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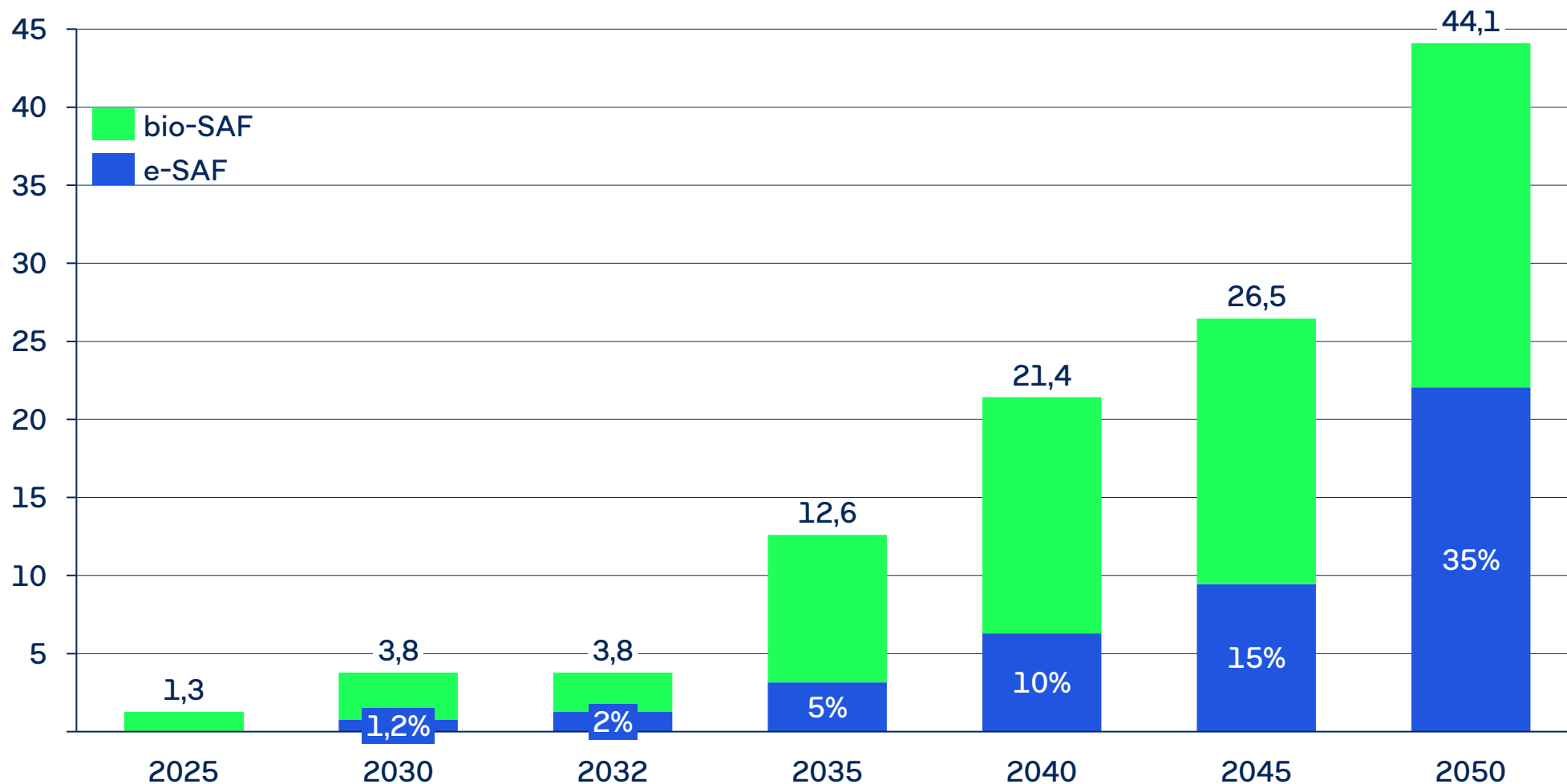
eSAF from a Refiner's Perspective

