



Department of Oil Products and Biofuels

Sustainable aviation fuels policies in Brazil

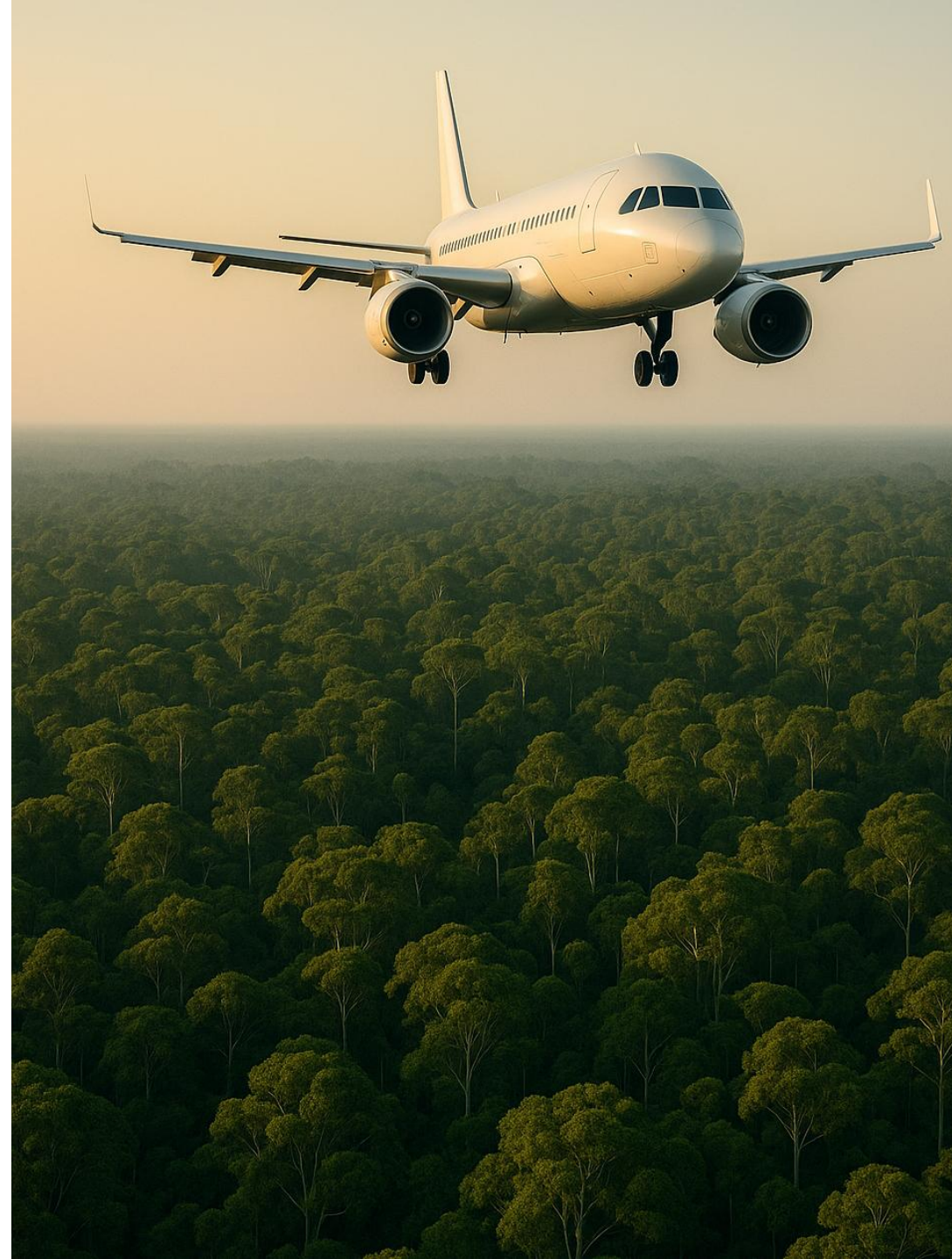
Icarus Project

Paula Isabel da Costa Barbosa
EPE – Energy Research Office

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MINISTÉRIO DE
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CAUTIONARY REMARKS

This publication provides information on sustainable aviation fuel (SAF) and green diesel supply and demand from different technological routes, based on studies by the Energy Research Office (EPE).

This document is for informational purposes and aims to support the planning of the national energy sector. Therefore, EPE expressly disclaims for any actions and decision-making (such as strategic guidelines definitions, investment decisions, or business strategies) taken by economic agents, and anyone based on information contained in this document.

