

# **Modified Starch Market Report by Raw Material (Corn, Cassava, Wheat, Potato, and Others), Type (Starch Esters and Ethers, Resistant, Cationic, Pre-gelatinized, and Others), Function (Thickeners, Stabilizers, Binders, Emulsifiers, and Others), Application (Food and Beverages, Animal Feed, Paper, Pharmaceuticals, Textiles, and Others), and Region 2024-2032**

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## **Abstracts**

The global modified starch market size reached US\$ 14.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 21.5 Billion by 2032, exhibiting a growth rate (CAGR) of 4.19% during 2024-2032. The widespread product adoption as a thickening agent, stabilizer, and emulsifier in various food products, the growing consumer awareness and demand for clean-label products, and the advent of precise customization are some of the major factors propelling the market.

Modified starch is a starch derivative that has been physically, chemically, or enzymatically treated to change its natural properties. The aim of these modifications is to improve the starch's performance when used in various applications including food processing, pharmaceuticals, and textiles. Some of the benefits of modified starch include enhanced water-holding capacity, improved texture, and better heat resistance. For example, in food processing, it is often used as a thickening agent, stabilizer, or emulsifier. In the pharmaceutical industry, it can be employed as a disintegrant or binder in tablets. The modification process can involve various methods such as hydrolysis, oxidation, or cross-linking. These treatments alter the molecular structure of the starch, making it more functional for specific uses. However, it's crucial to note that the

modification must be carefully controlled to maintain safety and efficacy for its intended purpose. Modified starches are a versatile and important ingredient across numerous industries, offering improved characteristics over native starches.

One of the major market drivers for the modified starch industry is the rising demand in the food and beverage sector. Modified starch is widely used as a thickening agent, stabilizer, and emulsifier in various food products, such as sauces, soups, and baked goods. With the increasing consumer preference for convenience foods that offer extended shelf life and better texture, the utilization of modified starch has accelerated. Along with this, consumer awareness and demand for clean label products are increasing significantly. Consumers are more conscious of their food and are actively seeking natural and organic ingredients. Modified starches that comply with clean label criteria such as those derived from non-GMO or organic sources are gaining traction. In addition, the rise in vegetarianism and veganism has led to an increased demand for plant-based products. Modified starches play a crucial role in the texture and stabilization of these products. Apart from this, the animal feed market is another significant driver for modified starch as it is used as binders and as energy-providing ingredients in animal feeds. Moreover, the advent of precise customization of starch characteristics, resulting in tailored products that meet specific industrial requirements is creating a positive market outlook.

#### Modified Starch Market Trends/Drivers:

##### Applications in the Pharmaceutical Industry

Another strong driver in the market growth for modified starch is its application in the pharmaceutical industry. Modified starch is commonly used as a binder and disintegrant in tablet formulations. As the healthcare sector continues to grow globally, the need for efficient and reliable excipients in drug formulations has never been more critical. Modified starch offers multiple advantages over its native counterpart, such as improved compressibility, better flowability, and enhanced drug release profiles. This is particularly significant in creating sustained-release or controlled-release medication, thus expanding treatment options for patients with chronic conditions. Also, modified starches are being researched for their role in targeted drug delivery systems. These advantages make modified starch indispensable in the pharmaceutical industry, thereby fueling market demand.

##### Growing Textile and Paper Industry

The textile and paper industries are also significant contributors to the modified starch

market's growth. In textiles, modified starch is used as a sizing agent to strengthen yarns during the weaving process. It provides superior adhesion, reducing yarn breakage, and enhancing the quality of the fabric. In the paper industry, modified starches are used for surface sizing and coating, which adds strength, print quality, and water resistance to the paper. As developing countries continue to industrialize, the demand for quality textiles and paper products is rising. This, in turn, pushes the need for modified starches that can deliver high performance in these applications. Given the global trends towards sustainable products, modified starches derived from renewable resources are gaining prominence, further boosting the market.

