

Global Native and Modified Starches Market Growth 2026-2032

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Abstracts

The global Native and Modified Starches market size is predicted to grow from US\$ 20617 million in 2025 to US\$ 25768 million in 2032; it is expected to grow at a CAGR of 3.4% from 2026 to 2032.

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.

LP Information, Inc. (LPI) ' newest research report, the "Native and Modified Starches Industry Forecast" looks at past sales and reviews total world Native and Modified Starches sales in 2025, providing a comprehensive analysis by region and market sector of projected Native and Modified Starches sales for 2026 through 2032. With Native and Modified Starches sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Native and Modified Starches industry.

This Insight Report provides a comprehensive analysis of the global Native and Modified Starches landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Native and Modified Starches portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Native and Modified Starches market.

This Insight Report evaluates the key market trends, drivers, and affecting factors

shaping the global outlook for Native and Modified Starches and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Native and Modified Starches.

This report presents a comprehensive overview, market shares, and growth opportunities of Native and Modified Starches market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Native Starch

Physically Modified Starch

Chemically Modified Starch

Enzymatically Modified Starch

Segmentation by Botanical Source:

Corn

Wheat

Potato

Tapioca Cassava

Other Botanical Sources

Segmentation by End Use Grade:

Food Grade

Industrial Grade

Feed Grade

Pharmaceutical Grade

Segmentation by Application:

Food and Beverage

Paper and Packaging

Textile

Adhesives and Binders

Personal Care and Home Care

Other Industrial Uses

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

ADM

Cargill

Ingredion

Roquette

Tate and Lyle

Tereos

AGRANA

Emsland Group

Royal Avebe

KMC

BENEIO

Hungrana

S?dst?rke

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Native and Modified Starches market?

What factors are driving Native and Modified Starches market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Native and Modified Starches market opportunities vary by end market size?

How does Native and Modified Starches break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Native and Modified Starches Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Native and Modified Starches by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Native and Modified Starches by Country/Region, 2021, 2025 & 2032

2.2 Native and Modified Starches Segment by Type

- 2.2.1 Native Starch
- 2.2.2 Physically Modified Starch
- 2.2.3 Chemically Modified Starch
- 2.2.4 Enzymatically Modified Starch
- 2.2.5 Native and Modified Starches Sales by Type
 - 2.2.5.1 Global Native and Modified Starches Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Native and Modified Starches Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Native and Modified Starches Sale Price by Type (2021-2026)

2.3 Native and Modified Starches Segment by Botanical Source

- 2.3.1 Corn
- 2.3.2 Wheat
- 2.3.3 Potato
- 2.3.4 Tapioca Cassava
- 2.3.5 Other Botanical Sources
- 2.3.6 Native and Modified Starches Sales by Botanical Source

2.3.6.1 Global Native and Modified Starches Sales Market Share by Botanical Source (2021-2026)

2.3.6.2 Global Native and Modified Starches Revenue and Market Share by Botanical Source (2021-2026)

2.3.6.3 Global Native and Modified Starches Sale Price by Botanical Source (2021-2026)

2.4 Native and Modified Starches Segment by End Use Grade

2.4.1 Food Grade

2.4.2 Industrial Grade

2.4.3 Feed Grade

2.4.4 Pharmaceutical Grade

2.4.5 Native and Modified Starches Sales by End Use Grade

2.4.5.1 Global Native and Modified Starches Sales Market Share by End Use Grade (2021-2026)

2.4.5.2 Global Native and Modified Starches Revenue and Market Share by End Use Grade (2021-2026)

2.4.5.3 Global Native and Modified Starches Sale Price by End Use Grade (2021-2026)

2.5 Native and Modified Starches Segment by Application

2.5.1 Food and Beverage

2.5.2 Paper and Packaging

2.5.3 Textile

2.5.4 Adhesives and Binders

2.5.5 Personal Care and Home Care

2.5.6 Other Industrial Uses

2.5.7 Native and Modified Starches Sales by Application

2.5.7.1 Global Native and Modified Starches Sale Market Share by Application (2021-2026)

2.5.7.2 Global Native and Modified Starches Revenue and Market Share by Application (2021-2026)

2.5.7.3 Global Native and Modified Starches Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Native and Modified Starches Breakdown Data by Company

3.1.1 Global Native and Modified Starches Annual Sales by Company (2021-2026)

3.1.2 Global Native and Modified Starches Sales Market Share by Company (2021-2026)

3.2 Global Native and Modified Starches Annual Revenue by Company (2021-2026)

- 3.2.1 Global Native and Modified Starches Revenue by Company (2021-2026)
- 3.2.2 Global Native and Modified Starches Revenue Market Share by Company (2021-2026)
- 3.3 Global Native and Modified Starches Sale Price by Company
- 3.4 Key Manufacturers Native and Modified Starches Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Native and Modified Starches Product Location Distribution
 - 3.4.2 Players Native and Modified Starches Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR NATIVE AND MODIFIED STARCHES BY GEOGRAPHIC REGION

