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Native Starch Market Report by End Use (Sweeteners, Ethanol, Food Industry, Paper Industry, and Others), Feedstock (Corn, Wheat, Cassava), and Region 2024-2032

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Abstracts

The global native starch market size reached 96.2 Million Tons in 2023. Looking forward, IMARC Group expects the market to reach 111.2 Million Tons by 2032, exhibiting a growth rate (CAGR) of 1.6% during 2024-2032. The increasing demand for convenience foods, shifting consumer preference for natural ingredients, rising usage of native starch sweeteners, growing demand for gluten-free products, and expanding industrial applications are some of the major factors propelling the market.

Native starch is the pure, raw form of starch procured from various plant sources, such as corn, wheat, potatoes, or tapioca. It is extracted from these sources and retains its natural properties without any chemical or physical modifications. Native starch is commonly used in food and industrial applications due to its thickening, stabilizing, and gelling properties. In the food industry, it serves as a thickener in soups, sauces, and dressings. In the industrial sector, native starch finds use in the production of paper, textiles, and adhesives. Its natural composition and versatility make it a valuable ingredient in various manufacturing processes.

The global native starch market is primarily driven by the widespread product utilization as a thickening and stabilizing agent and the rising demand for convenience foods and processed products. Besides this, as consumers' lifestyles become busier, the demand for ready-to-eat (RTE) meals, sauces, and dressings has surged, boosting the utilization of native starch in the food industry. Additionally, the rising awareness among consumers regarding the benefits of natural and unmodified ingredients in food products has led to an increased preference for native starch over modified starches,

strengthening the market growth. Moreover, the expanding industrial sectors, such as paper, textiles, and adhesives, rely heavily on native starch for its adhesive and binding properties, impelling its demand. Furthermore, the wide availability of raw materials, including corn, wheat, and potatoes, from which native starch can be extracted, is contributing to its market growth.

Native Starch Market Trends/Drivers:
Increasing demand for convenience and processed foods

The rising trend of urbanization and changing consumer lifestyles have led to a significant increase in the consumption of convenience foods and processed products worldwide. Consumers are seeking easy-to-prepare and RTE meals, as well as processed sauces, dressings, and soups, to fit their busy schedules. Native starch, being a natural and pure thickening and stabilizing agent, plays a crucial role in enhancing the texture, appearance, and overall quality of these food products. Its ability to provide improved mouthfeel, viscosity, and shelf stability has made it an essential ingredient in various food applications. As the demand for convenience and processed food products continues to rise, the requirement for native starch as a key functional ingredient is also growing, positively impacting the global market.

Shifting consumer preference for natural ingredients

In recent years, there has been a significant shift in consumer inclination toward healthier and more natural food options. Consumers are increasingly conscious of the ingredients present in the products they purchase and are seeking clean-label options with minimal chemical modifications. Native starch perfectly aligns with this demand as it is extracted directly from plant sources, such as corn, wheat, potatoes, or tapioca, without any chemical alterations. This natural composition makes it a preferred choice over modified starches, which may contain additives or undergo various chemical processes. As consumers become more health-conscious and demand transparency in food labeling, the demand for native starch as a natural and unmodified ingredient is witnessing substantial growth.

Expanding industrial applications

Beyond the food industry, native starch finds significant usage in various industrial sectors, such as paper manufacturing, textiles, and adhesives. In the paper industry, native starch is utilized as a binding agent to improve paper strength and enhance printability. In the textile industry, it acts as a sizing agent, providing stiffness and smoothness to fabrics. Native starch's adhesive properties make it an essential component in the production of adhesives for industries like packaging, woodworking, and construction. The continuous growth of these industries, particularly in developing regions, is driving the demand for native starch in the industrial sector. Moreover, its biodegradability and eco-friendliness further bolster its adoption as an environmentally sustainable choice in various applications.

Native Starch Industry Segmentation:
IMARC Group provides an analysis of the key trends in each segment of the global native starch market report, along with forecasts at the global and regional levels from 2024-2032. Our report has categorized the market based on end-use and feedstock.

Breakup by End Use:

Sweeteners
Ethanol
Food Industry
Paper Industry
Others

Sweeteners hold the largest share in the market

A detailed breakup and analysis of the market based on the end use has also been provided in the report. This includes sweeteners, ethanol, food industry, paper industry, and others. According to the report, sweeteners accounted for the largest market share.

The global native starch market is experiencing significant growth, with sweeteners, particularly native starch sweeteners such as tapioca syrup and rice syrup, driving the largest market share. These natural sweeteners are gaining popularity as healthier alternatives to traditional sweeteners, offering a balanced glycemic profile and appealing to individuals with specific dietary needs.

