

Global Tapioca 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

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 5.2 bn
Forecast (2031)	USD 7.6 bn
CAGR (2021-2031)	6.7%
Study period	2021-2031
Largest region	Asia-Pacific · 47.8%
Fastest-growing region	Middle East and Africa · 8.1%
Market concentration	Moderate
Licence	Individual / Company

The global tapioca market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounts for XX% of market value, supported by Thailand's export-scale starch industry, China's ingredient demand and established consumption across Southeast Asia. Food and beverage applications remain the principal revenue pool, while modified starch, clean-label texturizers and tapioca-based biomaterials generate the strongest value growth. Supply security, cassava disease management and investment in higher-yield processing will determine competitive performance through 2031.

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Executive summary

The global tapioca market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Asia-Pacific accounts for XX% of market value, supported by Thailand's export-scale starch industry, China's ingredient demand and established consumption across Southeast Asia. Food and beverage applications remain the principal revenue pool, while modified starch, clean-label texturizers and tapioca-based biomaterials generate the strongest value growth. Supply security, cassava disease management and investment in higher-yield processing will determine competitive performance through 2031.

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

Key findings

- The global tapioca market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Asia-Pacific held XX% of global market value in 2025 and remains the central processing, trading and consumption hub.
- Native tapioca starch represented XX% of 2025 revenue, while modified tapioca starch will grow faster at a XX% CAGR through 2031.
- Food and beverage applications accounted for XX% of 2025 market value, led by noodles, sauces, bakery fillings, dairy alternatives, confectionery and beverage inclusions.
- Thailand exported XXX tonnes of native tapioca starch and XXX tonnes of modified starch in 2024, according to the Thai Tapioca Starch Association.
- Thailand's HS 110814 cassava-starch exports reached USD XXX billion and XXX tonnes in 2024, with China receiving XXX tonnes, according to UN Comtrade data accessed through World Integrated Trade Solution.
- FAOSTAT recorded 2024 cassava production of XXX tonnes in Nigeria, XXX tonnes in the Democratic Republic of the Congo and XXX tonnes in Thailand.
- Brazil produced XXX tonnes of cassava in 2024, according to the Brazilian Institute of Geography and Statistics.

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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 Market Trends and Growth Drivers

Tapioca sits at the intersection of staple agriculture, internationally traded starch and higher-value ingredient technology. The market's volume engine is rooted in Southeast Asian processing and Asian food consumption, while its margin engine increasingly comes from modified starch, clean-label texture systems, certified grades and application support.

The supply side is unusually sensitive to agricultural logistics. Fresh cassava roots lose quality rapidly after harvest, so processors compete through factory catchments, farmer relationships, starch recovery and synchronized intake rather than through plant capacity alone. Thailand's dominant position in exportable starch means crop disease, root prices, currency and Chinese buying cycles have global consequences.

Demand is broadening beyond traditional noodles, sauces and industrial binders. Gluten-free foods, dairy alternatives, ready-to-eat pearls, pharmaceutical excipients and biodegradable compounds create new specifications and price tiers. This favors companies capable of translating cassava into performance solutions rather than selling a single commodity grade.

Growth drivers

Clean-label food reformulation

Food manufacturers are replacing ingredients perceived as artificial with recognizable plant-derived texturizers. Tapioca provides neutral flavor, translucent appearance and elastic texture, enabling premium formulations in sauces, dairy alternatives, bakery fillings and prepared meals. Physically modified grades capture additional value by combining clean-label declarations with industrial processing tolerance.

Asian convenience food and boba expansion

Noodles, instant meals, coated foods, desserts and tapioca pearls are expanding through foodservice and retail channels. Ready-to-eat and ambient-stable pearl formats reduce preparation time and bring boba-style products into supermarkets, convenience stores and home consumption. The effect is strongest in Asia-Pacific and increasingly material in North America and Europe.

Gluten-free formulation demand

Tapioca flour and starch improve chew, binding and moisture retention in gluten-free bread, snacks, tortillas and bakery mixes. Their allergen-neutral positioning supports formulations that avoid wheat and, in some markets, genetically modified maize. Blending tapioca with rice, pulse and potato ingredients broadens its role beyond niche dietary products.