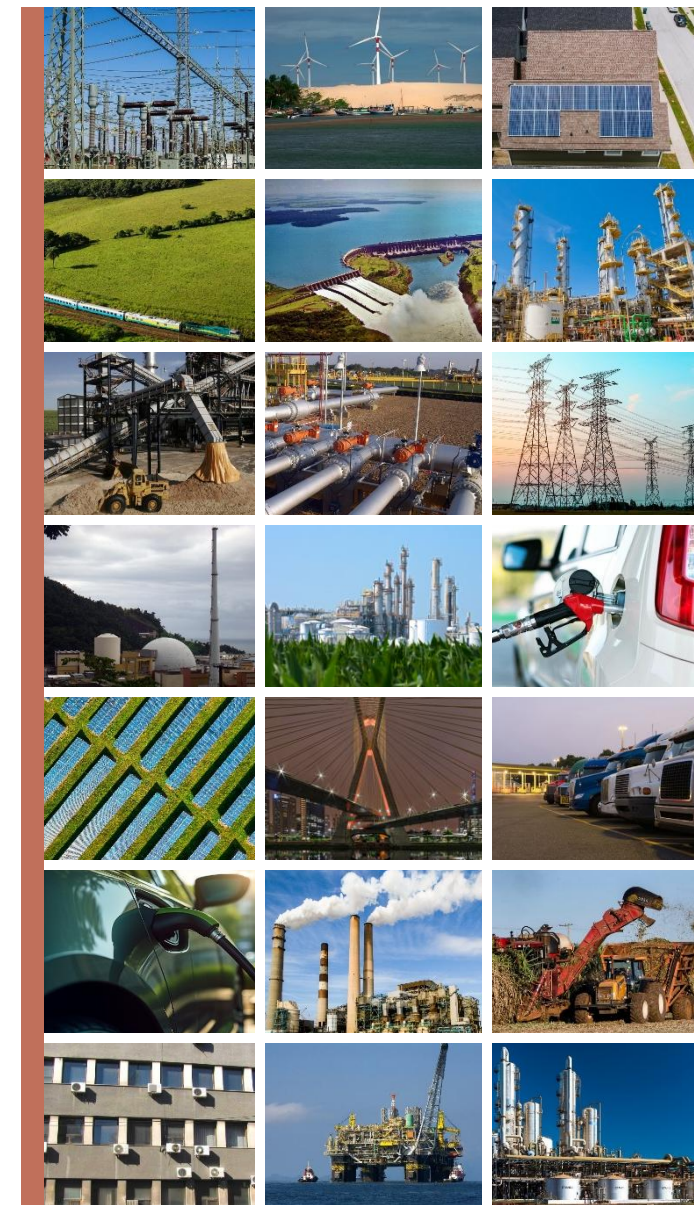
SAF Study 2027-2036

Public Value

EPE conducts studies and research to support the formulation, implementation and evaluation of Brazil's energy policy and planning.

In this report, EPE analyzes the panorama of sustainable aviation fuel productions and its relationship with green diesel, the current Brazilian public policies and international agreements, and project the supply and demand of these biofuels in Brazil.

With this study, EPE enhances transparency and reduces information asymmetry by presenting data and facts that can support discussions about the efforts towards SAF development in Brazil, thereby supporting the decision-making process of interested stakeholders.



Agenda

- International and National SAF Initiatives
- SAF supply and demand in Brazil
- Announced SAF Projects
- Investments in SAF/HVO
- Final Considerations

Note 1: The baseline level is defined as 100% of 2019 emissions for the 2021-2023 period and 85% of 2019 emissions from 2024 onward; 2 – [IATA, 2024](#); 3 – [Lei nº 14.993](#), 4 – [Decreto nº 13.094/2026](#)

International and National SAF Initiatives



- To reduce aviation sector emissions, the **International Civil Aviation Organization (ICAO)** has set the objectives of achieving **carbon-neutral growth from 2020** and **net-zero carbon emissions by 2050**.
- The **Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA)** is a market-based measure established to support the achievement of these objectives.
 - International aviation emissions above the baseline level¹ are required to be offset through the acquisition of carbon credits or through the use of **CORSIA-eligible fuels**, particularly **SAF**.
 - The replacement of conventional jet fuel with SAF is expected to account for approximately **65% of the emissions reductions needed to achieve the Net Zero 2050 goal**².
- CORSIA becomes mandatory for participating countries, including Brazil, from **2027 onward**.