Challenges and Opportunities

International Conference on Sustainable Aviation Fuels (SAFs) topics 2025

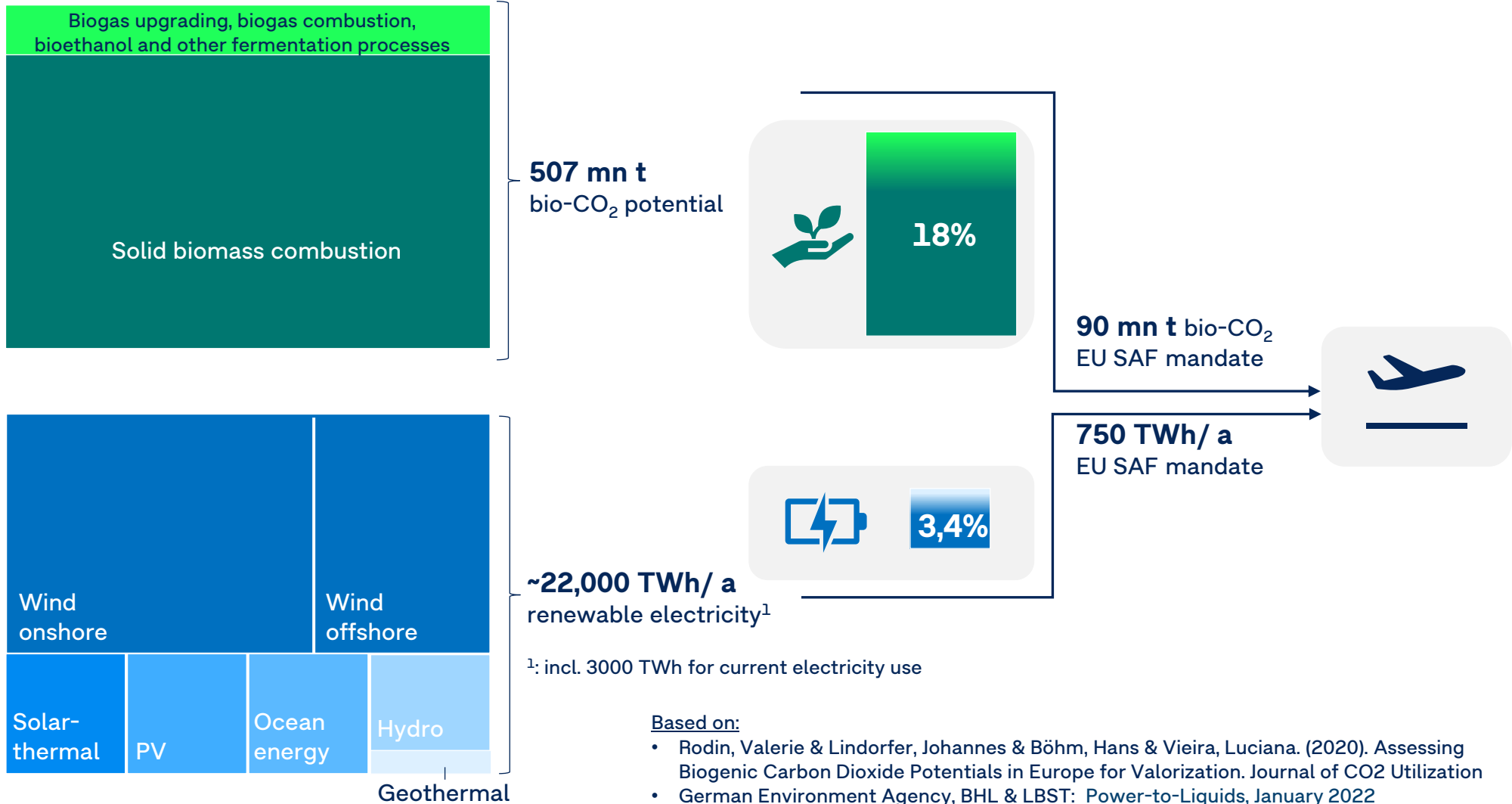


ReFuelEU Aviation defines SAF demand in Europe till 2050 (mn. t)