Functional starch innovation

Investment in hydroxypropylated, cross-linked, pregelatinized and physically modified grades moves tapioca into higher-value technical applications. These products deliver freeze-thaw stability, shear resistance, controlled viscosity and improved mouthfeel. Supplier application laboratories accelerate adoption by reducing customers' reformulation time.

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Bio-based materials substitution

Thermoplastic starch, compostable compounds, agricultural films and molded products create an additional demand route outside conventional food and industrial starch. Tapioca's high starch content and established processing base support blends with biodegradable polymers. Growth depends on performance improvement, certification and competitive compound economics.

African industrial import substitution

Nigeria and neighboring markets combine abundant cassava production with continued reliance on imported industrial starch. New processing plants can serve food, pharmaceuticals, paper, adhesives and textiles while shortening supply chains. Successful projects will integrate farmer aggregation, rapid root delivery, dependable power and standardized quality.

Restraints

Cassava disease and climate volatility

Cassava mosaic disease, drought, flooding and shifts toward competing crops periodically reduce factory utilization and raise root procurement costs. Thailand's concentrated export role transmits local crop disruption into global starch prices. Disease-resistant planting material and geographically diversified sourcing are therefore central competitive assets.

Substitution by competing starches

Maize, potato and wheat starch compete directly where customers can reformulate without sacrificing texture or process stability. Relative crop prices can prompt rapid substitution in paper, corrugating, adhesives and basic food thickening. Tapioca retains an advantage in neutral taste, clarity and elasticity but must justify premiums in commodity applications.

Water, energy and effluent burden

Starch extraction requires substantial washing, separation, drying and wastewater management. Processors without efficient water recycling, biogas recovery and modern dryers face higher unit costs and tighter permitting constraints. Capital requirements are particularly restrictive for smaller mills and new African projects.

Concentrated trade exposure

Thailand's export industry remains strongly exposed to Chinese industrial demand, customs conditions and inventory cycles. Freight costs, currency movements and border procedures can widen delivered-price volatility for importers. Market diversification and regional warehousing reduce, but do not eliminate, this exposure.

Perishable root logistics

Cassava roots deteriorate quickly after harvest, limiting economical transport distance and requiring synchronized harvesting and factory intake. Fragmented smallholder production increases aggregation

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costs and creates variable starch content. Contract farming, collection centers and digital scheduling improve recovery but require sustained field investment.

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Tapioca Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Clean-label food reformulation	XXX	XXX	XXX
Asian convenience food and boba expansion	XXX	XXX	XXX
Gluten-free formulation demand	XXX	XXX	XXX
Functional starch innovation	XXX	XXX	XXX
Bio-based materials substitution	XXX	XXX	XXX
African industrial import substitution	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Cassava disease and climate volatility	XXX	XXX	XXX
Substitution by competing starches	XXX	XXX	XXX
Water, energy and effluent burden	XXX	XXX	XXX
Concentrated trade exposure	XXX	XXX	XXX
Perishable root logistics	XXX	XXX	XXX

Source: XXX

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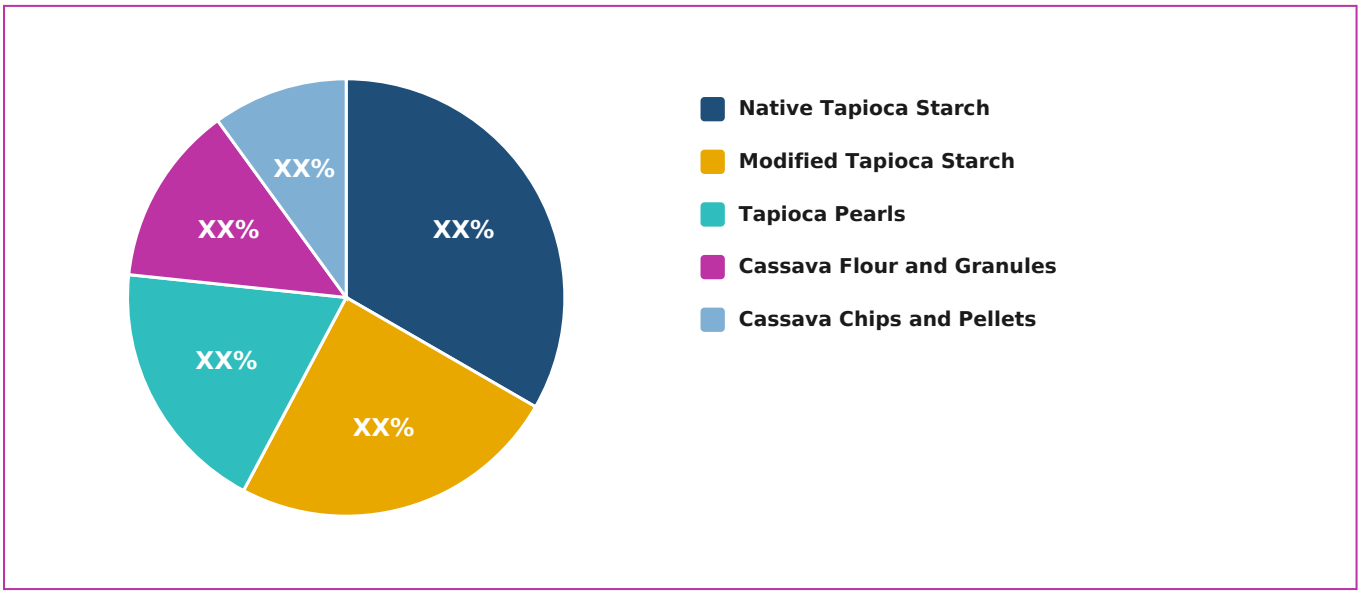
Tapioca Market Segmentation Analysis by Product and Application

