

Global Wheat 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 4.2 bn
Forecast (2031)	USD 5.7 bn
CAGR (2021–2031)	5.2%
Study period	2021–2031
Largest region	Europe · 42%
Fastest-growing region	Asia-Pacific · 6.5%
Market concentration	Moderate
Licence	Individual / Company

The global wheat starch market reaches USD XXX billion in 2025 and is projected to reach USD XXX billion by 2031, advancing at a CAGR of XX%, according to shev.io Research. Europe holds the largest revenue share, supported by integrated wheat processing, established food applications and a substantial paper and corrugated packaging customer base. Asia-Pacific delivers the fastest regional growth as food manufacturing and industrial starch consumption expand. Competitive advantage increasingly depends on application performance, coproduct economics, energy efficiency and the ability to qualify wheat starch against alternative botanical sources.

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Table of contents

1 Introduction and Wheat Starch Market Scope

1.1 Market Definition, Inclusions and Exclusions

1.2 Product Classification, Units and Geographic Allocation

2 Research Methodology

2.1 Secondary Sources and Evidence Hierarchy

2.2 Bottom-Up Sizing and Consumption Reconciliation

2.3 Forecast Assumptions, Quality Controls and Planned Primary Research

3 Executive Summary and Key Report Takeaways

4 Wheat Starch Market Dynamics

4.1 Growth Drivers and Directional Forecast Impacts

4.2 Restraints and Substitution Risks

4.3 Porter's Five Forces

4.4 Value Chain, Coproduct Economics and Producer Pricing

5 Global Wheat Starch Market Size and Segmentation Forecasts

5.1 Global Revenue, Volume and Average Producer Price

5.2 By Product Type: Native and Modified Wheat Starch

5.3 By Grade: Food, Industrial and Pharmaceutical

5.4 By Primary Function

5.5 By End Use

6 Wheat Starch Regional and Country Market Forecasts

6.1 Europe

6.1.1 Germany

6.1.2 France

6.1.3 United Kingdom

6.1.4 Austria

6.1.5 Rest of Europe

6.2 Asia-Pacific

6.2.1 China

6.2.2 Australia

6.2.3 Japan

6.2.4 India

6.2.5 South Korea

6.2.6 Rest of Asia-Pacific

6.3 North America

6.3.1 United States

6.3.2 Canada

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6.3.3 Mexico
6.4 South America
6.4.1 Brazil
6.4.2 Argentina
6.4.3 Rest of South America
6.5 Middle East and Africa
6.5.1 Türkiye
6.5.2 Saudi Arabia
6.5.3 South Africa
6.5.4 Rest of Middle East and Africa
7 Wheat Starch Competitive Landscape
7.1 Company Revenue Share, Concentration and Competitive Positioning
7.2 Company Profiles
7.2.1 Roquette Frères
7.2.2 Cargill
7.2.3 Tereos
7.2.4 AGRANA
7.2.5 Crespel & Deiters
7.2.6 Lantmännen Biorefineries
7.2.7 Manildra Group
7.2.8 MGP Ingredients
7.2.9 Sedamyl
7.2.10 Kröner-Stärke
8 Wheat Starch Regulations and Recent Developments
8.1 Wheat Allergens, Gluten Claims and Modified-Starch Requirements
8.2 Contaminant Controls, Packaging Rules and Corporate Developments
9 Wheat Starch Market Outlook and Opportunities
9.1 Base, Upside and Downside Forecast Scenarios
9.2 Application Opportunities and Investment Priorities
9.3 Procurement Strategy and Market Monitoring Indicators

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List of tables

Table 1. Wheat Starch Market Inclusion, Exclusion and Double-Counting Rules

Table 2. Data Dictionary: Revenue, Dry-Solids Volume, Grade, Function and Geography

Table 3. Source Register, Sizing Assumptions and Planned Validation Checks

Table 4. Global Wheat Starch Revenue, Volume and Average Producer Price by Year, 2021–2031

Table 5. Wheat Starch Revenue and Volume by Product Type and Year, 2021–2031

Table 6. Wheat Starch Revenue and Volume by Grade and Year, 2021–2031

Table 7. Wheat Starch Revenue and Volume by Primary Function and Year, 2021–2031

Table 8. Wheat Starch Revenue and Volume by End Use and Year, 2021–2031

Table 9. Wheat Starch Revenue and Volume by Consuming Region and Year, 2021–2031

Table 10. Driver and Restraint Impact Matrix by Geography and Time Horizon

Table 11. Wheat, Corn, Cassava and Potato Starch: Application and Procurement Comparison