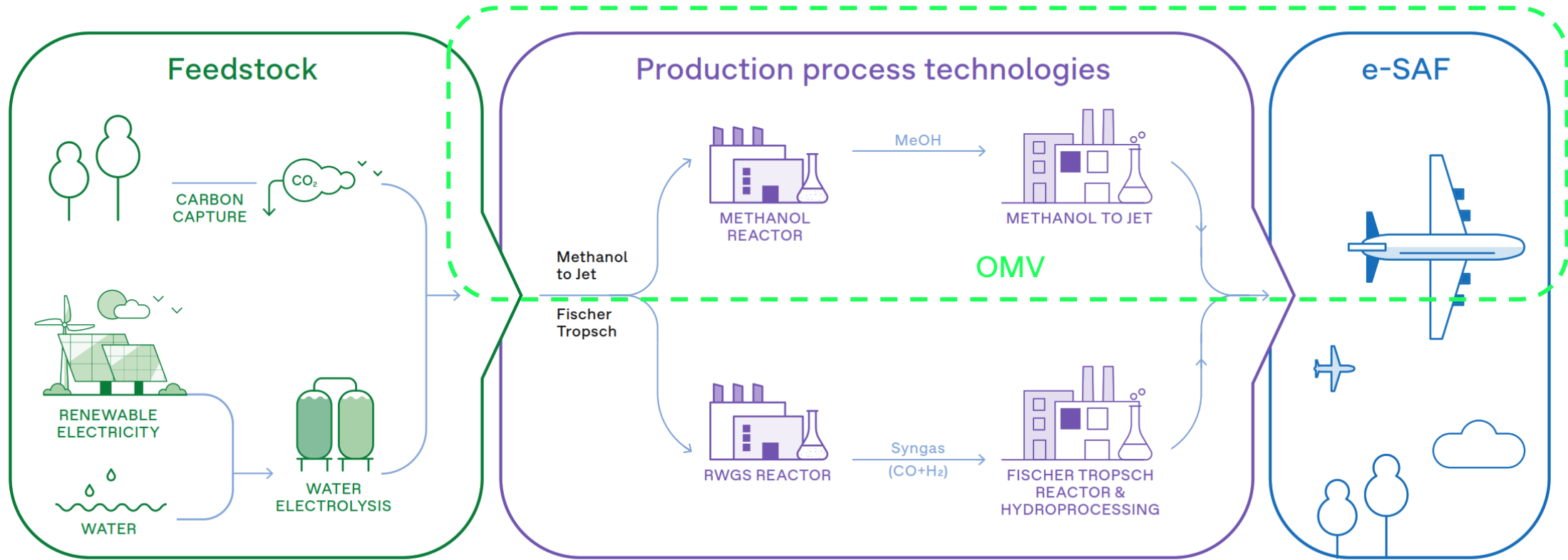


Assumption: ~63 mio. tons aviation fuels in 2050 (source: German Environment Agency, BHL & LBST: Power-to-Liquids, January 2022)
Percentages show e-SAF share of total sustainable aviation fuel volumes

Bio-CO₂ and renewable electricity available vs. demand for EU SAF mandates until 2050

