

# **Modified Starch Market by Raw Material (Corn, Cassava, Potato, Wheat), End-User (Food & Beverages, Feed, and Industrial), Form (Dry and Liquid), and Region (North America, Europe, APAC, South America, Rest of the World) - Global Forecast to 2027**

<https://marketpublishers.com/r/M19F1365E4FEN.html>

Date: April 2022

Pages: 219

Price: US\$ 4,950.00 (Single User License)

ID: M19F1365E4FEN

## **Abstracts**

The global modified starch market is estimated to be valued at USD 13.7 billion in 2022. It is projected to reach USD 15.9 billion by 2027, recording a CAGR of 3.1% during the forecast period. Starch is a polymeric carbohydrate that consists of a large number of glucose units. Modified starches are manufactured from native starches. Various processing methods such as physical, enzymatic, wet & dry chemical processes, drum drying, and extrusion are used to produce different types of modified starch products. These processes are used to change the properties of native starch, such as its freeze-thaw stability, acid or alkali resistance, and shear stability to meet industrial requirements. Modified starches are used for functions such as thickening, stabilizing, binding, and emulsification. Apart from food products, it is also used in a wide range of non-food applications and the animal feed industry.

“Asia Pacific is projected to witness the growth of 3.4% during the forecast period.”

The modified starch market in Asia Pacific is growing at a CAGR of 3.4% due to the rising demand in large economies, such as China, India, Japan, and other Southeast Asian countries. The industrial organization and technology of modified starch processing are changing rapidly in Asia Pacific. Unlike other regions where starch is processed almost entirely by large companies, in Asia Pacific, modified starch processing is done by small and medium-sized firms. Historically, native starch has

been largely used for food products in the Asia Pacific region. The industrial applications and technologies involved in modified starch processing are changing rapidly in the Asia Pacific countries. Modified starch is increasingly being demanded by various industries in the region and these industries are incorporating modified raw material of starches in their manufacturing processes and products.

“The corn modified starch dominates the market with 60.5% of total market share in terms of value.”

The corn modified starch dominates the market with 60.5% of total market share in terms of value in 2021. The North American modified starch market is dominated by corn starch due to its low price. Similarly, in Europe, the market is almost equally distributed among wheat, potato, and corn. In the Asia Pacific countries, however, the focus is on cassava, along with potato and corn. In some cases, the modified starch industry is likely to choose based on the cost factor of the starch over the quality or ingredient due to cost considerations.

“Modified starches are used to remove the constraints of food applications.”

In food, the aim of modified starches is to remove the constraints of food applications (for example, in cooking, freezing/thawing, canning, or sterilization) and make the ingredients compatible with modern food processing. Modified starches are used, for example in food products that need to be microwaved, freeze-dried, cooked at high temperatures, or baked and fried so that the texture of such foods does not change during the cooking process. Modified starches are used in chips, canned soups, cheese sauces, powder-coated foods (cocoa-dusted almonds), and candies. Starch is a binder used especially for sauces or soups, but it is not stable and releases water after long storage in the fridge. The common objective of most of these transformations is to limit the natural tendency of the starch to remove the water. During the cooking of soup, for example, the native starch is hydrated in contact with water. The starch granules expand and the viscosity of the solution increases, giving it a particular texture.

Break-up of Primaries:

By Company Type: Tier 1 – 40.0%, Tier 2- 30.0%, Tier 3 – 30.0%

By Designation: Managers – 40.0%, CXOs – 25.0%, and Executives- 35.0%

By Region: Europe - 30%, Asia Pacific – 50%, North America - 10%, RoW –

10%

Leading players profiled in this report:

Archer Daniel Midlands Company (US)

CARGILL (US)

Ingredion Incorporated (US)

Tate & Lyle (UK)

Avebe U.A. (The Netherlands)

Royal Ingredients Group (The Netherlands)

Roquette Frères (France)

Emsland (Germany)

Grain Processing Corporation (US)

AGRANA (Austria)

SMS Corporation (Thailand)

Global Bio-Chem Technology Group Company Limited (Hong-Kong)

SPAC Starch Products (India) Ltd. (India)

Qindao CBH Co., Ltd. (China)

Tereos (France)

KMC (Denmark)

Research Coverage:

*Modified Starch Market by Raw Material (Corn, Cassava, Potato, Wheat), End-User (Food & Beverages, Feed, and I...*

The report segments the modified starch market on the basis of function, modification type, raw material, form, application and region. In terms of insights, this report has focused on various levels of analyses—the competitive landscape, end-use analysis, and company profiles, which together comprise and discuss views on the emerging & high-growth segments of the global modified starch, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges.

