

Industrial Starches Market Size Analysis Report - Market Share, Forecast Trends and Outlook (2025-2034)

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Report description:

The global industrial starches market reached a value of about USD 57.24 Billion in 2024. The industry is further expected to grow at a CAGR of about 5.30% in the forecast period of 2025-2034 to reach a value of around USD 95.94 Billion by 2034.

Industrial Starches Market Growth

The rapid growth of the food and food processing industry is the major driver of the growth of the industrial starches market. They are used in manufacturing a wide range of products in the food industry. The product is used to manufacture frozen, packaged, and convenience food products. The demand for such foods is rapidly increasing, particularly in emerging nations, which is projected to impact the market's growth positively.

Over the forecast period, the increased use of industrial starch as a thickening, stabilising, and gelling agent, binder, diluent, and excipient, is expected to drive up the demand for the product. To build a footing in the market, industry players have been focused on various strategies such as mergers, expansions, and new product development. Cargill, Incorporated, for example, introduced label-friendly tapioca under the SimPure line in March 2021. Previously, SimPure products were exclusively created with waxy maize and potato-based starches. Tapioca starch provides a soft texture, strong water-binding properties, and cold-storage stability.

Industrial Starches Market Trends

A crucial trend of industrial starches market is the rise in the pharmaceutical sector. The rise of the biotechnology sector and growing demand from the paper and wallboard industries for wheat starch due to its adhesive properties, consistent viscosity, and better performance, are propelling the market forward. Along with this, improvements in the production process and the development of wastewater treatment technologies will boost the opportunities for the growth of the market.

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Recent Developments

As per the industrial starches market dynamics and trends, the National Union of Potato Producers (UNPT) in France offered its support for the recent announcement from the Ministry of Agriculture, Food Sovereignty, and Forestry regarding the new National Strategic Plan (PSN).

The Ministry revealed a significant increase in the basic coupled aid for starch potato production, which will rise from EUR83 per hectare in 2024 to EUR173 per hectare in 2025-2026, and then to EUR186 per hectare by 2027.

Industry Outlook

As per the industrial starches industry analysis, starch is the primary source of stored energy in cereals and tubers, with estimates suggesting that 70-80% of the carbohydrate calories consumed by humans globally come from starch-based products. Starch is commercially produced from various sources, including corn, tapioca, wheat, potatoes, rice, peas, barley, sago, and sweet potatoes. In industrial starch processing, two types of potatoes are used. Starch potatoes, which have a starch content exceeding 18%, are mainly grown for starch production in Europe. On the other hand, regular potatoes, containing between 12% and 15% starch, are used for starch processing in regions outside of Europe.

In 2023, the global production of potato starch and its derivatives was estimated at 2,450 kilotonnes, which contributed to the growth of the industrial starches industry. Native potato starch leads in production volume, followed by modified starch, maltodextrin, and dextrose. Europe is the largest producer of potato starch and its derivatives globally, known for its high-quality seed potatoes. Typically, starch potatoes achieve a starch recovery rate of 18-20%, benefiting from advanced technology in potato storage and starch production.

Several market players are investing in the construction of new industrial starch facilities, which can increase the industrial starches industry revenue. For instance, Al Ghurair Foods, a prominent food processing enterprise in the UAE, has officially began the construction of its advanced Corn Starch Manufacturing Plant at Khalifa Economic Zones Abu Dhabi (KEZAD). This facility, the first of its kind in the region, signifies a major advancement in boosting local food production capabilities and supports the UAE's National Strategy for Food Security.

Diverse applications, strong demand in food and beverage, renewable raw materials, and technological advancements are favouring the market growth.

- Industrial starches have a wide range of applications, including food, paper, textiles, and adhesives, ensuring a broad market base.
- The food and beverage industry drives strong demand of industrial starches market due to their functional properties in various products.
- Starches are derived from renewable raw materials such as corn, potatoes, and wheat, aligning with sustainable practices.
- Technological advancements in starch modification enhance product quality and expand its industrial applications.

Price volatility of raw materials, dependency on agricultural production, and competition from substitutes may pose challenges to the market players.

- The price volatility of raw materials like corn and potatoes can impact the cost structure of industrial starch production.
- Dependency on agricultural production makes the market vulnerable to climatic conditions and crop yields.
- The extraction and modification processes of starches can be complex and costly, affecting overall profitability and industrial

starches demand forecast.

- Industrial starches face competition from other natural and synthetic alternatives, such as gums, gelatin, and cellulose derivatives, which can offer similar functional properties.

Expansion in emerging markets, growing demand for bio-based products, and innovation in starch derivatives, offer new growth opportunities in the global industrial starches market.

- Growing industrialization and changing consumer lifestyles in emerging economies, particularly in Asia-Pacific and Latin America, present opportunities for starch-based products in food, paper, and packaging industries.
- The growing demand for bio-based and eco-friendly products drives the adoption of industrial starches in various applications.
- Continuous innovation in starch derivatives and modified starches can unlock new market segments and applications, which can boost the industrial starches demand.
- Increased investments in research and development enhance product offerings and technological capabilities.

