

# **Modified Starch Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Etherified Starch, Cationic Starch, Resistant Starch, Pre-Gelatinized and Esterified Starch), By Raw Material (Cassava, Corn, Wheat, Potato and Others), By Application (Food & Beverages, Animal Feed and Others), By Function (Thickeners, Emulsifiers, Stabilizers, Binders and Others), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Modified Starch Market is projected to expand from USD 14.21 Billion in 2025 to USD 19.49 Billion by 2031, achieving a CAGR of 5.41%. Modified starch is derived from native starch through physical, enzymatic, or chemical treatments designed to enhance functional properties like solubility, texture, and stability. A primary factor fueling this growth is the critical need for effective thickening and emulsifying agents within the processed food sector, which safeguard product quality during intense manufacturing and storage processes. Furthermore, increasing dependency on high-performance binders in the pharmaceutical and paper industries creates a durable path for expansion that remains distinct from fleeting consumer fads.

Despite these positive indicators, the market faces a substantial obstacle in the form of raw material price volatility, which disrupts supply chain stability and complicates pricing strategies. The sector's deep reliance on agricultural inputs is highlighted by recent industry data regarding consumption and scale. As reported by Starch Europe, the European starch industry processed agricultural materials into 9.8 million tonnes of starch products in 2024, with modified starches comprising 18 percent of the total starch

usage within the European Union.

## **Market Driver**

The rising global demand for convenience and processed foods serves as a major engine for the modified starch industry, creating a need for ingredients that maintain consistent texture and shelf life under diverse processing conditions. Manufacturers increasingly depend on these starches to withstand the rigors of high-shear mixing, acidic environments, and freeze-thaw cycles inherent in making ready-to-eat meals, bakery items, and sauces. This dependency is evident in the financial results of leading suppliers who are focusing on textural innovations. For example, Ingredion Incorporated stated in their '2023 Annual Report', released in February 2024, that net sales of specialty ingredients grew by 4 percent, a rise largely attributed to double-digit gains in starch-based texturizers, underscoring the vital function of these starches in meeting modern standards for food stability and mouthfeel.

Furthermore, the growing consumer shift toward low-fat and gluten-free options propels market adoption, as modified starches enable formulators to mimic the viscosity and mouthfeel of fats or gluten in "free-from" products without sacrificing sensory appeal. This movement toward functional, healthier ingredients has driven substantial innovation and trade volumes across the sector. According to the Tate & Lyle 'Annual Report 2024' from June 2024, revenue from New Products targeting healthier lifestyles made up 16 percent of their Food & Beverage Solutions income. The magnitude of this trend is also visible in export statistics; the Thai Tapioca Starch Association reported that in 2024, Thailand's total modified starch export volume hit 1,060,392 tonnes, highlighting the strong global trade supporting these expanding applications.

## **Market Challenge**

The significant volatility of agricultural feedstock prices constitutes a major hurdle restricting the Global Modified Starch Market's progress. Because the industry depends heavily on crops like corn, wheat, cassava, and potatoes, unpredictable fluctuations in input costs directly jeopardize operational stability and financial planning. Manufacturers struggle to secure long-term pricing agreements with clients in the pharmaceutical and food industries, as sudden spikes in input expenses can destroy profit margins or force disruptive, frequent price changes. This economic uncertainty compels companies to maintain conservative inventory levels, thereby curbing their ability to invest capital or expand aggressively.

This instability in pricing is clearly reflected in recent industrial statistics. As per the Thai Tapioca Trade Association, the export price of tapioca starch experienced considerable fluctuation in 2025, falling from \$405 per ton in January to \$350 per ton by December. Such erratic shifts in raw material valuation add complexity to supply chain management and foster a high-risk atmosphere that discourages new market entrants while stifling the consistent supply necessary for sustained industrial development.

## Market Trends

Manufacturers are increasingly turning to physical and enzymatic modification techniques, including annealing and heat-moisture treatment, to supersede conventional chemical methods. This transition is driven by the clean label movement, as brands aim to eliminate "modified starch" and E-numbers from ingredient panels while preserving the additive's essential processing tolerance. This technological shift permits functional texturizers to be labeled simply as "flour" or "starch," meeting rigorous consumer transparency expectations without sacrificing shear resistance or viscosity. The demand for such label-friendly ingredients is strong; Ingredion Incorporated reported in their 'Fourth Quarter and Full-Year 2024 Results' in February 2025 that their Texture & Healthful Solutions segment achieved double-digit volume growth in the fourth quarter, indicating rapid adoption of these specialized solutions.

Concurrently, the market is extending into non-food sectors by incorporating starch-based materials into compostable and biodegradable packaging. Modified starches, especially thermoplastic starch (TPS), are being combined with biodegradable polyesters to create eco-friendly substitutes for agricultural mulches, loose-fill packaging, and single-use films. This trend is fueled by global sustainability initiatives seeking to decrease dependence on fossil-fuel plastics in short-term applications, establishing modified starch as a crucial element of the circular economy. The scope of this application is substantial; according to the 'Bioplastics Market Development Update 2024' by European Bioplastics in December 2024, packaging applications comprised 45 percent, or roughly 1.12 million tonnes, of the global bioplastics market, highlighting the vital role of starch polymers in the sustainable materials sector.

## Key Market Players

Cargill

Ingredion

Tate & Lyle

Roquette

ADM

Emsland Group

Avebe

Global Bio-Chem

Lyckeby Starch

## Report Scope

In this report, the Global Modified Starch Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Modified Starch Market, By Type

Etherified Starch

Cationic Starch

Resistant Starch

Pre-Gelatinized and Esterified Starch

### Modified Starch Market, By Raw Material

Cassava

Corn

Wheat

Potato and Others

## Modified Starch Market, By Application

Food & Beverages

Animal Feed and Others

## Modified Starch Market, By Function

Thickeners

Emulsifiers

Stabilizers

Binders and Others

## Modified Starch Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

## Asia Pacific

China

India

Japan

Australia

South Korea

## South America

Brazil

Argentina

Colombia

## Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Modified Starch Market.

## **Available Customizations:**

Global Modified Starch Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

*Modified Starch Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Et...*

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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