

Global Tapioca Starch Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 6.4 bn
Forecast (2031)	USD 9.7 bn
CAGR (2021-2031)	7.3%
Study period	2021-2031
Largest region	Asia-Pacific · 61.4%
Fastest-growing region	Latin America · 8.4%
Market concentration	Moderate
Licence	Individual / Company

The global tapioca starch market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific held XX% of market value, supported by Thailand's export-oriented processing base and large food, paper, sweetener and industrial-starch sectors across China and Southeast Asia. Modified and functional native tapioca starches are gaining value share as formulators pursue clean labels, gluten-free products, process stability and neutral sensory performance. Investment is also moving toward pharmaceutical excipients, biodegradable materials and traceable cassava supply chains.

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Executive summary

The global tapioca starch market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific held XX% of market value, supported by Thailand's export-oriented processing base and large food, paper, sweetener and industrial-starch sectors across China and Southeast Asia. Modified and functional native tapioca starches are gaining value share as formulators pursue clean labels, gluten-free products, process stability and neutral sensory performance. Investment is also moving toward pharmaceutical excipients, biodegradable materials and traceable cassava supply chains.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Global market volume stood at XXX metric tons in 2025 and will rise to XXX metric tons by 2031.
- Asia-Pacific accounted for XX% of 2025 value, reflecting its dominant cassava-processing and export infrastructure.
- Modified tapioca starch represented XX% of market value in 2025, the largest product-type share.
- Food and beverages generated XX% of demand, led by noodles, bakery, dairy, sauces, snacks and confectionery.
- Thailand supplied XX% of global native cassava-starch exports and XX% of modified-starch exports in the latest USDA-cited industry assessment.
- Thailand exported USD XXX billion of food ingredients in 2024, with cassava starch ranking as its largest food-ingredient export category.
- FAOSTAT reported that global roots and tubers production increased XX% in 2023, supported partly by higher cassava output.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Tapioca Starch Market Trends and Growth Drivers

Tapioca starch sits at the intersection of agricultural commodity economics and specialty-ingredient formulation. Native starch competes primarily on root cost, extraction yield, energy efficiency and freight, while modified and functional native grades compete on measurable performance under heat, shear, acidity, refrigeration and frozen storage.

The market's strongest structural advantage is tapioca's neutral flavour, pale colour, translucent paste and gluten-free, non-cereal origin. These properties give formulators a reason to retain tapioca even when corn starch trades at a discount, particularly in delicately flavoured foods, clear sauces, chewy products and clean-label formulations.

Supply discipline remains decisive. Fresh cassava roots are bulky and perishable, tying starch mills to local farming zones, while international customers require consistent year-round specifications. Producers that improve farmer yields, diversify root catchments and maintain regional finished-goods inventories can convert agricultural resilience into pricing power.

Growth drivers

Clean-label reformulation accelerates functional native starch

Food manufacturers are replacing additive-coded modified starches with functional native tapioca starch where processing tolerance permits. Tapioca's neutral flavour, pale colour and soft gel structure support clean-label reformulation in dairy, sauces, soups, bakery fillings and prepared meals without sacrificing consumer-facing texture.

Gluten-free foods broaden tapioca penetration

Tapioca starch improves expansion, chew, moisture retention and crumb structure in gluten-free bakery, snacks and noodles. Demand is strongest in North America and Europe, while local gluten-free product development is increasing across urban Asia-Pacific markets.

Convenience-food production raises starch intensity

Instant noodles, frozen foods, sauces, soups and ready meals require economical viscosity, binding and process stability. Expanding packaged-food production in China, India and Southeast Asia increases both native-starch volume and demand for higher-value cross-linked and acetylated grades.

Premium texture systems lift realized pricing

Manufacturers increasingly specify starch by sensory and processing performance rather than commodity solids content. Freeze-thaw stability, shear resistance, translucency and creamy mouthfeel support higher pricing for application-specific tapioca systems.

