

# **Global Modified Starch Market Size study, by Raw Material (Corn, Cassava, Potato, Wheat), End-User (Food & Beverages, Feed, and Industrial), Form (Dry and Liquid), and Regional Forecasts 2022–2032**

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## **Abstracts**

Global Modified Starch Market is valued approximately at USD 14.12 billion in 2023 and is anticipated to grow with a moderate CAGR of more than 3.10% over the forecast period 2024–2032. Modified starch, once a humble thickening agent, has today evolved into a pivotal component redefining the very framework of food processing, bio-industrial operations, and functional feed solutions. Tailored through physical, enzymatic, or chemical transformations, modified starch derivatives offer superior stability, emulsification, and shelf-life extension—making them indispensable in products ranging from ready-to-eat meals and dairy beverages to bio-adhesives and paper coatings. With consumers gravitating toward cleaner, high-performance food matrices and industries demanding scalable, sustainable input materials, the global modified starch market has stepped into an era of strategic reinvention.

The escalating demand for processed and convenience foods—particularly across emerging economies—is serving as a cornerstone driver for market expansion. In the food & beverage segment, modified starches are leveraged for freeze-thaw stability, fat replacement, and moisture retention, while the industrial sector utilizes them in bioplastics, textiles, and oil drilling applications. Cassava and potato-based starches are being increasingly favored for their high paste viscosity and allergen-free attributes. Meanwhile, manufacturers are accelerating investments in green chemistry and non-GMO product lines, aiming to align with the global clean-label movement and respond to tightening food safety regulations.

Nevertheless, the industry is navigating several complex barriers. Supply chain

instability—particularly around raw materials like corn and wheat—alongside volatile climate conditions and price sensitivities, continues to create production bottlenecks. Further, stringent regulations on chemical modification techniques and the rising demand for organic inputs are prompting players to diversify sourcing and adopt enzyme-based, eco-friendly processing alternatives. To counter these challenges, manufacturers are embracing vertical integration, investing in precision fermentation, and experimenting with hybrid starch blends that offer enhanced solubility, viscosity, and thermal stability across multiple end-use applications.

A confluence of trends, including the rise of flexitarian diets, demand for gluten-free products, and growing environmental awareness, is fueling innovation in the modified starch arena. Forward-thinking firms are blending starches with fibers and proteins to develop multifunctional solutions tailored for health-conscious consumers. In the industrial domain, modified starch is gaining traction as a biodegradable alternative to petrochemical polymers, particularly in packaging and agriculture. Advanced drying technologies and encapsulation processes are also playing a vital role in enhancing modified starch properties for specific end-use functionalities.

Regionally, North America leads the global modified starch market, underpinned by its advanced food processing industry, rising demand for functional ingredients, and early adoption of clean-label standards. Europe follows closely, with sustainability mandates and innovation in bio-based industrial materials bolstering regional growth. Asia Pacific, however, is poised for the fastest CAGR during the forecast period, driven by its expanding processed food sector, rising disposable income, and vast raw material availability in countries such as India, China, Thailand, and Indonesia. Latin America and the Middle East & Africa also present lucrative opportunities, especially as food manufacturing and industrial infrastructure mature across these geographies.

Major market player included in this report are:

Cargill, Incorporated

Ingredion Incorporated

Tate & Lyle PLC

Roquette Frères

ADM

Avebe U.A.

Emsland Group

Global Bio-Chem Technology Group Company Limited

SPAC Starch Products (India) Ltd.

AGRANA Beteiligungs-AG

Grain Processing Corporation

Thai Flour Industry Co., Ltd.

Universal Starch-Chem Allied Ltd.

SMS Corporation Co., Ltd.

Gujarat Ambuja Exports Ltd.

