

Starch Derivatives Market: By Product (Maltodextrin, Cyclodextrin, Glucose Syrups, Hydrolysates, Modified Starch, and others); By Raw Material (Corn, Wheat, Cassava, Potato, and Other); By Application (Food and Beverage, Feed, Paper Industry, Pharmaceutical Industry, Bioethanol, Cosmetics and Other); and Region – Global Analysis by Market Size, Share & Trends for 2014 – 2020 and Forecasts to 2030

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Abstracts

Product Overview

In order to modify its properties, starch derivatives are made by enzymatically, mechanically, or chemically processing native starch. In different industries, starch derivatives are used. It is used in the food and beverage industry as a thickener and stabilizer, in the pharmaceutical industry as a tablet binder, in cosmetics as an emulsifier, and in animal feed as a fiber additive. Flocculation, film-forming, adhesiveness, pH stability improvement and shear stability, acid stability, and process tolerance enhancement are also other functions of starch derivatives. Starch derivatives are used in the pharmaceutical field as a tablet binder, as a food and beverage stabilizer and thickener, as a fiber filler in animal feed, and as an emulsifier in the cosmetic industry. In addition to these, adhesiveness, flocculation, film-forming, shear stability, pH stability improvement, process tolerance improvement, and acid stability are some more important applications of starch derivatives.

Market Highlights

Starch Derivatives Market is expected to project a notable CAGR of 8.7% in 2030.

Starch Derivatives Market to surpass USD 65.5 billion by 2030 from USD 49.74 billion in

2019 at a CAGR of 8.7% throughout the forecast period, i.e., 2020-30. The market is mainly driven by a wide spectrum of applications of starch and its derivatives across different end-user sectors. The growth of the industry is likely to be driven by strict regulations promoting the use of natural ingredients across various industries, including pharmaceuticals, textiles, fermentation, and cosmetics. The underlying demand for starch-based adhesives is paper and packaging and is expected to experience healthy growth in the near future. The demand for bio-based and biodegradable adhesives is expected to fuel ever-increasing regulatory requirements for low-emission adhesives, which, in turn, is expected to drive the market for starch and its derivatives. Due to factors such as rising R&D spending, along with fluctuations in raw material prices, the demand for starch derivatives has seen significant growth. Besides, rising public health and wellness issues, along with a shifting desire for a healthy appetite, are key to improve the market.

Starch Derivatives Market: Segments

Glucose syrup segment to grow with the highest CAGR of 6.3% during 2020-30

Starch Derivatives Market is segmented by product as maltodextrin, glucose syrup, cyclodextrin, hydrolysates, Modified starch, and Others. The greater market share in 2019 was accounted for by the Glucose syrup segment held the largest share of 55% in terms of volume in the Starch Derivatives market. Due to the increasing consumption of ice creams, sweets, bakery items, processed meats, and sauces, the segment is expected to experience substantial gains over the forecast period. Demand is expected to be propelled by increased glucose consumption in non-food applications, including cosmetics, pharmaceuticals, adhesives, textiles, paper, and plywood. It also acts as a taste enhancer, volume adding agent, texture agent, and sugar crystallization inhibitor in beverages. As a result of its growing usage in various industries, including food, cosmetics, pharmaceuticals, paper, textiles, construction, and paints and coatings, Maltodextrin is projected to grow at a revenue-based CAGR of 6.3% over the forecast period.

Pharmaceutical Segment to grow with the highest CAGR of 5.9% during 2020-30

Starch Derivatives Market is segmented by application into food & beverages, cosmetics, paper, pharmaceuticals, feed, and others. Food and beverages were the largest application segment in 2019 accounting for over 58.9% share of the global volume. In different countries, including China, India, Brazil, the United States, Germany, and Saudi Arabia, the segment is expected to see substantial growth due to rising consumption of packaged and convenience foods. Owing to high disposable income and developments in healthcare infrastructure, pharmaceuticals are projected to rise at a CAGR of 5.9 percent over the forecast period. Besides, over the forecast

period, the growing pharmaceutical industry in the U.S., China, and India is forecast to deliver significant opportunities. The market for starch derivatives is expected to increase the inclination for the use of natural cosmetics.

Starch Derivatives Market: Market Dynamics

Drivers

Increasing Investments by Organizations

Population growth, increasing demand for convenience foods and beverages in developing countries, and an increase in per capita incomes are among the key factors driving the growth of the global market for starch derivatives. Besides, starch holds an important position in the sectors of glue processing, textile finishing and weaving, bio-fuel, and fermentation. A striking inflow of capital is expected to be witnessed by the industry, as starch producers are extending their commitment to improving the quality of their goods to have an advantage over their rivals. It is also anticipated that the use of these derivatives in the personal care segment as a drug coating and animal feed would provide potential scope for market growth in the coming years.

Emerging economies

Emerging economies such as China and India are seeing a rise in the consumption of modified starch due to rapid industrialization and an increase in middle-class purchasing capacity per capita. A rise in use in areas with unexplored market applications such as functional foods, nutrition, and healthcare is expected to be seen. Its derivatives are poised to play an important role in improving the abundant supply and renewable existence of sustainable plastics. The supply and cost may further improve if lignocelluloses replace cornstarch as the preferred feedstock in the production of ethanol in the U.S. in the coming years.