- 4.1 World Historic Native and Modified Starches Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Native and Modified Starches Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Native and Modified Starches Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Native and Modified Starches Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Native and Modified Starches Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Native and Modified Starches Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Native and Modified Starches Sales Growth
- 4.4 APAC Native and Modified Starches Sales Growth
- 4.5 Europe Native and Modified Starches Sales Growth
- 4.6 Middle East & Africa Native and Modified Starches Sales Growth

5 AMERICAS

- 5.1 Americas Native and Modified Starches Sales by Country
 - 5.1.1 Americas Native and Modified Starches Sales by Country (2021-2026)
 - 5.1.2 Americas Native and Modified Starches Revenue by Country (2021-2026)

- 5.2 Americas Native and Modified Starches Sales by Type (2021-2026)
- 5.3 Americas Native and Modified Starches Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Native and Modified Starches Sales by Region
 - 6.1.1 APAC Native and Modified Starches Sales by Region (2021-2026)
 - 6.1.2 APAC Native and Modified Starches Revenue by Region (2021-2026)
- 6.2 APAC Native and Modified Starches Sales by Type (2021-2026)
- 6.3 APAC Native and Modified Starches Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe Native and Modified Starches by Country
 - 7.1.1 Europe Native and Modified Starches Sales by Country (2021-2026)
 - 7.1.2 Europe Native and Modified Starches Revenue by Country (2021-2026)
- 7.2 Europe Native and Modified Starches Sales by Type (2021-2026)
- 7.3 Europe Native and Modified Starches Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Native and Modified Starches by Country
 - 8.1.1 Middle East & Africa Native and Modified Starches Sales by Country

(2021-2026)

8.1.2 Middle East & Africa Native and Modified Starches Revenue by Country

(2021-2026)

8.2 Middle East & Africa Native and Modified Starches Sales by Type (2021-2026)

8.3 Middle East & Africa Native and Modified Starches Sales by Application

(2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Native and Modified Starches

10.3 Manufacturing Process Analysis of Native and Modified Starches

10.4 Industry Chain Structure of Native and Modified Starches

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Native and Modified Starches Distributors

11.3 Native and Modified Starches Customer

12 WORLD FORECAST REVIEW FOR NATIVE AND MODIFIED STARCHES BY GEOGRAPHIC REGION

12.1 Global Native and Modified Starches Market Size Forecast by Region

12.1.1 Global Native and Modified Starches Forecast by Region (2027-2032)

12.1.2 Global Native and Modified Starches Annual Revenue Forecast by Region

(2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Native and Modified Starches Forecast by Type (2027-2032)

12.7 Global Native and Modified Starches Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 ADM

13.1.1 ADM Company Information

13.1.2 ADM Native and Modified Starches Product Portfolios and Specifications

13.1.3 ADM Native and Modified Starches Sales, Revenue, Price and Gross Margin

(2021-2026)

13.1.4 ADM Main Business Overview

13.1.5 ADM Latest Developments

13.2 Cargill

13.2.1 Cargill Company Information

13.2.2 Cargill Native and Modified Starches Product Portfolios and Specifications

13.2.3 Cargill Native and Modified Starches Sales, Revenue, Price and Gross Margin

(2021-2026)

13.2.4 Cargill Main Business Overview

13.2.5 Cargill Latest Developments

13.3 Ingredion

13.3.1 Ingredion Company Information

13.3.2 Ingredion Native and Modified Starches Product Portfolios and Specifications

13.3.3 Ingredion Native and Modified Starches Sales, Revenue, Price and Gross

Margin (2021-2026)

13.3.4 Ingredion Main Business Overview

13.3.5 Ingredion Latest Developments

13.4 Roquette

13.4.1 Roquette Company Information

13.4.2 Roquette Native and Modified Starches Product Portfolios and Specifications

13.4.3 Roquette Native and Modified Starches Sales, Revenue, Price and Gross

Margin (2021-2026)

