

Global Cassava Flour 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 7.4 bn
Forecast (2031)	USD 10.9 bn
CAGR (2021-2031)	6.6%
Study period	2021-2031
Largest region	Africa · 46.8%
Fastest-growing region	Asia-Pacific · 7.5%
Market concentration	Low
Licence	Individual / Company

The global cassava flour market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is moving beyond traditional staple-food consumption as high-quality cassava flour gains adoption in gluten-free bakery, snacks, noodles and wheat-substitution programmes. Africa remains the largest market, supported by its substantial cassava crop and established food culture, while Asia-Pacific records the fastest growth through industrial processing, modified cassava flour and export-oriented ingredient production. The report quantifies the market by product type, nature, application, sales channel, packaging and geography while assessing processors, brands, regulation and investment opportunities.

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Executive summary

The global cassava flour market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is moving beyond traditional staple-food consumption as high-quality cassava flour gains adoption in gluten-free bakery, snacks, noodles and wheat-substitution programmes. Africa remains the largest market, supported by its substantial cassava crop and established food culture, while Asia-Pacific records the fastest growth through industrial processing, modified cassava flour and export-oriented ingredient production. The report quantifies the market by product type, nature, application, sales channel, packaging and geography while assessing processors, brands, regulation and investment opportunities.

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

Key findings

- The global cassava flour market generated USD XXX billion in 2025 and is forecast to reach USD XXX billion in 2031.
- World cassava-root production reached XXX tonnes in 2024, providing a broad raw-material base for flour, starch, food and feed processing.
- Nigeria produced XXX tonnes of cassava in 2024, equivalent to approximately XX% of global production and ahead of the Democratic Republic of the Congo and Thailand.
- Africa accounted for XX% of cassava flour revenue in 2025, reflecting deep household penetration and extensive traditional-food demand.
- High-quality unfermented cassava flour represented XX% of market value in 2025 and will remain the largest product category through 2031.
- Bakery and confectionery represented XX% of demand, supported by composite-flour programmes and gluten-free product formulation.
- Asia-Pacific will grow at a XX% CAGR through 2031, led by Indonesian mocaf, Thai processing expertise and expanding convenience-food production.
- Codex CXS 176-1989 limits moisture in edible cassava flour to XX% by mass and total hydrocyanic acid to 10 mg/kg.

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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 Cassava Flour Market Trends and Growth Drivers

Cassava flour sits at the intersection of staple-food demand, import substitution and premium gluten-free formulation. The raw-material base is extensive, but commercial value depends on converting perishable roots into stable flour rapidly enough to preserve colour, flavour and functional quality.

Demand growth is separating the market into two operating models. Local mills serve culturally embedded household foods through short supply chains, while high-quality processors supply audited bakery, snack, noodle and retail customers that require repeatable moisture, cyanide, particle-size and microbiological specifications.

Processing economics will determine the pace of formalization. Root aggregation, dry-matter yield, transport distance, pressing and drying energy have greater influence on delivered cost than milling alone, making vertically coordinated supply networks the central competitive advantage.

Growth drivers

Gluten-free formulation broadens cassava flour demand

Cassava flour provides a naturally gluten-free carbohydrate base with a neutral-to-mild flavour that works in bread mixes, tortillas, snacks and home baking. Brand owners increasingly use it alongside rice flour, starches and hydrocolloids to improve differentiation and simplify grain-free positioning.

Wheat substitution strengthens local ingredient economics

Countries exposed to imported wheat and foreign-exchange pressure are promoting locally sourced composite flours. High-quality cassava flour can replace a controlled share of wheat in bread, biscuits and institutional foods while retaining agricultural value within producing economies.

Industrial bakery and snack adoption raises addressable volume

Improved particle-size control, lower moisture and more consistent colour are moving cassava flour from informal markets into audited food factories. Larger purchase contracts support mechanized processing and create a commercial bridge between smallholder root supply and national food manufacturers.