Table 12. Porter's Five Forces Assessment and Wheat-Processing Value-Chain Economics

Table 13. Native and Modified Wheat Starch: Revenue, Volume, Share and Growth, 2025 and 2031

Table 14. Food, Industrial and Pharmaceutical Grades: Revenue, Volume, Share and Growth, 2025 and 2031

Table 15. Primary Functional Applications: Revenue, Volume, Share and Growth, 2025 and 2031

Table 16. End-Use Industries: Revenue, Volume, Share and Growth, 2025 and 2031

Table 17. Europe Wheat Starch Revenue and Volume by Country, 2021–2031: Germany; France; United Kingdom; Austria; Rest of Europe

Table 18. Asia-Pacific Wheat Starch Revenue and Volume by Country, 2021–2031: China; Australia; Japan; India; South Korea; Rest of Asia-Pacific

Table 19. North America Wheat Starch Revenue and Volume by Country, 2021–2031: United States; Canada; Mexico

Table 20. South America Wheat Starch Revenue and Volume by Country, 2021–2031: Brazil; Argentina; Rest of South America

Table 21. Middle East and Africa Wheat Starch Revenue and Volume by Country, 2021–2031: Türkiye; Saudi Arabia; South Africa; Rest of Middle East and Africa

Table 22. Supplier Wheat Starch Revenue, Global Share, Processing Footprint and Product Positioning, 2025

Table 23. Roquette Frères Company Profile: Wheat Starch Portfolio, Revenue, Capacity, Developments and Strategy

Table 24. Cargill Company Profile: Wheat Starch Portfolio, Revenue, Capacity, Developments and Strategy

Table 25. Tereos Company Profile: Wheat Starch Portfolio, Revenue, Capacity, Developments and Strategy

Table 26. AGRANA Company Profile: Wheat Starch Portfolio, Revenue, Capacity, Developments and Strategy

Table 27. Crespel & Deiters Company Profile: Wheat Starch Portfolio, Revenue, Capacity, Developments and Strategy

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Table 28. Lantmännen Biorefineries Company Profile: Wheat Starch Portfolio, Revenue, Capacity, Developments and Strategy

Table 29. Manildra Group Company Profile: Wheat Starch Portfolio, Revenue, Capacity, Developments and Strategy

Table 30. MGP Ingredients Company Profile: Wheat Starch Portfolio, Revenue, Capacity, Developments and Strategy

Table 31. Sedamyl Company Profile: Wheat Starch Portfolio, Revenue, Capacity, Developments and Strategy

Table 32. Kröner-Stärke Company Profile: Wheat Starch Portfolio, Revenue, Capacity, Developments and Strategy

Table 33. EU and US Wheat Starch Requirements: Allergen Information, Gluten Claims, Contaminants and Modified Starch

Table 34. Regulatory and Corporate Development Register: Effective Dates, Affected Applications and Commercial Implications

Table 35. Wheat Starch Forecast Scenarios: Revenue, Volume, Price and Key Assumptions, 2026–2031

Table 36. Application Opportunity Matrix: Addressable Demand, Qualification Requirements and Commercial Priorities

Table 37. Investment and Procurement Decision Framework: Feedstock, Coproducts, Utilities, Customer Access and Supply Risk

