

India Starch And Starch Derivative - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

India Starch And Starch Derivative Market Analysis

The Indian starch and starch derivatives market size is valued at USD 3.45 billion in 2025 and is forecast to reach USD 4.12 billion by 2030, expanding at a 7.34% CAGR. Growth stems from ethanol-blending policies that have lifted corn demand, rising adoption of clean-label modified starches across food and beverage categories, and policy-backed shifts toward starch-based bioplastics following the single-use plastic ban. Parallel expansion in pharmaceutical manufacturing, where cyclodextrins enhance drug-delivery performance, and in e-commerce packaging, where starch adhesives replace synthetic glues, further bolsters revenue opportunities. Key enabling factors include India's integrated maize supply chain, the government's 17.98% ethanol blend rate achieved by February 2025, and steady investment in new poly-lactic acid (PLA) projects that anchor latent starch demand. Nonetheless, corn-price volatility, GMO-related quality scrutiny, and sub-scale wet-milling capacity challenge near-term margins, underscoring the need for feedstock hedging and process upgrades.

India Starch And Starch Derivative Market Trends and Insights

Abundant Domestic Maize Supply Chain Integration

In 2024/25, India's corn production is projected to hit 37 million metric tons, as reported by the USDA Foreign Agriculture Service . This robust maize output offers strategic benefits to starch manufacturers. By integrating domestic supply chains, India not only curtails its reliance on imports but also gains a cost edge, especially amidst the backdrop of fluctuating global corn prices. In India,

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approximately 14% of maize production is directed towards starch manufacturing, setting a robust foundation for the industry's expansion. This segment benefits significantly from government initiatives such as the Digital Agriculture Mission, which aims to modernize the agricultural sector through technology integration. Additionally, advancements in post-harvest infrastructure, including storage and processing facilities, have strengthened the supply chain. These developments not only boost agricultural productivity but also position domestic manufacturers advantageously against their import-dependent counterparts, fostering long-term growth in the starch manufacturing industry.

Surge in Demand for Clean-Label Modified Starches

In India, a shift towards clean-label products is transforming the food processing sector, which is on track to hit USD 535 billion by 2025-26, as per the U.S. Department of Agriculture. Urban consumers, becoming more health-conscious, are turning to modified starches as natural substitutes for synthetic additives. Companies are now prioritizing clean-label formulations, heavily leaning on modified starch systems to enhance texture and mouthfeel, according to Food Ingredients First. Notably, cross-linked starches are emerging as favorites due to their superior stability and functional benefits in processed foods, showcasing better resistance to retrogradation and freeze-thaw challenges. Food manufacturers are not only adopting these modified starches to comply with regulatory standards but also to uphold product quality, driving consistent demand growth in the bakery, dairy, and convenience food sectors.

Corn-Price Volatility from Rising Ethanol Diversion

India's shift from being a corn exporter to a net importer has led to significant price fluctuations. Corn prices have jumped to USD 27.35 per quintal, driven by ethanol demand, which consumes 6-7 million tons annually. This surge in prices has a direct effect on the raw material costs for starch manufacturers, hitting smaller players with limited procurement power the hardest. In response to these challenges, the government is contemplating the import of genetically modified corn at reduced duties to address supply shortages. However, the timeline for regulatory approvals remains a gray area. Meanwhile, poultry producers are pushing for duty-free corn imports, highlighting the strain on the broader supply chain and its implications for the starch industry's competitiveness. With corn accounting for 60-70% of production costs for many starch derivatives, this volatility poses significant planning hurdles for manufacturers. As a result, companies are either resorting to advanced hedging strategies or passing the increased costs onto their downstream customers.

Other drivers and restraints analyzed in the detailed report include:

E-commerce-Driven Paper & Packaging Starch Uptake / Government Ethanol-Blending Push Boosting Glucose Syrups / Quality Concerns Due to Genetically Modified Ingredient Adulteration /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

In 2024, native starches command a dominant 40.34% market share, leveraging cost advantages and widespread applications in food processing and industrial sectors. Meanwhile, modified starches are the fastest-growing segment, projected to expand at an 8.02% CAGR through 2030. This surge is fueled by their specialized applications, which demand enhanced functional properties like improved stability, texture modification, and adherence to clean-label standards. Starch derivatives, such as glucose syrups and maltodextrin, are witnessing strong demand from both the ethanol and food processing industries. Notably, glucose syrups are reaping benefits from government mandates on ethanol blending.

These segment dynamics underscore India's evolving industrial landscape. While traditional native starches found their footing in

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textiles and paper, there's a notable shift towards higher-value modified products catering to pharmaceuticals and specialty foods. Cross-linked starches are becoming popular for their stability in processed foods. At the same time, cyclodextrin derivatives are seeing a rise in drug delivery system applications, as highlighted by RSC Pharm. Although high fructose corn syrup (HFCS) and dextrins cater to niche markets, they grapple with competition from natural sweeteners, reflecting a broader consumer shift towards clean-label products.

In 2024, maize accounts for 62.34% of the market share, supported by India's position as the 4th largest global producer by area and a robust wet-milling infrastructure concentrated in Gujarat, Punjab, and Maharashtra. Potato-based starches are the fastest-growing segment, with an expected CAGR of 8.55% through 2030. This growth is driven by their superior functional properties and increasing use in pharmaceutical excipients and specialty food products. Wheat-based starches continue to see steady demand in traditional applications, while tapioca starches cater to specialized industrial needs requiring specific viscosity characteristics.

The diversification of starch sources highlights manufacturers' efforts to manage risks and reduce reliance on single feedstocks amid concerns over price volatility. For example, Anil Limited operates one of India's largest corn wet-milling facilities, with a capacity of 550 tonnes per day, showcasing the scale advantages in maize processing. Additionally, alternative sources like barnyard millet starch are being explored for their sustainability and unique physicochemical properties, although their commercial scalability remains limited.

The India Starch & Starch Derivatives Market Report is Segmented by Type (Native Starch, Modified Starch, Starch Derivatives), Source (Maize, Wheat, Tapioca, Others), Form (Powder, Liquid), Application (Food and Beverage, Pharmaceutical, Personal Care & Cosmetics, Animal Feed, Textile, Paper and Corrugating, Others) and Geography. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Archer Daniels Midland Company / Cargill Inc. / Ingredion Incorporated / Gulshan Polyols Ltd / Tirupati Starch & Chemicals Ltd / Sukhjit Starch & Chemicals Ltd / Gayatri Bio Organics Ltd / Universal Starch Chem Allied Ltd / Sahyadri Starch & Industries Pvt Ltd / Gujarat Ambuja Exports Ltd / Bluecraft Agro Pvt Ltd / Angel Starch & Food Pvt Ltd / RVP Starch Pvt Ltd / Spac Starch Products (India) Ltd / Shalom Sales Indore / Roquette Freres SA / Tate & Lyle PLC / Tereos Syral / Avebe UA / BASF-SE /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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