13.4.4 Roquette Main Business Overview

13.4.5 Roquette Latest Developments

13.5 Tate and Lyle

- 13.5.1 Tate and Lyle Company Information
- 13.5.2 Tate and Lyle Native and Modified Starches Product Portfolios and Specifications
- 13.5.3 Tate and Lyle Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.5.4 Tate and Lyle Main Business Overview
- 13.5.5 Tate and Lyle Latest Developments
- 13.6 Tereos
 - 13.6.1 Tereos Company Information
 - 13.6.2 Tereos Native and Modified Starches Product Portfolios and Specifications
 - 13.6.3 Tereos Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Tereos Main Business Overview
 - 13.6.5 Tereos Latest Developments
- 13.7 AGRANA
 - 13.7.1 AGRANA Company Information
 - 13.7.2 AGRANA Native and Modified Starches Product Portfolios and Specifications
 - 13.7.3 AGRANA Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 AGRANA Main Business Overview
 - 13.7.5 AGRANA Latest Developments
- 13.8 Emsland Group
 - 13.8.1 Emsland Group Company Information
 - 13.8.2 Emsland Group Native and Modified Starches Product Portfolios and Specifications
 - 13.8.3 Emsland Group Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Emsland Group Main Business Overview
 - 13.8.5 Emsland Group Latest Developments
- 13.9 Royal Avebe
 - 13.9.1 Royal Avebe Company Information
 - 13.9.2 Royal Avebe Native and Modified Starches Product Portfolios and Specifications
 - 13.9.3 Royal Avebe Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Royal Avebe Main Business Overview
 - 13.9.5 Royal Avebe Latest Developments
- 13.10 KMC
 - 13.10.1 KMC Company Information

- 13.10.2 KMC Native and Modified Starches Product Portfolios and Specifications
- 13.10.3 KMC Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.10.4 KMC Main Business Overview
- 13.10.5 KMC Latest Developments
- 13.11 BENEEO
 - 13.11.1 BENEEO Company Information
 - 13.11.2 BENEEO Native and Modified Starches Product Portfolios and Specifications
 - 13.11.3 BENEEO Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 BENEEO Main Business Overview
 - 13.11.5 BENEEO Latest Developments
- 13.12 Hungrana
 - 13.12.1 Hungrana Company Information
 - 13.12.2 Hungrana Native and Modified Starches Product Portfolios and Specifications
 - 13.12.3 Hungrana Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Hungrana Main Business Overview
 - 13.12.5 Hungrana Latest Developments
- 13.13 S?dst?rke
 - 13.13.1 S?dst?rke Company Information
 - 13.13.2 S?dst?rke Native and Modified Starches Product Portfolios and Specifications
 - 13.13.3 S?dst?rke Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 S?dst?rke Main Business Overview
 - 13.13.5 S?dst?rke Latest Developments
- 13.14 AKV
 - 13.14.1 AKV Company Information
 - 13.14.2 AKV Native and Modified Starches Product Portfolios and Specifications
 - 13.14.3 AKV Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 AKV Main Business Overview
 - 13.14.5 AKV Latest Developments
- 13.15 Lyckeby
 - 13.15.1 Lyckeby Company Information
 - 13.15.2 Lyckeby Native and Modified Starches Product Portfolios and Specifications
 - 13.15.3 Lyckeby Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.15.4 Lyckeby Main Business Overview

- 13.15.5 Lyckeby Latest Developments
- 13.16 Pepees
 - 13.16.1 Pepees Company Information
 - 13.16.2 Pepees Native and Modified Starches Product Portfolios and Specifications
 - 13.16.3 Pepees Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.16.4 Pepees Main Business Overview
 - 13.16.5 Pepees Latest Developments
- 13.17 Grain Processing
 - 13.17.1 Grain Processing Company Information
 - 13.17.2 Grain Processing Native and Modified Starches Product Portfolios and Specifications
 - 13.17.3 Grain Processing Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.17.4 Grain Processing Main Business Overview
 - 13.17.5 Grain Processing Latest Developments
- 13.18 Chemigate
 - 13.18.1 Chemigate Company Information
 - 13.18.2 Chemigate Native and Modified Starches Product Portfolios and Specifications
 - 13.18.3 Chemigate Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 Chemigate Main Business Overview
 - 13.18.5 Chemigate Latest Developments
- 13.19 Japan Corn Starch
 - 13.19.1 Japan Corn Starch Company Information
 - 13.19.2 Japan Corn Starch Native and Modified Starches Product Portfolios and Specifications
 - 13.19.3 Japan Corn Starch Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 Japan Corn Starch Main Business Overview
 - 13.19.5 Japan Corn Starch Latest Developments
- 13.20 Sanwa Starch
 - 13.20.1 Sanwa Starch Company Information
 - 13.20.2 Sanwa Starch Native and Modified Starches Product Portfolios and Specifications
 - 13.20.3 Sanwa Starch Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 Sanwa Starch Main Business Overview
 - 13.20.5 Sanwa Starch Latest Developments

13.21 Bangkok Starch Industrial

13.21.1 Bangkok Starch Industrial Company Information

13.21.2 Bangkok Starch Industrial Native and Modified Starches Product Portfolios and Specifications

13.21.3 Bangkok Starch Industrial Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 Bangkok Starch Industrial Main Business Overview