Table 38. Market value by year, USD bn

Table 39. Year-over-year value change

Table 40. Drivers — impact on forecast

Table 41. Restraints — impact on forecast

Table 42. Value by product Type, USD bn

Table 43. Value by grade, USD bn

Table 44. Value by primary Function, USD bn

Table 45. Value by end Use, USD bn

Table 46. Market value by region, USD bn

Table 47. Market value by leading country, USD bn

Table 48. Leading companies

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List of figures

Figure 1. Global Wheat Starch Revenue Sensitivity to Producer Selling Price

Figure 2. Global Wheat Starch Revenue Sensitivity to Merchant Volume

Figure 3. Global Wheat Starch Revenue by Year, 2021–2031

Figure 4. Global Wheat Starch Dry-Solids Volume by Year, 2021–2031

Figure 5. Global Wheat Starch Average Producer Selling Price by Year, 2021–2031

Figure 6. Directional CAGR Effects of Wheat Starch Market Drivers and Restraints

Figure 7. Wheat Starch Substitution Exposure by End-Use Application

Figure 8. Wheat Starch Revenue Share by Product Type, 2025

Figure 9. Wheat Starch Revenue Share by Grade, 2025

Figure 10. Wheat Starch Revenue Share by Primary Function, 2025

Figure 11. Wheat Starch Revenue Share by End Use, 2025

Figure 12. Global Wheat Starch Revenue Share by Region, 2025

Figure 13. Wheat Starch Revenue CAGR by Region, 2025–2031

Figure 14. Global Wheat Starch Revenue Share by Supplier Group, 2025

Figure 15. Profiled Suppliers' Wheat Starch Revenue by Company, 2025

Figure 16. Compliance and Qualification Cost Exposure by Wheat Starch Grade

Figure 17. Global Wheat Starch Revenue under Base, Upside and Downside Scenarios, 2026–2031

Figure 18. Incremental Wheat Starch Revenue Opportunity by End Use, 2025–2031

Figure 19. Value share by product Type, 2025

Figure 20. Value share by end Use, 2025

Figure 21. Growth rate by region, 2025-2031

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Executive summary

The global wheat starch market reaches USD XXX billion in 2025 and is projected to reach USD XXX billion by 2031, advancing at a CAGR of XX%, according to shev.io Research. Europe holds the largest revenue share, supported by integrated wheat processing, established food applications and a substantial paper and corrugated packaging customer base. Asia-Pacific delivers the fastest regional growth as food manufacturing and industrial starch consumption expand. Competitive advantage increasingly depends on application performance, coproduct economics, energy efficiency and the ability to qualify wheat starch against alternative botanical sources.

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

Key findings

- Global wheat starch revenue reaches USD XXX billion in 2025 and USD XXX billion in 2031, representing a XX% CAGR.
- Merchant wheat starch volume reaches XXX tonnes of dry solids in 2025 and XXX tonnes in 2031.
- Europe accounts for XX% of global revenue in 2025, equivalent to USD XXX billion.
- Asia-Pacific accounts for XX% of revenue and records the fastest regional forecast CAGR at XX%.
- Native wheat starch represents XX% of revenue, while modified wheat starch accounts for XX%.
- Food and beverages account for XX% of revenue; paper and corrugated packaging contribute a further XX%.
- The largest five supplier groups account for XX% of global wheat-starch revenue.
- European Commission Regulation (EU) No 828/2014 permits a gluten-free statement at a gluten content no greater than 20 mg/kg; wheat-starch suppliers targeting this application compete on purification, testing and documentation.

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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 Wheat Starch Market Trends and Growth Drivers

Wheat starch sits at the intersection of crop processing and application chemistry. Its commercial value depends on the cost of extracting and refining starch, the revenue earned from gluten and other coproducts, and the performance delivered to food and industrial customers. This combination makes wheat-starch economics different from a simple comparison of grain prices or starch production volumes.

Demand growth follows separate food and industrial purchasing cycles. Food customers prioritize texture, stability, documentation and consistency, while paper and corrugating customers place substantial weight on delivered cost and machine performance. Modified products and specialist grades can support higher revenue per tonne, but they require application development and successful customer qualification.

The decisive competitive variables are increasingly operational. Energy efficiency, process-water management, separation performance and supply reliability affect both margins and the credibility of customer commitments. Regulatory changes reinforce the need for clear product specifications, particularly where wheat origin, gluten claims, contaminants or modified-starch authorizations affect market access.

Growth drivers

Convenience foods support wheat starch demand

Prepared meals, sauces, bakery fillings and processed foods require dependable viscosity, moisture control and texture across manufacturing and storage. Wheat starch suppliers gain business when they demonstrate repeatable performance under the customer's actual heat, shear and storage conditions. Application support strengthens customer retention and supports a richer product mix.

Corrugated packaging sustains industrial consumption

Corrugating adhesives and paper surface treatment provide a substantial outlet for wheat starch in regions with established wheat-processing infrastructure. Customers evaluate bonding performance, machine speed, solids loading and delivered cost together. Suppliers that reduce application variability can defend industrial volumes even when alternative starches become cheaper.