Reasons to buy this report:

To get a comprehensive overview of the modified starch market

To gain wide-ranging information about the top players in this industry, their product portfolios, and key strategies adopted by them

To gain insights about the major countries/regions in which the modified starch market is flourishing

## Contents

### 1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

1.2 MARKET DEFINITION

1.3 STUDY SCOPE

FIGURE 1 MARKET SEGMENTATION

1.4 REGIONS COVERED

1.5 PERIODIZATION CONSIDERED

1.6 CURRENCY CONSIDERED

TABLE 1 USD EXCHANGE RATES CONSIDERED, 2019–2021

1.7 VOLUME UNIT CONSIDERED

1.8 STAKEHOLDERS

1.9 SUMMARY OF CHANGES

### 2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 MODIFIED STARCH MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Key industry insights

2.1.2.3 Breakdown of primary interviews

FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS: BY VALUE CHAIN, DESIGNATION, AND REGION

2.2 FACTOR ANALYSIS

2.2.1 INTRODUCTION

2.2.2 DEMAND-SIDE ANALYSIS

FIGURE 4 KEY ECONOMIES BASED ON GDP, 2013–2018 (USD TRILLION)

2.2.3 SUPPLY-SIDE ANALYSIS

2.2.4 MARKET SIZE ESTIMATION

2.2.5 APPROACH ONE (BASED ON RAW MATERIAL, BY REGION)

2.2.6 APPROACH TWO (BASED ON THE GLOBAL MARKET)

2.3 DATA TRIANGULATION

FIGURE 5 DATA TRIANGULATION METHODOLOGY

2.4 ASSUMPTIONS FOR THE STUDY

## 2.5 LIMITATIONS OF THE STUDY

## 3 EXECUTIVE SUMMARY

FIGURE 6 IMPACT OF COVID-19 ON THE MODIFIED STARCH MARKET SIZE, BY SCENARIO, 2022 VS. 2021 (USD MILLION)

FIGURE 7 MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2022 VS. 2027 (USD MILLION)

FIGURE 8 MODIFIED STARCH MARKET SIZE, BY APPLICATION, 2022 VS. 2027 (USD MILLION)

FIGURE 9 MODIFIED STARCH MARKET SIZE, BY FORM, 2022 VS. 2027 (USD MILLION)

FIGURE 10 MODIFIED STARCH MARKET SHARE (VALUE), BY REGION, 2022

## 4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES IN THE MODIFIED STARCH MARKET

FIGURE 11 RISE IN DEMAND FOR MODIFIED STARCH DUE TO CONSUMER DEMAND FOR CONVENIENT FOOD PACKAGING GLOBALLY

4.2 ASIA PACIFIC: MODIFIED STARCH MARKET, BY RAW MATERIAL & COUNTRY

FIGURE 12 MODIFIED CORN STARCH AND CHINA TO ACCOUNT FOR THE LARGEST RESPECTIVE MARKET SHARES IN THE ASIA PACIFIC MARKET IN 2022