Moreover, the growing consumer awareness of their health benefits has led to increased adoption in various food and beverage applications, creating a favorable market outlook. Besides this, the rising demand for gluten-free products is also contributing to the success of native starch sweeteners. As more people seek gluten-free options due to celiac disease, gluten intolerance, or dietary preferences, the demand for these sweeteners sourced from gluten-free plants has surged. This combination of health consciousness and gluten-free trends is influencing the dominance of sweeteners in the native starch market, propelling the market growth.

Breakup by Feedstock:

Corn
Wheat
Cassava

Corn dominates the market

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

Corn has emerged as the leading contributor to the global native starch market due to its extensive utilization in diverse commercial sectors. The rising demand for native starch in various commercial institutions, such as hotels and restaurants, is driven by its multifunctional properties in food preparation and processing. Native starch serves as a thickening and stabilizing agent in soups, sauces, gravies, and desserts, enhancing the overall texture and consistency of dishes.

Additionally, the beverage industry extensively employs native corn starch in the production of beverages such as soft drinks and fruit juices, where it aids in improving viscosity and mouthfeel. Furthermore, the industrial sector, encompassing paper, textile, and adhesive industries, also relies heavily on corn-based native starch for its superior binding and adhesive properties. Corn's widespread availability, coupled with its versatility and cost-effectiveness, strengthens its position as the dominant source of native starch across various applications.

Breakup by Region:

Production
United States
European Union
China
Others
Consumption
North America
European Union

Asia Pacific
Latin America
Middle East and Africa

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

The report has also provided a comprehensive analysis of all the major regional markets on the basis of production, which includes United States, European Union, China, and Others. It also provides the market breakup on the basis of consumption, covering North America, European Union, Asia Pacific, Latin America, and Middle East and Africa. According to the report, North America accounted for the largest market share.

At present, North America represents the leading consumer. The increasing consumer awareness and preference for clean labels and natural food products in North America are driving the demand for native starch as a natural and unmodified ingredient. As consumers become more health-conscious, they seek food products with transparent labeling and minimal chemical modifications, which has led to a surge in the usage of native starch in various food and beverage applications. Moreover, the growing trend of gluten-free diets in the region is positively influencing the market demand for native starch, especially from gluten-free sources such as tapioca and rice. Furthermore, with a significant portion of the population diagnosed with celiac disease or adopting gluten-free diets for health reasons, there is a rising need for gluten-free alternatives in food manufacturing, leading to an increased preference for native starch. Additionally, the expanding industrial applications of native starch in North America, particularly in the paper, textiles, and adhesive industries, are contributing to the rising demand in the region.

Competitive Landscape:
The global native starch market is highly competitive and characterized by the existence of several established players and regional manufacturers. Key companies are continuously striving to strengthen their market position through various strategies, including product innovation, expansion of production capacities, and strategic collaborations. Research and development efforts are focused on developing novel native starch products with enhanced functionalities to cater to diverse industries and consumer demands. Additionally, mergers and acquisitions play a significant role in the competitive landscape, enabling companies to expand their geographic reach and product portfolios. As the demand for natural and unmodified ingredients rises, the

competitive landscape is expected to witness further developments, with companies continually adapting to changing market dynamics and consumer preferences.

The 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:

Cargill, Inc.
Ingredion, Inc.
Archer Daniels Midland Company (ADM)
Tate & Lyle PLC
Roquette Fr?res
Tereos SA

Recent Developments:
In July 2023, Cargill and John Deere announced a collaborative effort to streamline the digital and in-field experience for farmers using John Deere technology and electing to participate in the Cargill RegenConnect® program.
In July 2023, Archer Daniels Midland Company (ADM) and Air Protein announced that they have entered into a Strategic Development Agreement to collaborate on research and development to further advance new and novel proteins for nutrition.
In May 2023, Tate & Lyle PLC announced a new addition to its sweetener portfolio – TASTEVA® SOL Stevia Sweetener, a premium tasting stevia that has over 200x the solubility of Reb M and D products on the market.

Key Questions Answered in This Report

1. What is the size of the global native starch market?
2. What are the key factors driving the global native starch market?
3. What has been the impact of COVID-19 on the global native starch market?
4. What is the breakup of the global native starch market based on the end use?
5. What are the key regions in the global native starch market based on the production?
6. What are the key regions in the global native starch market based on the consumption?
7. Who are the key players/companies in the global native starch market?

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