

# International SAF Markets and Policies

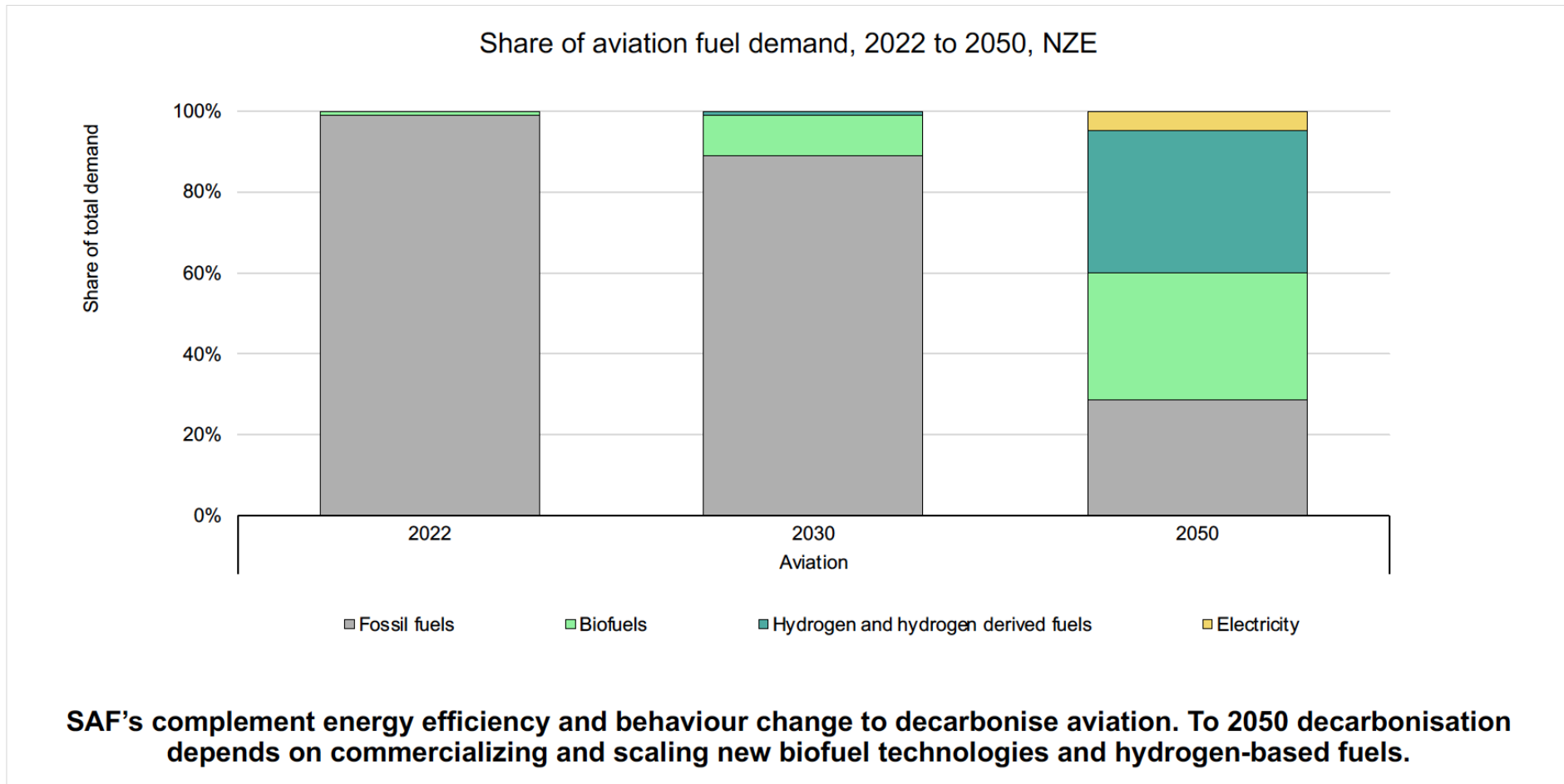


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# SAF's are crucial to decarbonising aviation on a net zero pathway



# SAF Markets

## Need diversification beyond HEFA pathway\*

Total Renewable Fuel Capacity:  
% Split by Pathway



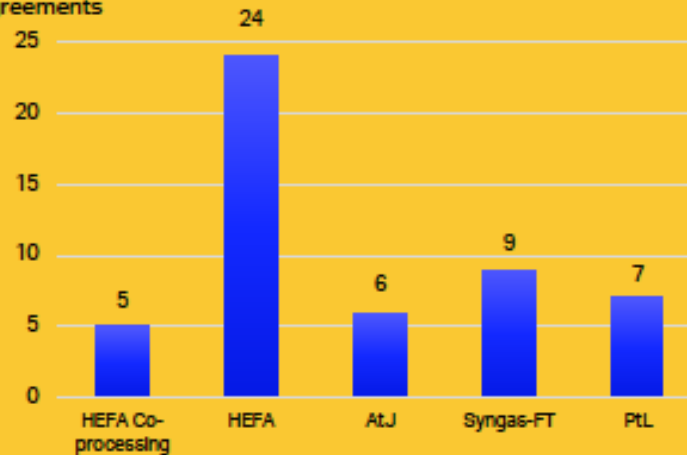
■ AtJ    ■ CHJ    ■ HEFA  
■ PtL    ■ Syngas FT    ■ Co-process

