



SAF Policies & Markets

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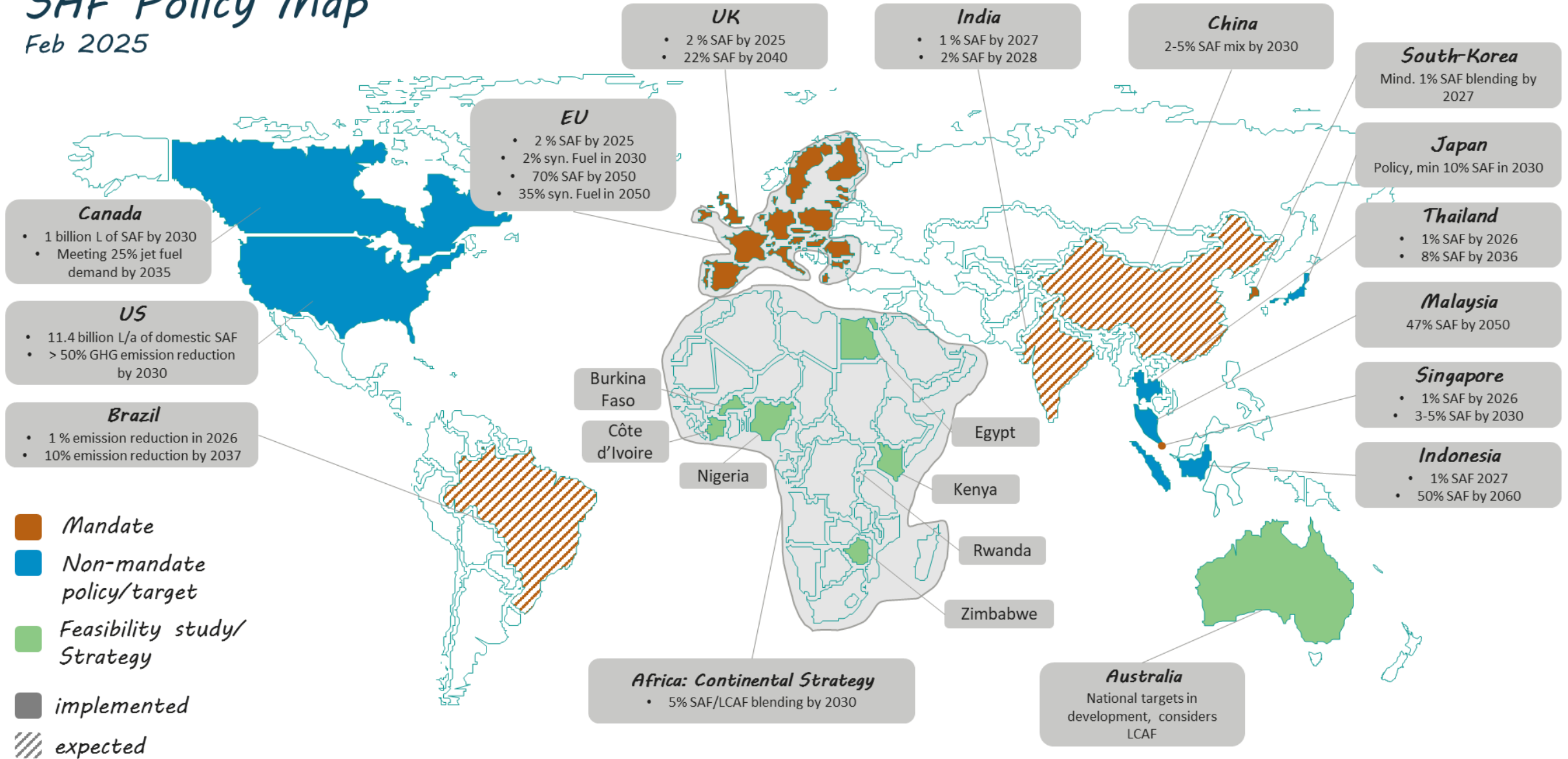
ICARUS Final Conference