Processing investment improves quality and availability

Mobile processing units, flash dryers, mechanical presses and clean-energy drying shorten the interval between harvest and stabilization. Higher recovery, safer processing and year-round specifications reduce rejection rates and expand the radius of viable industrial demand.

Convenient traditional foods formalize household demand

Urban consumers are shifting from labor-intensive root preparation toward packaged flour with defined cooking instructions and smaller pack sizes. Modern retail and diaspora channels convert established cassava eating occasions into branded, traceable sales.

Climate resilience supports long-run crop availability

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Cassava tolerates intermittent drought and comparatively marginal soils, giving it strategic value where cereal production is exposed to rainfall volatility. Breeding, clean planting material and better agronomy can translate that resilience into a more dependable processing feedstock.

Restraints

Inconsistent specifications constrain industrial uptake

Small-scale drying and milling produce variation in moisture, colour, fibre, granulation and microbial quality. Food manufacturers respond with intensive incoming inspection, supplier consolidation or conservative inclusion rates, slowing conversion from wheat and other flours.

Fresh-root perishability narrows procurement windows

Cassava roots deteriorate rapidly after harvest, requiring coordinated harvesting, transport, peeling and drying. Delays reduce starch quality and recovery, while processors operating below capacity carry higher conversion costs.

Food-safety compliance raises entry requirements

Processors must control cyanogenic compounds, moisture, foreign matter, microorganisms and cross-contact in certified gluten-free facilities. Testing, documentation and hygienic drying add cost but remain essential for formal retail and export channels.

Formulation limits restrict direct wheat replacement

Cassava flour does not supply gluten structure and can alter loaf volume, dough handling, water absorption and texture at high inclusion rates. Commercial adoption therefore depends on application-specific blends, enzymes, proteins or hydrocolloids.

Root and energy costs pressure processor margins

Flour economics are sensitive to fresh-root prices, seasonal dry-matter content, diesel or electricity costs and the distance between farms and dryers. Suppliers without contracted roots or efficient thermal systems face pronounced margin volatility.

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Cassava Flour Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Gluten-free formulation broadens cassava flour demand	XXX	XXX	XXX
Wheat substitution strengthens local ingredient economics	XXX	XXX	XXX
Industrial bakery and snack adoption raises addressable volume	XXX	XXX	XXX
Processing investment improves quality and availability	XXX	XXX	XXX
Convenient traditional foods formalize household demand	XXX	XXX	XXX
Climate resilience supports long-run crop availability	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Inconsistent specifications constrain industrial uptake	XXX	XXX	XXX
Fresh-root perishability narrows procurement windows	XXX	XXX	XXX
Food-safety compliance raises entry requirements	XXX	XXX	XXX
Formulation limits restrict direct wheat replacement	XXX	XXX	XXX
Root and energy costs pressure processor margins	XXX	XXX	XXX