The detailed segments and sub-segment of the market are explained below:

#### By Raw Material

Corn

Cassava

Potato

Wheat

#### By End-User

Food & Beverages

Feed

Industrial

By Form

Dry

Liquid

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Rest of Latin America

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

Years considered for the study are as follows:

Historical year – 2022

Base year – 2023

Forecast period – 2024 to 2032

## Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

## Contents

### **CHAPTER 1. GLOBAL MODIFIED STARCH MARKET EXECUTIVE SUMMARY**

- 1.1. Global Modified Starch Market Size & Forecast (2022–2032)
- 1.2. Regional Summary
- 1.3. Segmental Summary
  - 1.3.1. By Raw Material
  - 1.3.2. By End User
- 1.4. Key Trends
- 1.5. Recession Impact
- 1.6. Analyst Recommendation & Conclusion

### **CHAPTER 2. GLOBAL MODIFIED STARCH MARKET DEFINITION AND RESEARCH ASSUMPTIONS**

- 2.1. Research Objective
- 2.2. Market Definition
- 2.3. Research Assumptions
  - 2.3.1. Inclusion & Exclusion
  - 2.3.2. Limitations
  - 2.3.3. Supply Side Analysis
    - 2.3.3.1. Availability
    - 2.3.3.2. Infrastructure
    - 2.3.3.3. Regulatory Environment
    - 2.3.3.4. Market Competition
    - 2.3.3.5. Economic Viability (Consumer's Perspective)
  - 2.3.4. Demand Side Analysis
    - 2.3.4.1. Regulatory Frameworks
    - 2.3.4.2. Technological Advancements
    - 2.3.4.3. Environmental Considerations
    - 2.3.4.4. Consumer Awareness & Acceptance
- 2.4. Estimation Methodology
- 2.5. Years Considered for the Study
- 2.6. Currency Conversion Rates

### **CHAPTER 3. GLOBAL MODIFIED STARCH MARKET DYNAMICS**

- 3.1. Market Drivers

- 3.1.1. Surging Demand for Processed and Convenience Foods
- 3.1.2. Diversified Industrial Applications (Bioplastics, Textiles, Oil Drilling)
- 3.1.3. Clean Label and Non GMO Regulatory Push
- 3.2. Market Challenges
  - 3.2.1. Raw Material Volatility and Supply Chain Disruptions
  - 3.2.2. Stringent Regulations on Chemical Modification Techniques
- 3.3. Market Opportunities
  - 3.3.1. Enzyme Based and Eco Friendly Processing Alternatives
  - 3.3.2. Hybrid Starch Blends for Enhanced Functionality
  - 3.3.3. Biodegradable Polymer Substitutes in Packaging and Agriculture

## **CHAPTER 4. GLOBAL MODIFIED STARCH MARKET INDUSTRY ANALYSIS**

- 4.1. Porter's 5 Force Model
  - 4.1.1. Bargaining Power of Suppliers
  - 4.1.2. Bargaining Power of Buyers
  - 4.1.3. Threat of New Entrants
  - 4.1.4. Threat of Substitutes
  - 4.1.5. Competitive Rivalry
  - 4.1.6. Futuristic Approach to Porter's 5 Force Model
  - 4.1.7. Porter's 5 Force Impact Analysis
- 4.2. PESTEL Analysis
  - 4.2.1. Political
  - 4.2.2. Economical
  - 4.2.3. Social
  - 4.2.4. Technological
  - 4.2.5. Environmental
  - 4.2.6. Legal
- 4.3. Top Investment Opportunities
- 4.4. Top Winning Strategies
- 4.5. Disruptive Trends
- 4.6. Industry Expert Perspective
- 4.7. Analyst Recommendation & Conclusion

## **CHAPTER 5. GLOBAL MODIFIED STARCH MARKET SIZE & FORECASTS BY RAW MATERIAL 2022–2032**

- 5.1. Segment Dashboard
- 5.2. Global Modified Starch Market: Raw Material Revenue Trend Analysis, 2022 &



2032 (USD Million/Billion)

- 5.2.1. Corn
- 5.2.2. Cassava
- 5.2.3. Potato
- 5.2.4. Wheat

## **CHAPTER 6. GLOBAL MODIFIED STARCH MARKET SIZE & FORECASTS BY END USER 2022–2032**

- 6.1. Segment Dashboard
- 6.2. Global Modified Starch Market: End User Revenue Trend Analysis, 2022 & 2032 (USD Million/Billion)
  - 6.2.1. Food & Beverages
  - 6.2.2. Feed
  - 6.2.3. Industrial

