

Global Native and Modified Starches Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Native and Modified Starches market size was valued at US\$ 21685 million in 2025 and is forecast to a readjusted size of US\$ 26795 million by 2032 with a CAGR of 3.2% during review period.

Native and Modified Starches are carbohydrate polymers extracted from botanical feedstocks and supplied as standardized ingredients that deliver viscosity control, texture, binding, film formation, water management, and process stability across many manufacturing value chains. Native starch is the baseline material with predictable thickening and gelation behavior, while modified starches are engineered to improve shear stability, acid tolerance, freeze thaw stability, cook up profile, adhesion, or specialty functionality that native starch alone cannot reliably deliver at industrial scale. Because starch performance is highly sensitive to granule structure, impurity control, and consistency lot to lot, these products are treated as formulation critical inputs rather than interchangeable commodities in many end markets, with qualification, specification lock in, and change control embedded into procurement and quality systems.

Upstream supply is anchored by agricultural raw materials and wet milling or extraction assets, supported by enzymes, approved reagents for specific modification chemistries, process water, energy, and drying and milling capacity that largely determine cost position and consistency. Producers differentiate through scale, feedstock sourcing, plant integration, application laboratories, and regulatory and quality documentation, especially for food grade and pharma excipient requirements. Downstream demand is led by food processors, beverage and dairy formulators, bakery and snack manufacturers, paper and packaging producers, textile and sizing users, and industrial

formulators in adhesives, construction additives, and home and personal care. Procurement commonly combines annual framework agreements with multi site supply qualification, indexed raw material pass through clauses for large customers, and spot or short term purchasing for tactical coverage, with modified starch grades more frequently contracted under tighter specifications and longer qualification cycles.

In the current market, global production is around 50,457,000 metric ton, with an average selling price of about 417.68 USD per metric ton EXW basis. Competitive structure is shaped by a small set of multinational starch and ingredient groups plus strong regional champions in Europe, China, and Southeast Asia, and Top 5 suppliers control approximately 55% of global revenue CR5 in value terms as an industry pattern estimate. Demand weight is highest in North America, Europe, and China, while Southeast Asia is a major growth engine tied to cassava supply chains and expanding food and packaging capacity. A typical gross margin benchmark for diversified native plus modified starch producers is 24%, supported by scale economics, qualification lock in, application know how, and compliance documentation that raises switching costs for customers. Over the next 6 years, growth is expected to track packaged food, paper substitution and fiber based packaging, and performance driven reformulation toward clean label and improved functionality, while capacity decisions remain constrained by feedstock volatility, energy and water intensity, and permitting requirements; producers are also adopting data driven formulation and plant optimization tools, including AI enabled process control and product recommendation workflows, to improve yield, consistency, and speed of application development.

This report is a detailed and comprehensive analysis for global Native and Modified Starches market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Native and Modified Starches market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Native and Modified Starches market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices

(US\$/Ton), 2021-2032

Global Native and Modified Starches market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Native and Modified Starches market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Native and Modified Starches
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Native and Modified Starches market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ADM, Cargill, Ingredion, Roquette, Tate and Lyle, Tereos, AGRANA, Emsland Group, Royal Avebe, KMC, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Native and Modified Starches market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Native Starch

Physically Modified Starch

Chemically Modified Starch

Enzymatically Modified Starch

Market segment by Botanical Source

Corn

Wheat

Potato

Tapioca Cassava

Other Botanical Sources

Market segment by End Use Grade

Food Grade

Industrial Grade

Feed Grade

Pharmaceutical Grade

Market segment by Application

Food and Beverage

Paper and Packaging

Textile

Adhesives and Binders

Personal Care and Home Care

Other Industrial Uses

Major players covered

ADM

Cargill

Ingredion

Roquette

Tate and Lyle

Tereos

AGRANA

Emsland Group

Royal Avebe

KMC

BENEO

Hungrana

Sudstarke

AKV

Lyckeby

Pepees

Grain Processing

Chemigate

Japan Corn Starch

Sanwa Starch

Bangkok Starch Industrial

Thai Wah

Manildra

MGP Ingredients

Zhucheng Xingmao Corn Development

Luzhou Group

Guangxi State Farms Mingyang Starch Development

Shandong Fuyang Biotechnology

Shandong Shouguang Juneng Golden Corn Development

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Native and Modified Starches product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Native and Modified Starches, with price, sales quantity, revenue, and global market share of Native and Modified Starches from 2021 to 2026.

Chapter 3, the Native and Modified Starches competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Native and Modified Starches breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Native and Modified Starches market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Native and Modified Starches.

Chapter 14 and 15, to describe Native and Modified Starches sales channel, distributors, customers, research findings and conclusion.

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