



SAF policies Developments

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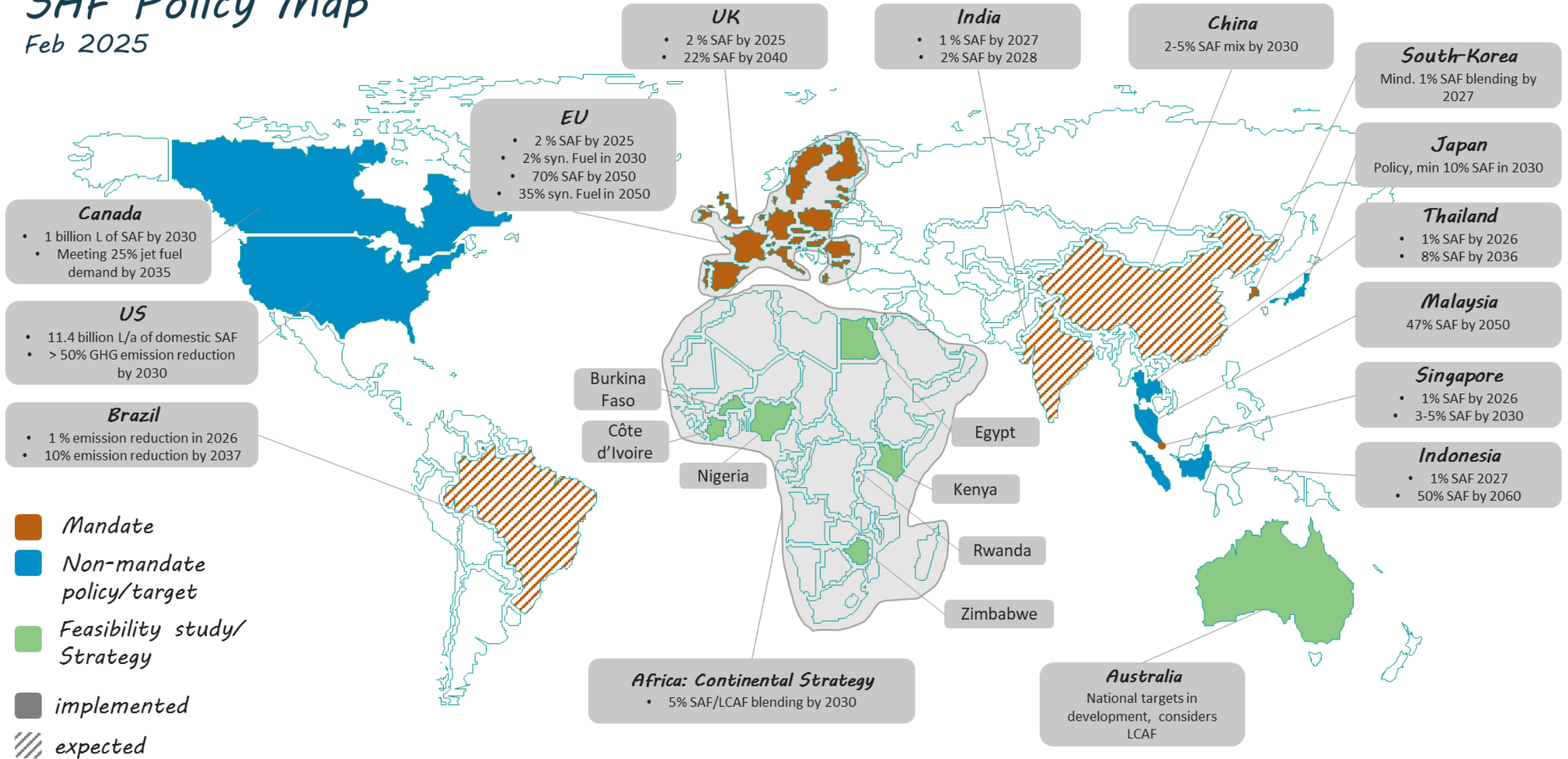


SAF Policies and support actions in the EU, Brazil, Canada, China, India, USA and UK