### Environmental Concerns and Sustainability

A growing emphasis on environmental sustainability and reducing carbon footprint is another driving force in the modified starch market. Along with this, traditional petroleum-based polymers are increasingly being replaced by bio-based polymers, and modified starches are at the forefront of this transition. In addition, the utilization of modified starch in producing biodegradable plastics offers a sustainable alternative to conventional plastics. These bioplastics are used in various applications, including packaging, agricultural films, and disposable cutlery. As governments worldwide implement more stringent regulations on plastic use, the demand for eco-friendly alternatives is likely to skyrocket. This trend opens new avenues for the modified starch industry and aligns it with global sustainability goals, thereby driving market growth.

### Modified Starch Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global modified starch market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on raw material, type, function and application.

### Breakup by Raw Material:

- Corn
- Cassava
- Wheat
- Potato
- Others

Corn dominates the market

The report has provided a detailed breakup and analysis of the market based on the raw material. This includes corn, cassava, wheat, potato, and others. According to the report, corn represented the largest segment.

The use of corn as a raw material in the modified starch industry is a significant market driver, particularly due to its abundant availability and relatively low cost. Corn-based modified starches are versatile and find extensive applications across various industries, including food and beverages, textiles, and pharmaceuticals. Additionally, the high amylose content in corn makes it suitable for modifications that require excellent gel-forming properties, making it a preferred choice for processed foods and baking applications. The bio-ethanol industry, which utilizes corn starch, also contributes to its demand, as the byproducts are often used in animal feed, thereby creating a circular economy. Moreover, corn is one of the crops for which non-GMO variants are readily available, catering to the rising consumer demand for clean-label products. Advancements in agricultural practices have further increased corn yields, making it a more sustainable option.

Breakup by Type:

Starch Esters and Ethers

Resistant

Cationic

Pre-gelatinized

Others

Starch esters and ethers hold the largest share in the market

A detailed breakup and analysis of the market based on the type has also been provided in the report. These include starch esters and ethers, resistant, cationic, pre-gelatinized, and others. According to the report, starch esters and ethers accounted for the largest market share.

The market for starch esters and ethers within the modified starch industry is experiencing robust growth due to the widespread adoption in applications requiring emulsion stabilization, viscosity control, and gel strength. This makes them highly valuable in industries, such as food processing, pharmaceuticals, and cosmetics. One key driver is the demand for specialized additives in food products for improved texture and shelf-life. Starch esters and ethers meet this need effectively as they offer better heat resistance and freeze-thaw stability. Additionally, their application in

pharmaceuticals as binders and disintegrants in tablets is gaining traction. The push for environmentally sustainable options is another driving factor; starch esters and ethers are increasingly being explored as biodegradable alternatives to synthetic polymers, especially in packaging applications. Moreover, advancements in processing technologies have enabled the development of customized starch esters and ethers with specific functionalities, further widening their application scope and driving market growth.

#### Breakup by Function:

Thickeners

Stabilizers

Binders

Emulsifiers

Others

Thickeners dominate the market

The report has provided a detailed breakup and analysis of the market based on the function. This includes thickeners, stabilizers, binders, emulsifiers, and others. According to the report, thickeners represented the largest segment.

The growing need for thickeners in various industries is a significant market driver for the modified starch sector. Modified starches serve as effective thickeners in a broad range of applications, most notably in the food and beverage industry where they are used to improve the texture, consistency, and mouthfeel of products like sauces, gravies, and soups. In confluence with this, the demand for thickeners is also high in cosmetics and personal care products, where modified starches are utilized for their excellent water-holding and stabilizing properties. Another sector contributing to the thickener demand is the construction industry, where modified starch is used to improve the consistency of concrete mixes. Apart from this, the increasing consumer preference for gluten-free products is further boosting the demand for modified starch as a thickening agent as it is a suitable alternative to traditional flour-based thickeners. Advances in starch modification technology have led to the development of customized solutions that offer better heat stability and pH tolerance, making modified starches more adaptable and thereby driving market growth.

#### Breakup by Application:

Food and Beverages

Animal Feed

Paper

Pharmaceuticals

Textiles

Others

Food and beverages hold the largest share in the market

A detailed breakup and analysis of the market based on the application has also been provided in the report. These include food and beverages, animal feed, paper, pharmaceuticals, textiles, and others. According to the report, food and beverages accounted for the largest market share.

