

Global Cassava 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 5.4 bn
Forecast (2031)	USD 7.7 bn
CAGR (2021–2031)	6.1%
Study period	2021–2031
Largest region	Asia-Pacific · 58%
Fastest-growing region	Asia-Pacific · 7%
Market concentration	Moderate
Licence	Individual / Company

The global cassava starch market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, representing a XX% CAGR, according to shev.io Research. Asia-Pacific accounts for XX% of demand by value, supported by established processing clusters, food manufacturing and industrial starch consumption. Native starch generates XX% of market revenue, while modified starch captures growing demand for controlled viscosity, processing tolerance and application-specific performance. This report connects purchasing demand with root procurement, factory economics, trade exposure and customer qualification to identify where suppliers can defend margins and expand sales.

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Executive summary

The global cassava starch market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, representing a XX% CAGR, according to shev.io Research. Asia-Pacific accounts for XX% of demand by value, supported by established processing clusters, food manufacturing and industrial starch consumption. Native starch generates XX% of market revenue, while modified starch captures growing demand for controlled viscosity, processing tolerance and application-specific performance. This report connects purchasing demand with root procurement, factory economics, trade exposure and customer qualification to identify where suppliers can defend margins and expand sales.

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

Key findings

- shev.io Research places global cassava starch revenue at USD XXX billion in 2025 and USD XXX billion in 2031, with a XX% forecast CAGR.
- Asia-Pacific represents XX% of 2025 market value and grows at XX% annually through 2031, making it both the largest and fastest-growing region.
- Native cassava starch accounts for XX% of market revenue; modified cassava starch contributes XX%.
- Food and beverages generate XX% of cassava starch revenue, followed by paper and paperboard at XX%.
- Food-grade products represent XX% of market value, industrial-grade products XX% and pharmaceutical-grade products XX%.
- Direct producer sales account for XX% of market value, reflecting large industrial accounts and application-led supplier relationships.
- Commercial cassava starch volume reaches XXX tonnes of dry starch equivalent in 2025, with a blended producer realization of USD XXX per tonne.
- The World Customs Organization identifies native manioc starch under HS 110814; HS 350510 covers dextrins and other modified starches across botanical sources, requiring cassava-specific allocation.

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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 Starch Market Trends and Growth Drivers

Cassava starch competes simultaneously as an agricultural derivative and a performance ingredient. Native-starch economics respond to root availability, recovery, drying cost and freight, while specialty products depend more heavily on customer qualification and functional consistency. A useful market assessment must therefore distinguish changes in physical consumption from movements in price and product mix.

The supply chain begins with a perishable root and ends with customers that expect stable industrial specifications. Variations in starch content, procurement distance and processing reliability can determine margins before the product reaches an export terminal. This makes farmer relationships, extraction control and working capital central to competitive performance.

Demand expansion is strongest where cassava starch solves a measurable manufacturing problem. Food texture, paper performance, pharmaceutical specifications and material processing each create different purchasing criteria. Sustainability initiatives add opportunities when suppliers can demonstrate compliant materials and workable disposal pathways, while competitive starch prices continue to discipline purchasing decisions.

Growth drivers

Processed-food demand strengthens cassava starch consumption

Cassava starch supports viscosity, binding and texture in noodles, sauces, snacks and other manufactured foods. Its mild flavor and formulation versatility make it relevant to manufacturers balancing sensory performance with ingredient cost. Suppliers benefit most when they translate these characteristics into application-specific specifications and dependable delivery.

Modified cassava starch increases revenue per tonne

Demanding food and industrial processes require starches with controlled responses to heat, shear, acidity and storage. Chemical and enzymatic modification expand the range of customer requirements that cassava starch can serve. The commercial advantage comes from qualification, technical support and consistency, allowing specialized suppliers to capture more value than undifferentiated native-starch sellers.

Paperboard and adhesives broaden industrial demand

Paper producers and converters use starch in strength development, surface treatment and adhesive preparation. Cassava competes where its performance and delivered economics fit the mill or corrugator's operating conditions. Growth depends on industrial output and successful application trials rather than a universal substitution away from other starch sources.

