

Business Review
Potato Starches
 GLOBAL SUPPLY/DEMAND/FORECASTS
 2023 - 2028

INTRODUCTION	The potato starch market has undergone major upheavals during the last decade, with potato starches increasingly finding application as a clean-label ingredient in many food categories, and advances in technical development expanding their use in non-food applications. With production principally located in Europe, supply and pricing have always been sensitive to inclement growing conditions and harvests, as typified by the droughts in North Eastern Europe in 2022 and 2023. Additionally, the Covid-19 pandemic, the Ukraine-Russia conflict, energy price volatility, and broader inflationary pressures during 2022 and 2023 have also impacted potato starch supply and pricing. Capacity expansions of oven chips/French fries manufacturers in Europe and North America have encouraged the planting of conventional potato varieties; rather than starch potatoes, thus putting additional upward pressure on potato starch supply and pricing. With the growing popularity of plant-based food options, the demand for potato protein has surged, leading to a rise in both supply and demand. In order to extract greater value from potatoes, manufacturers can take advantage of this starch processing by-product.
OBJECTIVES	<p>The overall objective is to provide a global picture of the supply, demand, and forecast for potato starches in food and non-food applications. This can be broken down into the following sub-objectives:</p> <ul style="list-style-type: none"> • Provide potato starch production (kt) by producer and country/region • Estimate potato starch availability (kt) by country, taking into account production and trade patterns • Overview of relevant legislation by region • Indicative pricing by region • Historical assessment of the evolution of the potato starch market, and the growing influence of other starch sources such as tapioca and rice • Provide current demand (2023; t/kt) for potato starches by food and non-food application and key country/region • Estimate forecast demand (2028; t/kt) for potato starches by food and non-food application and key country/region • Present an analysis of the why and why not for potato starch use, derived from in-depth interviews with end-users of potato starches across applications and regions
PRODUCTS	Native potato starch, organic native potato starch, physically modified potato starch, clean label functional potato starch, chemically modified potato starch (cationic, esters, ethers, oxidized, other chemically modified starches), and resistant potato starch
SECTORS	<p>Food and Non-food:</p> <p>Food split into bakery, confectionery, dairy, dairy alternatives, processed meat, meat analogs, snacks, soups, dressings and sauces, syrups and spreads, noodles, ready meals, other food (including food service)</p> <p>Non-food split into paper/board, textile, adhesives, construction materials, pharmaceuticals, other non-food</p>
MARKETS	North America (USA, Canada, Mexico), Europe (EU27, UK, Switzerland, Norway), Asia (China, India, Thailand, Indonesia, Vietnam), Brazil, RoW (as overview)
TIMESCALE	2023 - 2028
PUBLICATION	December 2023
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