13.21.5 Bangkok Starch Industrial Latest Developments

13.22 Thai Wah

13.22.1 Thai Wah Company Information

13.22.2 Thai Wah Native and Modified Starches Product Portfolios and Specifications

13.22.3 Thai Wah Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 Thai Wah Main Business Overview

13.22.5 Thai Wah Latest Developments

13.23 Manildra

13.23.1 Manildra Company Information

13.23.2 Manildra Native and Modified Starches Product Portfolios and Specifications

13.23.3 Manildra Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 Manildra Main Business Overview

13.23.5 Manildra Latest Developments

13.24 MGP Ingredients

13.24.1 MGP Ingredients Company Information

13.24.2 MGP Ingredients Native and Modified Starches Product Portfolios and Specifications

13.24.3 MGP Ingredients Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 MGP Ingredients Main Business Overview

13.24.5 MGP Ingredients Latest Developments

13.25 Zhucheng Xingmao Corn Development

13.25.1 Zhucheng Xingmao Corn Development Company Information

13.25.2 Zhucheng Xingmao Corn Development Native and Modified Starches Product Portfolios and Specifications

13.25.3 Zhucheng Xingmao Corn Development Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)

13.25.4 Zhucheng Xingmao Corn Development Main Business Overview

13.25.5 Zhucheng Xingmao Corn Development Latest Developments

13.26 Luzhou Group

- 13.26.1 Luzhou Group Company Information
- 13.26.2 Luzhou Group Native and Modified Starches Product Portfolios and Specifications
- 13.26.3 Luzhou Group Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.26.4 Luzhou Group Main Business Overview
- 13.26.5 Luzhou Group Latest Developments
- 13.27 Guangxi State Farms Mingyang Starch Development
 - 13.27.1 Guangxi State Farms Mingyang Starch Development Company Information
 - 13.27.2 Guangxi State Farms Mingyang Starch Development Native and Modified Starches Product Portfolios and Specifications
 - 13.27.3 Guangxi State Farms Mingyang Starch Development Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.27.4 Guangxi State Farms Mingyang Starch Development Main Business Overview
 - 13.27.5 Guangxi State Farms Mingyang Starch Development Latest Developments
- 13.28 Shandong Fuyang Biotechnology
 - 13.28.1 Shandong Fuyang Biotechnology Company Information
 - 13.28.2 Shandong Fuyang Biotechnology Native and Modified Starches Product Portfolios and Specifications
 - 13.28.3 Shandong Fuyang Biotechnology Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.28.4 Shandong Fuyang Biotechnology Main Business Overview
 - 13.28.5 Shandong Fuyang Biotechnology Latest Developments
- 13.29 Shandong Shouguang Juneng Golden Corn Development
 - 13.29.1 Shandong Shouguang Juneng Golden Corn Development Company Information
 - 13.29.2 Shandong Shouguang Juneng Golden Corn Development Native and Modified Starches Product Portfolios and Specifications
 - 13.29.3 Shandong Shouguang Juneng Golden Corn Development Native and Modified Starches Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.29.4 Shandong Shouguang Juneng Golden Corn Development Main Business Overview
 - 13.29.5 Shandong Shouguang Juneng Golden Corn Development Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Native and Modified Starches Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Native and Modified Starches Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Native Starch

Table 4. Major Players of Physically Modified Starch

Table 5. Major Players of Chemically Modified Starch

Table 6. Major Players of Enzymatically Modified Starch

Table 7. Global Native and Modified Starches Sales by Type (2021-2026) & (Kilotons)

Table 8. Global Native and Modified Starches Sales Market Share by Type (2021-2026)

Table 9. Global Native and Modified Starches Revenue by Type (2021-2026) & (\$ million)

Table 10. Global Native and Modified Starches Revenue Market Share by Type (2021-2026)

Table 11. Global Native and Modified Starches Sale Price by Type (2021-2026) & (US\$/Ton)

Table 12. Major Players of Corn

Table 13. Major Players of Wheat

Table 14. Major Players of Potato

Table 15. Major Players of Tapioca Cassava

Table 16. Major Players of Other Botanical Sources

Table 17. Global Native and Modified Starches Sales by Botanical Source (2021-2026) & (Kilotons)

Table 18. Global Native and Modified Starches Sales Market Share by Botanical Source (2021-2026)

Table 19. Global Native and Modified Starches Revenue by Botanical Source (2021-2026) & (\$ million)

Table 20. Global Native and Modified Starches Revenue Market Share by Botanical Source (2021-2026)

Table 21. Global Native and Modified Starches Sale Price by Botanical Source (2021-2026) & (US\$/Ton)

Table 22. Major Players of Food Grade

Table 23. Major Players of Industrial Grade

Table 24. Major Players of Feed Grade

Table 25. Major Players of Pharmaceutical Grade

Table 26. Global Native and Modified Starches Sales by End Use Grade (2021-2026) & (Kilotons)

Table 27. Global Native and Modified Starches Sales Market Share by End Use Grade (2021-2026)

Table 28. Global Native and Modified Starches Revenue by End Use Grade (2021-2026) & (\$ million)