Local processing converts cassava agriculture into industrial supply

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Cassava-growing countries can replace selected starch imports when processors establish dependable root collection, utilities and product quality. Nigeria and other African markets offer a significant industrialization opportunity, but agricultural abundance alone does not deliver competitive starch. Integrated procurement and anchor-customer contracts are central to making new plants commercially viable.

Certified starch-based materials create additional applications

Cassava starch can serve as an input to thermoplastic starch and selected material blends used in packaging and other manufactured products. Demand depends on the finished material's mechanical properties, processing behavior and compliance with the intended disposal pathway. Suppliers that support certification and converter trials are better positioned than those relying on broad environmental claims.

Processing efficiency improves competitive delivered cost

Better extraction recovery, drying control, water reuse and energy management increase the amount of saleable starch obtained from purchased roots. These improvements support more competitive offers and reduce exposure to operating-cost volatility. Export processors and emerging domestic suppliers both gain when efficiency improvements are accompanied by tighter quality control.

Restraints

Root volatility constrains plant utilization and margins

Weather, crop disease, competing outlets and variations in root starch content affect both procurement cost and extraction economics. Cassava roots also require prompt handling after harvest, limiting the flexibility available to processors. Plants with weak farmer relationships or narrow procurement catchments face greater difficulty maintaining utilization and export commitments.

Alternative starches limit cassava pricing power

Maize, wheat and potato starch compete with cassava across many applications, although substitution requires technical assessment. Buyers compare the cost of achieving the desired performance rather than purchasing solely by botanical source. Sustained cassava price premiums can therefore trigger reformulation, dual sourcing or changes in purchasing allocation.

Wastewater and energy requirements raise investment thresholds

Starch extraction generates wastewater that requires effective treatment, while drying creates a substantial energy requirement. Plants must fund reliable treatment, monitoring and utility systems before pursuing premium customers or sustained capacity expansion. Smaller processors can struggle to finance these upgrades and maintain competitive operating costs.

Trade exposure and qualification slow supplier switching

International buyers depend on shipping reliability, accurate documentation and consistent specifications from export suppliers. Freight disruption, working-capital requirements and lengthy customer trials can delay the conversion of available capacity into recurring sales. These barriers are particularly important for

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new exporters entering regulated or technically demanding applications.

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Cassava Starch Market Drivers, Restraints and Forecast Impact

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Processed-food demand strengthens cassava starch consumption	XXX	XXX	XXX
Modified cassava starch increases revenue per tonne	XXX	XXX	XXX
Paperboard and adhesives broaden industrial demand	XXX	XXX	XXX
Local processing converts cassava agriculture into industrial supply	XXX	XXX	XXX
Certified starch-based materials create additional applications	XXX	XXX	XXX
Processing efficiency improves competitive delivered cost	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Root volatility constrains plant utilization and margins	XXX	XXX	XXX
Alternative starches limit cassava pricing power	XXX	XXX	XXX
Wastewater and energy requirements raise investment thresholds	XXX	XXX	XXX
Trade exposure and qualification slow supplier switching	XXX	XXX	XXX