Source: IATA

\* HEFA is most mature today but least scalable for future needs

## Airline Offtakes starting to address this

Number of agreements



Source: IATA



- HEFA accounts for 85% of future (5 years) SAF volume
- Dependence on feedstock (waste fat, oil and grease) with limited availability
- Need for diversification

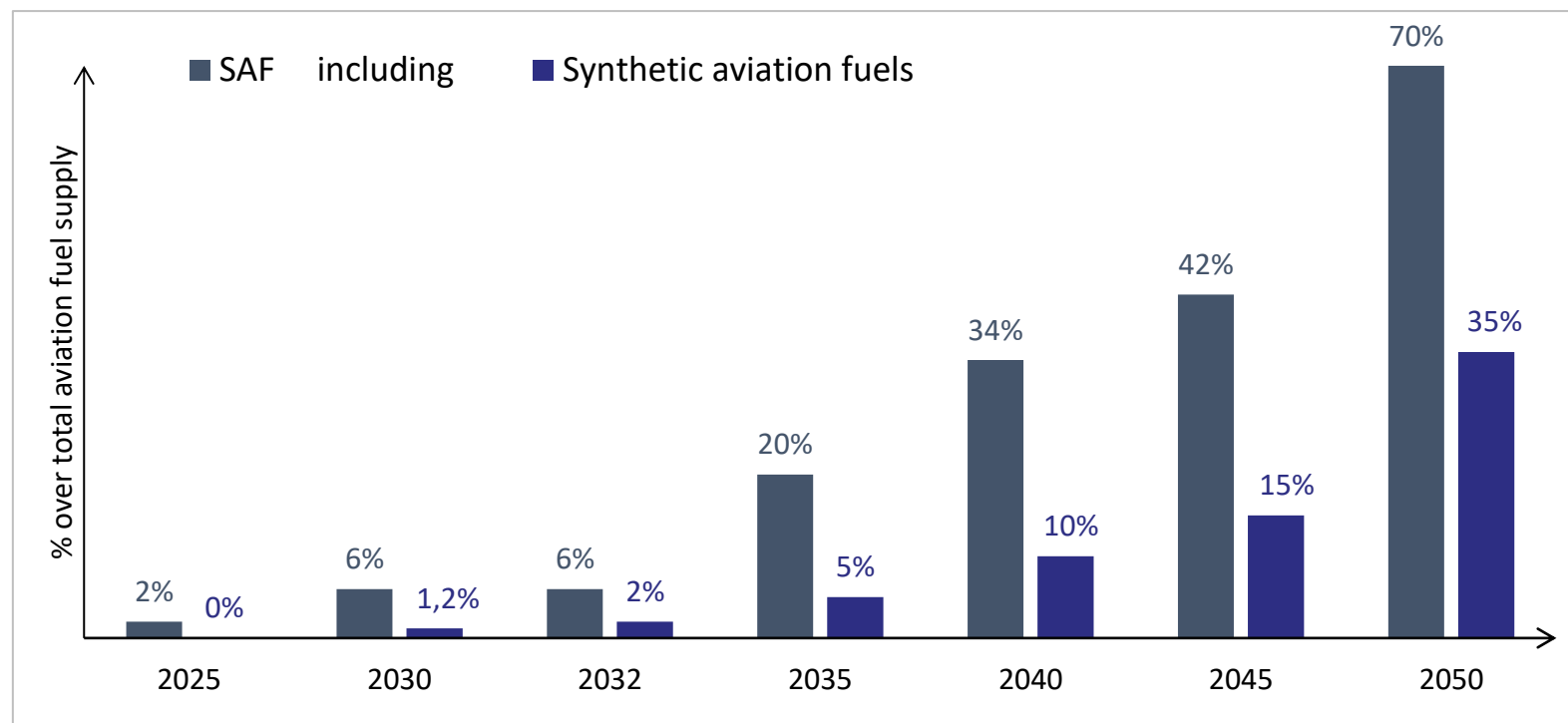
# SAF Policies



Region/Country	Key initiatives	Type	Comments
EU	ReFuelEU Aviation Regulation, legislation	Legislation & Mandates	Complex legislation in relation to feedstocks Mandate targets very ambitious and in short time High GHG minimum targets Obligation is upon the fuel suppliers <b>Mandate targets also on eSAF; nuclear included</b>
Brazil	Policy on forthcoming mandate	Mandate	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 be ready to produce SAF to meet 25% of total jet fuel demand
China	Short term goal for biofuel uses in aviation	Target	Cumulatively consuming 50,000 tons of SAF by 2025 No reference yet to sustainability certification <b>No relationship to ASTM, thus need to develop own standards</b>
India	Policy on forthcoming mandate	Mandate	Use of 1% SAF for domestic airlines by 2025 <b>The policy also aims to support farmers and rural job creation</b>
USA	Sustainable Aviation Fuel tax credit, legislation	Production Target	Expand production to achieve 3 billion gallons (11.4 billion litres) per year of domestic SAF production that achieve a minimum of a 50% reduction in life cycle GHG emission compared to conventional fuel by 2030 <b>Strong support for new types of feedstock development</b> Loan guarantees