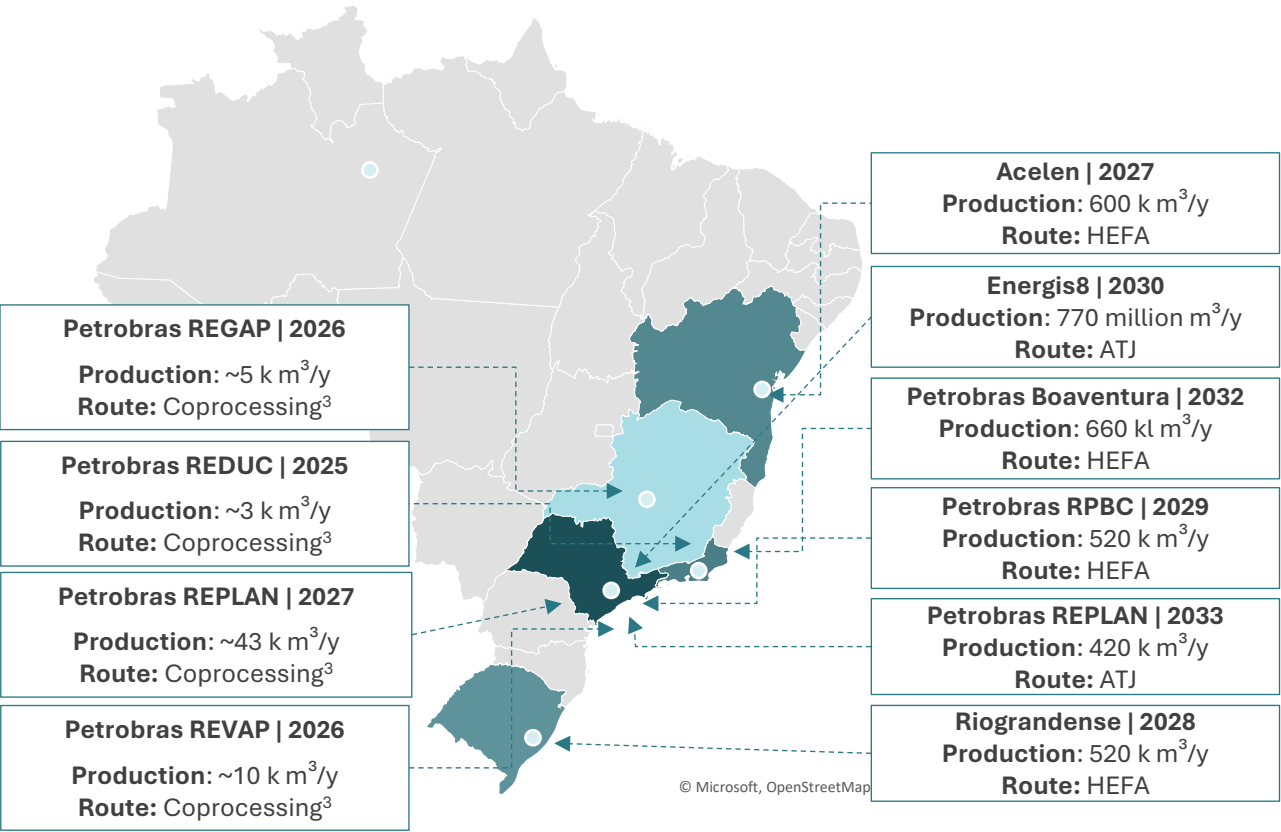


- The **National Sustainable Aviation Fuel Program (ProBioQAV)** was established by Brazil's **Fuel of the Future Law**³, introducing annual emissions reduction targets for domestic aviation operators.
 - The required emissions reduction percentage begins at **1% in 2027** and rises progressively to **10% by 2037**.
- ProBioQAV will employ a **well-to-wake Life Cycle Assessment (LCA)** methodology to quantify emissions from each SAF production pathway and will permit transactions under a **Book-and-Claim framework**.
- In the early years of ProBioQAV, alternative means of compliance may be used, up to a maximum of **15% in 2027, 15% in 2028, 10% in 2029, and 5% thereafter**⁴.