4.3 MODIFIED STARCH MARKET, BY RAW MATERIAL

FIGURE 13 CORN-BASED MODIFIED STARCH TO DOMINATE THE MARKET DURING THE FORECAST PERIOD

4.4 MODIFIED STARCH MARKET, BY RAW MATERIAL & REGION

FIGURE 14 ASIA PACIFIC TO DOMINATE ACROSS RAW MATERIAL MARKETS DURING THE FORECAST PERIOD

4.5 MODIFIED STARCH MARKET, BY APPLICATION

FIGURE 15 FOOD & BEVERAGE APPLICATIONS TO DOMINATE THE MARKET DURING THE FORECAST PERIOD

4.6 MODIFIED STARCH MARKET, BY FORM

FIGURE 16 DRY MODIFIED STARCH TO DOMINATE THE MARKET DURING THE FORECAST PERIOD

FIGURE 17 COVID-19 IMPACT ON THE MODIFIED STARCH MARKET: COMPARISON OF PRE- AND POST-COVID-19 SCENARIOS

## 5 MARKET OVERVIEW

## 5.1 INTRODUCTION

## 5.2 MARKET DYNAMICS

### FIGURE 18 MODIFIED STARCH MARKET DYNAMICS

#### 5.2.1 DRIVERS

5.2.1.1 Rise in demand for convenience and processed food

### FIGURE 19 CONSUMER PREFERENCE FOR FOOD PROCESSING

5.2.1.2 Functional properties of modified starch and their ease of incorporation in a wide range of food applications

### TABLE 2 RESEARCH CONDUCTED ON THE PHYSICAL MODIFICATION OF STARCH

5.2.1.3 Growth in demand for adhesives in a range of industrial applications

#### 5.2.2 RESTRAINTS

5.2.2.1 Limited sources and high cost of natural additives

### FIGURE 20 US: CASSAVA PRICE TRENDS, 2013–2018 (USD/TONNE)

5.2.2.2 Higher demand for gum arabic

#### 5.2.3 OPPORTUNITIES

5.2.3.1 Potential alternative sources of modified starch

5.2.3.2 Untapped applications of modified starch

#### 5.2.4 CHALLENGES

5.2.4.1 Approval from the different regulatory bodies

5.2.4.2 Rise in cost of raw materials

## 5.3 COVID-19 IMPACT ON THE MODIFIED STARCH MARKET

## 6 INDUSTRY TRENDS

### 6.1 INTRODUCTION

### 6.2 IMPACT OF REVENUE SHIFT

### FIGURE 21 YC-YCC: IMPACT OF REVENUE SHIFT ON THE MODIFIED STARCH MARKET

### 6.3 VALUE CHAIN

6.3.1 RESEARCH & DEVELOPMENT

6.3.2 SOURCING OF RAW MATERIALS

6.3.3 PRODUCTION AND PROCESSING

6.3.4 DISTRIBUTION, MARKETING, AND SALES

### FIGURE 22 MODIFIED STARCH MARKET: VALUE CHAIN

### 6.4 TECHNOLOGY ANALYSIS

### FIGURE 23 MODIFIED STARCH MARKET: TECHNOLOGY ANALYSIS

6.4.1 PHYSICAL METHODS

6.4.2 CHEMICAL METHODS

#### 6.4.3 ENZYMATIC METHODS

#### 6.5 PATENT ANALYSIS

TABLE 3 PATENTS PERTAINING TO MODIFIED STARCH, 2021

#### 6.6 ECOSYSTEM MAP AND SUPPLY CHAIN

6.6.1 MODIFIED STARCH: MARKET MAP OF ECOSYSTEM

FIGURE 24 MODIFIED STARCH MARKET: SUPPLY CHAIN

FIGURE 25 ECOSYSTEM VIEW

#### 6.7 PORTER'S FIVE FORCES ANALYSIS

TABLE 4 MODIFIED STARCH MARKET: PORTER'S FIVE FORCES ANALYSIS

6.7.1 BARGAINING POWER OF SUPPLIERS

6.7.2 BARGAINING POWER OF BUYERS

6.7.3 THREAT OF SUBSTITUTES

6.7.4 THREAT OF NEW ENTRANTS

6.7.5 INTENSITY OF COMPETITION RIVALRY

#### 6.8 TRADE ANALYSIS

6.8.1 CORN STARCH

TABLE 5 TOP 10 EXPORTERS AND IMPORTERS OF CORN STARCH, 2019 (KT)

6.8.2 CASSAVA STARCH

TABLE 6 TOP 10 EXPORTERS AND IMPORTERS OF CASSAVA STARCH, 2019 (KT)

6.8.3 POTATO STARCH

TABLE 7 TOP 10 EXPORTERS AND IMPORTERS OF POTATO STARCH, 2019 (KT)

6.8.4 WHEAT STARCH

TABLE 8 TOP 10 EXPORTERS AND IMPORTERS OF WHEAT STARCH, 2019 (KT)

#### 6.9 CASE STUDIES

6.9.1 ROQUETTE: BAKERY PRODUCTS WITH MODIFIED STARCH

6.9.2 INGREDION INCORPORATED: COMPANY USES MODIFIED POTATO STARCH TO MAINTAIN THE PULPY GOODNESS

#### 6.10 KEY CONFERENCES & EVENTS

TABLE 9 MODIFIED STARCH MARKET: DETAILED LIST OF CONFERENCES & EVENTS, 2022–2023

#### 6.11 KEY STAKEHOLDERS & BUYING CRITERIA

6.11.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 26 INFLUENCE OF STAKEHOLDERS IN BUYING MODIFIED STARCH APPLICATIONS

TABLE 10 INFLUENCE OF STAKEHOLDERS IN BUYING FOR TOP 3 APPLICATIONS

6.11.2 BUYING CRITERIA

FIGURE 27 KEY BUYING CRITERIA FOR TOP APPLICATIONS

TABLE 11 KEY BUYING CRITERIA FOR MODIFIED STARCH APPLICATIONS



## 6.12 AVERAGE SELLING PRICES

### 6.12.1 AVERAGE SELLING PRICE TREND ANALYSIS

FIGURE 28 US: CORN PRICES, 2013–2019 (USD/BUSHELS)

TABLE 12 GLOBAL AVERAGE PRICES OF MODIFIED STARCH, BY RAW MATERIAL, 2018 VS. 2019 (USD/TON)

FIGURE 29 PRICING TRENDS OF THE POTATO STARCH, 2017–2019 (USD/TON)

TABLE 13 AVERAGE PRICES OF MODIFIED STARCH, BY REGION, 2020 VS. 2021 (USD/TON)

## 7 REGULATORY FRAMEWORK

### 7.1 INTRODUCTION

### 7.2 MODIFIED STARCH REGULATIONS IN NORTH AMERICA

#### 7.2.1 US FOOD AND DRUG ADMINISTRATION

### 7.3 MODIFIED STARCH REGULATIONS IN EUROPE

### 7.4 MODIFIED STARCH REGULATIONS IN THE ASIA PACIFIC

## 8 MODIFIED STARCH MARKET, BY RAW MATERIAL

### 8.1 INTRODUCTION

TABLE 14 MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

TABLE 15 MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (KT)

### 8.2 CORN

#### 8.2.1 EASY PROCESSIBILITY MAKES CORN STARCH HIGHLY PREFERRED

TABLE 16 MODIFIED CORN STARCH MARKET SIZE, BY REGION, 2018–2027 (USD MILLION)

TABLE 17 MODIFIED CORN STARCH MARKET SIZE, BY REGION, 2018–2027 (KT)

### 8.3 CASSAVA

#### 8.3.1 CASSAVA MODIFIED STARCH MARKET DRIVEN BY FUNCTIONAL PROPERTIES

TABLE 18 MODIFIED CASSAVA STARCH MARKET SIZE, BY REGION, 2018–2027 (USD MILLION)