Restrain

Variation in raw material costs

High R&D costs involved in the extraction and development of starch derivatives are one of the major factors limiting the growth of the demand for starch derivatives. They are used in different industries, such as food & beverage, pharmaceutical, paper, and many more, but they have small natural sources of starch extraction. Starch derivatives have improved functional properties and give various advantages. This has forced a large variety of starch derivatives for food and non-food applications to be developed and marketed by producers and marketers.

Starch Derivatives Market: Key Players

Archer Daniels Midland Company

Company Overview, Business Strategy, Key Product Offerings, Financial Performance, Key Performance Indicators, Risk Analysis, Recent Development, Regional Presence, and SWOT Analysis.

Cargill Incorporated

Royal Avebe U.A (Avebe Nutrition)

Ingredion Incorporated

Beneo

Roquette

Tate & Lyle PLC

Starch Derivatives Market: Regions

Starch Derivatives Market is segmented based on regional analysis into five major regions. These include North America, Latin America, Europe, APAC, and MENA.

Starch Derivatives Market in Asia Pacific held the largest market share of XX.X% in the year 2019 due to the increasing demand for processed food, because of the shift in lifestyle trends. People are searching for choices for ready-to-eat meals as they lead a busy life. Asia Pacific is also the fastest-growing market, as industrial applications and starch-processing technologies are rapidly evolving in the region. As different industries integrate starch derivatives into their manufacturing processes and goods, the demand for starch derivatives is growing. Key players are also investing rapidly in the demand for starch derivatives in the Asia Pacific. Due to the growth of the pharmaceutical and food and beverage industries in countries such as the U.S., Canada, and Mexico, North America is projected to grow at a volume-based CAGR of 3.4 percent over the forecast period. As a result of the rapid growth of the personal care and textile industries in the U.K., Germany, and Spain, Europe is expected to see significant growth.

Competitive Landscape:

The Starch Derivatives market, which is highly competitive, consists of several major players such as Archer Daniels Midland Company (US), Cargill (US), Ingredion (US), Tate & Lyle (UK) hold a substantial market share in the Starch Derivatives market. Other players analyzed in this report are Roquette Freres (France), Grain Processing Corporation (US), Global Sweeteners Holdings Ltd. (Hong Kong), AGRANA (Austria), Gulshan Polyols (India), Fooding Company Limited (China), Foodchem International Corporation (China), Tereos (France), Molinos Juan Semino SA (Argentina), JP & SB International (Spain), and Gujarat Ambuja Export (India). ShreeGluco Biotech Private Ltd. (India), Varun Industries (India), Shubham Starch Chem Pvt. Ltd. (India), Matsutani Chemical Industry Co., Ltd. (Japan), Sansar Bio-Polymers Ltd. (India), Jay Sardar

Starch & Gum Consultant (India), B Food Science Co., Ltd. (Japan), Tirupati Starch & Chemicals Ltd. (India), Sinofi Ingredients (China), and Nagase & Co., Ltd. (Japan).

The market competition has been stepped up by the availability of many players offering Starch Derivatives. In November 2020, AGRANA announced the opening of its new wheat starch production plant in Lower Austria. Through this plant, the company has expanded its business operations and doubled its wheat starch producing capacity. This plant will also help the company to respond to the growing demand for starch from the paper industry.

Starch Derivatives Market is further segmented by region into:

North America Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – United States and Canada

Latin America Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – Mexico, Argentina, Brazil, and Rest of Latin America

Europe Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – United Kingdom, France, Germany, Italy, Spain, Belgium, Hungary, Luxembourg, Netherlands, Poland, NORDIC, Russia, Turkey, and Rest of Europe

APAC Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – India, China, South Korea, Japan, Malaysia, Indonesia, New Zealand, Australia, and Rest of APAC

MENA Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – North Africa, Israel, GCC, South Africa, and Rest of MENA

Starch Derivatives Market report also contains analysis on:

Starch Derivatives Market Segments:

By Product:

Maltodextrin

Glucose syrup

Cyclodextrin

Hydrolysates

Modified starch

Others

By Raw Material:

Corn

Cassava

Potato

Wheat

By Application:

Food & beverages

Cosmetics

Paper

Pharmaceuticals

Feed

Others

Starch Derivatives Market Dynamics

Starch Derivatives Market Size

Supply & Demand

Current Trends/Issues/Challenges

Competition & Companies Involved in the Market

Value Chain of the Market

Market Drivers and Restraints

FAQs on Starch Derivatives Market

Which segment is anticipated to hold the largest market share?

At what CAGR is the market anticipated to grow between 2020 and 2030?

Who are the key players in the Starch Derivatives Market?

What could be the challenging factors in the growth of the Starch Derivatives Market?

What are the growth drivers for the Starch Derivatives Market?

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3. AVEBE

4. CIRANDA

5. ARCHER DANIELS MIDLAND

6. INGREDION

7. NIC STARCH PRODUCTS LTD.

8. AGRANA GROUP

9. EMSLAND STARKE GMBH

10. BENEIO GMBH

Consultant Recommendation

**The above-given segmentations and companies could be subjected to further modification based on in-depth feasibility studies conducted for the final deliverable.

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