Paper and adhesive substitution sustains industrial volume

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Tapioca starch provides surface strength, binding and viscosity control in corrugated board, paper coatings, textile sizing and water-based adhesives. Packaging growth and plastic-reduction programs support demand, particularly near Southeast Asian starch production clusters.

Pharmaceutical and biomaterial uses open premium niches

Purified tapioca starch is gaining attention as a binder, disintegrant and platform for engineered excipients, while thermoplastic starch expands into compostable compounds and three-dimensional-printing filaments. These applications begin from smaller volumes but deliver attractive value per ton and stricter customer qualification.

Restraints

Cassava harvest volatility compresses processor margins

Root starch content and availability respond to rainfall, drought, disease pressure and farmer planting decisions. Because fresh roots deteriorate quickly and move over limited distances, local crop shortfalls can raise procurement costs before processors can rebalance exports or substitute origins.

Low corn-starch prices intensify substitution

Corn starch benefits from deep processing scale, broad availability and integrated sweetener economics. When corn prices weaken, cost-sensitive paper, adhesive and mainstream food users can reformulate away from tapioca unless its sensory or label advantages are essential.

Export concentration increases supply-chain exposure

Thailand and neighboring mainland Southeast Asian countries account for a dominant portion of internationally traded tapioca starch. Port disruption, currency appreciation, crop disease or changes in Chinese buying therefore transmit quickly into delivered prices across Europe and North America.

Water and wastewater compliance raises capital needs

Starch extraction generates high-organic-load wastewater and requires disciplined water, energy and residue management. Tighter discharge expectations favor scaled, modern plants but increase entry costs and can constrain smaller processors near water-stressed production zones.

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Tapioca Starch Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Clean-label reformulation accelerates functional native starch	XXX	XXX	XXX
Gluten-free foods broaden tapioca penetration	XXX	XXX	XXX
Convenience-food production raises starch intensity	XXX	XXX	XXX
Premium texture systems lift realized pricing	XXX	XXX	XXX
Paper and adhesive substitution sustains industrial volume	XXX	XXX	XXX
Pharmaceutical and biomaterial uses open premium niches	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Cassava harvest volatility compresses processor margins	XXX	XXX	XXX
Low corn-starch prices intensify substitution	XXX	XXX	XXX
Export concentration increases supply-chain exposure	XXX	XXX	XXX
Water and wastewater compliance raises capital needs	XXX	XXX	XXX

Source: XXX

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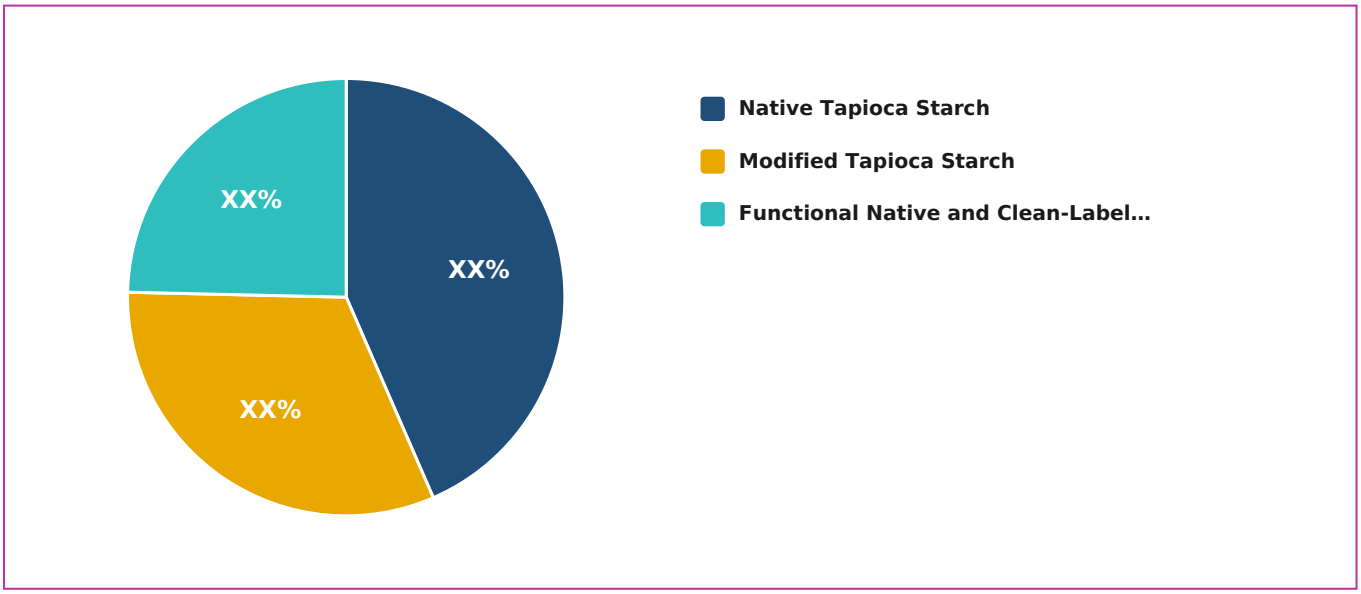
Tapioca Starch Market Segmentation by Product, Grade, Application and Function