TABLE 19 MODIFIED CASSAVA STARCH MARKET SIZE, BY REGION, 2018–2027 (KT)

### 8.4 POTATO

#### 8.4.1 POTATO STARCH FINDS MAJOR APPLICATION IN THE EUROPEAN MARKET

TABLE 20 MODIFIED POTATO STARCH MARKET SIZE, BY REGION, 2018–2027

(USD MILLION)

TABLE 21 MODIFIED POTATO STARCH MARKET SIZE, BY REGION, 2018–2027

(KT)

8.5 WHEAT

8.5.1 WHEAT MODIFIED STARCH GAINS POPULARITY OWING TO ITS  
THICKENING AND BLENDING PROPERTIES

TABLE 22 MODIFIED WHEAT STARCH MARKET SIZE, BY REGION, 2018–2027

(USD MILLION)

TABLE 23 MODIFIED WHEAT STARCH MARKET SIZE, BY REGION, 2018–2027 (KT)

8.6 OTHER RAW MATERIALS

TABLE 24 OTHER RAW MATERIALS MARKET SIZE, BY REGION, 2018–2027 (USD  
MILLION)

TABLE 25 OTHER RAW MATERIALS MARKET SIZE, BY REGION, 2018–2027 (KT)

## **9 MODIFIED STARCH MARKET, BY APPLICATION**

9.1 INTRODUCTION

TABLE 26 MODIFIED STARCH MARKET SIZE, BY APPLICATION, 2018–2027 (USD  
MILLION)

FIGURE 30 MODIFIED STARCH MARKET SIZE, BY APPLICATION, 2022 VS. 2027  
(USD MILLION)

9.2 COVID-19 IMPACT ON THE MODIFIED STARCH MARKET, BY APPLICATION

9.2.1 REALISTIC SCENARIO

TABLE 27 REALISTIC SCENARIO: MODIFIED STARCH MARKET SIZE, BY  
APPLICATION, 2019–2021 (USD MILLION)

9.2.2 OPTIMISTIC SCENARIO

TABLE 28 OPTIMISTIC SCENARIO: MODIFIED STARCH MARKET SIZE, BY  
APPLICATION, 2019–2021 (USD MILLION)

9.2.3 PESSIMISTIC SCENARIO

TABLE 29 PESSIMISTIC SCENARIO: MODIFIED STARCH MARKET SIZE, BY  
APPLICATION, 2019–2021 (USD MILLION)

9.3 FOOD & BEVERAGES

TABLE 30 MODIFIED STARCH MARKET SIZE IN FOOD & BEVERAGES, BY  
REGION, 2018–2027 (USD MILLION)

TABLE 31 MODIFIED STARCH MARKET SIZE IN FOOD & BEVERAGES, BY  
SUBAPPLICATION, 2018–2027 (USD MILLION)

9.3.1 BAKERY & CONFECTIONERY PRODUCTS

9.3.1.1 Modified starch improves the texture and quality of bakery products

TABLE 32 MODIFIED STARCH MARKET SIZE IN BAKERY & CONFECTIONERY

## PRODUCTS, BY REGION, 2018–2027 (USD MILLION)

### 9.3.2 PROCESSED FOODS

9.3.2.1 Modified starch functions as a stabilizer and provides freeze-thaw ability to processed foods

TABLE 33 MODIFIED STARCH MARKET SIZE IN PROCESSED FOODS, BY REGION, 2018–2027 (USD MILLION)

### 9.3.3 BEVERAGES

9.3.3.1 Starches stabilize beverages and provide them with viscosity for desired mouthfeel

TABLE 34 MODIFIED STARCH MARKET SIZE IN BEVERAGES, BY REGION, 2018–2027 (USD MILLION)

### 9.3.4 OTHER FOOD APPLICATIONS

TABLE 35 MODIFIED STARCH MARKET SIZE IN OTHER FOOD APPLICATIONS, BY REGION, 2018–2027 (USD MILLION)

## 9.4 FEED

TABLE 36 MODIFIED STARCH MARKET SIZE IN FEED, BY REGION, 2018–2027 (USD MILLION)

TABLE 37 MODIFIED STARCH MARKET SIZE IN FEED, BY TYPE, 2018–2027 (USD MILLION)

### 9.4.1 SWINE FEED

9.4.1.1 Starch improves digestibility in swine

### 9.4.2 RUMINANT FEED

9.4.2.1 Starch provides carbohydrates, helping ruminants gain weight

### 9.4.3 POULTRY FEED

9.4.3.1 Starch is an important nutrient source in poultry diets

### 9.4.4 OTHER FEED APPLICATIONS

## 9.5 INDUSTRIAL

TABLE 38 MODIFIED STARCH MARKET SIZE IN INDUSTRIAL APPLICATIONS, BY REGION, 2018–2027 (USD MILLION)

TABLE 39 MODIFIED STARCH MARKET SIZE IN INDUSTRIAL APPLICATIONS, BY SUBAPPLICATION, 2018–2027 (USD MILLION)

### 9.5.1 PAPERMAKING

9.5.1.1 Modified starch provides internal strength to paper

TABLE 40 MODIFIED STARCH MARKET SIZE IN PAPERMAKING, BY REGION, 2018–2027 (USD MILLION)