Region/Country	Key initiatives	Type	Comments
EU	ReFuelEU Aviation Regulation, legislation	Legislation & Mandate	Complex legislation in relation to feedstocks. Mandate targets very ambitious and in short time. High GHG minimum targets with obligation on the fuel suppliers. Mandate targets also on eSAF; nuclear included. Revision is expected in 2027.
Brazil	Policy on forthcoming mandate	Mandate Proposal	Forthcoming mandate set for 2027 aiming to reduce Brazil's aviation emissions by 1% of the sector's total emissions in 2026. Strong relationship to the ethanol route for SAF.
Canada	Policy on targets	Target	1 billion litres of SAF by 2030. By 2035, Canada should produce SAF to meet 25 percent of total jet fuel demand. Aspirational target 10% SAF Use by 2030
China	Short term goal for biofuel uses in aviation and mandate proposal	Mandate Proposal	Cumulatively consuming 50,000 tons of SAF by 2025. No reference yet to sustainability certification. No relationship to ASTM, thus need to develop own standards.
India	Policy on forthcoming mandate	Mandate Proposal	Use of 1% SAF for domestic airlines by 2025. The policy also aims to support farmers and rural job creation.
USA	One Big Beautiful Bill Act	Production Target	Expand production to 2.7 Mt by 2030 equivalent to 3.5 % SAF Blend. Loan guarantees.
UK	Legislation on mandate	Legislation & Mandate	The SAF Mandate starts in 2025 at 2% of total UK jet fuel demand, increasing linearly to 10% in 2030 and then to 22% in 2040. From 2040, the obligation will remain at 22% of total UK jet fuel demand until there is greater certainty regarding SAF supply.

SAF Policy Map

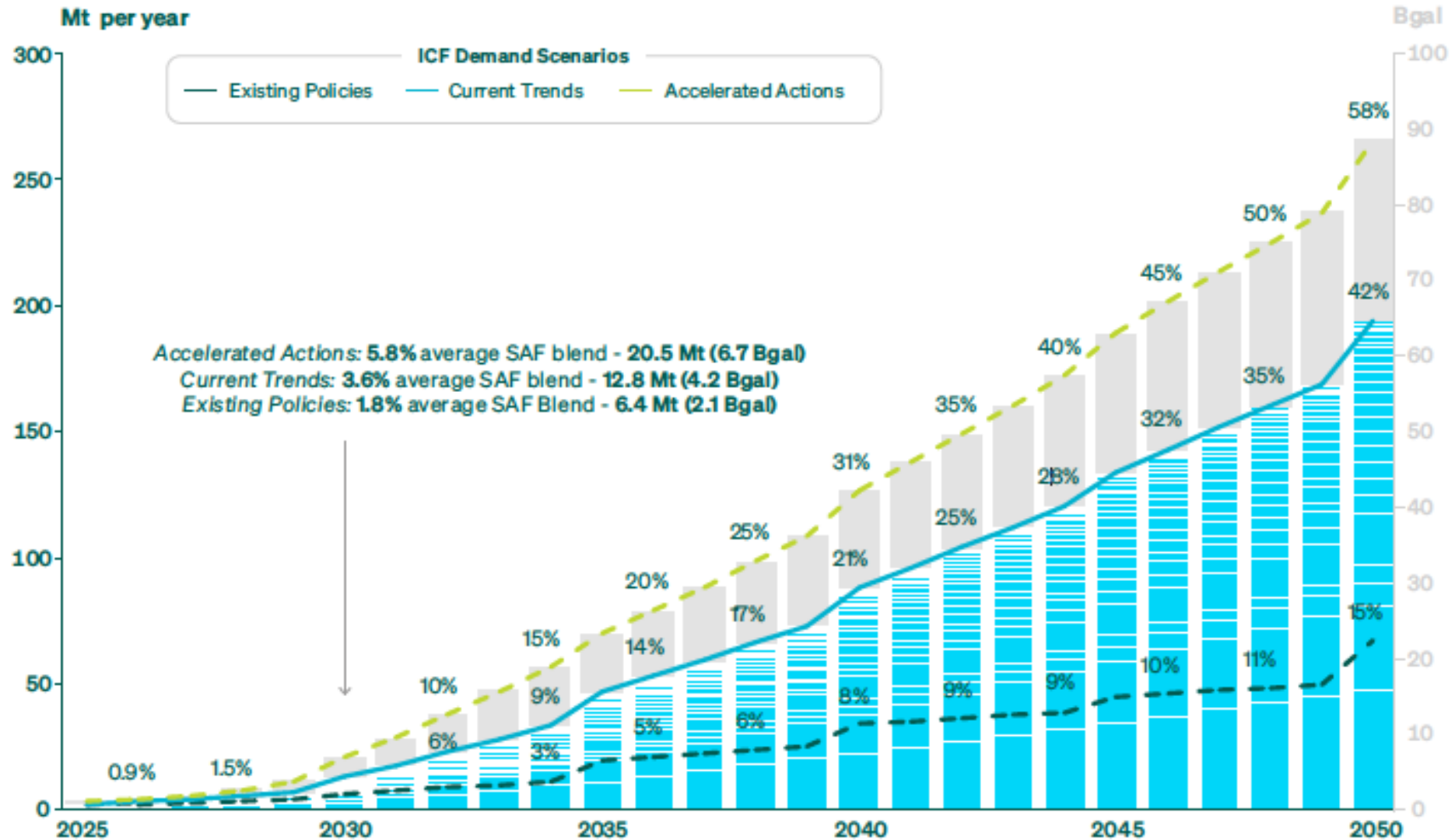
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	2030	2050
 United States	9 Mt SAF (3 billion gallons) 14-29 MtCO ₂	106 Mt SAF (35 billion gallons) 170-335 MtCO ₂
 European Union	3 Mt SAF 5.7-7.1 MtCO ₂	29 Mt SAF 66-83 MtCO ₂
 United Kingdom	1.1 Mt SAF 2.6 MtCO ₂	<i>Same % as in 2040 i.e., 22% (2.5 Mt SAF 6.3 MtCO₂)</i>
 Norway	0.06 Mt SAF 0.2 MtCO ₂	<i>For scenario, assumed to be same as in 2030</i>
 Brazil	0.3 Mt SAF 0.7 MtCO ₂	<i>For scenario, assumed to be same as in 2037 (0.36 Mt SAF 3 MtCO₂)</i>
 Singapore	0.68 Mt SAF 1.7 MtCO ₂	<i>For scenario, assumed to be same as in 2030</i>
 Japan	0.68 Mt SAF 3.5 MtCO ₂	<i>For scenario, assumed to be same as in 2030</i>
 Canada (BC only)	0.1 Mt SAF 0.3 MtCO ₂	<i>For scenario, assumed to be same as in 2030</i>
 China	~ 3 Mt SAF 7.6 MtCO ₂	<i>For scenario, assumed to be same as in 2035</i>
 Türkiye	0.5 Mt SAF 1.3 MtCO ₂	<i>For scenario, assumed to be same as in 2030</i>
 UAE	0.5 Mt SAF 1.3 MtCO ₂	<i>For scenario, assumed to be same as in 2030</i>
 Egypt	0.0 Mt SAF 0.0 MtCO ₂	<i>For scenario, assumed to be same as in 2030</i>
 South Korea	0.076 Mt SAF 1.9 MtCO ₂	<i>For scenario, assumed to be same as in 2030</i>
 India	0.4 Mt SAF 1 MtCO ₂	<i>For scenario, assumed to be same as in 2030</i>
 Indonesia	0.05 Mt SAF 0.1 MtCO ₂	0.7 Mt SAF 1.6 MtCO ₂
 Malaysia	0.04 Mt SAF 0.1 MtCO ₂	2.5 Mt SAF 5.5 MtCO ₂
 Thailand	0.07 Mt SAF 0.2 MtCO ₂	<i>For scenario, assumed to be same as in 2030</i>

