is a good option for direct compression tablet production. The increasing pharmaceutical manufacturing in countries such as India, China, and Brazil, driven by economical manufacturing and rising patient populations, is directly contributing to the demand

for starch-based pharmaceutical excipients.

Rising Focus Towards Sustainability

The growing world emphasis on sustainability is greatly influencing the industrial starch market, with industries moving towards environmentally friendly replacements for synthetic substances. Governments globally are enforcing stringent policies to counteract plastic waste, and as a result, industries are turning towards biodegradable and sustainable alternatives. Starch, which is obtained from vegetation like corn, wheat, cassava, and potatoes, is a very good biodegradable material and is hence a prime content in green packaging, adhesives, and bio-based polymers. Starch is naturally sustainable as it is renewable, biodegradable, and non-toxic. Starch is not produced from the depletion of fossil fuels compared to polymers, which are carbon-neutral and naturally replenished. Its property to break down without trace left behind as microplastic residue makes starch a coveted raw material for industries shifting to a circular economy. With more industries turning to sustainability, the application of industrial starch as an eco-friendly alternative will continue to grow across most sectors. Innovation in high-performance starch materials like biodegradable coatings, edible films, and emulsifiers derived from plants will provide new avenues for starch producers to grow.

MARKET DRIVERS

Rise In Demand In The Textile Industry

The textile sector is one of the largest consumers of industrial starch. Starch is mainly used in sizing to improve the strength, smoothness, and durability of yarns. It is a protective coating on fibers that minimizes breakage when the yarn is woven and maximizes the efficiency of textile production. Global increase in textile manufacturing, especially in nations such as China, India, Bangladesh, and Vietnam, is fueling growing demand for starch-based sizing agents. Apart from sizing, starch is also vital in textile printing and dyeing as it enhances dye adhesion, viscosity control, and color fastness. Oxidized and cationic starches, which are modified starches, are applied in textile printing pastes to achieve better color retention, even fabric penetration, and less bleeding. The international growth of the fast fashion business has resulted in a boom in textile production, and hence the demand for starch-based processing agents has grown. Starch-based formulations are extensively applied as a result of their low cost, renewability, and simplicity of use.

Growth of The Food & Beverage Industry

Growing consumer demand for processed, ready-to-consume, and convenience foods is largely driving the industrial starch demand. Starch is extensively employed as a thickener, stabilizer, gelling agent, and moisture-retaining ingredient in processed food such as soups, sauces, frozen food, bakery items, and confectionery. With urban life and busy schedules, consumers are turning to convenient-to-prepare food products, which translates into increased use of starch-based additives that provide texture, shelf life, and product consistency. Consumer awareness for clean-label, non-GMO, and organic food ingredients is fueling the industrial starch market, which is prompting companies to move towards natural and lower-processed starches. The dairy and bakery industries are major consumers of industrial starch, which they employ to improve texture, viscosity, and moisture retention. Modified starches in the bakery industry are applied to avoid staling of bread, cakes, and pastries, providing extended shelf life and freshness. Also, the growth in plant-based and vegan diets is contributing to the growth of the industrial starch market in the food & beverages industry.

INDUSTRY RESTRAINTS

Fluctuating Raw Material Prices

The industrial starch market is heavily dependent on agricultural commodities such as corn, wheat, cassava, and potatoes. Factors such as climate change, supply chain disruptions, geopolitical tensions, and changing government policies on crop subsidies and tariffs impact the cost and availability of starch sources. The industrial starch market is greatly dependent on raw agricultural commodities such as corn, wheat, cassava, and potatoes, whose prices vary with the shifting climatic conditions, geopolitical tensions, and trade policies. This volatility is a significant challenge for starch manufacturers since procurement costs can shift unpredictably, which directly affects profit margins. Climate change has emerged as a key driver of agricultural output, resulting in unstable starch availability. Drought, floods, and unpredictable temperature fluctuations decrease crop yields, consequently reducing the supply of raw materials required for starch processing. The price of fertilizers, pesticides, and fuel greatly influences the price of raw materials for starch. Increased agricultural input prices directly result in higher crop prices, impacting starch production positively in terms of cost.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT TYPE

The global industrial starch market by product type is segmented into native starches, modified starches, and others. In 2024, the native starches segment dominates and holds the largest market share. Native starches are unaltered carbohydrate polymers derived from various plant sources, such as corn, wheat, potato, tapioca, and rice. They retain their natural structure and functionality, making them essential in applications that require clean-label and minimally processed ingredients. Unlike modified starches, native starches are preferred in products where natural, non-GMO, and organic labels are important. The growing interest in gluten-free and plant-based diets has increased the demand for starches as gluten substitutes in baked goods and processed foods. Tapioca and potato starches, in particular, serve as effective replacements for gluten in gluten-free bread and pasta. Since native starches are not chemically modified, they undergo less processing, making them a more sustainable and cost-effective alternative to modified starches. This advantage supports companies' efforts to reduce their carbon footprint while maintaining product functionality.