By Product Type

Native starch remains the volume anchor because of its use in food thickening, noodles, paper, corrugating and adhesives. Modified starch commands higher unit prices and is gaining share where manufacturers require freeze-thaw stability, shear resistance, instant viscosity or clean-label functionality. Tapioca pearls benefit from global boba consumption, while chips and pellets remain more exposed to feed, fermentation and Chinese procurement cycles.

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
Tapioca Pearls	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cassava Flour and Granules	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cassava Chips and Pellets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

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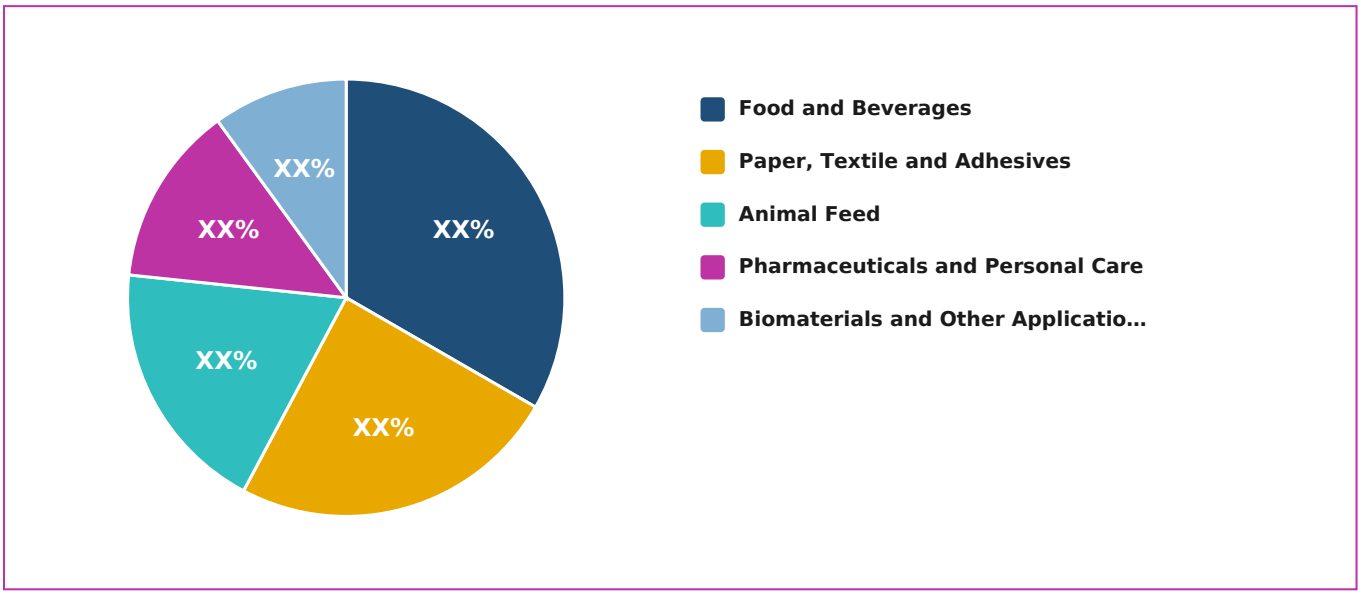
Food and beverage demand spans noodles, sauces, soups, dairy alternatives, bakery, confectionery, beverages and pearl inclusions. Industrial applications depend more heavily on delivered cost and competition with maize starch, although tapioca retains performance advantages in selected paper, textile and adhesive formulations. Pharmaceutical, personal-care and biomaterial applications expand from a smaller base but provide attractive specification-led margins.

