IATA's view on SAF deployment on a global level

IEA AMF Online workshop on Monitoring fuels for aviation

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Our commitment:

TO ACHIEVE NET ZERO CARBON EMISSIONS BY 2050

Target aligned with the global community's broader commitment to tackling climate change and minimizing the global temperature increase

It is also aimed at keeping the benefits of global connectivity for future generations

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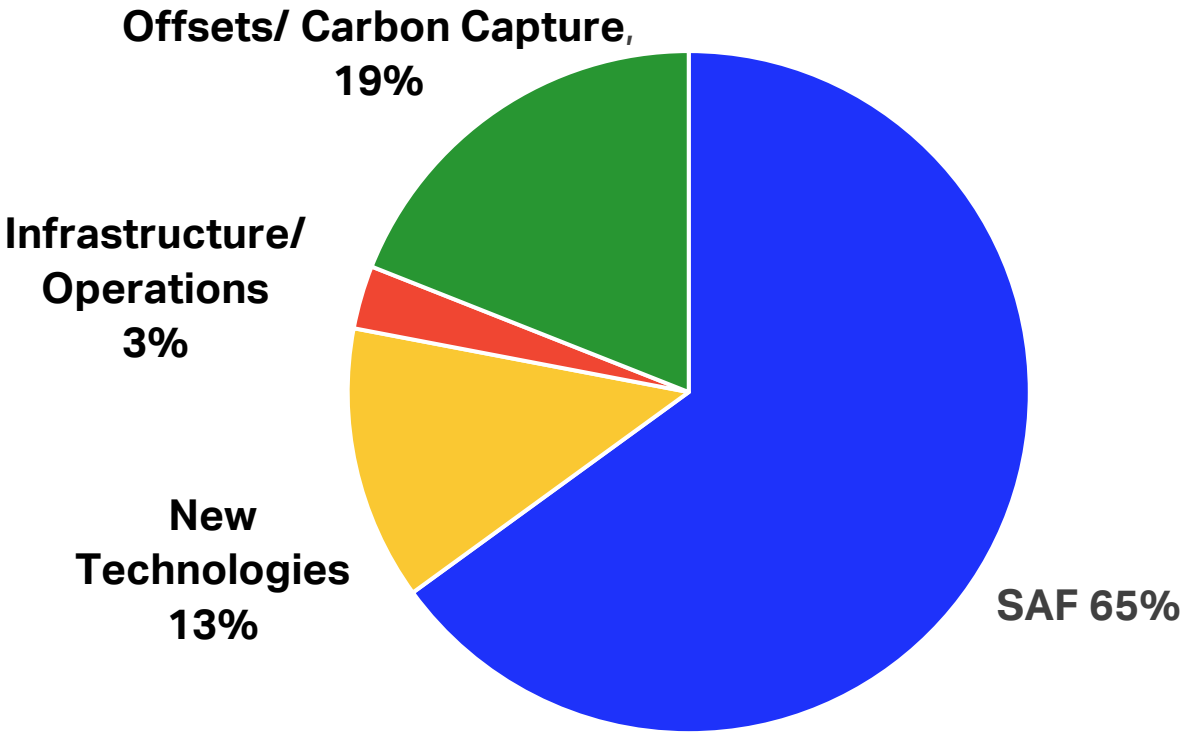
Enablers for Aviation net-zero carbon emissions 2050



- SAF is an important **drop-in solution** for substituting conventional jet fuel in modern aircraft fleets.
- Net zero requires a **whole-economy approach**; no single industry can achieve this on its own.

