

Business Review
Starch Demand Patterns in Non-food Applications
 2022 – 2027
 Europe, North America, Mexico, Brazil

INTRODUCTION Starch is a major building block of modern industry and its production and use continue to expand unabated in the developed economies of Europe and North America.

In paper and board applications, starches are used for wet-end, surface sizing, and coating. Adhesives use native starches, but often require modified starches to achieve special properties such as water resistance, printing quality, durability, and bonding strength. In the textile industry, starches are used in agents for sizing, finishing, and thickening of printing inks. Modified starches provide greater stability, better viscosity, and heat-resistance to the sizing agent during processing. In the construction industry, modified starches are used in different production stages, such as dry mortar, gypsum, and construction mixes. In the pharmaceutical industry, modified starches are generally employed for immediate release tablet formulations.

Such specific applications require highly-tailored functionality. However, the markets for the starches developed to deliver such functionality have been upended by a series of global impactors: the Covid-19 pandemic, continued lockdowns in China and trade disruption, the war in Ukraine, energy price volatility, and the inflationary pressures that have resulted from these phenomena.

Giract has recently published a comprehensive study investigating Starch Demand Patterns in Food 2021–2026 (October 2022), and now proposes a complementary study assessing the current scenario, and outlook, for starches in industrial applications. This unique demand study will be essential for any stakeholder wanting to chart the current impacts of the Covid-19 pandemic, the war in Ukraine, energy price volatility, trade disruption, and inflationary pressures, to name but a few of the global challenges facing the industrial starches markets.

- OBJECTIVES**
- To estimate current demand for native and modified starches by sector and region
 - To describe the structure of the important end-product sectors in each region
 - To understand demand dynamics in each sector/region through discussions with major players in both supply and demand sectors
 - To identify native and modified starch production by key producer/region
 - To estimate supply by country taking into account production and trade patterns
 - To provide forecasts for native and modified starches by sector and region

PRODUCTS Native starches, cationic starch starch esters, starch ethers, oxidised starch, other modified starches

MARKETS Paper/board, textile, adhesives, construction materials, pharmaceuticals, other non-food applications

GEOGRAPHICAL Europe (EU27+UK+CH+NO), North America (USA+Canada), Mexico, Brazil

TIMESCALE Current market: 2022, demand forecasts: 2027.

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