25 September 2026

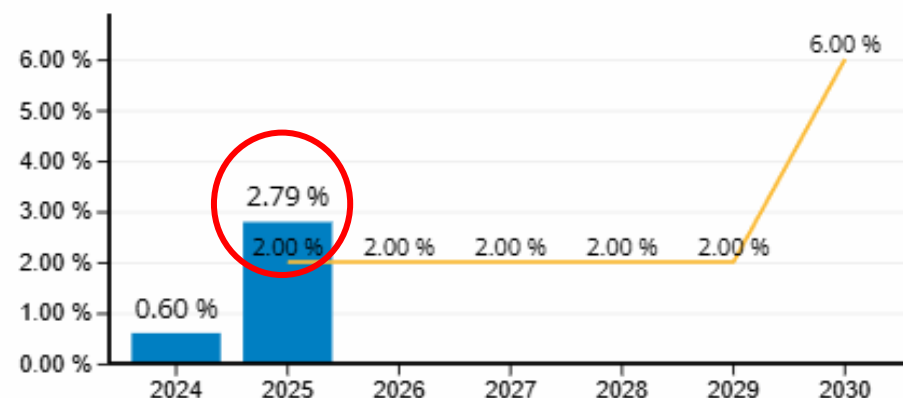
SAF Policy Map

Feb 2025



EU: Status of implementation – SAF market is progressing

Historical SAF supplied

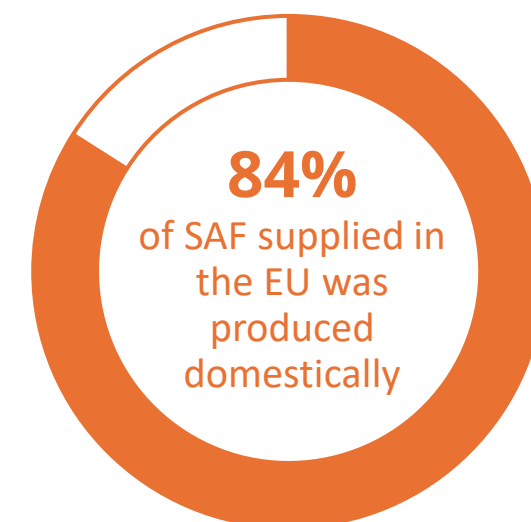


■ Actual % SAF ■ RFEUA SAF minimum shares

Type of SAF supplied



■ Aviation biofuels (884.5 kt) ■ Advanced aviation biofuels (90.5 kt)
■ Other aviation biofuels (120.5 kt)



eSAF: launch of the largest EU-based demonstration plant and **50** EU projects in the pipeline

- **85%** of SAF supplied came from feedstock originating outside the EU.
- The two most prevalent feedstocks were **used cooking oil** (80%) and **animal fats** (11%).

Policy developments in other Countries

Only in the **US** recent policies has reduced the targets and interest for SAF

Brazil, Canada and India continue their efforts for SAF deployment. After addressing national SAF market needs, Brazil and India will look to export. **Canada** is more looking to built its industry mainly for export with **British Columbia** the only province with a SAF mandate.

In China, "green fuels" appeared in the 2026 Government Work Report for the first time, with SAF explicitly identified as a new growth driver under the 15th Five-Year Plan. It also proposes extending the green hydrogen industry chain toward SAF.

As of June 2026, China's SAF production capacity has exceeded **2 million tons per year**, with planned and under-construction capacity totaling approximately **6 million tons per year**.

The industry has entered a phase of rapid capacity expansion, yet the domestic market remains in a pilot and cultivation stage; consequently, the industry currently relies heavily on exports to absorb its excess capacity.