Value share by application, 2025



Source: XXX

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, Textile and Adhesives	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Animal Feed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pharmaceuticals and Personal Care	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Biomaterials and Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Food and Beverage Use

Noodles and convenience foods lead because tapioca improves elasticity, bite and processing performance across Asian product formats. Sauces, soups and dressings form the second-largest use, supported by viscosity and neutral flavor. Beverage inclusions grow fastest as instant pearls, popping formats and shelf-stable boba move into retail, while gluten-free bakery sustains premium demand in Western markets.

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Value by food and Beverage Use, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Noodles and Convenience Foods	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sauces, Soups and Dressings	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Bakery and Gluten-Free Products	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Confectionery and Desserts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Beverages and Tapioca Inclusions	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dairy and Dairy Alternatives	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Processing Grade

Conventional tapioca dominates industrial and mass-market food use because of broad availability and lower cost. Organic grades attract premiums in infant food, natural retail, specialty bakery and branded clean-label products, particularly in North America and Europe. Expansion is constrained by certified acreage, segregation requirements and the multi-year effort needed to establish traceable grower networks.

Value by processing Grade, USD bn

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

Source: XXX

By Distribution Channel

Large food, paper, textile and pharmaceutical users purchase directly because viscosity, microbiology, modification chemistry and delivery schedules are contract-specific. Ingredient distributors remain essential for smaller manufacturers and markets requiring local stock, technical support and regulatory documentation. Retail and e-commerce are concentrated in pearls, consumer flour and specialty gluten-free packs and grow faster than the broader market.

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Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Industrial Sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Ingredient Distributors and Wholesalers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Retail and E-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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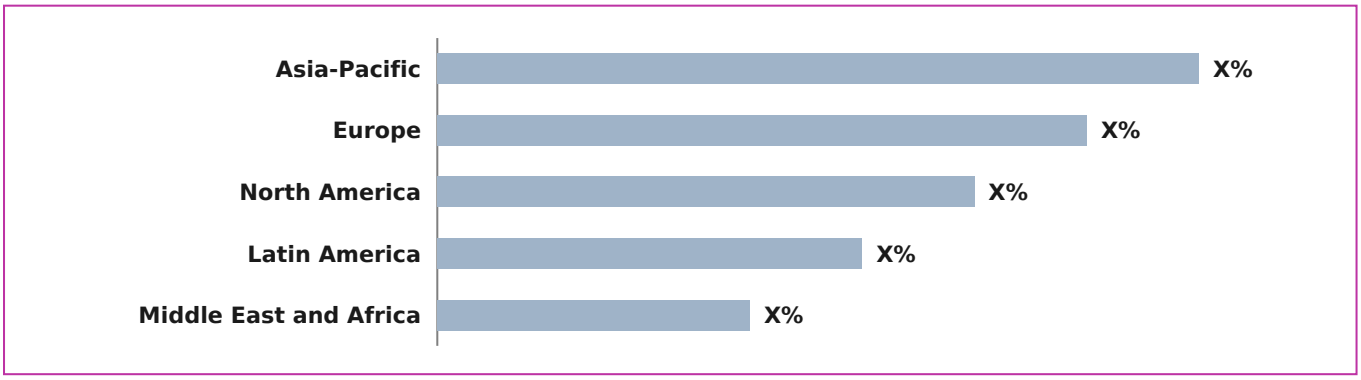
Tapioca Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global tapioca revenue in 2025. Thailand anchors internationally traded native and modified starch, while China provides the largest import demand pool and consumes cassava inputs across food, sweetener, paper, feed and fermentation chains. Indonesia, Vietnam, Cambodia and Laos add processing capacity and root supply, while Japan, South Korea, Malaysia and the Philippines sustain demand for high-specification food starches and convenience-food applications.