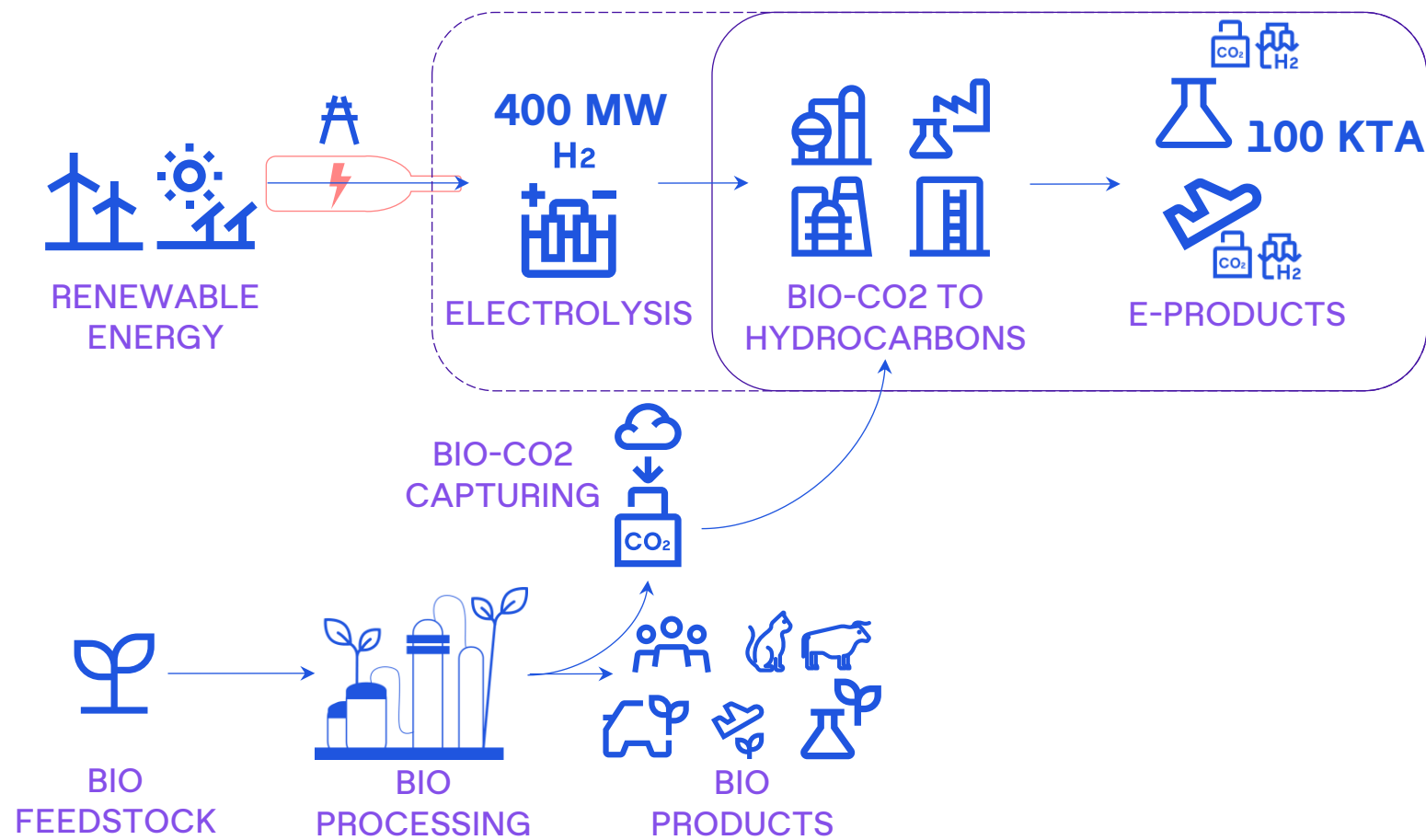


Two possible roads to eSAF

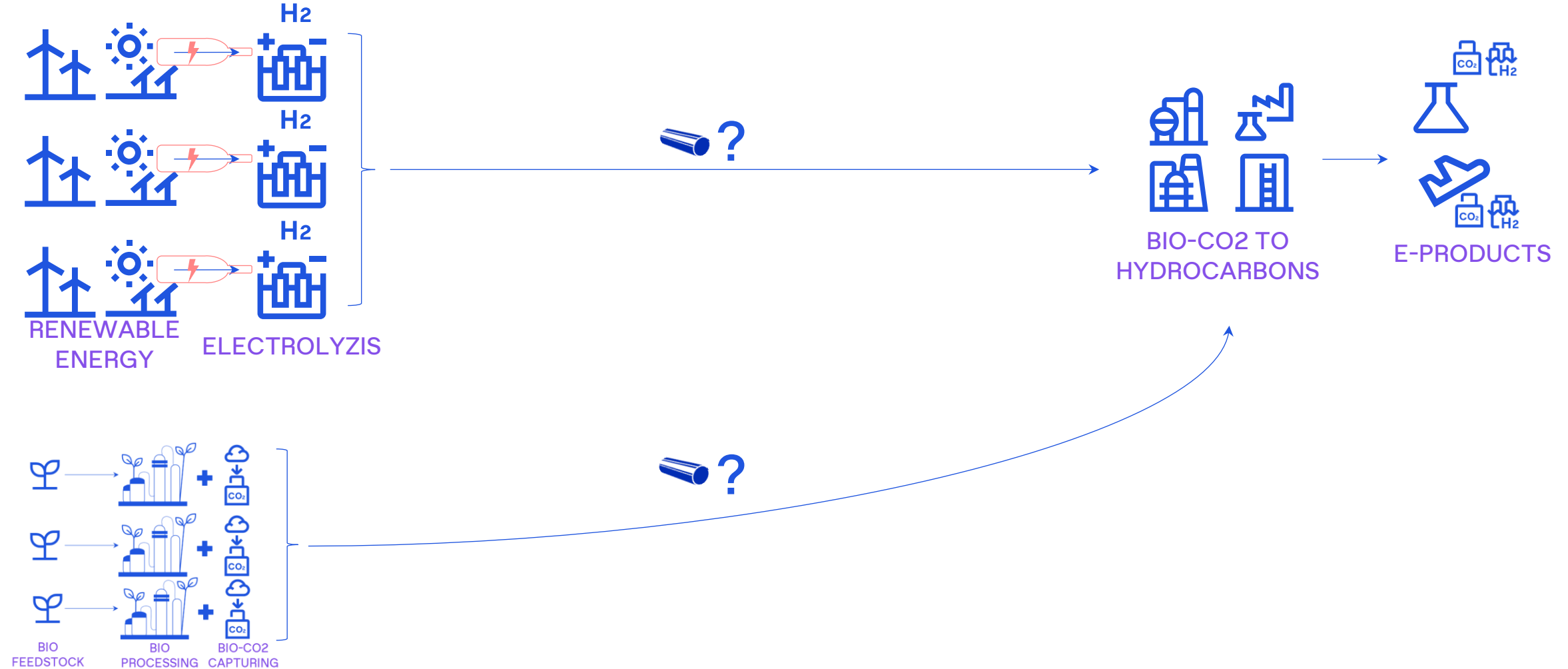


Source: OMV_2025_Factsheet_SAF_LO_08.pdf

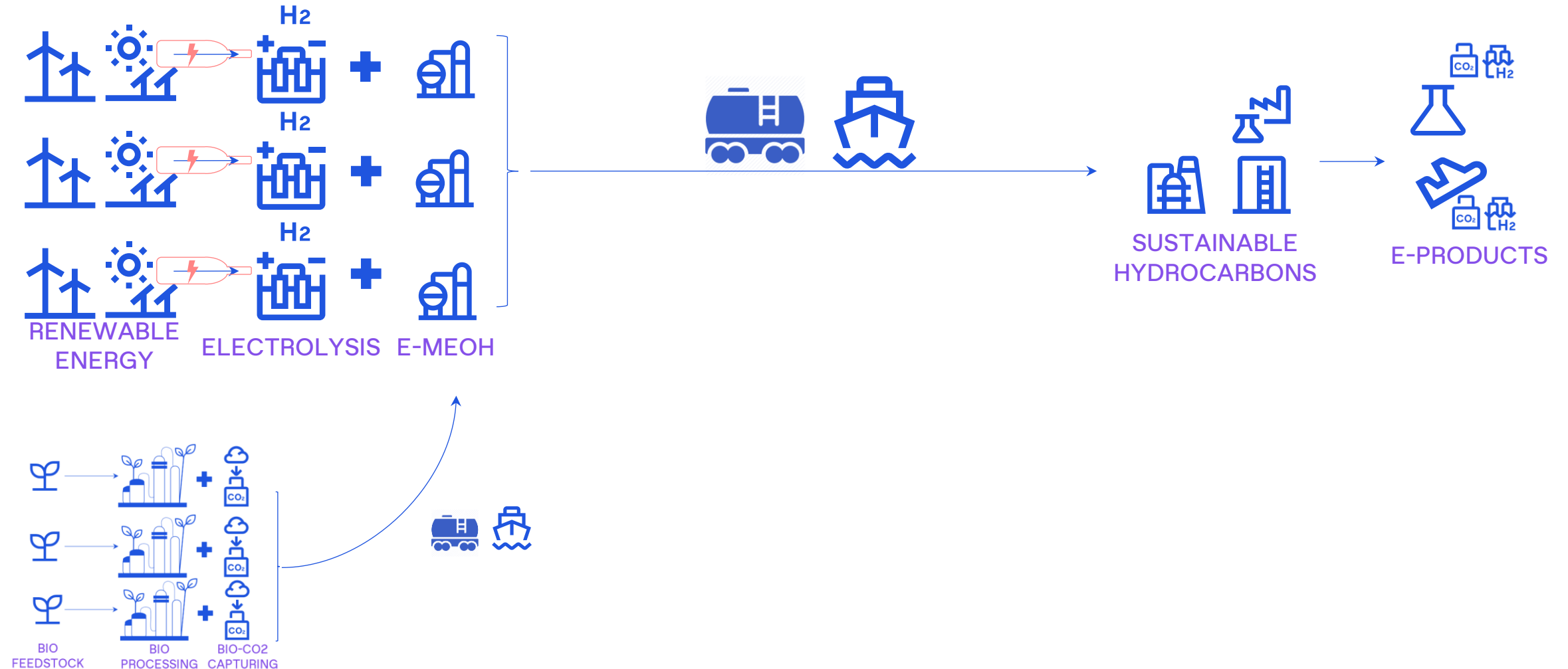
Limited and intermitted feedstock, and downscaling established processes are the big challenges



Secure decentralized feedstock supply and stick with ↻ known chemical processes at commercial scale



Balance between decentralized and centralized parts of value chain depends on set up of own assets



KEY TAKE AWAYS



- Bio-CO₂ based hydrocarbons are part of the future sustainable aviation fuels portfolio.
- For economies of scale, chemical processes downstream in the value chain should be placed in a refinery environment.
- Until the H₂/CO₂ infrastructure is in place, a partly decentralized set up might be favorable, especially for landlocked refineries.
- Clear regulatory framework is essential to trigger investments.



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Thank you!





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