Source: IATA Sustainability and Economics

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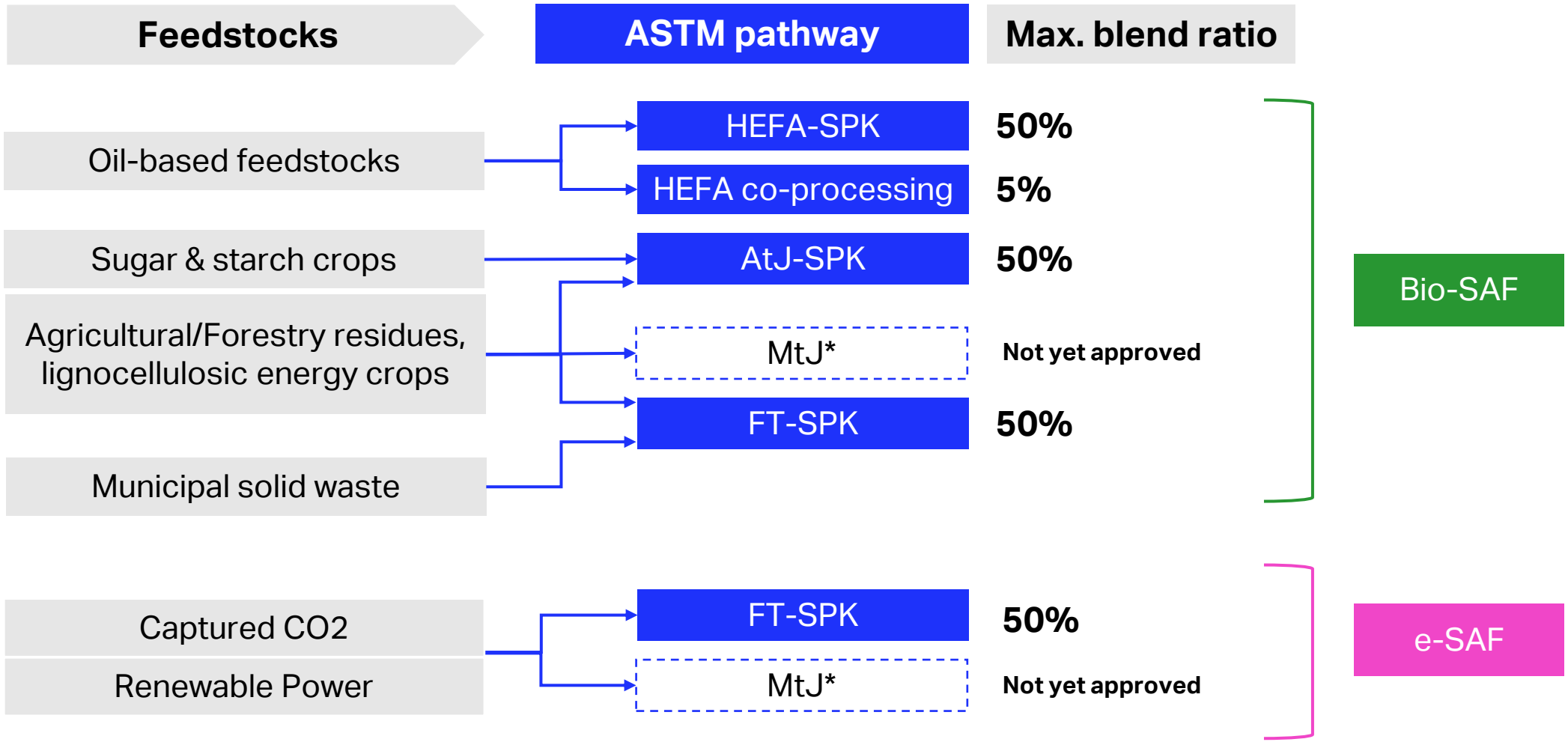
SAF production routes



*The Methanol-to-Jet route is under ASTM evaluation.

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IATA SAF global overview

~300 SAF projects mapped globally.

160 identified projects are progressing to be online by 2030.

81%	40	~55 Mt
of renewable fuel will be HEFA in 2030	**Countries with announced SAF projects**	**Renewable fuel capacity* to 2030**