Competitive Analysis of the Global Industrial Starches Market

The global industrial starches market is characterized by intense competition among key players leveraging advanced production technologies, extensive distribution networks, and strategic partnerships.

Competitive Strategies:

- Product Innovation: Companies continuously invest in research and development to introduce innovative starch products that cater to the evolving needs of various industries, including food and beverages, paper, textiles, and pharmaceuticals, which can boost the industrial starches demand growth. For example, the development of modified starches with improved functionalities such as enhanced stability, texture, and shelf-life is a key focus area.
- Quality and Certification: Maintaining high-quality standards and obtaining relevant certifications (e.g., ISO, GMP) are critical for gaining a competitive edge. Players emphasize stringent quality control measures and sustainable sourcing of raw materials to ensure product consistency and reliability.
- Strategic Partnerships and Acquisitions: Collaborations with local suppliers, technology providers, and research institutions help companies enhance their market presence and innovation capabilities, affecting overall industrial starches market value. Strategic acquisitions also enable market leaders to expand their product offerings and geographical reach. For instance, Ingredion's acquisition of Western Polymer LLC in 2019 strengthened its position in the North American market.
- Market Expansion: Geographic expansion into emerging markets is a key growth strategy. Companies target regions with high demand potential and invest in local production facilities, distribution channels, and marketing activities.
- Customer Relationships: Building strong customer relationships through exceptional service, customized solutions, and technical support ensures customer loyalty and repeat business. Companies focus on understanding customer needs and providing value-added services such as formulation assistance and regulatory compliance support.

Industrial Starches Industry Segmentations

Starches are derived from a range of food sources, including wheat, potato, and maize, and are utilised in a variety of industries, including paper, food, printing, textiles, and many others. Plants produce starch, which is an edible polymer. It is widely used in the culinary and pharmaceutical sectors. The most common commercial sources of starch include corn, rice, potato, tapioca, and wheat.

The various sources of industrial starches in the market are:

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- Corn
- Wheat
- Cassava
- Potato
- Others

Based on type, the market is divided into:

- Native
- Starch Derivatives and Sweeteners

The major applications of the market are:

- Food
- Feed
- Paper Industry
- Pharmaceutical Industry
- Others

The report also covers the regional markets like:

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

Industrial Starches Market Share

The pharmaceutical industry is growing at a CAGR of 5.9% between 2025 and 2034 and is increasingly boosting industrial starches market revenue, mainly due to starch's versatile properties and the growing demand for effective drug delivery systems. In recent years, starch has gained traction as a valuable excipient, a substance added to medications to aid in the formulation and delivery of active ingredients.

Starch is widely used in pharmaceuticals as a binder, disintegrant, and filler. It helps control the release of drugs, making it useful for creating both fast-acting and extended-release medications. This versatility increases the demand for different types of modified starches tailored to various pharmaceutical needs.

Competitive Landscape

The report gives a detailed analysis of the following key players in the global industrial starches market, covering their competitive landscape, capacity, and latest developments like mergers, acquisitions, and investments, expansions of capacity, and plant turnarounds:

- Cargill Incorporated
- Archer Daniels Midland Company
- Ingredion Incorporated

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- Tate & Lyle PLC
- AGRANA Beteiligungs-AG
- Roquette Freres
- Others

Industrial Starches Market Regional Analysis

With a highly developed food industry utilising all ingredients, North America is expected to dominate the global market for industrial starches. Canadian market is expected to grow at a CAGR of 5.5% in the forecast period. The presence of several multinational food manufacturing and processing enterprises in the region has increased the industrial starches market opportunities. The United States is one of the world's leading producers of corn, which is used in a variety of applications, including starch production. The market is heavily oriented toward the consumption of gluten-free foods, which is bolstered by the country's government's tight regulations on gluten-free ingredient labelling. As a result, the majority of modified dietary starches originating from corn, waxy maize, and potatoes in the United States are gluten-free.

The Canadian industrial starches industry is growing rapidly, owing to rising consumer demand for healthy and cleaner ingredients. Light-coloured applications with subtle flavours drive the demand for native starches in the country.

Due to the substantial growth of the manufacturing sector in the area, Asia Pacific is predicted to have the highest revenue based CAGR from 2023 to 2027. The markets in India and China are expected to grow at CAGRs of 6.2% and 5.7% in the forecast period. Several pharmaceutical companies, including Serum Institute of India Pvt. Ltd, Hyphen's Pharma, and Kalbe's Pharma are expected to support the product demand in the Asia Pacific. Due to its biocompatibility and gel-forming capacity, industrial starch is utilised in the manufacturing of tablets and capsules. The rise of several end-use sectors, including food, paper, and textiles, is likely to further augment the industrial starches market development in the region.

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