By Product Type

Modified starch leads because cross-linking, substitution and other treatments deliver process stability required in sauces, dairy, noodles, paper and adhesives. Conventional native starch retains a major volume position in foods and industrial binders. Functional native and clean-label grades are taking value share by combining simpler declarations with improved heat, shear and storage performance.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Native Tapioca Starch	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Modified Tapioca Starch	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Functional Native and Clean-Label Starch	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Food grade dominates because tapioca starch is widely used for thickening, texture, moisture management and crispness. Industrial grade supplies price-sensitive paper, textile, construction and adhesive markets. Pharmaceutical and personal-care grades grow fastest as suppliers invest in purification, excipient functionality, documentation and controlled manufacturing.

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Value by grade, USD bn

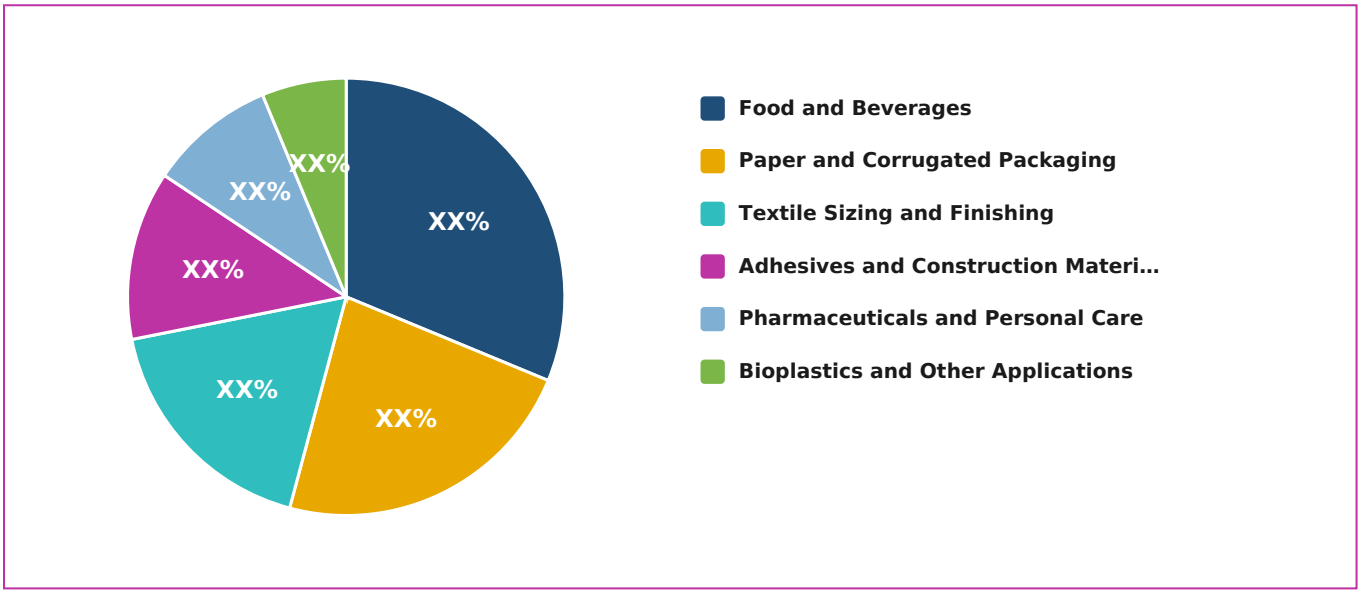
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceutical and Personal-Care Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Food and beverage demand spans noodles, bakery, snacks, dairy, confectionery, sauces, soups and processed meat. Paper, corrugating and adhesives remain important volume outlets close to Asian production centers. Pharmaceuticals, personal care and bioplastics expand more rapidly from a smaller base because tapioca offers renewable origin, neutral sensory properties and tunable functionality.