### 9.5.2 WEAVING & TEXTILES

9.5.2.1 Starch improves the appearance of fabric

TABLE 41 MODIFIED STARCH MARKET SIZE IN WEAVING & TEXTILES, BY REGION, 2018–2027 (USD MILLION)

### 9.5.3 MEDICINES & PHARMACEUTICALS

9.5.3.1 Modified starch is important in various pharmaceutical applications

TABLE 42 MODIFIED STARCH MARKET SIZE IN MEDICINES & PHARMACEUTICALS, BY REGION, 2018–2027 (USD MILLION)

### 9.5.4 COSMETICS

9.5.4.1 Modified starch provides smoothness to cosmetics

TABLE 43 MODIFIED STARCH MARKET SIZE IN COSMETICS, BY REGION, 2018–2027 (USD MILLION)

### 9.5.5 OTHER INDUSTRIAL APPLICATIONS

TABLE 44 MODIFIED STARCH MARKET SIZE IN OTHER INDUSTRIAL APPLICATIONS, BY REGION, 2018–2027 (USD MILLION)

## 10 MODIFIED STARCH MARKET, BY FORM

### 10.1 INTRODUCTION

TABLE 45 MODIFIED STARCH MARKET SIZE, BY FORM, 2018–2027 (USD MILLION)

FIGURE 31 MODIFIED STARCH MARKET SIZE, BY FORM, 2022 VS. 2027 (USD MILLION)

### 10.2 COVID-19 IMPACT ON THE MODIFIED STARCH MARKET, BY FORM

#### 10.2.1 REALISTIC SCENARIO

TABLE 46 REALISTIC SCENARIO: MODIFIED STARCH MARKET SIZE, BY FORM, 2019–2021 (USD MILLION)

#### 10.2.2 OPTIMISTIC SCENARIO

TABLE 47 OPTIMISTIC SCENARIO: MODIFIED STARCH MARKET SIZE, BY FORM, 2019–2021 (USD MILLION)

#### 10.2.3 PESSIMISTIC SCENARIO

TABLE 48 PESSIMISTIC SCENARIO: MODIFIED STARCH MARKET SIZE, BY FORM, 2019–2021 (USD MILLION)

### 10.3 DRY

10.3.1 DRY FORM OF MODIFIED STARCH IS CONVENIENT TO USE

TABLE 49 DRY MODIFIED STARCH MARKET SIZE, BY REGION, 2018–2027 (USD MILLION)

### 10.4 LIQUID

10.4.1 LIQUID FORM OF MODIFIED STARCH REQUIRES MORE CARE

TABLE 50 LIQUID MODIFIED STARCH MARKET SIZE, BY REGION, 2018–2027 (USD MILLION)

## 11 MODIFIED STARCH MARKET, BY FUNCTION

- 11.1 INTRODUCTION
- 11.2 THICKENERS
- 11.3 STABILIZERS
- 11.4 BINDERS
- 11.5 EMULSIFIERS
- 11.6 OTHER FUNCTIONS

## **12 MODIFIED STARCH MARKET, BY MODIFICATION TYPE**

- 12.1 INTRODUCTION
- 12.2 PHYSICAL MODIFICATION
  - TABLE 51 RESEARCH ON THE PHYSICAL MODIFICATION OF STARCH
  - 12.2.1 HYDROTHERMAL
  - 12.2.2 NON-HYDROTHERMAL
- 12.3 CHEMICAL MODIFICATION
  - TABLE 52 CHEMICAL MODIFICATION OF STARCH
  - 12.3.1 CATIONIC STARCH
  - 12.3.2 ETHERIFIED STARCH
  - TABLE 53 ETHERIFIED STARCH IN FOOD APPLICATIONS
  - 12.3.3 ESTERIFIED STARCH
- 12.4 ENZYMATIC MODIFICATION

## **13 MODIFIED STARCH MARKET, BY REGION**

- 13.1 INTRODUCTION
  - FIGURE 32 REGIONAL SNAPSHOT: NEW HOTSPOTS TO EMERGE IN ASIA PACIFIC, 2022–2027
  - TABLE 54 MODIFIED STARCH MARKET SIZE, BY REGION, 2018–2027 (USD MILLION)
  - TABLE 55 MODIFIED STARCH MARKET SIZE, BY REGION, 2018–2027 (KT)
- 13.2 COVID-19 IMPACT ON THE MODIFIED STARCH MARKET, BY REGION
  - 13.2.1 OPTIMISTIC SCENARIO
    - TABLE 56 OPTIMISTIC SCENARIO: MODIFIED STARCH MARKET SIZE, BY REGION, 2019–2021 (USD MILLION)
  - 13.2.2 REALISTIC SCENARIO
    - TABLE 57 REALISTIC SCENARIO: MODIFIED STARCH MARKET SIZE, BY REGION, 2019–2021 (USD MILLION)
  - 13.2.3 PESSIMISTIC SCENARIO

TABLE 58 PESSIMISTIC SCENARIO: MODIFIED STARCH MARKET SIZE, BY REGION, 2019–2021 (USD MILLION)