Table 29. Global Native and Modified Starches Revenue Market Share by End Use Grade (2021-2026)

Table 30. Global Native and Modified Starches Sale Price by End Use Grade (2021-2026) & (US\$/Ton)

Table 31. Global Native and Modified Starches Sale by Application (2021-2026) & (Kilotons)

Table 32. Global Native and Modified Starches Sale Market Share by Application (2021-2026)

Table 33. Global Native and Modified Starches Revenue by Application (2021-2026) & (\$ million)

Table 34. Global Native and Modified Starches Revenue Market Share by Application (2021-2026)

Table 35. Global Native and Modified Starches Sale Price by Application (2021-2026) & (US\$/Ton)

Table 36. Global Native and Modified Starches Sales by Company (2021-2026) & (Kilotons)

Table 37. Global Native and Modified Starches Sales Market Share by Company (2021-2026)

Table 38. Global Native and Modified Starches Revenue by Company (2021-2026) & (\$ millions)

Table 39. Global Native and Modified Starches Revenue Market Share by Company (2021-2026)

Table 40. Global Native and Modified Starches Sale Price by Company (2021-2026) & (US\$/Ton)

Table 41. Key Manufacturers Native and Modified Starches Producing Area Distribution and Sales Area

Table 42. Players Native and Modified Starches Products Offered

Table 43. Native and Modified Starches Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 44. New Products and Potential Entrants

Table 45. Market M&A Activity & Strategy

Table 46. Global Native and Modified Starches Sales by Geographic Region (2021-2026) & (Kilotons)

Table 47. Global Native and Modified Starches Sales Market Share Geographic Region (2021-2026)

Table 48. Global Native and Modified Starches Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 49. Global Native and Modified Starches Revenue Market Share by Geographic Region (2021-2026)

Table 50. Global Native and Modified Starches Sales by Country/Region (2021-2026) & (Kilotons)

Table 51. Global Native and Modified Starches Sales Market Share by Country/Region (2021-2026)

Table 52. Global Native and Modified Starches Revenue by Country/Region (2021-2026) & (\$ millions)

Table 53. Global Native and Modified Starches Revenue Market Share by Country/Region (2021-2026)

Table 54. Americas Native and Modified Starches Sales by Country (2021-2026) & (Kilotons)

Table 55. Americas Native and Modified Starches Sales Market Share by Country (2021-2026)

Table 56. Americas Native and Modified Starches Revenue by Country (2021-2026) & (\$ millions)

Table 57. Americas Native and Modified Starches Sales by Type (2021-2026) & (Kilotons)

Table 58. Americas Native and Modified Starches Sales by Application (2021-2026) & (Kilotons)

Table 59. APAC Native and Modified Starches Sales by Region (2021-2026) & (Kilotons)

Table 60. APAC Native and Modified Starches Sales Market Share by Region (2021-2026)

Table 61. APAC Native and Modified Starches Revenue by Region (2021-2026) & (\$ millions)

Table 62. APAC Native and Modified Starches Sales by Type (2021-2026) & (Kilotons)

Table 63. APAC Native and Modified Starches Sales by Application (2021-2026) & (Kilotons)

Table 64. Europe Native and Modified Starches Sales by Country (2021-2026) & (Kilotons)

Table 65. Europe Native and Modified Starches Revenue by Country (2021-2026) & (\$ millions)

Table 66. Europe Native and Modified Starches Sales by Type (2021-2026) & (Kilotons)

Table 67. Europe Native and Modified Starches Sales by Application (2021-2026) &

(Kilotons)

Table 68. Middle East & Africa Native and Modified Starches Sales by Country (2021-2026) & (Kilotons)

Table 69. Middle East & Africa Native and Modified Starches Revenue Market Share by Country (2021-2026)

Table 70. Middle East & Africa Native and Modified Starches Sales by Type (2021-2026) & (Kilotons)

Table 71. Middle East & Africa Native and Modified Starches Sales by Application (2021-2026) & (Kilotons)

Table 72. Key Market Drivers & Growth Opportunities of Native and Modified Starches

Table 73. Key Market Challenges & Risks of Native and Modified Starches

Table 74. Key Industry Trends of Native and Modified Starches

Table 75. Native and Modified Starches Raw Material

Table 76. Key Suppliers of Raw Materials

Table 77. Native and Modified Starches Distributors List

Table 78. Native and Modified Starches Customer List

Table 79. Global Native and Modified Starches Sales Forecast by Region (2027-2032) & (Kilotons)

Table 80. Global Native and Modified Starches Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Americas Native and Modified Starches Sales Forecast by Country (2027-2032) & (Kilotons)

Table 82. Americas Native and Modified Starches Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. APAC Native and Modified Starches Sales Forecast by Region (2027-2032) & (Kilotons)

