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Industrial Starch Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Native Starch and Starch Derivatives & Sweeteners), By Source (Corn, Wheat, Cassava, Potato and Others), By Form (Dry and Liquid), By Function (Stabilizing, Thickening, Film Forming Agents, Gelling Agent and Others), By Application (Food & Beverage, Feed and Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Industrial Starch Market is expected to expand from USD 120.18 Billion in 2025 to USD 196.18 Billion by 2031, reflecting a compound annual growth rate (CAGR) of 8.51%. Derived from crops like cassava, corn, and wheat, this carbohydrate polymer is primarily used in non-food manufacturing for its adhesive, binding, and thickening qualities. Market growth is largely fueled by the essential demand for binding agents in extensive paper production and the ongoing expansion of the worldwide textile sector. These primary factors ensure consistent product usage as producers scale up their operations. Furthermore, Starch Europe reported that the European industry manufactured 9.8 million tonnes of starch and related derivatives in 2025.

A major hurdle to the growth of this market is the ongoing fluctuation in the prices and yields of agricultural raw materials. Erratic weather often interferes with crop harvests, leading to supply chain disruptions that increase processing expenses and limit overall profitability.

Market Driver

The growth of the international paper and corrugated packaging sector serves as a main driver for the Global Industrial Starch Market. In paper production, industrial starch acts as an essential binding material that ensures structural strength and powerful adhesion in corrugated cartons. The swift rise of e-commerce has heightened the need for durable shipping boxes, thereby driving up the use of specialized starches. As highlighted in a June 2025 Packaging Dive article titled 'More than a PFAS replacement,' Ingredion committed $50 million to an Iowa plant to boost its specialty industrial starch output for the packaging and paper sectors. The extensive use of these substances supports major business operations, with Ingredion Incorporated reporting yearly net sales of roughly $7.2 billion in 2025.

The increasing shift toward biobased and biodegradable plastics also provides a major boost to industrial starch usage. Producers are frequently combining starch with compostable polymers to create eco-friendly substitutes for traditional petroleum-based plastics. Starch introduces affordable biodegradability without compromising the critical barrier characteristics required for rigid packaging and flexible films. According to the December 2025 'EUBP presents the Results of the 2025 Market Data Report' by European Bioplastics, global biobased plastic production capacity is anticipated to double from 2.31 million tonnes in 2025 to around 4.69 million tonnes by 2030. This shift directly increases the worldwide demand for starch feedstocks.

Market Challenge

Ongoing fluctuations in the pricing and yield of agricultural raw materials impede the growth of the global industrial starch market by introducing financial instability. The manufacturing of industrial starch depends significantly on crops such as cassava and corn. Erratic weather patterns interfere with these harvests, leading to abrupt material shortages. Such scarcity compels producers to purchase crops at higher prices, thereby raising their operating costs. Because industrial starch is a bulk material used in textile and paper production, transferring these elevated costs to consumers frequently results in lower overall sales volumes.

Unstable supply chains squeeze profit margins and hinder the capacity expansion efforts of producers. Fluctuating raw material prices make it difficult for manufacturers to sustain consistent production routines. For example, the Thai Tapioca Starch Association noted that in 2025, the export price of tapioca starch fell to $470 per ton from $581 per ton the previous year, driven by variations in raw material supplies. Such unpredictability discourages long-term agreements and creates financial vulnerabilities.

The continuous changes in the cost of agricultural inputs ultimately restrict the broader advancement of the market.

Market Trends

The movement toward organic and clean label industrial starches is reshaping formulation methods within the global market. To comply with rigorous transparency standards, businesses are substituting chemically modified starches with native and physically altered options. This shift enables manufacturers to offer straightforward ingredient lists without sacrificing crucial technical characteristics such as viscosity. As noted by Food Ingredients First in a February 2026 article titled 'Ingredion banks on texture innovation as beverage sweetener demand cools,' Ingredion highlighted that its clean label and texture division fueled company growth, achieving a 16 percent increase in operating income to reach US$405 million.

Another major market development is the increasing use of alternative raw materials, such as pea and cassava, for extracting starch. Producers are broadening their crop supply chains beyond traditional wheat and corn to ensure more sustainable resources. Pea starch provides excellent thermal resistance and strong binding capabilities for sophisticated material uses. Manufacturers are also constantly improving their extraction processes to maximize the potential of these alternative starches. In March 2026, Roquette detailed in its 'A New Clean Label Pea Starch' article the introduction of a native pea starch that uses an additional dehydration phase to lower moisture levels from 12 percent to 6 percent, thereby extending the shelf life of the product.

Key Market Players

Cargill, Incorporated

Archer Daniels Midland Company

Ingredion Incorporated

Tate & Lyle PLC

AGRANA Beteiligungs-AG

Grain Processing Corporation

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Roquette Freres

The Tereos Group

Cooperatie Koninklijke Cosun U.A.

Altia Consultores

Report Scope

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

- Industrial Starch Market, By Type
  - Native Starch
  - Starch Derivatives & Sweeteners
- Industrial Starch Market, By Source
  - Corn
  - Wheat
  - Cassava
  - Potato
  - Others
- Industrial Starch Market, By Form
  - Dry
  - Liquid
- Industrial Starch Market, By Function

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Stabilizing

Thickening

Film Forming Agents

Gelling Agent

Others

Industrial Starch Market, By Application

Food & Beverage

Feed

Others

Industrial 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 Industrial Starch Market.

Available Customizations:

Global Industrial Starch Market report with the given market data, TechSci Research

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offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

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

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8. ASIA PACIFIC INDUSTRIAL STARCH MARKET OUTLOOK

9. MIDDLE EAST & AFRICA INDUSTRIAL STARCH MARKET OUTLOOK

10. SOUTH AMERICA INDUSTRIAL STARCH MARKET OUTLOOK

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