Source: XXX

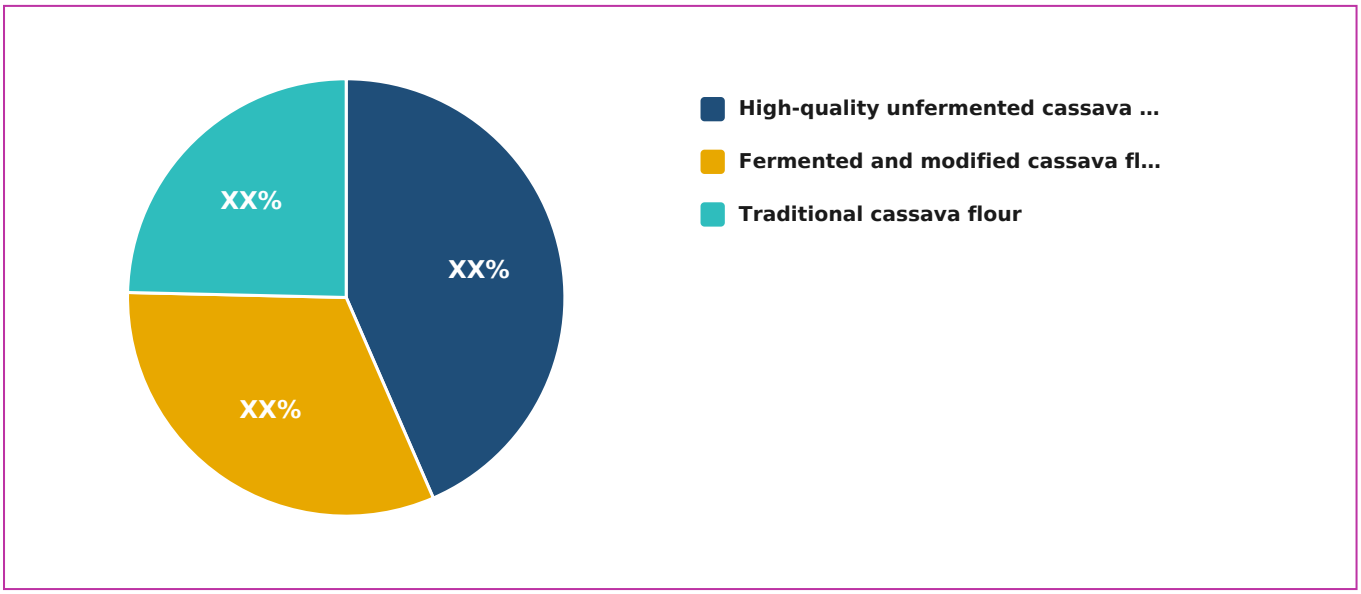
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Cassava Flour Market Segmentation Analysis by Product, Application and Channel

By Product Type

High-quality unfermented flour leads because its neutral flavour, controlled granulation and lower fermentation notes suit industrial bakery and packaged-food formulations. Fermented and modified cassava flour is the fastest-growing category as Indonesian mocaf and related processes improve texture and application performance. Traditional flour retains substantial staple-food demand but loses share as packaged and specification-driven products expand.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
High-quality unfermented cassava flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fermented and modified cassava flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Traditional cassava flour	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Nature

Conventional production dominates because most roots are sourced from smallholder systems without formal organic certification and because industrial buyers prioritize functionality and price. Organic cassava flour commands a premium in North American and European natural-food channels. Its growth is supported

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by certified supply chains, but audit costs and segregated processing constrain availability.

Value by nature, USD bn

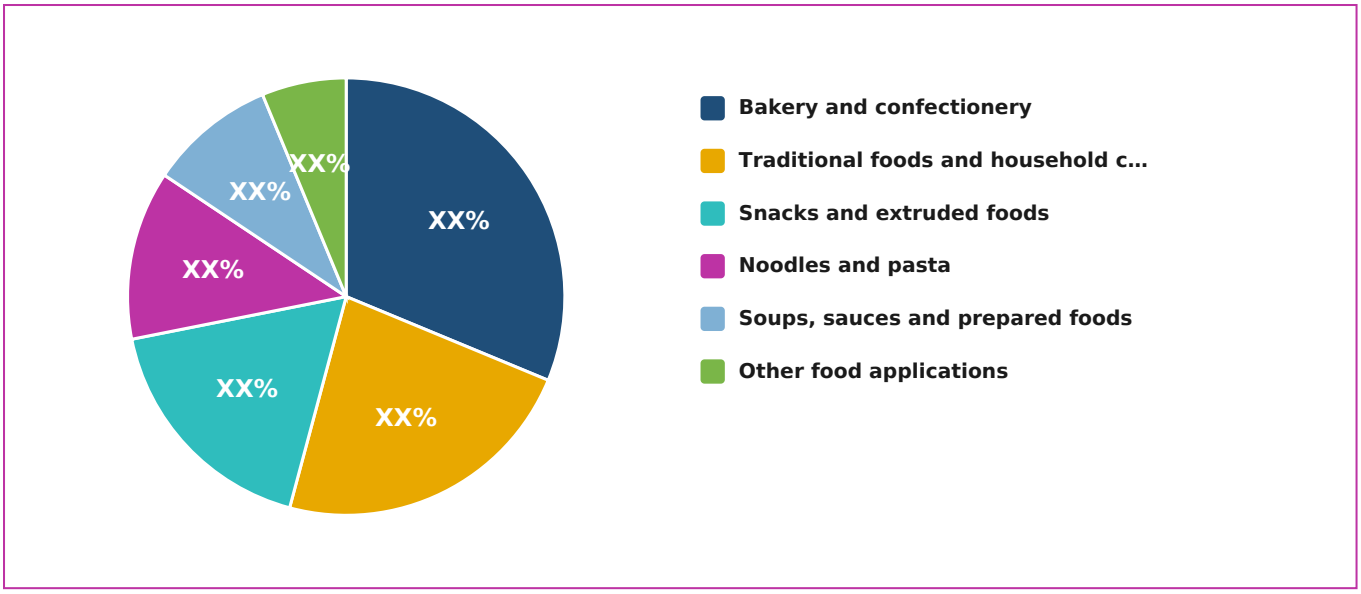
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Organic	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Bakery and confectionery lead through bread, cakes, biscuits, premixes and composite-flour formulations. Traditional foods remain a large and resilient demand base, particularly in Africa and Latin America, but grow more slowly than processed applications. Noodles and pasta advance at an XX% CAGR as processors use fermented or high-quality flour in gluten-free and wheat-reduced formulations.