Table 84. APAC Native and Modified Starches Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 85. Europe Native and Modified Starches Sales Forecast by Country (2027-2032) & (Kilotons)

Table 86. Europe Native and Modified Starches Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. Middle East & Africa Native and Modified Starches Sales Forecast by Country (2027-2032) & (Kilotons)

Table 88. Middle East & Africa Native and Modified Starches Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 89. Global Native and Modified Starches Sales Forecast by Type (2027-2032) & (Kilotons)

Table 90. Global Native and Modified Starches Revenue Forecast by Type (2027-2032)

& (\$ millions)

Table 91. Global Native and Modified Starches Sales Forecast by Application (2027-2032) & (Kilotons)

Table 92. Global Native and Modified Starches Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 93. ADM Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 94. ADM Native and Modified Starches Product Portfolios and Specifications

Table 95. ADM Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 96. ADM Main Business

Table 97. ADM Latest Developments

Table 98. Cargill Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 99. Cargill Native and Modified Starches Product Portfolios and Specifications

Table 100. Cargill Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 101. Cargill Main Business

Table 102. Cargill Latest Developments

Table 103. Ingredion Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 104. Ingredion Native and Modified Starches Product Portfolios and Specifications

Table 105. Ingredion Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 106. Ingredion Main Business

Table 107. Ingredion Latest Developments

Table 108. Roquette Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 109. Roquette Native and Modified Starches Product Portfolios and Specifications

Table 110. Roquette Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 111. Roquette Main Business

Table 112. Roquette Latest Developments

Table 113. Tate and Lyle Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 114. Tate and Lyle Native and Modified Starches Product Portfolios and Specifications

Table 115. Tate and Lyle Native and Modified Starches Sales (Kilotons), Revenue (\$

Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 116. Tate and Lyle Main Business

Table 117. Tate and Lyle Latest Developments

Table 118. Tereos Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 119. Tereos Native and Modified Starches Product Portfolios and Specifications

Table 120. Tereos Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 121. Tereos Main Business

Table 122. Tereos Latest Developments

Table 123. AGRANA Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 124. AGRANA Native and Modified Starches Product Portfolios and Specifications

Table 125. AGRANA Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 126. AGRANA Main Business

Table 127. AGRANA Latest Developments

Table 128. Emsland Group Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 129. Emsland Group Native and Modified Starches Product Portfolios and Specifications

Table 130. Emsland Group Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 131. Emsland Group Main Business

Table 132. Emsland Group Latest Developments

Table 133. Royal Avebe Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 134. Royal Avebe Native and Modified Starches Product Portfolios and Specifications

Table 135. Royal Avebe Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 136. Royal Avebe Main Business

Table 137. Royal Avebe Latest Developments

Table 138. KMC Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 139. KMC Native and Modified Starches Product Portfolios and Specifications

Table 140. KMC Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 141. KMC Main Business

Table 142. KMC Latest Developments

Table 143. BENEIO Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 144. BENEIO Native and Modified Starches Product Portfolios and Specifications

Table 145. BENEIO Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 146. BENEIO Main Business

Table 147. BENEIO Latest Developments

Table 148. Hungrana Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 149. Hungrana Native and Modified Starches Product Portfolios and Specifications

Table 150. Hungrana Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 151. Hungrana Main Business

Table 152. Hungrana Latest Developments

Table 153. S?dst?rke Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 154. S?dst?rke Native and Modified Starches Product Portfolios and Specifications

Table 155. S?dst?rke Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 156. S?dst?rke Main Business

Table 157. S?dst?rke Latest Developments

Table 158. AKV Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 159. AKV Native and Modified Starches Product Portfolios and Specifications

Table 160. AKV Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 161. AKV Main Business

Table 162. AKV Latest Developments

Table 163. Lyckeby Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 164. Lyckeby Native and Modified Starches Product Portfolios and Specifications

Table 165. Lyckeby Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 166. Lyckeby Main Business

Table 167. Lyckeby Latest Developments

Table 168. Pepees Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 169. Pepees Native and Modified Starches Product Portfolios and Specifications

Table 170. Pepees Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 171. Pepees Main Business

Table 172. Pepees Latest Developments

Table 173. Grain Processing Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 174. Grain Processing Native and Modified Starches Product Portfolios and Specifications

Table 175. Grain Processing Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 176. Grain Processing Main Business

Table 177. Grain Processing Latest Developments

Table 178. Chemigate Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 179. Chemigate Native and Modified Starches Product Portfolios and Specifications

Table 180. Chemigate Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 181. Chemigate Main Business

Table 182. Chemigate Latest Developments

Table 183. Japan Corn Starch Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 184. Japan Corn Starch Native and Modified Starches Product Portfolios and Specifications

Table 185. Japan Corn Starch Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 186. Japan Corn Starch Main Business

Table 187. Japan Corn Starch Latest Developments

Table 188. Sanwa Starch Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 189. Sanwa Starch Native and Modified Starches Product Portfolios and Specifications