Modified wheat starch improves revenue per tonne

Food and industrial manufacturers use modified starch to obtain stability and processing performance that native grades cannot deliver in every application. Wheat-specific modification expertise creates opportunities in selected formulations where customers value functionality and technical support. This product-mix shift supports revenue growth beyond the increase in physical starch consumption.

Coproduct integration strengthens processing economics

Wheat wet milling produces starch alongside gluten and other saleable streams, making operating economics dependent on the complete output portfolio. Producers with effective protein recovery, flexible product routing and established coproduct customers can maintain more competitive starch offers. Integration also supports investment in separation efficiency and process reliability.

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Asia-Pacific manufacturing expands the customer base

Growth in packaged foods and industrial manufacturing broadens the addressable customer base for wheat starch in Asia-Pacific. Local application requirements and competition from cassava and corn make regional technical support particularly important. Suppliers that combine reliable delivery with formulation assistance are positioned to win incremental demand.

Purified wheat starch opens specialist food applications

Specialist bakery manufacturers use purified wheat starch where its functionality fits the required product and the finished food meets applicable gluten criteria. Commercial success depends on consistent purification, appropriate analytical testing and clear wheat-allergen communication. These applications support differentiated specifications and customer relationships centered on quality assurance.

Restraints

Wheat and energy volatility compress processing margins

Wheat procurement, drying and process heat expose producers to raw-material and energy price movements. Contract repricing can lag changes in production costs, while customers resist increases when alternative starches remain competitively priced. The resulting margin pressure can delay capacity expenditure and encourage shorter purchasing commitments.

Alternative starches constrain pricing power

Corn, cassava and potato starch compete with wheat starch across food and industrial applications. Relative crop prices, freight and functional requirements determine the practical substitution opportunity. Customers with flexible formulations can shift purchasing when wheat starch loses its delivered-cost advantage.

Allergen management limits formulation access

Wheat-origin ingredients require careful assessment of allergen declarations and manufacturing controls in relevant jurisdictions. Achieving a gluten-free specification does not automatically remove wheat-allergen obligations. These requirements can favor alternative starches in products designed around broad allergen avoidance and can extend customer qualification periods.

Water and capital requirements slow expansion

Wet milling and starch purification require substantial process infrastructure, water management and wastewater treatment. New facilities must establish dependable utilization and outlets for coproducts to support their economics. These requirements favor established processing clusters and limit the speed at which new entrants can add competitive capacity.

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Wheat Starch Market Drivers, Restraints and Forecast Impact

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Convenience foods support wheat starch demand	XXX	XXX	XXX
Corrugated packaging sustains industrial consumption	XXX	XXX	XXX
Modified wheat starch improves revenue per tonne	XXX	XXX	XXX
Coproduct integration strengthens processing economics	XXX	XXX	XXX
Asia-Pacific manufacturing expands the customer base	XXX	XXX	XXX
Purified wheat starch opens specialist food applications	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Wheat and energy volatility compress processing margins	XXX	XXX	XXX
Alternative starches constrain pricing power	XXX	XXX	XXX
Allergen management limits formulation access	XXX	XXX	XXX
Water and capital requirements slow expansion	XXX	XXX	XXX