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
Bakery and confectionery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Traditional foods and household cooking	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Snacks and extruded foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Noodles and pasta	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Soups, sauces and prepared foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other food applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Direct and distributor-led business-to-business contracts dominate because bakeries, snack manufacturers, caterers and institutional buyers purchase larger formats against technical specifications. Modern retail expands with branded gluten-free and convenient traditional-food packs. E-commerce is the fastest-growing channel, particularly for premium flour in markets where store-level distribution remains narrow.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Business-to-business	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Traditional retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Supermarkets and specialty retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Packaging

Multiwall paper or woven sacks remain the principal format for industrial processors, wholesalers and food-service customers. Retail pouches gain share because they support moisture protection, portioning and branded communication. Bulk containers grow in large plants but remain limited by handling infrastructure and the dispersed nature of cassava-flour production.

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Value by packaging, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Industrial sacks	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail pouches and bags	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bulk containers and other formats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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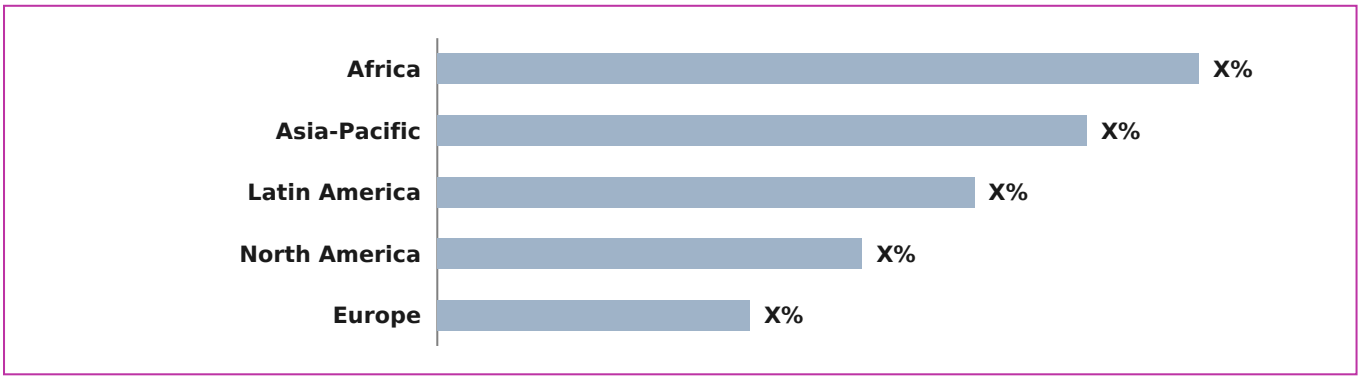
Cassava Flour Market Regional Analysis and Country Outlook

Africa generated XX% of global revenue in 2025. Nigeria is the region's largest commercial opportunity because it combines the world's largest cassava crop with substantial household consumption, bakery demand and policy support for local processing. Ghana has a more organized high-quality cassava flour value chain, while the Democratic Republic of the Congo, Angola, Cameroon and East Africa retain large conversion opportunities as mechanical drying and formal packaged-food distribution expand.