### 13.3 NORTH AMERICA

TABLE 59 NORTH AMERICA: MODIFIED STARCH MARKET SIZE, BY COUNTRY, 2018–2027 (USD MILLION)

TABLE 60 NORTH AMERICA: MODIFIED STARCH MARKET SIZE, BY COUNTRY, 2018–2027 (KT)

TABLE 61 NORTH AMERICA: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

TABLE 62 NORTH AMERICA: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (KT)

TABLE 63 NORTH AMERICA: MODIFIED STARCH MARKET SIZE, BY APPLICATION, 2018–2027 (USD MILLION)

TABLE 64 NORTH AMERICA: MODIFIED STARCH MARKET SIZE, BY FORM, 2018–2027 (USD MILLION)

#### 13.3.1 US

13.3.1.1 Corn is an important raw material for modified starch in the US

TABLE 65 US: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

#### 13.3.2 CANADA

13.3.2.1 Canadian government agencies work to incorporate modified starch in various industrial applications

TABLE 66 CANADA: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

#### 13.3.3 MEXICO

13.3.3.1 Growth of the paper & packaging industry demands modified starch

TABLE 67 MEXICO: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

### 13.4 EUROPE

TABLE 68 EUROPE: MODIFIED STARCH MARKET SIZE, BY COUNTRY, 2018–2027 (USD MILLION)

TABLE 69 EUROPE: MODIFIED STARCH MARKET SIZE, BY COUNTRY, 2018–2027 (KT)

TABLE 70 EUROPE: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

TABLE 71 EUROPE: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (KT)

TABLE 72 EUROPE: MODIFIED STARCH MARKET SIZE, BY APPLICATION, 2018–2027 (USD MILLION)

TABLE 73 EUROPE: MODIFIED STARCH MARKET SIZE, BY FORM, 2018–2027  
(USD MILLION)

13.4.1 GERMANY

13.4.1.1 Increase in consumption of convenience food drives demand in Germany

TABLE 74 GERMANY: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL,  
2018–2027 (USD MILLION)

13.4.2 FRANCE

13.4.2.1 High consumption of dairy products fuels the demand for modified starch in France

TABLE 75 FRANCE: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL,  
2018–2027 (USD MILLION)

13.4.3 UK

13.4.3.1 Growth of the feed industry contributes to the market in the UK

TABLE 76 UK: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027  
(USD MILLION)

13.4.4 SPAIN

13.4.4.1 Developed food processing industry propels growth in Spain

TABLE 77 SPAIN: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL,  
2018–2027 (USD MILLION)

13.4.5 ITALY

13.4.5.1 Widespread baker & confectionery industry in Italy to drive demand

TABLE 78 ITALY: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL,  
2018–2027 (USD MILLION)

13.4.6 REST OF EUROPE

TABLE 79 REST OF EUROPE: MODIFIED STARCH MARKET SIZE, BY RAW  
MATERIAL, 2018–2027 (USD MILLION)

13.5 ASIA PACIFIC

TABLE 80 ASIA PACIFIC: MODIFIED STARCH MARKET SIZE, BY COUNTRY,  
2018–2027 (USD MILLION)

TABLE 81 ASIA PACIFIC: MODIFIED STARCH MARKET SIZE, BY COUNTRY,  
2018–2027 (KT)

TABLE 82 ASIA PACIFIC: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL,  
2018–2027 (USD MILLION)

TABLE 83 ASIA PACIFIC: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL,  
2018–2027 (KT)

TABLE 84 ASIA PACIFIC: MODIFIED STARCH MARKET SIZE, BY APPLICATION,  
2018–2027 (USD MILLION)

TABLE 85 ASIA PACIFIC: MODIFIED STARCH MARKET SIZE, BY FORM, 2018–2027  
(USD MILLION)



### 13.5.1 CHINA

13.5.1.1 China dominates in Asia Pacific due to significant changes in lifestyle

TABLE 86 CHINA: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

### 13.5.2 JAPAN

13.5.2.1 Rise in the processed food industry in Japan drives the modified starch market

TABLE 87 JAPAN: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

### 13.5.3 INDIA

13.5.3.1 The modified starch market is highly fragmented in India

TABLE 88 INDIA: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

### 13.5.4 SOUTH KOREA

13.5.4.1 Growth in demand for packaged food drives demand for modified starch in South Korea

TABLE 89 SOUTH KOREA: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

### 13.5.5 THAILAND

13.5.5.1 Abundance of cassava as a raw material drives the Thai market

TABLE 90 THAILAND: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

### 13.5.6 REST OF ASIA PACIFIC

TABLE 91 REST OF ASIA PACIFIC: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

## 13.6 SOUTH AMERICA

TABLE 92 SOUTH AMERICA: MODIFIED STARCH MARKET SIZE, BY COUNTRY, 2018–2027 (USD MILLION)

TABLE 93 SOUTH AMERICA: MODIFIED STARCH MARKET SIZE, BY COUNTRY, 2018–2027 (KT)

TABLE 94 SOUTH AMERICA: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

TABLE 95 SOUTH AMERICA MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (KT)