Note 1: The baseline level is defined as 100% of 2019 emissions for the 2021-2023 period and 85% of 2019 emissions from 2024 onward; 2 – [IATA, 2024](#); 3 – [Lei nº 14.993](#), 4 – [Decreto nº 13.094/2026](#)

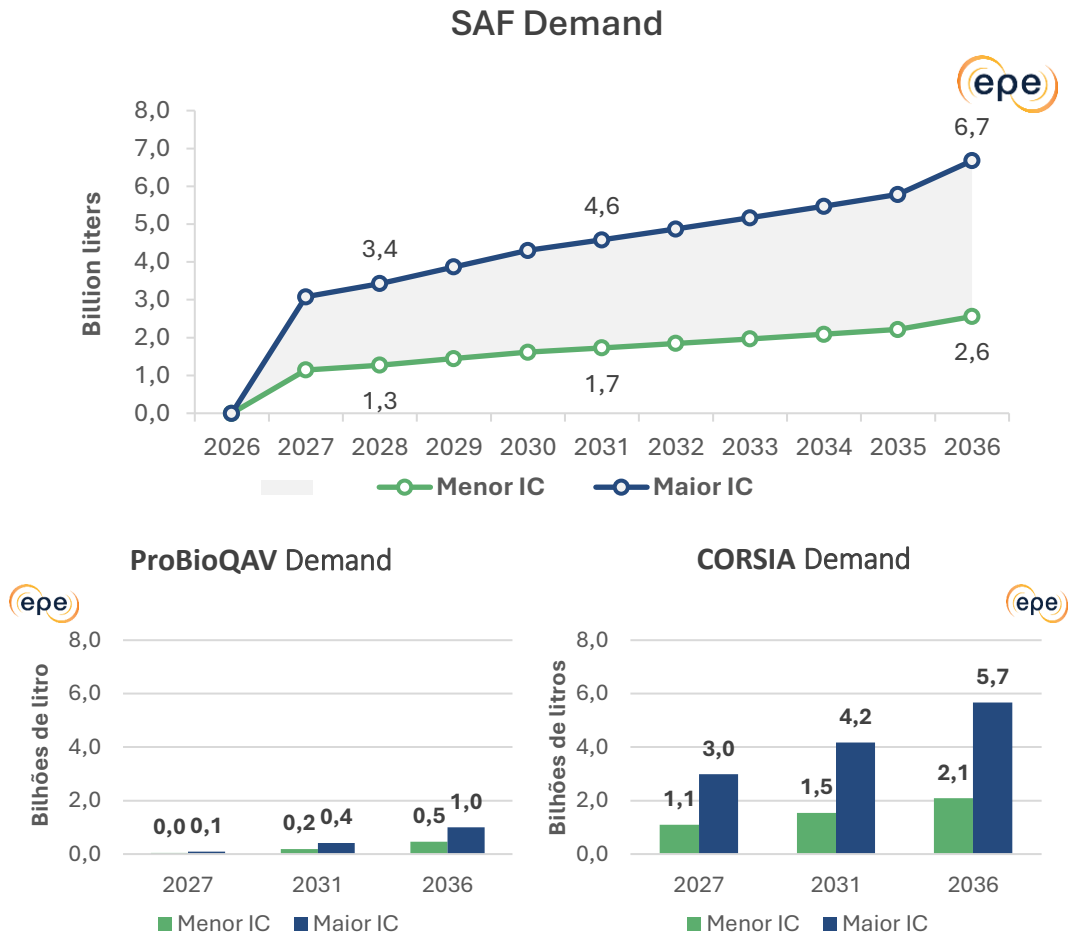
SAF supply and demand in Brazil

- Commercial-scale SAF projects announced to date¹ are projected to deliver **1.7 billion liters of annual SAF production capacity by 2030**, rising to approximately **3.6 billion liters per year by 2036**²



Notes: 1 – Only projects announced by companies as of June 2026 were considered. 2 – The nominal project capacity was weighted according to an assumed utilization factor and operating mode designed to maximize SAF production. 3 – For projects employing the co-processing route, only the renewable portion of the fuel was taken into account.

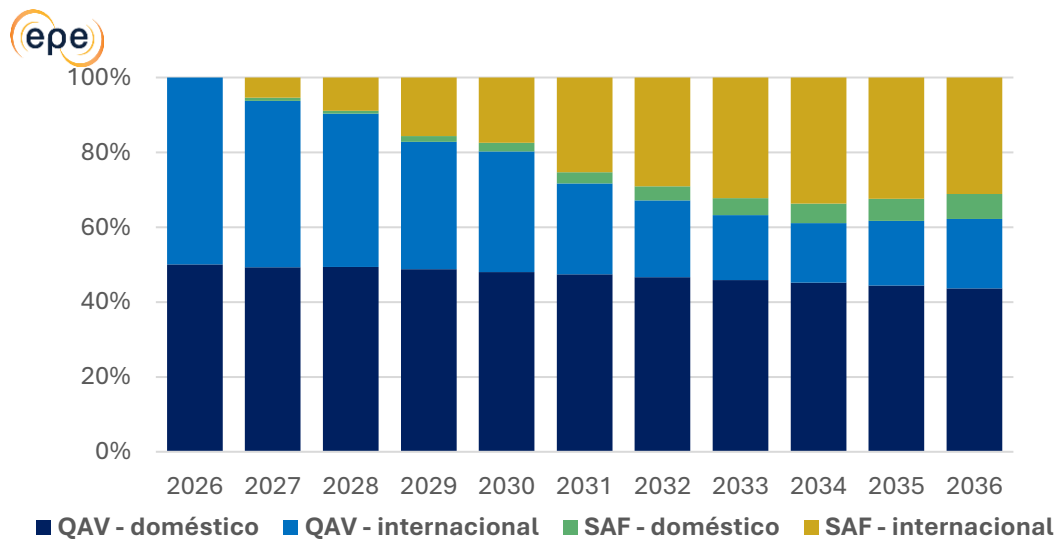
- The volumetric demand for SAF will depend on the carbon intensity (CI) of the fuel produced, since the targets are established based on emissions reduction requirements.