** Renewable fuel capacity of projects with current or upcoming SAF production capability*

Source: IATA Sustainability and Economics

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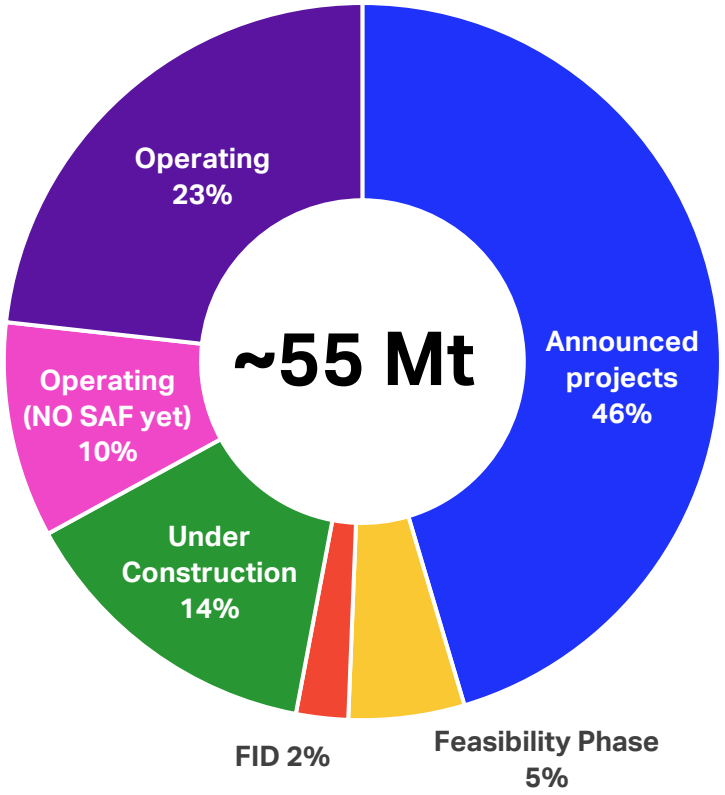
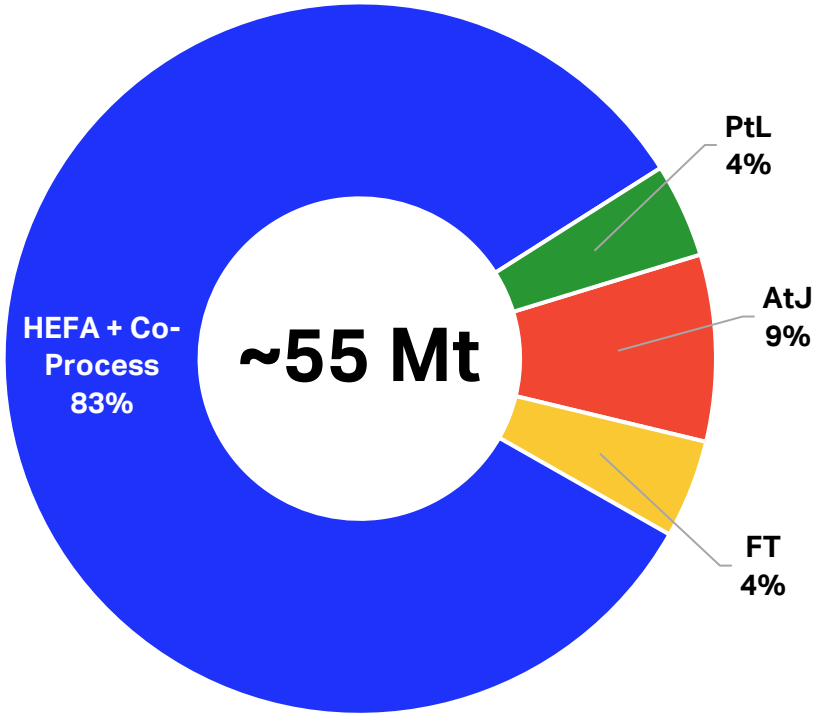
Renewable fuels outlook to 2030

Status of SAF projects to be online in 2030, by plant capacity (Mt)



SAF technologies in 2030 (Mt)



Source: IATA Sustainability and Economics

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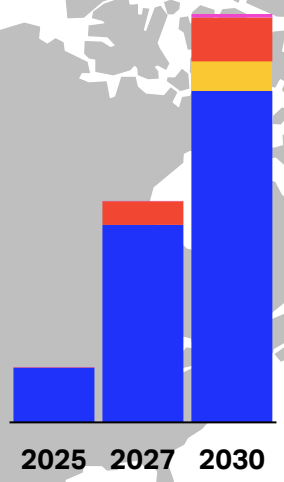
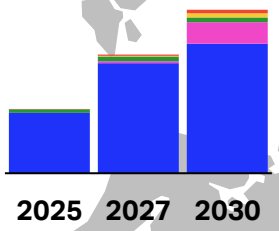
Projects and SAF pathways to 2030

Renewable fuel capacity* by region (~55 Mt or 71 bl globally by 2030)



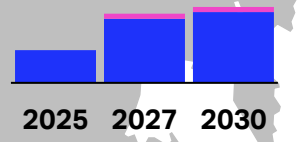
Americas

30 Mt (39 bl)
50 projects



Europe

12 Mt (15 bl)
64 projects

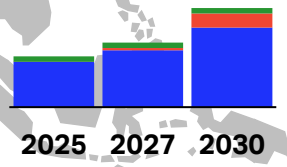


North Asia

5 Mt (6 bl)
13 projects

Africa & Middle East

0.6 Mt (0.8 bl)
5 projects



Asia Pacific

7 Mt (9 bl)
28 projects

- HEFA
- AtJ
- Co-process
- FT
- PtL

Source: IATA Sustainability and Economics

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** Renewable fuel capacity of projects with current or upcoming SAF production capability*

