Business Review

Global Starch and Derivatives, Production and Supply

9TH EDITION

2023 – 2028

INTRODUCTION

The starch and derivatives industry has seen sustained growth for several decades, and the current supply landscape is changing at an unprecedented rate. This is due in part to the supply pressures wrought by the Covid-19 pandemic, as well as the ramifications of the war in Ukraine, and the associated raw material supply volatility. Additionally, the starch industry was hit particularly hard by rising energy costs due to the energy-intensive drying steps required in most production processes.

Different raw materials offer different technical advantages, but maize continues to dominate due to its agricultural fit in China and N. America, as well as S. America. Tapioca is the significant second starch source and is growing in importance along with maize due to its large crop potential in South East Asia, Latin America and Africa, combined with its excellent technological properties and relatively low cost. The burgeoning clean-label trend, accelerated by the Covid-19 pandemic, has put pressure on manufacturers to valorise products such as pea and rice starch, and there is growing appetite in the industry to expand processing of these materials.

The many possible derivatives have long been driving the growth of the industry, allowing it to respond with great flexibility to changing issues, be they global raw material availability, trade regulations, new technologies or end-use sector dynamics.

Giract, the ingredients and technologies specialist and leader in market analysis of starches and their derivatives, has published eight landmark starch supply studies since 1996 (1996, 2000, 2004, 2007, 2010, 2013, 2015, and 2020), which pulled together starch supply by type of raw material and player across the world. These studies continue to serve as the reference for all players in the starches and derivatives industry.

OBJECTIVES

To estimate raw material grind/crush (kt), capacity (kt), and primary starch production:

- by country/region
- by producer and production facility
- by raw material utilisation

To estimate starch and derivative production (kt):

- by type
- by country/region
- by producer and production facility
- by raw material utilisation

To evaluate trade patterns and availability of starches and derivatives by country/region

To forecast global trends in the supply of starches and derivatives to 2028

PRODUCTS

Primary starch from different raw materials, including, but not limited to, maize, wheat, potato, tapioca, and pea. Finished products include starches (native and modified), glucose syrup, HFS, dextrose, other dry hydrolysates, and polyols

MARKETS

Global

TIMESCALE

Current: 2023; Forecast: 2028

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SUBSCRIPTION

Please contact us for subscription details

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