Table 190. Sanwa Starch Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 191. Sanwa Starch Main Business

Table 192. Sanwa Starch Latest Developments

Table 193. Bangkok Starch Industrial Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 194. Bangkok Starch Industrial Native and Modified Starches Product Portfolios and Specifications

Table 195. Bangkok Starch Industrial Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 196. Bangkok Starch Industrial Main Business

Table 197. Bangkok Starch Industrial Latest Developments

Table 198. Thai Wah Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 199. Thai Wah Native and Modified Starches Product Portfolios and Specifications

Table 200. Thai Wah Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 201. Thai Wah Main Business

Table 202. Thai Wah Latest Developments

Table 203. Manildra Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 204. Manildra Native and Modified Starches Product Portfolios and Specifications

Table 205. Manildra Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 206. Manildra Main Business

Table 207. Manildra Latest Developments

Table 208. MGP Ingredients Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 209. MGP Ingredients Native and Modified Starches Product Portfolios and Specifications

Table 210. MGP Ingredients Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 211. MGP Ingredients Main Business

Table 212. MGP Ingredients Latest Developments

Table 213. Zhucheng Xingmao Corn Development Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 214. Zhucheng Xingmao Corn Development Native and Modified Starches Product Portfolios and Specifications

Table 215. Zhucheng Xingmao Corn Development Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 216. Zhucheng Xingmao Corn Development Main Business

Table 217. Zhucheng Xingmao Corn Development Latest Developments

Table 218. Luzhou Group Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 219. Luzhou Group Native and Modified Starches Product Portfolios and Specifications

Table 220. Luzhou Group Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 221. Luzhou Group Main Business

Table 222. Luzhou Group Latest Developments

Table 223. Guangxi State Farms Mingyang Starch Development Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 224. Guangxi State Farms Mingyang Starch Development Native and Modified Starches Product Portfolios and Specifications

Table 225. Guangxi State Farms Mingyang Starch Development Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 226. Guangxi State Farms Mingyang Starch Development Main Business

Table 227. Guangxi State Farms Mingyang Starch Development Latest Developments

Table 228. Shandong Fuyang Biotechnology Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 229. Shandong Fuyang Biotechnology Native and Modified Starches Product Portfolios and Specifications

Table 230. Shandong Fuyang Biotechnology Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 231. Shandong Fuyang Biotechnology Main Business

Table 232. Shandong Fuyang Biotechnology Latest Developments

Table 233. Shandong Shouguang Juneng Golden Corn Development Basic Information, Native and Modified Starches Manufacturing Base, Sales Area and Its Competitors

Table 234. Shandong Shouguang Juneng Golden Corn Development Native and Modified Starches Product Portfolios and Specifications

Table 235. Shandong Shouguang Juneng Golden Corn Development Native and Modified Starches Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 236. Shandong Shouguang Juneng Golden Corn Development Main Business

Table 237. Shandong Shouguang Juneng Golden Corn Development Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Native and Modified Starches
- Figure 2. Native and Modified Starches Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Native and Modified Starches Sales Growth Rate 2021-2032 (Kilotons)
- Figure 7. Global Native and Modified Starches Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Native and Modified Starches Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Native and Modified Starches Sales Market Share by Country/Region (2025)
- Figure 10. Native and Modified Starches Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Native Starch
- Figure 12. Product Picture of Physically Modified Starch
- Figure 13. Product Picture of Chemically Modified Starch
- Figure 14. Product Picture of Enzymatically Modified Starch
- Figure 15. Global Native and Modified Starches Sales Market Share by Type in 2026
- Figure 16. Global Native and Modified Starches Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Corn
- Figure 18. Product Picture of Wheat
- Figure 19. Product Picture of Potato
- Figure 20. Product Picture of Tapioca Cassava
- Figure 21. Product Picture of Other Botanical Sources
- Figure 22. Global Native and Modified Starches Sales Market Share by Botanical Source in 2026
- Figure 23. Global Native and Modified Starches Revenue Market Share by Botanical Source (2021-2026)
- Figure 24. Product Picture of Food Grade
- Figure 25. Product Picture of Industrial Grade
- Figure 26. Product Picture of Feed Grade
- Figure 27. Product Picture of Pharmaceutical Grade
- Figure 28. Global Native and Modified Starches Sales Market Share by End Use Grade in 2026

Figure 29. Global Native and Modified Starches Revenue Market Share by End Use Grade (2021-2026)

Figure 30. Native and Modified Starches Consumed in Food and Beverage

Figure 31. Global Native and Modified Starches Market: Food and Beverage (2021-2026) & (Kilotons)

Figure 32. Native and Modified Starches Consumed in Paper and Packaging

Figure 33. Global Native and Modified Starches Market: Paper and Packaging (2021-2026) & (Kilotons)

Figure 34. Native and Modified Starches Consumed in Textile

Figure 35. Global Native and Modified Starches Market: Textile (2021-2026) & (Kilotons)