Value share by application, 2025



Source: XXX

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Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Food and Beverages	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Paper and Corrugated Packaging	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Textile Sizing and Finishing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Adhesives and Construction Materials	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceuticals and Personal Care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bioplastics and Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Function

Thickening remains the largest function because tapioca develops clean viscosity and a neutral flavour profile across food and industrial systems. Binding and adhesion are established in paper, corrugating, tablets and construction formulations. Film forming and biopolymer uses will post the strongest growth as compounders improve moisture resistance and mechanical performance.

Value by function, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Thickening and Viscosity Control	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Binding and Adhesion	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Texturizing and Gelling	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Stabilizing and Encapsulation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Film Forming and Biopolymer Function	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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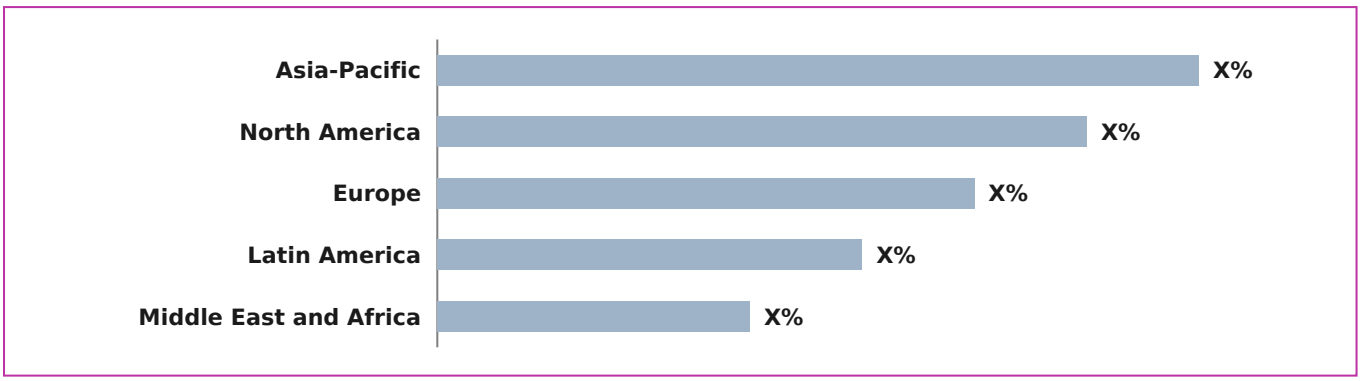
Tapioca Starch Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global value in 2025 and remains both the principal production base and the largest demand center. Thailand anchors internationally traded native and modified starch through established root procurement, wet-milling, drying, port and application-development infrastructure. China is the largest regional consumption market, while Vietnam, Cambodia and Laos are expanding their roles as processing and raw-material origins linked to Chinese and ASEAN supply chains.