TABLE 96 SOUTH AMERICA: MODIFIED STARCH MARKET SIZE, BY APPLICATION, 2018–2027 (USD MILLION)

TABLE 97 SOUTH AMERICA: MODIFIED STARCH MARKET SIZE, BY FORM, 2018–2027 (USD MILLION)

### 13.6.1 BRAZIL



#### 13.6.1.1 High meat consumption in Brazil to drive the market

TABLE 98 BRAZIL: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

#### 13.6.2 ARGENTINA

13.6.2.1 Growing feed industry to increase the demand for modified starch in Argentina

TABLE 99 ARGENTINA: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

#### 13.6.3 REST OF SOUTH AMERICA

TABLE 100 REST OF SOUTH AMERICA: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

#### 13.7 REST OF THE WORLD (ROW)

TABLE 101 ROW: MODIFIED STARCH MARKET SIZE, BY REGION, 2018–2027 (USD MILLION)

TABLE 102 ROW: MODIFIED STARCH MARKET SIZE, BY REGION, 2018–2027 (KT)

TABLE 103 ROW: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

TABLE 104 ROW: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (KT)

TABLE 105 ROW: MODIFIED STARCH MARKET SIZE, BY APPLICATION, 2018–2027 (USD MILLION)

TABLE 106 ROW: MODIFIED STARCH MARKET SIZE, BY FORM, 2018–2027 (USD MILLION)

#### 13.7.1 AFRICA

13.7.1.1 Increased demand for food processing ingredients drives market in the region

TABLE 107 AFRICA: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

#### 13.7.2 MIDDLE EAST

13.7.2.1 Consumers are witnessing an increased demand for clean-label food products in the Middle East

TABLE 108 MIDDLE EAST: MODIFIED STARCH MARKET SIZE, BY RAW MATERIAL, 2018–2027 (USD MILLION)

## 14 COMPETITIVE LANDSCAPE

### 14.1 OVERVIEW

### 14.2 KEY PLAYER STRATEGIES

TABLE 109 KEY PLAYER STRATEGIES

### 14.3 MARKET SHARE ANALYSIS

FIGURE 33 MARKET SHARE ANALYSIS, 2020

### 14.4 REVENUE ANALYSIS OF MAJOR MARKET PLAYERS

FIGURE 34 REVENUE ANALYSIS OF MAJOR MARKET PLAYERS, 2018–2020 (USD BILLION)

### 14.5 COMPETITIVE SCENARIO & TRENDS

#### 14.5.1 NEW PRODUCT LAUNCHES

TABLE 110 NEW PRODUCT LAUNCHES, 2018–2020

#### 14.5.2 DEALS

TABLE 111 DEALS, 2018–2020

#### 14.5.3 OTHERS

TABLE 112 OTHERS, 2018–2020

### 14.6 COMPANY EVALUATION QUADRANT

#### 14.6.1 STARS

#### 14.6.2 EMERGING LEADERS

#### 14.6.3 PERVASIVE PLAYERS

#### 14.6.4 EMERGING COMPANIES

#### 14.6.5 COMPETITIVE BENCHMARKING

TABLE 113 LIST OF KEY STARTUPS

TABLE 114 MODIFIED STARCH MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS

#### 14.6.6 COMPANY EVALUATION MATRIX, 2020 (OVERALL MARKET)

FIGURE 35 MODIFIED STARCH MARKET COMPANY EVALUATION MATRIX, 2020 (OVERALL MARKET)