Source: XXX

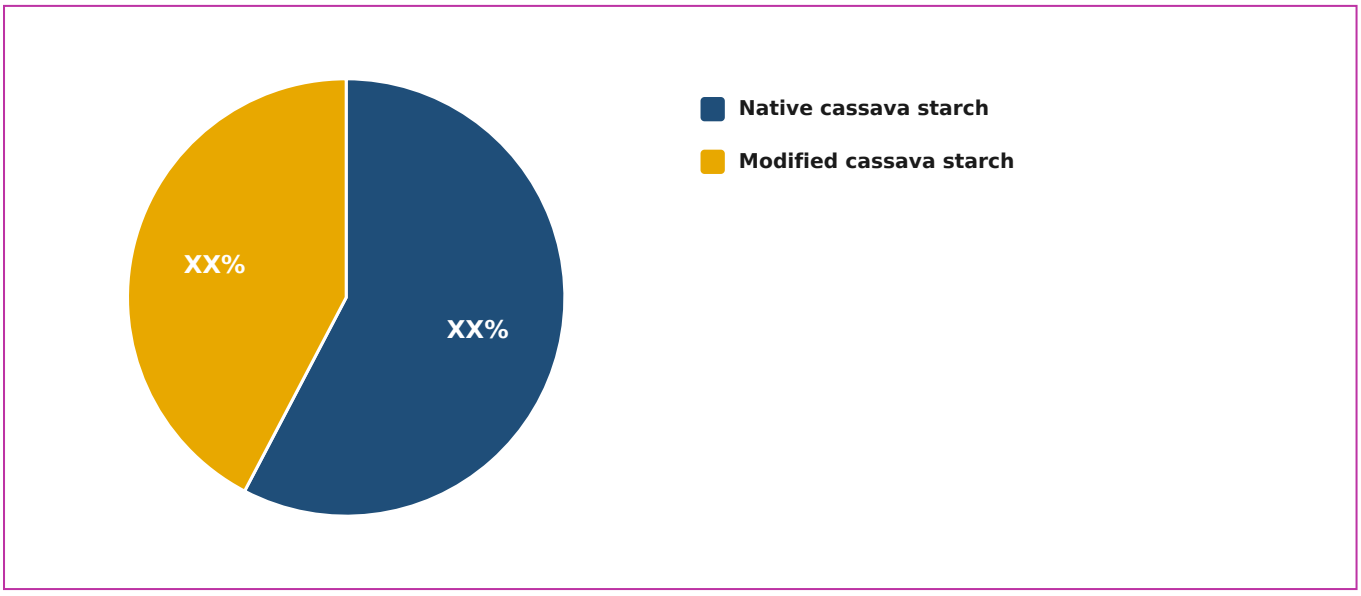
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Cassava Starch Market Segmentation by Product, Application, Grade and Sales Channel

By Product Type

Native starch anchors the market through broad food and industrial use and relatively standardized purchasing specifications. Modified starch grows faster as customers seek tighter control over viscosity, processing tolerance and storage performance. Functional native products remain in the native category when their processing does not involve intentional chemical or enzymatic modification, keeping the segment boundaries consistent.

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 cassava starch	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Modified cassava starch	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