WayPoint 2050

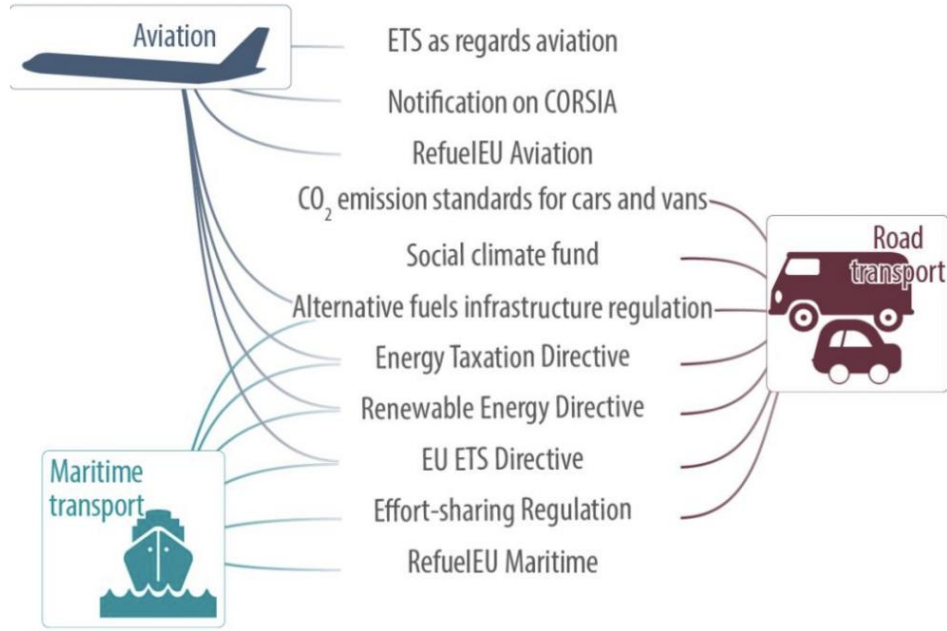
Global policy driven SAF demand is expected to reach 12.8 Mt by 2030



The EU ReFuelEU Aviation Regulation

Transport: a challenging sector for climate action

6 legislative proposals to reduce transport emissions



EPRS | European Parliamentary Research Service

The e-SAF target is currently impossible to meet, as no commercial production facility has reached a Final Investment Decision (FID).