Europe and North America together represented XX% of 2025 value. These markets pay higher average prices for clean-label, organic, specialty and traceable grades used in gluten-free bakery, dairy alternatives, sauces, pet food and prepared meals. Local distributors and application laboratories are strategically important because buyers require formulation support, dependable inventory and documentation covering food safety, allergens, origin and sustainability.

The Middle East and Africa is forecast to grow at XX% annually through 2031, the fastest regional rate. Nigeria and the Democratic Republic of the Congo lead global cassava cultivation, yet industrial conversion remains well below the scale of Asian export processors. Investment in root aggregation, modern starch plants, renewable process energy and import substitution will progressively shift value creation closer to African farms, while Brazil remains Latin America's leading integrated production and consumption base.

Growth rate by region, 2025-2031



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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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Tapioca Market Competitive Landscape and Company Share

The tapioca market is moderately concentrated at the international specialty-starch level and fragmented across commodity processors. Ingredion, Cargill and Roquette compete through formulation expertise, global customer access and broader texturizer portfolios, while Thai Wah, SMS Corporation, Siam Modified Starch, General Starch and Chorchaiwat Industry combine direct cassava access with export-scale processing. Numerous regional mills compete on native starch, flour, pearls and chips.

Competition is shifting from undifferentiated starch volume toward application-specific performance, secure sourcing and technical service. Roquette's 2024 launch of four CLEARAM TR tapioca cook-up starches illustrates the move into tailored texture systems, while Thai Wah's partnership with Fuji Nihon combines Asian cassava processing with Japanese food-science capabilities. Producers are also investing in pregelatinized grades, organic certification, pharmaceutical specifications and thermoplastic starch.

Capacity strategy increasingly links upstream agriculture with downstream application centers. Thai processors are expanding contract farming, disease-resistant planting material, biogas recovery and regional distribution, while emerging African processors focus on replacing imported food and pharmaceutical starch. Acquisitions and joint ventures will remain selective because asset value depends on dependable root catchments, factory water access and proximity to export infrastructure.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Ingredion Incorporated	XXX	XXX	XXX	XXX
Cargill, Incorporated	XXX	XXX	XXX	XXX
Roquette Frères	XXX	XXX	XXX	XXX
Thai Wah Public Company Limited	XXX	XXX	XXX	XXX
SMS Corporation Co., Ltd.	XXX	XXX	XXX	XXX
Siam Modified Starch Co., Ltd.	XXX	XXX	XXX	XXX
General Starch Limited	XXX	XXX	XXX	XXX
Chorchaiwat Industry Co., Ltd.	XXX	XXX	XXX	XXX
Asia Cassava Resources Holdings Limited	XXX	XXX	XXX	XXX
Cassava S/A	XXX	XXX	XXX	XXX

Source: XXX

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Tapioca Market Forecast and Investment Opportunities

The market will add USD XXX billion between 2025 and 2031. Volume growth will remain anchored in food, beverages and basic industrial uses, but modified starch, functional native starch, instant pearls and biomaterials will capture a disproportionate share of incremental gross profit. Buyers will increasingly separate commodity procurement from solution-based contracts requiring formulation support and documented performance.

The central forecast assumes stable long-run cassava acreage, gradual yield improvement, continued Asian convenience-food growth and wider clean-label adoption. A high-growth scenario emerges if African industrialization and compostable-material demand scale faster, while prolonged disease pressure in Southeast Asia would raise prices, constrain commodity volumes and accelerate reformulation toward competing starches.

Winning suppliers will combine diversified root sourcing, efficient water and energy systems, local application development and regional inventory. High-return opportunities include physically modified clean-label starch, pharmaceutical-grade excipients, shelf-stable pearls and thermoplastic starch compounds. Commodity processors without agricultural integration or energy recovery will face increasing margin pressure.

Opportunities

- Physically modified clean-label tapioca starch
- Tapioca-based thermoplastic starch and compostable packaging
- Local industrial starch production in Nigeria, Ghana and East Africa
- Ready-to-eat and shelf-stable tapioca pearls
- Pharmaceutical-grade binders and disintegrants
- Upcycling cassava pulp into feed, fiber and biogas
- Digital traceability and contract farming in Southeast Asia

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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