UK	Policy on forthcoming mandate	Mandate	Plans unveiled (25/04/2024) for world leading sustainable aviation fuel mandate, with 10% of all jet fuel set to go green by 2030 Needs parliamentary approval, will come into force in January 2025

# ReFuelEU Aviation in the EU

## ReFuelEU Aviation



**Ewa Oney**  
 Team Leader for Sustainable Aviation  
 Aviation Policy Unit, DG MOVE

- **Twin objectives:**
  - Ramp up SAF deployment
  - Level playing field through EU uniform rules
- **Supply obligation:** Aviation fuel suppliers to supply SAF-blends at EU airports

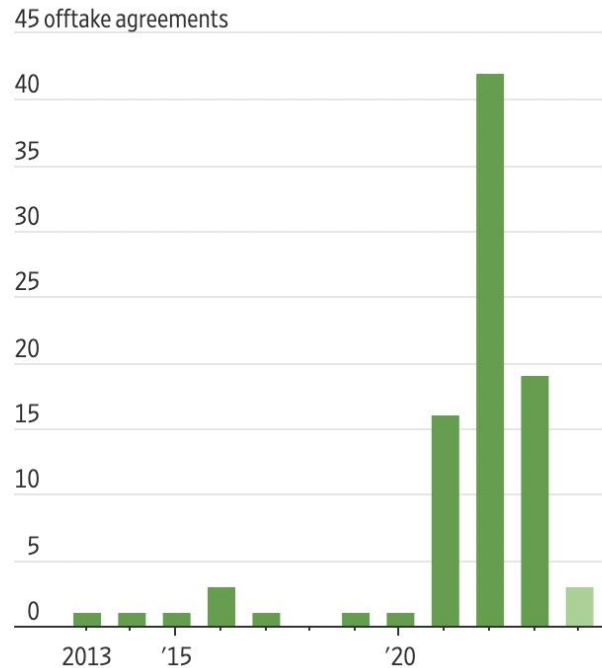
# Indicative conclusions – Strong policies, but...



**The U.S. and Europe Can't Agree on What Counts as Sustainable Aviation Fuel. That's Leaving Investors in a Bind. Confusion swirling against a backdrop of failed investment in the alternative fuel industry**

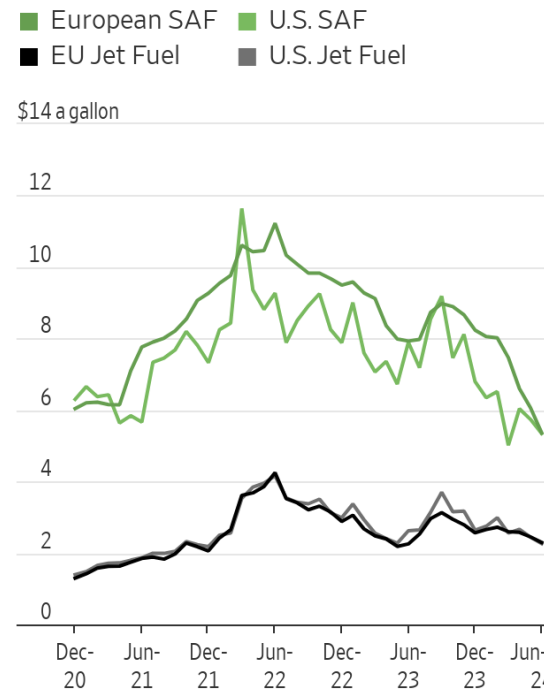
WSJ, 24/06/2024

## Purchase Agreements Are Stalling



Source: Argus Media

## Sky-High Prices



Source: Argus Media

- Significant interest and work to promote SAF with policy, market and technology measures in all Mission Innovation countries
- Strong reference to develop new crops in India and USA to ensure availability of biomass resources
- Several failed investments (Fulcrum, Shell, Vattenfall)
- Investors remain largely hesitant to ramp up SAF production

# Thank you for your attention



## Partners



Stay tuned....



## Associated Partners



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