Source: XXX

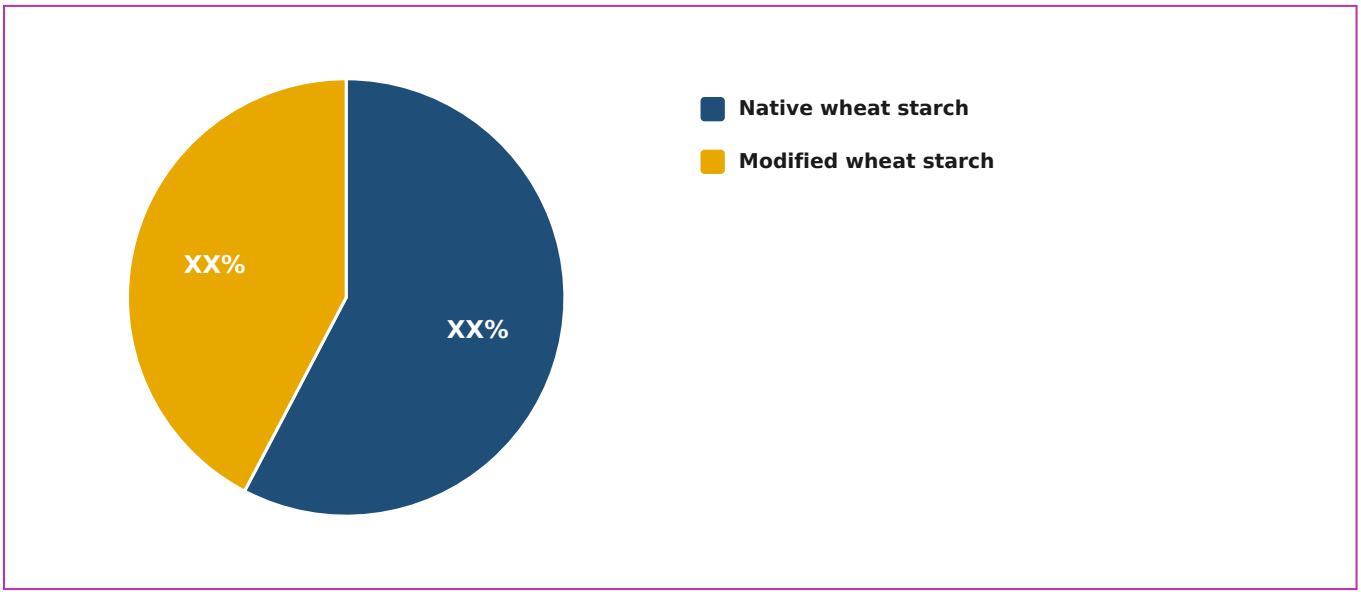
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Wheat Starch Market Segmentation by Product, Grade, Function and End Use

By Product Type

Native starch benefits from established food, paper and adhesive applications where its functional characteristics meet customer requirements at a competitive cost. Modified wheat starch accounts for XX% of revenue and provides the stronger product-mix opportunity as customers seek processing tolerance and consistent finished-product performance. Product classification follows the starch sold, preventing intermediate native starch from being counted again after modification.

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 wheat starch	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Modified wheat starch	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Food-grade products lead because customers require controlled microbiological quality, traceability and consistent performance across food manufacturing. Industrial grade accounts for XX% and competes strongly on delivered cost and process suitability. Pharmaceutical grade represents XX%; growth in this category depends on compendial compliance, documentation and lengthy customer qualification rather than bulk volume alone.

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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 Primary Function

Thickening leads because viscosity management is central to many food formulations and processing systems. Binding and adhesion reflect wheat starch's role in industrial applications, while texturizing and moisture management support differentiation in food products. Each sale is assigned to its principal customer use, maintaining a mutually exclusive split when a starch performs several functions.

Value by primary Function, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Thickening	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Binding and adhesion	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Texturizing and moisture management	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Film formation and surface treatment	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