North America and Europe together represented XX% of market value in 2025. These regions import substantial volumes but command higher average selling prices because demand is weighted toward clean-label foods, gluten-free bakery, specialty texturants, infant and clinical nutrition, and tightly specified industrial grades. Supplier differentiation rests on traceability, inventory availability, technical service and the capacity to qualify tapioca as an alternative to corn and potato starch.

Latin America will grow fastest at XX% CAGR through 2031. Brazil combines a large cassava crop, established starch processors and growing domestic food demand, while Colombia is developing sustainable tapioca supply for multinational ingredient portfolios. African countries possess abundant cassava output, but investment in industrial-scale extraction, reliable power, logistics and food-grade quality systems remains the decisive step between root production and tradable starch.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Tapioca Starch Market Competitive Landscape and Company Share

The market is moderately concentrated: the ten largest suppliers controlled an estimated XX% of 2025 value, while a long tail of Thai, Vietnamese, Chinese, Brazilian and African processors competed in native and standard modified grades. Ingredion, Cargill, Thai Wah and SMS Corporation combine agricultural sourcing with application development, whereas regional processors frequently compete through root access, operating efficiency and export pricing.

Competitive advantage is shifting from commodity capacity toward proprietary functionality, clean-label performance and dependable multi-origin supply. Waxy tapioca, functional native starch, pharmaceutical excipients and customized texture systems carry stronger margins and require customer co-development, regulatory support and repeatable performance under heat, shear, acid and frozen storage.

Recent strategy has moved in two directions. SMS and Thai Wah are adding specialty capability and partnerships in Thailand, while Tate & Lyle chose an alternate sourcing model and exited its Chaodee manufacturing operation. Buyers should expect further alliances between root processors and international ingredient companies, especially where local assets require global technical-service and distribution reach.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Ingredion Incorporated	XXX	XXX	XXX	XXX
Cargill, Incorporated	XXX	XXX	XXX	XXX
Thai Wah Public Company Limited	XXX	XXX	XXX	XXX
SMS Corporation Co., Ltd.	XXX	XXX	XXX	XXX
Ubon Bio Ethanol Public Company Limited	XXX	XXX	XXX	XXX
Sanguan Wongse Industries Co., Ltd.	XXX	XXX	XXX	XXX
General Starch Limited	XXX	XXX	XXX	XXX
Eiamheng Tapioca Starch Industry Co., Ltd.	XXX	XXX	XXX	XXX
SPAC Starch Products (India) Ltd.	XXX	XXX	XXX	XXX
Tate & Lyle PLC	XXX	XXX	XXX	XXX

Source: XXX

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Tapioca Starch Market Forecast and Strategic Opportunities to 2031

Tapioca starch demand will rise from XXX metric tons in 2025 to XXX metric tons in 2031. Value growth will exceed volume growth as the product mix shifts toward functional native, modified food-grade, pharmaceutical and biomaterial formulations and as suppliers monetize traceability and application support.

The central forecast assumes stable long-run cassava acreage, gradual yield improvement and sufficient processing investment to prevent persistent shortages. A high-growth scenario led by faster clean-label conversion and biopolymer adoption places 2031 value at USD XXX billion; a supply-constrained scenario characterized by crop volatility and aggressive corn-starch substitution places it at USD XXX billion.

Winning suppliers will combine contract farming, improved cassava varieties, efficient water and energy systems, flexible modification technology and regional inventories. Product portfolios built around a demonstrable formulation outcome—freeze-thaw stability, crispness, creamy texture, tablet performance or compostable-material strength—will capture more value than undifferentiated native-starch expansion.

Opportunities

- High-performance functional native and waxy tapioca starch
- Direct-compression pharmaceutical excipients
- Thermoplastic starch and compostable packaging blends
- Certified sustainable and fully traceable cassava programs
- Local processing expansion in Brazil, Colombia and sub-Saharan Africa
- Customized starch systems for plant-based dairy, sauces and gluten-free bakery

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