Asia-Pacific accounted for XX% of market value and will record the fastest regional CAGR of XX% through 2031. Indonesia leads fermented modified cassava flour development, Thailand contributes mature cassava aggregation and ingredient-processing capabilities, and Vietnam and Cambodia provide expanding root supply. Growth is concentrated in noodles, coatings, snacks, premixes and industrial formulations rather than traditional flour alone.

Latin America combines established farinha and yuca-flour consumption with export potential in naturally gluten-free ingredients. Brazil anchors regional scale, Colombia and Paraguay support industrial development, and North American and European markets deliver higher unit values through certified gluten-free retail products, clean-label mixes and ethnic-food distribution.

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
Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	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

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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Cassava Flour Market Competitive Landscape and Company Share

The cassava flour market is fragmented: the ten largest suppliers controlled XX% of 2025 revenue. Local mills dominate staple-food volumes, while international ingredient groups, specialist processors and premium consumer brands compete for standardized industrial and gluten-free demand. Scale alone is insufficient because winning suppliers must combine root access, drying efficiency, food-safety assurance and application support.

Thai Wah has the broadest industrial cassava platform among the profiled companies, while Psaltry International and Matna Foods illustrate the growth of integrated Nigerian processing. Consumer-facing competition is led by brands including Otto's Naturals, Bob's Red Mill and Anthony's, whose value proposition rests on convenient pack formats, traceability and gluten-free use cases.

Investment is moving toward contracted farmer networks, decentralized root collection, mechanical or low-carbon drying and laboratory-backed quality control. Strategic partnerships between processors and bakeries are more prevalent than large cross-border acquisitions because fresh-root economics remain local and product specifications vary by application.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Thai Wah Public Company Limited	XXX	XXX	XXX	XXX
Psaltry International Company Limited	XXX	XXX	XXX	XXX
Matna Foods Company Limited	XXX	XXX	XXX	XXX
Otto's Naturals	XXX	XXX	XXX	XXX
Bob's Red Mill Natural Foods	XXX	XXX	XXX	XXX
Anthony's Goods	XXX	XXX	XXX	XXX
American Key Food Products	XXX	XXX	XXX	XXX
Woodland Foods	XXX	XXX	XXX	XXX
Mocaf Indonesia	XXX	XXX	XXX	XXX
Ladang Lima	XXX	XXX	XXX	XXX

Source: XXX

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Cassava Flour Market Forecast, Scenarios and Opportunities

The market will add USD XXX billion between 2025 and 2031. Base-case growth assumes wider industrial qualification of high-quality cassava flour, continued formalization of traditional consumption and stronger gluten-free demand, with average selling prices moderating as processing productivity improves.

The upside scenario is driven by binding composite-flour procurement, rapid commissioning of African drying capacity and stronger adoption in Asian noodles and snacks. The downside scenario centers on root disease, inconsistent quality, delayed processing investment and weak cost competitiveness against wheat, maize and rice flour.

The strongest performers will sell functional consistency rather than undifferentiated flour. Supplier advantages will come from controlled cyanide and moisture levels, application laboratories, contracted high-dry-matter varieties, traceable sourcing and the ability to deliver flour blends engineered for specific bakery, snack and noodle processes.

Opportunities

- Contract production of standardized high-quality cassava flour for industrial bakeries
- Fermented mocaf for noodles, coatings and clean-label texture systems
- Certified gluten-free consumer brands in North America and Europe
- Solar, biomass and heat-recovery drying systems in African processing clusters
- Composite-flour premixes tailored to regional bread and snack formulations
- Traceable and sustainably sourced cassava ingredients
- Cross-border African trade in packaged traditional and convenience flours

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