INSIGHTS BY SOURCE

The global industrial starch market by source is categorized into corn, potato, cassava, wheat, and others. The cassava segment shows significant growth, with the fastest-growing CAGR of 6.79% during the forecast period. Cassava is an important starch source because of its high carbohydrate content, tolerance to adverse environmental conditions, and relatively low cost of production compared to other starch sources such as corn and wheat. As a tropical root crop, cassava is grown extensively in countries like Brazil, Thailand, Nigeria, and Indonesia, and thus it is a staple for food and industrial uses. End-users of cassava starch are food processors, pharmaceutical industries, paper makers, textile industries, and packaging industries. The fast growth of gluten-free food markets, growing applications of bio-based products in manufacturing, and the emerging demand for starch-based pharmaceuticals have all been instrumental in boosting the market. One of the most powerful stimuli for cassava starch adoption is its sustainability. Cassava can thrive in poor soil, requires little fertilizer, and requires less water than other staple crops like wheat and rice. This renders cassava starch a green solution for companies that would like to reduce their carbon emissions.

INSIGHTS BY APPLICATION

Based on the application, the food & beverage sector segment accounted for the largest share of the global industrial starch market. The food processing market is among the biggest users of industrial starch owing to the increased demand for processed, convenient, and functional food products. Starch finds applications in various segments such as bakery, dairy, confectionery, beverages, and processed food because it adds texture, stability, and shelf life. Food consumers are on the rise for clean-label and natural food ingredients, which is driving growing demand for starches from corn, potato, rice, and cassava. The shift from

artificial emulsifiers and stabilizers has turned starch into a popular alternative for thickening and texturizing food products. Companies like Ingredion, Cargill, and Tate & Lyle are producing modified starches with clean-label designation. The food and beverages industry employs starch in stabilizers, emulsifiers, and sweeteners. Starch-derived maltodextrins and starches that are modified are used in flavored drinks, fruit juice, and dairy beverages to enhance mouthfeel and texture. So, with growing food & beverages industry is also growing the industrial starch market.

GEOGRAPHICAL ANALYSIS

In 2024, North America dominates and holds the largest share of over 40% in the global industrial starch market. North America dominates a huge portion of the global industrial starch market with its huge production capacity, robust industry demand, and starch modification technology advancements. The region, which is dominated by the United States and Canada, boasts abundant raw material supplies, mostly corn, wheat, and potatoes, which are the primary raw materials used to extract starch. Growing demand for modified and functional starches in food & beverages, pharmaceuticals, paper & packaging, textiles, and bioplastics is pushing market dynamics. The rising trend of green packaging and bio-based adhesives has also fueled investment and innovation in the direction of starch-based alternatives.
The pharmaceutical sector in North America is one of the major consumers of modified starches as disintegrants, fillers, and binders in tablet formulations. Owing to the growth of the nutraceutical and dietary supplement industry, starch-based excipients will see increasing demand.

COMPETITIVE LANDSCAPE

The global industrial starch market report consists of exclusive data on 22 vendors. The market is highly competitive, with a moderate market concentration level and a high level of fragmentation. Large multinational corporations as well as regional players exist together, which makes the competitive environment dynamic and ever-changing. Global players focus on technological advancements, product differentiation, and supply chain optimization, while regional vendors compete on price efficiency, local raw material sourcing, and niche product offerings. One of the biggest market challenges is the risk of penetration by poor-quality starch products, especially in price-sensitive markets. Sustainability has become a key differentiator in the industrial starch market. Vendors are increasingly investing in eco-friendly and bio-based starch products to align with environmental regulations and consumer preferences.

Key Vendors

-ADM
-AGRANA Beteiligungs-AG
-Cargill
-Grain Processing Corporation
-Ingredion Incorporated
-Roquette Freres
-Tate & Lyle
-Tereos

Other Prominent Vendors

-Anora Industrial
-BASF
-Beneo
-COFCO

-Emsland Group
-HL Agro Products
-KMC
-Manildra Group
-Meelunie
-Novamont
-Royal Avebe
-Royal Cosun
-SCG International Corporation
-SMS Group

KEY QUESTIONS ANSWERED:

1.How big is the global industrial starch market?
2.What is the growth rate of the global industrial starch market?
3.What are the factors driving the global industrial starch market growth?
4.Who are the major players in the global industrial starch market?
5.Which region will have the highest CAGR in the global industrial starch market?

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