Global SAF capacity by technology

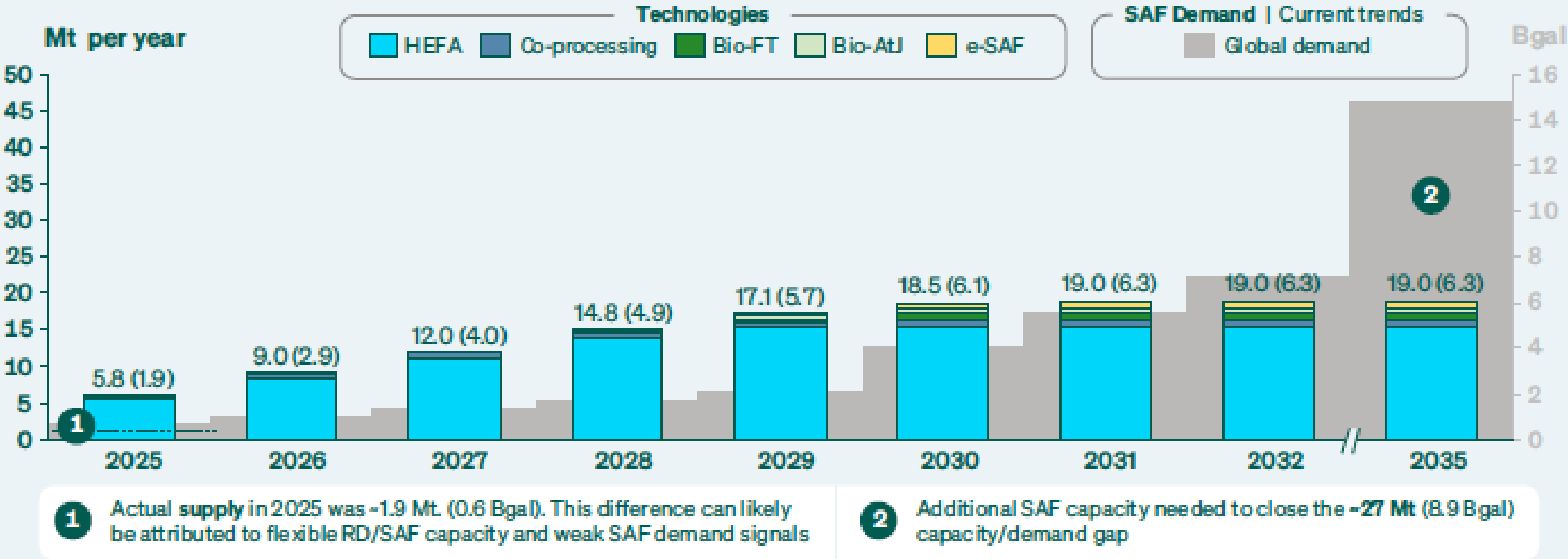
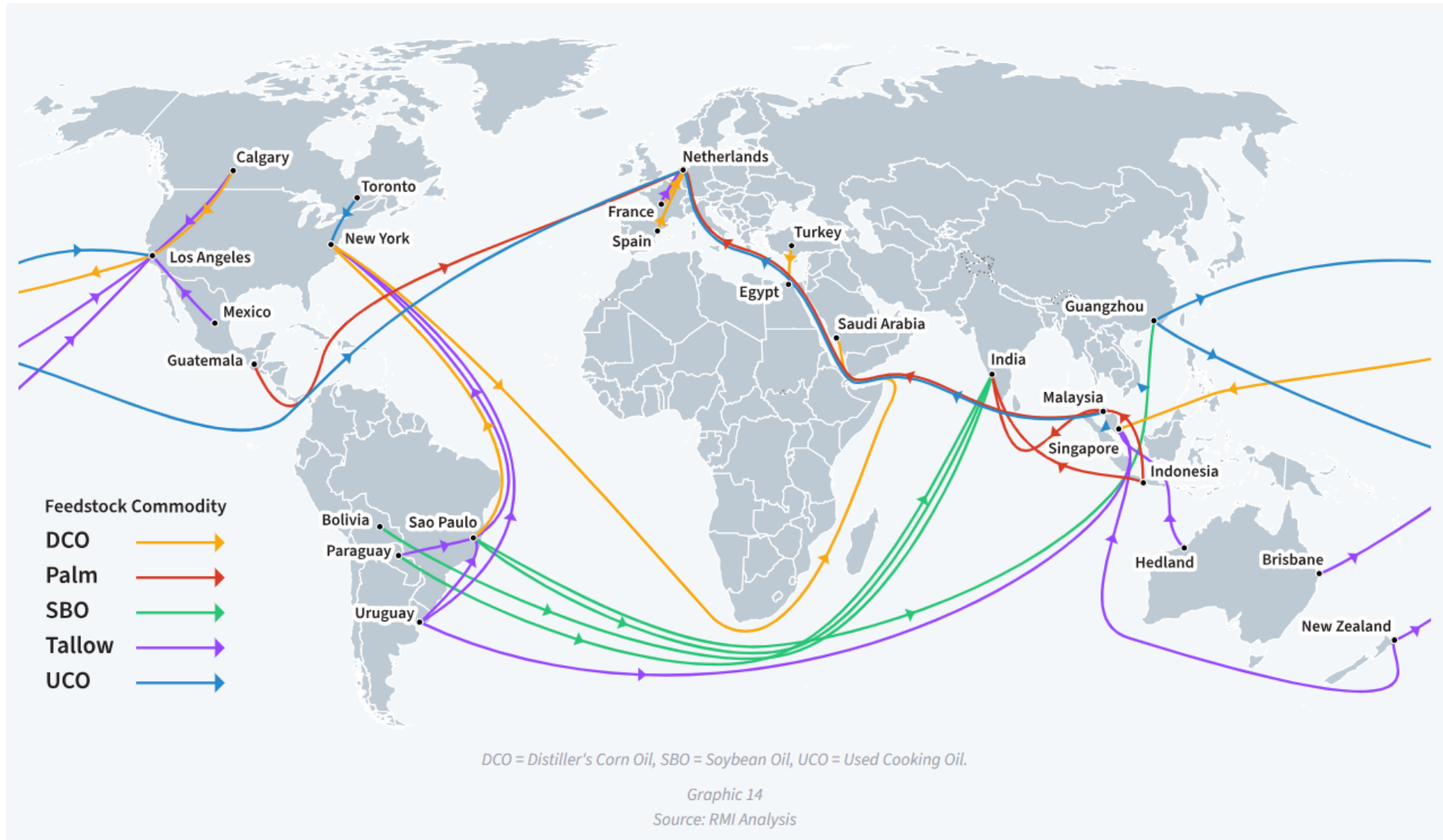