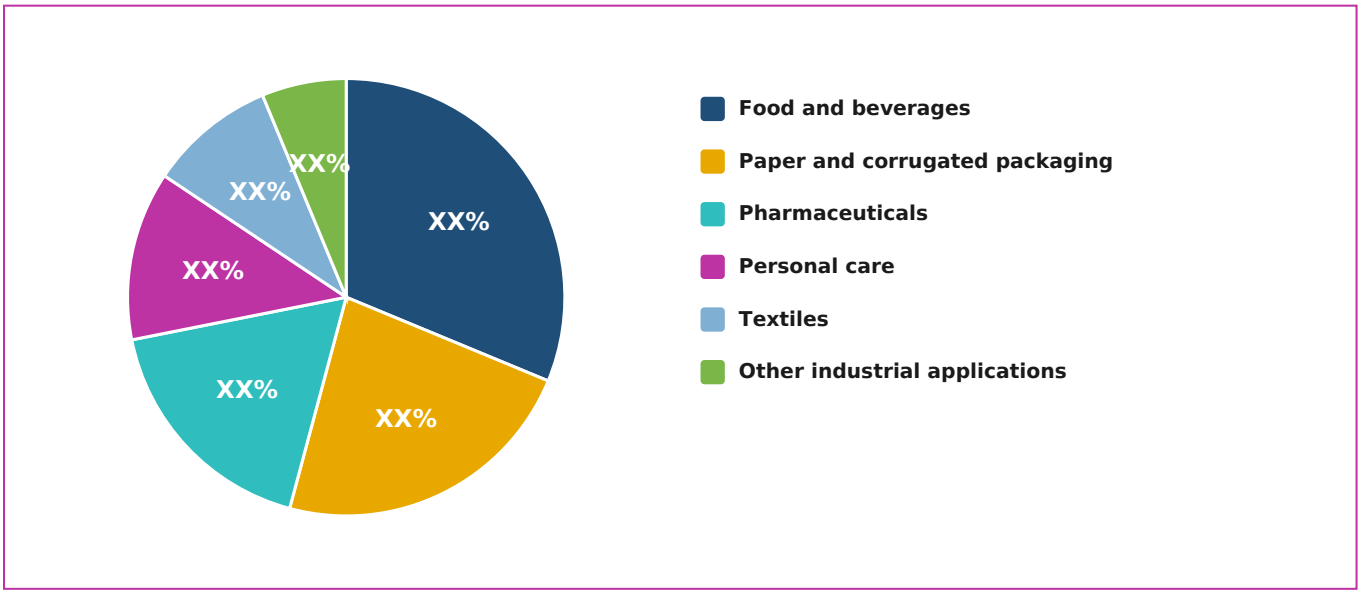
Source: XXX

By End Use

Food and beverages provide the largest revenue pool through bakery, prepared foods, sauces and other formulation applications. Paper and corrugated packaging provide substantial industrial demand, with purchasing decisions closely linked to machine performance and competing starch costs. Pharmaceutical and personal-care applications offer specification-led opportunities, while textiles and other industrial uses remain more sensitive to local manufacturing economics.

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Value share by end Use, 2025



Source: XXX

Value by end Use, 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
Pharmaceuticals	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Personal care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Textiles	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other industrial applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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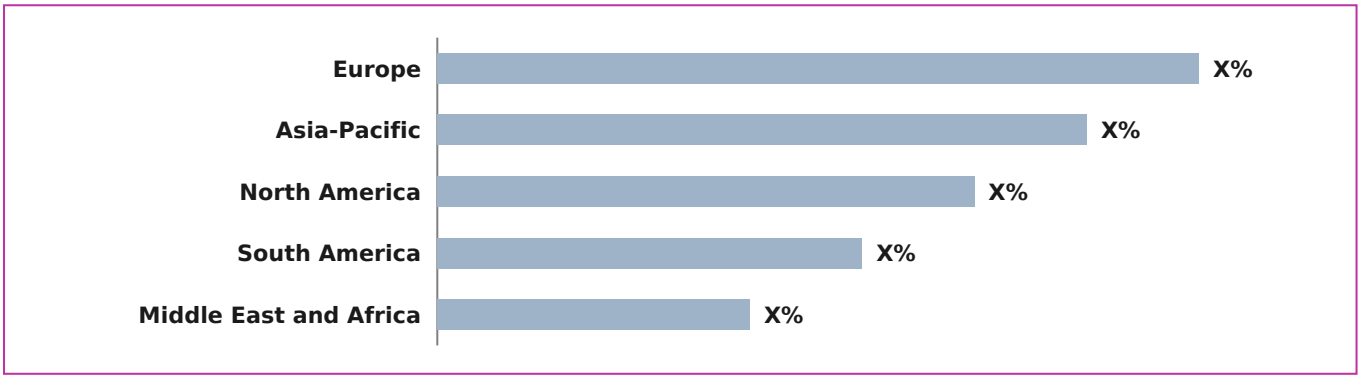
Wheat Starch Market Regional Analysis and Country Outlook

Europe leads the wheat starch market with a XX% revenue share in 2025. Its position reflects established wheat wet-milling infrastructure, integrated gluten production and proximity to major food, paper and corrugated packaging customers. Germany and France anchor the regional analysis, while Austria and the United Kingdom illustrate different combinations of processing integration and customer access. Commercial priorities center on energy efficiency, dependable specifications and protecting customer economics against competing starches.