Figure 36. Native and Modified Starches Consumed in Adhesives and Binders

Figure 37. Global Native and Modified Starches Market: Adhesives and Binders (2021-2026) & (Kilotons)

Figure 38. Native and Modified Starches Consumed in Personal Care and Home Care

Figure 39. Global Native and Modified Starches Market: Personal Care and Home Care (2021-2026) & (Kilotons)

Figure 40. Native and Modified Starches Consumed in Other Industrial Uses

Figure 41. Global Native and Modified Starches Market: Other Industrial Uses (2021-2026) & (Kilotons)

Figure 42. Global Native and Modified Starches Sale Market Share by Application (2025)

Figure 43. Global Native and Modified Starches Revenue Market Share by Application in 2026

Figure 44. Native and Modified Starches Sales by Company in 2026 (Kilotons)

Figure 45. Global Native and Modified Starches Sales Market Share by Company in 2026

Figure 46. Native and Modified Starches Revenue by Company in 2026 (\$ millions)

Figure 47. Global Native and Modified Starches Revenue Market Share by Company in 2026

Figure 48. Global Native and Modified Starches Sales Market Share by Geographic Region (2021-2026)

Figure 49. Global Native and Modified Starches Revenue Market Share by Geographic Region in 2026

Figure 50. Americas Native and Modified Starches Sales 2021-2026 (Kilotons)

Figure 51. Americas Native and Modified Starches Revenue 2021-2026 (\$ millions)

Figure 52. APAC Native and Modified Starches Sales 2021-2026 (Kilotons)

Figure 53. APAC Native and Modified Starches Revenue 2021-2026 (\$ millions)

Figure 54. Europe Native and Modified Starches Sales 2021-2026 (Kilotons)

Figure 55. Europe Native and Modified Starches Revenue 2021-2026 (\$ millions)

Figure 56. Middle East & Africa Native and Modified Starches Sales 2021-2026 (Kilotons)

Figure 57. Middle East & Africa Native and Modified Starches Revenue 2021-2026 (\$ millions)

Figure 58. Americas Native and Modified Starches Sales Market Share by Country in 2026

Figure 59. Americas Native and Modified Starches Revenue Market Share by Country (2021-2026)

Figure 60. Americas Native and Modified Starches Sales Market Share by Type (2021-2026)

Figure 61. Americas Native and Modified Starches Sales Market Share by Application (2021-2026)

Figure 62. United States Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 63. Canada Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 64. Mexico Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 65. Brazil Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 66. APAC Native and Modified Starches Sales Market Share by Region in 2026

Figure 67. APAC Native and Modified Starches Revenue Market Share by Region (2021-2026)

Figure 68. APAC Native and Modified Starches Sales Market Share by Type (2021-2026)

Figure 69. APAC Native and Modified Starches Sales Market Share by Application (2021-2026)

Figure 70. China Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 71. Japan Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 72. South Korea Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 73. Southeast Asia Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 74. India Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 75. Australia Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 76. China Taiwan Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 77. Europe Native and Modified Starches Sales Market Share by Country in

2026

Figure 78. Europe Native and Modified Starches Revenue Market Share by Country (2021-2026)

Figure 79. Europe Native and Modified Starches Sales Market Share by Type (2021-2026)

Figure 80. Europe Native and Modified Starches Sales Market Share by Application (2021-2026)

Figure 81. Germany Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 82. France Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 83. UK Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 84. Italy Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 85. Russia Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 86. Middle East & Africa Native and Modified Starches Sales Market Share by Country (2021-2026)

Figure 87. Middle East & Africa Native and Modified Starches Sales Market Share by Type (2021-2026)

Figure 88. Middle East & Africa Native and Modified Starches Sales Market Share by Application (2021-2026)

Figure 89. Egypt Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 90. South Africa Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 91. Israel Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 92. Turkey Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 93. GCC Countries Native and Modified Starches Revenue Growth 2021-2026 (\$ millions)

Figure 94. Manufacturing Cost Structure Analysis of Native and Modified Starches in 2026

Figure 95. Manufacturing Process Analysis of Native and Modified Starches

Figure 96. Industry Chain Structure of Native and Modified Starches

Figure 97. Channels of Distribution

Figure 98. Global Native and Modified Starches Sales Market Forecast by Region (2027-2032)

Figure 99. Global Native and Modified Starches Revenue Market Share Forecast by Region (2027-2032)

Figure 100. Global Native and Modified Starches Sales Market Share Forecast by Type

(2027-2032)

Figure 101. Global Native and Modified Starches Revenue Market Share Forecast by Type (2027-2032)

Figure 102. Global Native and Modified Starches Sales Market Share Forecast by Application (2027-2032)

Figure 103. Global Native and Modified Starches Revenue Market Share Forecast by Application (2027-2032)

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