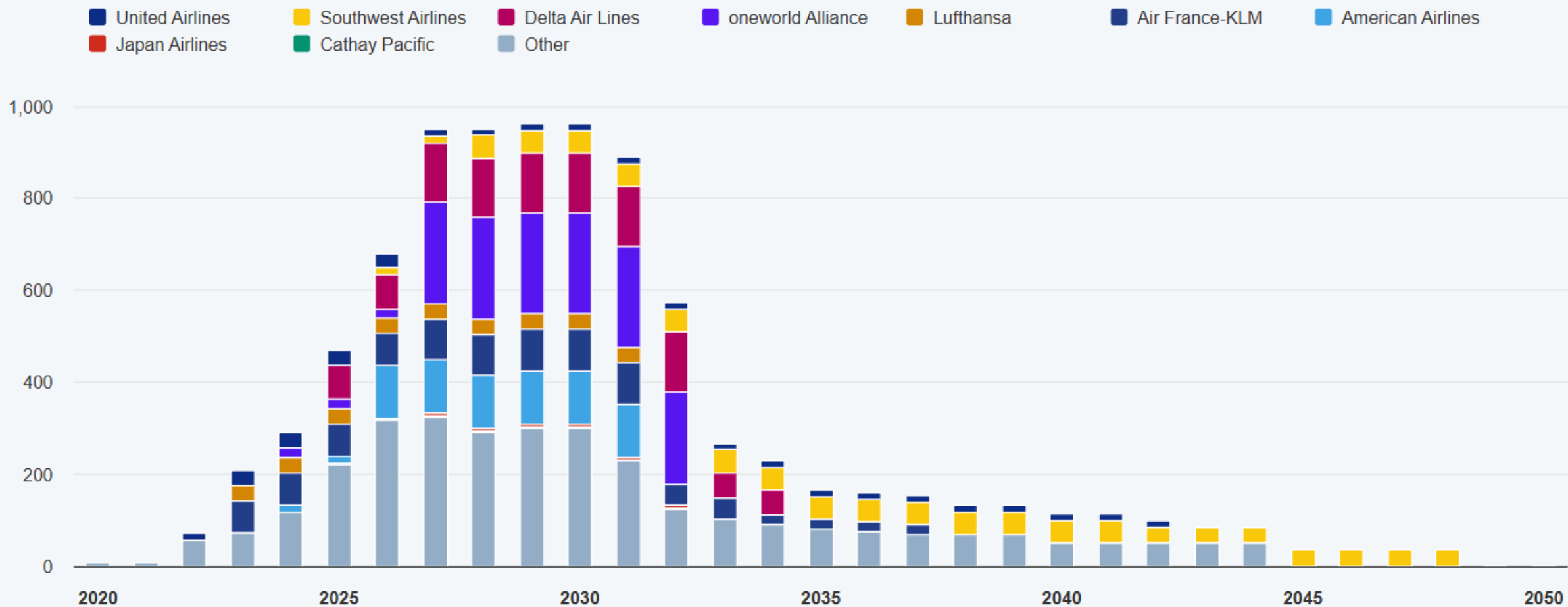
Figure 1: Global SAF capacity and demand balance is expected to yield a supply gap from 2032