Ever changing legislation resulting in instability

Anticipated 2027 Review & Cost Relief:

The European Commission's upcoming 2027 comprehensive review is expected to evaluate relaxing or adjusting compliance paths or timelines for hard-to-meet e-SAF sub-targets, potentially offering temporary cost relief for airlines ahead of broader EU-backed revenue-certainty mechanisms.

The SAF quota distorts international competition

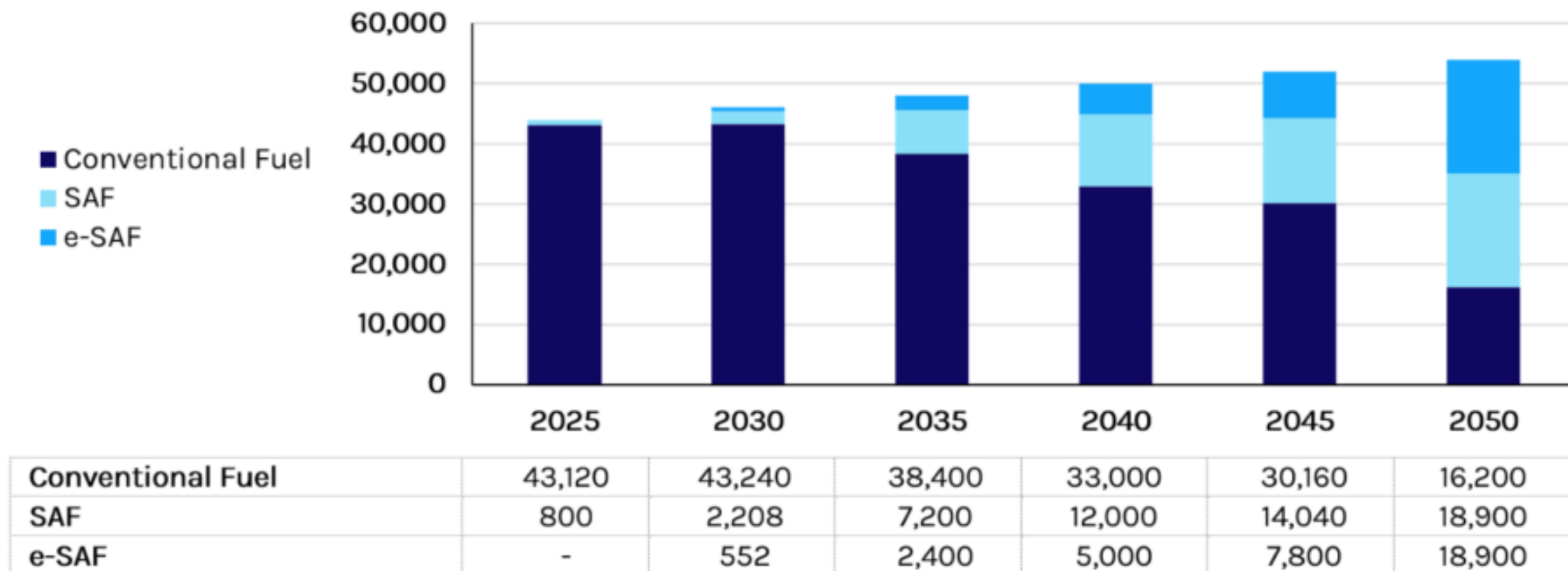
because it only applies to flights originating in the EU.

Regional Expansion: As of January 1, 2026, Switzerland adopted the ReFuelEU Aviation Regulation requiring fuel suppliers at Zurich and Geneva airports to enforce the baseline 2% sustainable aviation fuel (SAF) blend.

SAF Ecosystem:

The EU is still far from creating a stable and efficient ecosystem for SAF deployment.

SAF and e-SAF Demand, Based on ReFuelEU Obligations, in thousands of tonnes



Source: European Alternative Fuels Observatory (EAFO)

United States

Changes introduced under the “One Big Beautiful Bill Act” have lowered the support for SAF and made other business cases for other biofuels like Renewable Diesel more attractive.

Canada

British Columbia with the Carbon Fuel Standards including minimum SAF requirement of 1, 2 and 3 % uplift respectively for 2028, 2029 and 2030. This amounts to 55,000 tonnes in 2030.

China

A SAF blending mandate is expected to be introduced under the 5 year plan 2026-2030. This combined with the fact that China is a major exporter of used cooking oils could have a serious impact on future HEFA feedstock supply elsewhere.

Key Messages

- At present only the EU and UK have enacted legislation for the deployment of SAF including a submandate for eSAF.
- The nature of the EU “mandate” can create market distortions.
- Brazil, China and India also consider a SAF mandate while Canada, and the USA are basing their policies on policy and volumetric targets.
- Big oil has withdrawn from the SAF market with the exception of some European refineries.
- Investors remain however on the edge.