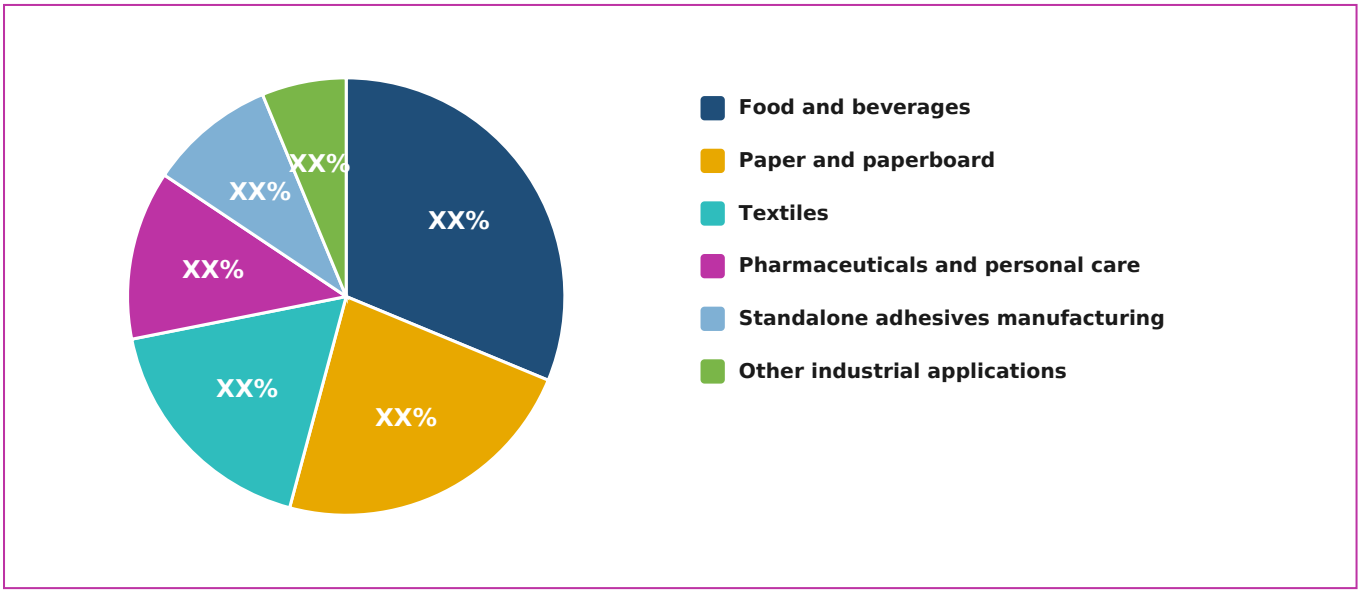
By End-use Industry

Food manufacturing values cassava starch for texture, binding and formulation performance, while paper and paperboard purchasing is closely tied to mill economics and application requirements. Textiles, pharmaceutical and personal-care products, and standalone adhesive manufacturing provide additional demand pools. Other industrial applications grow fastest from a smaller base as selected starch-based materials progress through qualification; starch used internally by paper mills remains in paper and

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paperboard to prevent double counting.

Value share by end-use Industry, 2025



Source: XXX

Value by end-use Industry, 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 paperboard	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Textiles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceuticals and personal care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Standalone adhesives manufacturing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other industrial applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Grade segmentation follows the specification under which the starch is sold rather than the buyer's industry alone. Food-grade material leads because of its broad commercial use, including selected non-food formulations that purchase food-grade inputs. Pharmaceutical grade grows fastest from a smaller base as suppliers pursue tighter specifications, documentation and customer qualification; products satisfying multiple standards are assigned to the highest contracted grade.

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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 grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Direct sales dominate large industrial contracts and technically demanding accounts where producers participate in application trials and specification management. Distributors support smaller order sizes, local inventory, credit and access to geographically dispersed customers. Distributor-mediated sales grow faster as suppliers extend their reach into fragmented food manufacturing and emerging industrial markets; channel shares allocate producer revenue and exclude resale markups.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct producer sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributor-mediated sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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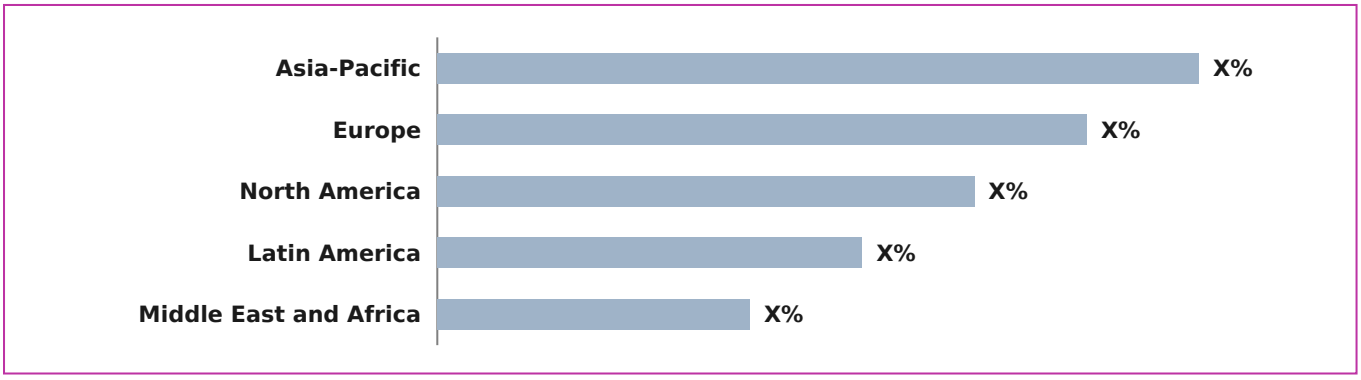
Cassava Starch Market Regional Analysis and Country Outlook

Asia-Pacific accounts for XX% of cassava starch market value in 2025 and records the fastest regional CAGR at XX% through 2031. Thailand and Vietnam are central to the export-oriented supply system, while China combines substantial food and industrial demand with access to imported starch. Indonesia and India add distinct domestic manufacturing opportunities. Regional analysis separates extraction capacity, cross-border trade and final consumption so that an export hub is not automatically treated as the largest demand center.