SAF Market Development (March 2025)

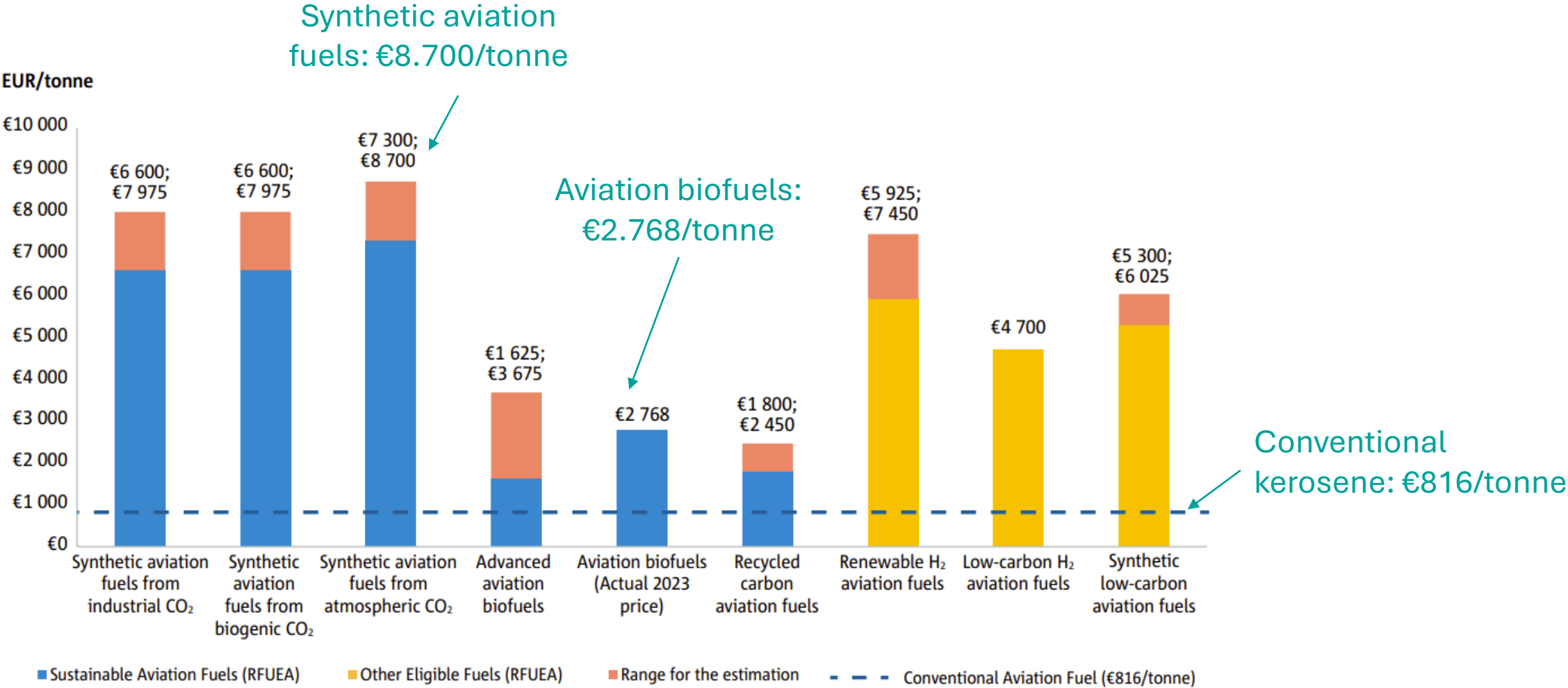
Global SAF trade is sensitive to national and local policy changes





SAF offtake agreements by major airlines, MGal/yr

SAF Pricing



Average price estimates for 2024 by EASA following the SAF terminology established by the ReFuelEU Aviation

Key Messages

- The ReFuelEU Aviation has met its target objective so far. The Commission expects this will continue but some adjustments are necessary to facilitate the process.
- The policy developments in China may change the structure of the global SAF market.
- In spite of the global policy uncertainties the SAF market slowly develops.
- There are commercial corridors established for international trade in SAF.
- The cost of SAF and eSAF remain significantly higher than fossil kerosene.