#### 14.6.7 MARKET EVALUATION FRAMEWORK

FIGURE 36 MARKET EVALUATION FRAMEWORK, 2018–2021

## 15 COMPANY PROFILES

(Business overview, Products offered, Recent Developments, MNM view)\*

### 15.1 ARCHER DANIELS MIDLAND COMPANY

TABLE 115 ARCHER DANIELS MIDLAND COMPANY: COMPANY AT A GLANCE

FIGURE 37 ARCHER DANIELS MIDLAND COMPANY: COMPANY SNAPSHOT

TABLE 116 ARCHER DANIELS MIDLANDS COMPANY: DEALS

### 15.2 CARGILL

TABLE 117 CARGILL, INCORPORATED: COMPANY AT A GLANCE

FIGURE 38 CARGILL: COMPANY SNAPSHOT

TABLE 118 CARGILL: OTHERS

### 15.3 INGREDION INCORPORATED

TABLE 119 INGREDION INCORPORATED: COMPANY AT A GLANCE

FIGURE 39 INGREDION INCORPORATED: COMPANY SNAPSHOT

TABLE 120 INGREDION INCORPORATED: NEW PRODUCT LAUNCHES

TABLE 121 INGREDION INCORPORATED: DEALS

15.4 TATE & LYLE

TABLE 122 TATE & LYLE: COMPANY AT A GLANCE

FIGURE 40 TATE & LYLE: COMPANY SNAPSHOT

TABLE 123 TATE & LYLE: NEW PRODUCT LAUNCHES

TABLE 124 TATE & LYLE: OTHERS

15.5 ROQUETTE FR?RES

TABLE 125 ROQUETTE FR?RES: COMPANY AT A GLANCE

15.6 AVEBE U.A.

TABLE 126 AVEBE U.A.: COMPANY AT A GLANCE

FIGURE 41 AVEBE U.A.: COMPANY SNAPSHOT

TABLE 127 AVEBE U.A.: OTHERS

15.7 GRAIN PROCESSING CORPORATION

TABLE 128 GRAIN PROCESSING CORPORATION: COMPANY AT A GLANCE

15.8 EMSLAND GROUP

TABLE 129 EMSLAND GROUP: COMPANY AT A GLANCE

TABLE 130 EMSLAND GROUP: NEW PRODUCTS OFFERED

TABLE 131 EMSLAND GROUP: DEALS

15.9 AGRANA

TABLE 132 AGRANA BETEILIGUNGS-AG: COMPANY AT A GLANCE

FIGURE 42 AGRANA: COMPANY SNAPSHOT

TABLE 133 AGRANA: OTHERS

15.10 SMS CORPORATION

TABLE 134 SMS CORPORATION: COMPANY AT A GLANCE

TABLE 135 SMS CORPORATION: NEW PRODUCT LAUNCHES

15.11 GLOBAL BIO-CHEM TECHNOLOGY GROUP COMPANY LIMITED

TABLE 136 GLOBAL BIO-CHEM TECHNOLOGY GROUP COMPANY LIMITED:  
COMPANY AT A GLANCE

FIGURE 43 GLOBAL BIO-CHEM TECHNOLOGY GROUP COMPANY LIMITED:  
COMPANY SNAPSHOT

15.12 SPAC STARCH PRODUCTS (INDIA) LTD.

TABLE 137 SPAC STARCH PRODUCTS (INDIA) LTD.: COMPANY AT A GLANCE

15.13 QINGDAO CBH CO., LTD.

TABLE 138 QINGDAO CBH CO., LTD.: COMPANY AT A GLANCE

15.14 TEREOS

TABLE 139 TEREOS: COMPANY AT A GLANCE

**FIGURE 44 TEREOS: COMPANY SNAPSHOT****15.15 KMC****TABLE 140 KMC: COMPANY AT A GLANCE****15.16 BENEIO****TABLE 141 BENEIO: COMPANY AT A GLANCE****TABLE 142 BENEIO: NEW PRODUCT LAUNCHES****TABLE 143 BENEIO: OTHERS****15.17 ANGEL STARCH & FOOD PVT. LTD.****TABLE 144 ANGEL STARCH & FOOD PVT. LTD.: COMPANY AT A GLANCE****15.18 SHUBHAM STARCH CHEM PVT. LTD.****TABLE 145 SHUBHAM STARCH CHEM PVT. LTD.: COMPANY AT A GLANCE****15.19 EVEREST STARCH (INDIA) PVT. LTD.****TABLE 146 EVEREST STARCH (INDIA) PVT. LTD.: COMPANY AT A GLANCE****15.20 SHEEKHARR STARCH PVT. LTD.****TABLE 147 SHEEKHARR STARCH PVT. LTD.: COMPANY AT A GLANCE****15.21 SANSTAR BIO-POLYMERS LTD.****TABLE 148 SANSTAR BIO-POLYMERS LTD.: COMPANY AT A GLANCE****15.22 UNIVERSAL BIOPOLYMERS****TABLE 149 UNIVERSAL BIOPOLYMERS: COMPANY AT A GLANCE****15.23 SONISH STARCH TECHNOLOGY CO. LTD.****TABLE 150 SONISH STARCH TECHNOLOGY CO. LTD.: COMPANY AT A GLANCE****15.24 VENUS STARCH SUPPLIERS****TABLE 151 VENUS STARCH SUPPLIERS: COMPANY AT A GLANCE****15.25 GROMOTECH AGROCHEM PVT. LTD.****TABLE 152 GROMOTECH AGROCHEM PVT. LTD.: COMPANY AT A GLANCE**

\*Details on Business overview, Products offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

**16 ADJACENT AND RELATED MARKETS****16.1 INTRODUCTION****TABLE 153 ADJACENT MARKETS TO MODIFIED STARCH****16.2 LIMITATIONS****16.3 POTATO STARCH MARKET****16.3.1 MARKET DEFINITION****16.3.2 MARKET OVERVIEW****TABLE 154 POTATO STARCH MARKET SIZE, BY TYPE, 2019–2027 (USD MILLION)****16.4 PEA STARCH MARKET****16.4.1 MARKET DEFINITION**

#### 16.4.2 MARKET OVERVIEW

TABLE 155 PEA STARCH MARKET SIZE, BY GRADE, 2019–2026 (USD BILLION)

### 17 APPENDIX

17.1 DISCUSSION GUIDE

17.2 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

17.3 AVAILABLE CUSTOMIZATIONS

17.4 RELATED REPORTS

17.5 AUTHOR DETAILS

## I would like to order

Product name: Modified Starch Market by Raw Material (Corn, Cassava, Potato, Wheat), End-User (Food & Beverages, Feed, and Industrial), Form (Dry and Liquid), and Region (North America, Europe, APAC, South America, Rest of the World) - Global Forecast to 2027

Product link: <https://marketpublishers.com/r/M19F1365E4FEN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/M19F1365E4FEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below

and fax the completed form to +44 20 7900 3970