The food and beverage sector serves as a pivotal market driver for the modified starch industry. One of the main factors contributing to this is the growing consumer demand for convenience and ready-to-eat foods. Modified starches are crucial in these products, offering improved texture, enhanced flavor release, and increased shelf life. They function as thickeners, stabilizers, and emulsifiers in a variety of food products, from sauces and soups to bakery items and dairy products. In confluence with this, the increasing health consciousness among consumers is also driving the use of modified starch as a fat replacer, allowing for reduced-calorie formulations without compromising on texture or taste. Additionally, the clean-label movement, which focuses on natural and organic ingredients, is stimulating innovation in non-GMO and organic-modified starches. Global trends towards vegetarian and vegan diets further boost the demand for modified starch as a key ingredient in plant-based foods. Furthermore, the diverse applications and evolving consumer preferences within the food and beverage industry significantly contribute to the growing market for modified starch.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia  
Indonesia  
Others  
Europe  
Germany  
France  
United Kingdom  
Italy  
Spain  
Russia  
Others  
Latin America  
Brazil  
Mexico  
Others  
Middle East and Africa

North America exhibits a clear dominance, accounting for the largest modified starch market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America exhibits the largest segment.

The North America market for modified starch is propelled by a combination of factors, notably technological advancement, consumer preferences, and industrial growth. The region hosts a thriving food and beverage sector, where modified starches are extensively used as thickeners, stabilizers, and emulsifiers in a wide array of products ranging from baked goods to dairy items. In addition, the increasing consumer focus on health and wellness is driving the demand for modified starches as fat replacers and as components in gluten-free and clean-label products.

Moreover, the robust pharmaceutical industry in North America offers another avenue for growth, with modified starches used as binders and disintegrants in drug formulations. The expanding biofuel and biodegradable plastics sectors also contribute to market dynamics, as modified starches are key components in these sustainable

initiatives. Additionally, the presence of key market players and sophisticated research facilities in the region accelerates innovation and adoption. All these elements combine to make North America a substantial market driver in the global modified starch industry.

#### Competitive Landscape:

The global market is experiencing significant growth due to the escalating number of research and development activities to create innovative types of modified starch that can serve specific industry needs. This includes developing modified starches that are non-GMO, organic, or that cater to specific functionalities, including better heat stability, viscosity control, or targeted drug delivery. Along with this, Companies are expanding their operations globally, particularly targeting emerging markets where there is a growing middle-class population with a higher demand for processed foods, pharmaceuticals, and cosmetics that utilize modified starches. In addition, strategic partnerships with other industry players or research institutions are also positively influencing the market. These collaborations often focus on research, product development, or distribution. Apart from this, firms are also diversifying their product portfolios to include a broader range of modified starches catering to different industries. Furthermore, the rising consumer and regulatory focus on sustainability is contributing to the market.

The market report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

AGRANA Beteiligungs-AG (AGRANA Zucker, Stärke und Frucht Holding AG)  
Archer-Daniels-Midland Company  
Cargill Incorporated  
Emsland-Stärke GmbH  
Grain Processing Corporation (Kent Corporation)  
Ingredion Incorporated  
Novidon B.V. (Duynie Group)  
Roquette Frères  
SMS Corporation  
Tate & Lyle PLC  
Tereos  
The cooperative Royal Avelbe U.A.

#### Recent Developments:



In November 2022, Ingredion Incorporated completed one-third of its 160 million dollars in capital expenditures to considerably increase supply chain capacity for a variety of modified and clean-label specialty starches.

In October 2022, Grain Processing Corporation (Kent Corporation) launched Fybrin RS, a resistant starch derived from maize that is gluten-free and enhances fiber in food formulations while supplying fewer calories than other carbs, claims the business. It has the description 'food starch-modified'.

In October 2020, Tate & Lyle PLC decided to purchase an 85% stake in Chaodee Modified Starch Co. Ltd., a Thai company that produces tapioca-modified food starch. Tate & Lyle, located in London, will be able to provide a wider selection of tapioca-based systems in areas such baked foods, dairy, snacks, noodles, soup, sauces, and dressings thanks to the purchase.

### Key Questions Answered in This Report

1. What was the size of the global modified starch market in 2023?
2. What is the expected growth rate of the global modified starch market during 2024-2032?
3. What are the key factors driving the global modified starch market?
4. What has been the impact of COVID-19 on the global modified starch market?
5. What is the breakup of the global modified starch market based on raw material?
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