Source: Elaborated by EPE

Announced SAF Projects

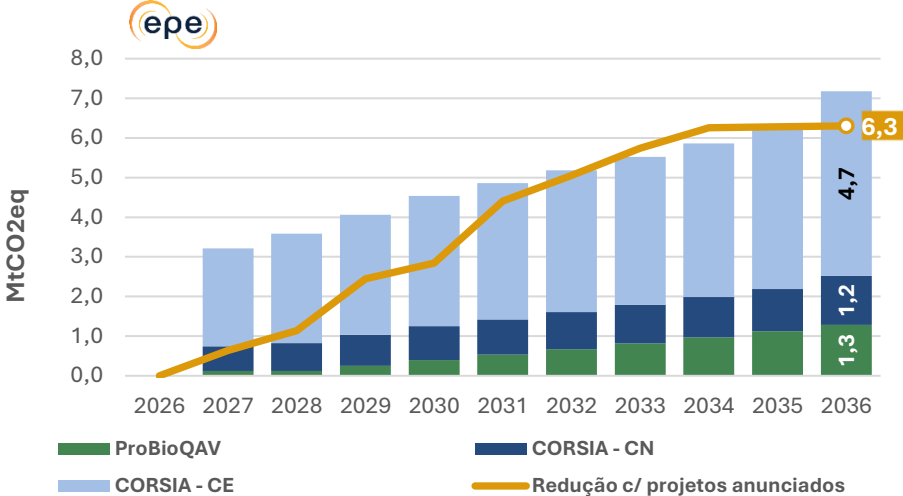
SAF Share in Demand Fulfillment by Category



Source: Elaborated by EPE

- The estimated capacity of the announced projects is equivalent to 38% of the projected aviation fuel demand for 2036.
- For the purposes of the chart, SAF volumes were first allocated to meet the ProBioQAV mandate, with any remaining volumes directed toward compliance with CORSIA emissions reduction requirements.

Compliance with Emissions Reduction Targets



Nota: CE – foreign companies ; CN – national companies

Source: Elaborated by EPE

- **Between 2027¹ and 2036**, the announced projects are projected to achieve, on average, 76% of the emissions reduction targets set by CORSIA and ProBioQAV.
- From 2028 onward, the emissions reductions associated with the announced projects could be sufficient to **fully comply with the CORSIA and ProBioQAV targets applicable** to Brazilian airlines, assuming the SAF produced is supplied to the domestic market.

Note: 1 – The ProBioQAV and CORSIA requirements become mandatory starting in 2027.

Investments in SAF/HVO



Units: 5 under construction, 1 project: 5.5 million liters

Investment: R\$ 39.0 billion or approx. US\$ 8 billion

Nota: Capital expenditures related to biofuel distribution and marketing, as well as operation and maintenance (O&M) costs, are excluded from the analysis.

Total estimated investments for biofuel sector in Brazil 2027-2036

 R\$ 143 billion or approx. US\$ 28 bi

Final Considerations

Biofuels are expected to maintain a prominent position in Brazil's energy mix throughout the decadal outlook period. Together with RenovaBio, the Fuel of the Future Law supports favorable market developments and enhances the long-term growth and competitiveness of the sector – including SAF.

There are significant opportunities for the production of Sustainable Aviation Fuel (SAF) and renewable diesel from a range of technological pathways and feedstocks.

The expansion and deployment of Sustainable Aviation Fuel (SAF) – together with other biofuels – are key to preserving Brazil's leadership in renewable energy and strengthening its position as a driver of a just and inclusive global energy transition.

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