Asia-Pacific accounts for XX% of revenue and grows at a XX% CAGR through 2031. China provides a substantial manufacturing and consumption base, while Australia contributes an established wheat-processing industry. Japan and South Korea emphasize consistent specifications and application performance; India adds a significant competitive test because wheat starch must compete with other locally available starches. Regional growth rewards suppliers that adapt products and technical service to local food systems rather than relying solely on imported standard grades.

North America accounts for XX% of revenue, supported by food ingredients, specialty wheat processing and selected industrial applications. South America and the Middle East and Africa account for XX% and XX%, respectively, with growth shaped by food manufacturing, import economics and alternative starch availability. Across these regions, local wheat production alone does not establish a competitive starch industry: processing scale, coproduct markets, energy costs and customer qualification remain decisive.

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
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
South 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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Wheat Starch Market Competitive Landscape and Company Share

The wheat starch market has moderate concentration, with the largest five supplier groups accounting for XX% of revenue in 2025. Competition combines diversified ingredient groups, integrated wheat processors and specialists focused on selected applications. Roquette, Cargill, Tereos, AGRANA, Crespel & Deiters, Lantmännen Biorefineries, Manildra and MGP Ingredients illustrate the range of business models. Company share is assessed on wheat-starch sales within the report boundary, excluding unrelated starches, sweeteners, proteins and group revenue.

Native wheat starch competition centers on delivered cost, consistency, logistics and the economics of integrated wheat processing. Modified and specialty grades place greater weight on formulation expertise, documentation and customer approval. The company assessment therefore separates wheat-processing footprint from total corporate scale and examines the ability to support specific food and industrial applications. Facility analysis distinguishes wet-milling throughput from finished merchant starch capacity.

Corporate developments require product-level interpretation. Roquette's acquisition of IFF Pharma Solutions, completed in May 2025, expanded its pharmaceutical excipient platform; the transaction is relevant to strategic positioning but is not treated as an addition to wheat-starch capacity. The report applies the same discipline to capacity announcements, partnerships and portfolio changes, identifying the specific wheat-starch activities affected before incorporating them into company share or supply forecasts.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Roquette Frères	XXX	XXX	XXX	XXX
Cargill	XXX	XXX	XXX	XXX
Tereos	XXX	XXX	XXX	XXX
AGRANA	XXX	XXX	XXX	XXX
Crespel & Deiters	XXX	XXX	XXX	XXX
Lantmännen Biorefineries	XXX	XXX	XXX	XXX
Manildra Group	XXX	XXX	XXX	XXX
MGP Ingredients	XXX	XXX	XXX	XXX
Sedamyl	XXX	XXX	XXX	XXX
Kröner-Stärke	XXX	XXX	XXX	XXX

Source: XXX

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Wheat Starch Market Forecast and Investment Opportunities

Global wheat starch revenue reaches USD XXX billion by 2031, while merchant volume reaches XXX tonnes of dry solids. The difference between revenue and volume growth reflects pricing and a shift toward products with more demanding specifications. Native grades remain the larger revenue category, while modified starch, specialist purification and application support provide opportunities to improve revenue per tonne. Winning suppliers connect product claims to measurable performance in the customer's manufacturing process.

The investment case depends on the complete wheat-processing system. Attractive projects combine competitive feedstock procurement, efficient separation, dependable energy and water infrastructure, and established outlets for gluten and other coproducts. Capacity expansion without a clear customer qualification strategy risks exposing producers to commodity pricing before differentiated applications are secured. Commercial due diligence should therefore assess prospective starch customers and coproduct customers together.

Scenario analysis focuses on wheat costs, competing starch prices, industrial customer activity and the pace of food formulation changes. Stronger growth comes from faster qualification of modified grades and broader penetration of food manufacturing in Asia-Pacific. Weaker growth emerges when customers substitute other starches, packaging demand softens or operating costs delay capacity investment. Procurement and investment decisions benefit from monitoring these variables alongside headline market growth.

Opportunities

- Application-specific modified wheat starch for sauces, fillings and prepared meals
- Purified wheat starch with documented gluten control for specialist bakery customers
- Higher-performance starch systems for corrugating adhesives and paper surface treatment
- Regional technical-service partnerships with food manufacturers in Asia-Pacific
- Energy integration, process-water recovery and improved starch-protein separation
- Customer contracts that connect starch quality, supply security and transparent raw-material adjustments

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