

Business Review

Global Patterns of Starch Demand in Key Food Sectors in the COVID and post-COVID world

2021 - 2026

North America, Brazil, Europe, China, APAC, ME, and RoW

INTRODUCTION

Native and modified starches have been key structural elements of processed food and beverages, providing texture, mouthfeel, bite, crunch, viscosity and rheology in a variety of applications. Preference for native or modified starches, by raw material or type of modification, varies by region. In this edition of the report, Giract will attempt to split demand of modified starches by raw material. About seven years ago, “clean label” started becoming a major driving force in starches also. Many starch manufacturers seized this trend and introduced options for food and beverage manufacturers to consider. Over the course of 2021, Giract has been tracking the “clean label” trend across many regions and sectors and its impact on the use of various ingredients, as well as the choices that are available for replacement of current ingredients with clean versions. Starch is no exception and the understanding of the clean label trend and its impact will be a key component of this study.

2020 has been a difficult year due to the impact of COVID-19 on global economies. The food and beverage industry has largely emerged unscathed due to its daily necessity and the fact that agricultural activities were not severely affected, therefore ensuring adequate raw material supply. Yet, complications with logistics which influence global trade in starches are a potential problem. The pandemic has also increased price sensitivity of consumers who may be prioritizing their expenses and choosing lower priced foods.

Since the last published starch demand study in 2018, there have been significant changes in the global food and beverage markets, which Giract believes will influence the demand for native and modified starches. This study will attempt to highlight the impact of these changes, and is a key decision making tool for players in the starch industry.

OBJECTIVES

The overall objective is to provide a global picture of demand for native and modified starches in food applications. This can be broken down into the following sub-objectives:

- To identify native, modified (**physical and chemical**), and **clean label functional** starches production by key producer/country and source
- To estimate availability by country taking into account production and trade patterns
- To understand demand dynamics in specific sectors/regions through discussions with major players in both supply and demand
- To estimate global patterns in the demand for native, modified (**physical and chemical**), and **clean label functional** starches in food applications based on in-depth research across major countries/regions
- To estimate current demand for native, modified (**physical and chemical**), and **clean label functional starches** across food sectors and by key country/region and source
- To provide forecasts for native, modified (**physical and chemical**), and **clean label functional** starches by key sectors/regions

PRODUCTS

Native starches, physically modified (thinned/enzymatically modified, pregelatinized, ~~spray dried and dextrinised~~), chemically modified (esterified, etherified, oxidised), clean-label functional starches, resistant starches, and organic starches. *All starches split by raw material source*

MARKETS

Global demand, with focus on Europe (EU27, UK, Switzerland, Norway), N. America (USA, Canada, Mexico), Brazil, China, APAC (India, Thailand, Indonesia, **Vietnam**), Middle East (UAE/KSA), RoW as an overview

SECTORS

Bakery, Confectionery, Dairy, Dairy Alternatives, Processed Meat, Meat Analogs, Snacks, Soups, Dressings and Sauces, Syrups and Spreads, Noodles, Ready Meals, Other food

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