## **CHAPTER 7. GLOBAL MODIFIED STARCH MARKET SIZE & FORECASTS BY REGION 2022–2032**

- 7.1. North America
  - 7.1.1. U.S.
    - 7.1.1.1. Raw Material breakdown size & forecasts, 2022–2032
    - 7.1.1.2. End User breakdown size & forecasts, 2022–2032
  - 7.1.2. Canada
- 7.2. Europe
  - 7.2.1. UK
  - 7.2.2. Germany
  - 7.2.3. France
  - 7.2.4. Spain
  - 7.2.5. Italy
  - 7.2.6. Rest of Europe
- 7.3. Asia Pacific
  - 7.3.1. China
  - 7.3.2. India
  - 7.3.3. Japan
  - 7.3.4. Australia
  - 7.3.5. South Korea
  - 7.3.6. Rest of Asia Pacific
- 7.4. Latin America

- 7.4.1. Brazil
- 7.4.2. Mexico
- 7.4.3. Rest of Latin America
- 7.5. Middle East & Africa
  - 7.5.1. Saudi Arabia
  - 7.5.2. South Africa
  - 7.5.3. Rest of Middle East & Africa

## **CHAPTER 8. COMPETITIVE INTELLIGENCE**

- 8.1. Key Company SWOT Analysis
  - 8.1.1. Cargill, Incorporated
  - 8.1.2. Ingredion Incorporated
  - 8.1.3. Tate & Lyle PLC
- 8.2. Top Market Strategies
- 8.3. Company Profiles
  - 8.3.1. Cargill, Incorporated
    - 8.3.1.1. Key Information
    - 8.3.1.2. Overview
    - 8.3.1.3. Financial (Subject to Data Availability)
    - 8.3.1.4. Product Summary
    - 8.3.1.5. Market Strategies
  - 8.3.2. Ingredion Incorporated
  - 8.3.3. Tate & Lyle PLC
  - 8.3.4. Roquette Frères
  - 8.3.5. ADM
  - 8.3.6. Avebe U.A.
  - 8.3.7. Emsland Group
  - 8.3.8. Global Bio Chem Technology Group Company Limited
  - 8.3.9. SPAC Starch Products (India) Ltd.
  - 8.3.10. AGRANA Beteiligungs AG

## **CHAPTER 9. RESEARCH PROCESS**

- 9.1. Research Process
  - 9.1.1. Data Mining
  - 9.1.2. Analysis
  - 9.1.3. Market Estimation
  - 9.1.4. Validation

9.1.5. Publishing  
9.2. Research Attributes

## List Of Tables

### LIST OF TABLES

- TABLE 1. Global Modified Starch market, report scope
- TABLE 2. Global Modified Starch market estimates & forecasts by Region 2022–2032 (USD Million/Billion)
- TABLE 3. Global Modified Starch market estimates & forecasts by Raw Material 2022–2032 (USD Million/Billion)
- TABLE 4. Global Modified Starch market estimates & forecasts by End User 2022–2032 (USD Million/Billion)
- TABLE 5. Global Modified Starch market by segment, estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 6. Global Modified Starch market by region, estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 7. Global Modified Starch market by segment, estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 8. Global Modified Starch market by region, estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 9. Global Modified Starch market by segment, estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 10. Global Modified Starch market by region, estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 11. U.S. Modified Starch market estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 12. U.S. Modified Starch market estimates & forecasts by segment 2022–2032 (USD Million/Billion)
- TABLE 13. Canada Modified Starch market estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 14. Canada Modified Starch market estimates & forecasts by segment 2022–2032 (USD Million/Billion)
- TABLE 15. Europe Modified Starch market estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 16. Asia Pacific Modified Starch market estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 17. Latin America Modified Starch market estimates & forecasts, 2022–2032 (USD Million/Billion)
- TABLE 18. Middle East & Africa Modified Starch market estimates & forecasts, 2022–2032 (USD Million/Billion)

TABLE 19. Price trend analysis of key Modified Starch raw materials, 2022–2023

TABLE 20. Comparison of enzymatic vs. chemical modification techniques

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