Europe and North America represent XX% and XX% of market value, respectively, with each expanding at XX% annually. Their purchasing case centers on documented functionality, traceability and reliable ingredient qualification rather than proximity to cassava cultivation. European distribution hubs require particular care in geographic allocation because customs entry and final industrial use can occur in different countries. Suppliers pursuing these markets need application support and documentation that match food, pharmaceutical or industrial customer requirements.

Latin America contributes XX% of market value and grows at XX%, supported by cassava processing and regional food and industrial applications. Brazil offers an established processing base, while Paraguay is relevant to regional supply and trade. The Middle East and Africa contributes XX% and grows at XX%; Nigeria and Ghana illustrate the opportunity to connect domestic root production with consistent industrial starch supply. Realizing that opportunity requires dependable collection networks, extraction economics and qualified commercial demand.

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
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	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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Cassava Starch Market Competitive Landscape and Company Share

The cassava starch market has moderate concentration, with a fragmented native-starch supply base alongside a more selective field of technically capable modified-starch suppliers. Competition differs sharply between commodity export tenders and customer-qualified specialty ingredients. Ingredion, Cargill and Tate & Lyle participate through broader ingredient portfolios, while companies such as Thai Wah, SMS Corporation, General Starch and Sanguan Wongse Industries bring cassava-focused processing or application capabilities.

Scale matters through root procurement, plant utilization, energy efficiency and shipment reliability, but it does not determine every purchasing decision. Specialty customers also assess batch consistency, analytical support, formulation assistance and the supplier's ability to manage specification changes. Company comparisons therefore separate cassava-related revenue from total corporate sales and distinguish extraction capacity from modification or finishing capacity.

The strategic assessment examines expansion, partnerships and acquisition opportunities through their effect on product capability, geographic reach and customer access. Purchasing a processing asset creates value only when procurement, environmental systems and commercial qualification can support the additional output. The strongest competitive positions combine dependable native-starch supply with a credible route into higher-value applications, supported by disciplined capital allocation.

Leading companies

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

Source: XXX

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Cassava Starch Market Forecast and Investment Opportunities

Global cassava starch revenue reaches USD XXX billion by 2031, with Asia-Pacific remaining the principal source of incremental demand. Volume growth is reinforced by a richer product mix as manufacturers purchase starches designed for specific processing conditions. Native starch remains the largest product category, but suppliers that combine efficient extraction with higher-value modification and application services have more ways to expand revenue.

The upside case rests on faster customer qualification for specialty food applications, stronger paper and packaging demand, and successful commercialization of certified starch-based materials. The downside case centers on root shortages, adverse delivered-price comparisons against competing starches and slower utilization of new processing assets. Scenario analysis varies these operating mechanisms independently so that buyers can distinguish demand growth from price-driven revenue changes.

Commercial winners will manage the entire chain from root quality to customer performance. Procurement relationships, starch recovery, environmental systems and product consistency determine whether capacity becomes profitable sales. For investors and buyers, the most useful early indicators are root starch content, plant utilization, application qualification progress and the spread between cassava starch and technically substitutable alternatives.

Opportunities

- Functional native cassava starch for suitable clean-label food formulations
- Modified starch for frozen foods, sauces and demanding thermal processes
- Pharmaceutical excipients with traceability and customer-specific qualification
- Application services for paper coating and corrugating adhesives
- Reliable domestic starch supply for African food and industrial manufacturers
- Certified thermoplastic starch ingredients for selected packaging applications
- Farm-linked procurement and disease-resilient planting material
- Water recycling and biogas recovery that improve factory economics

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