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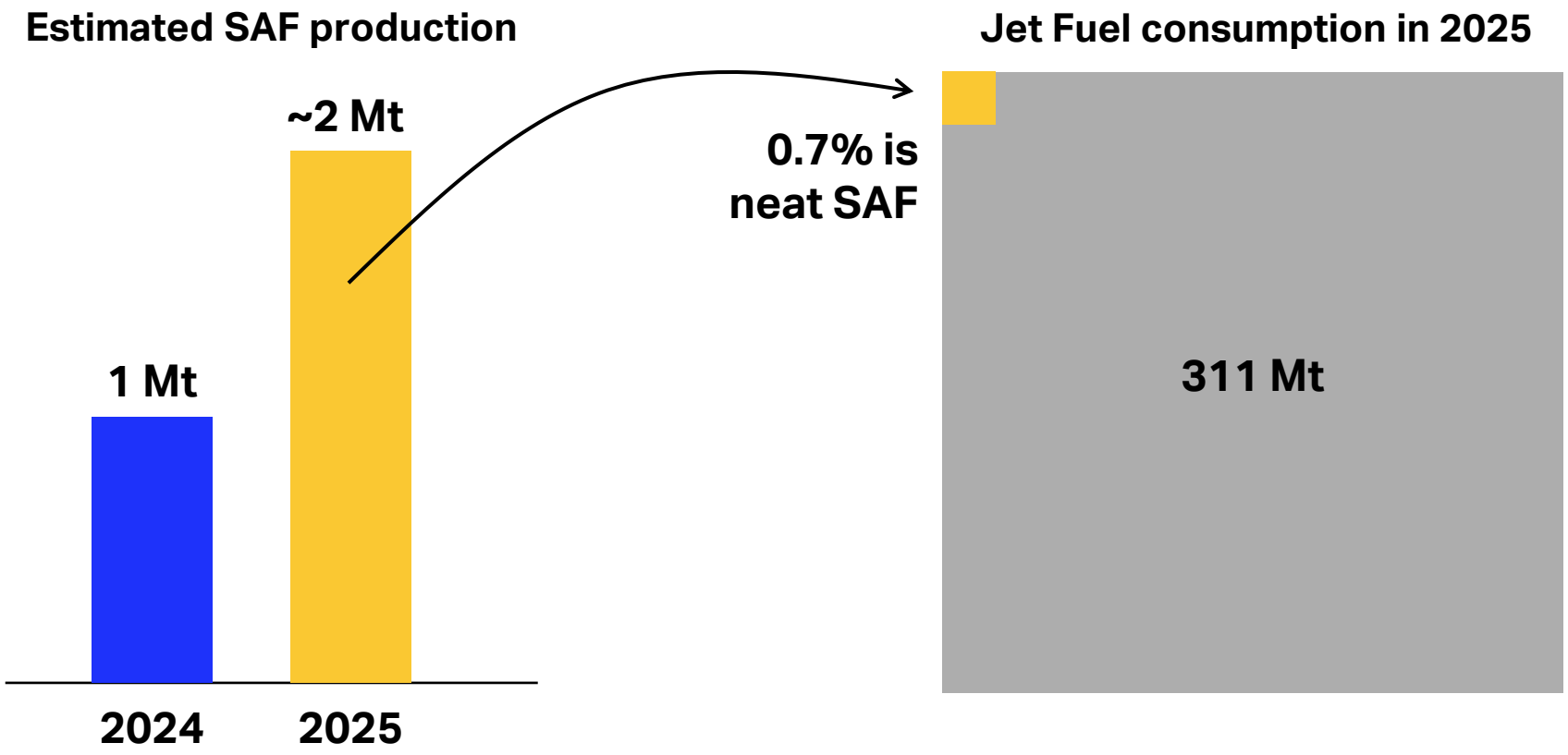
SAF production status



- **SAF production is expected to double** in 2025, but the share remains very small in the jet fuel pool.
- Around **1.2 Mt** of SAF is required to cover the **EU and UK mandates in 2025.**

Source: IATA Sustainability and Economics

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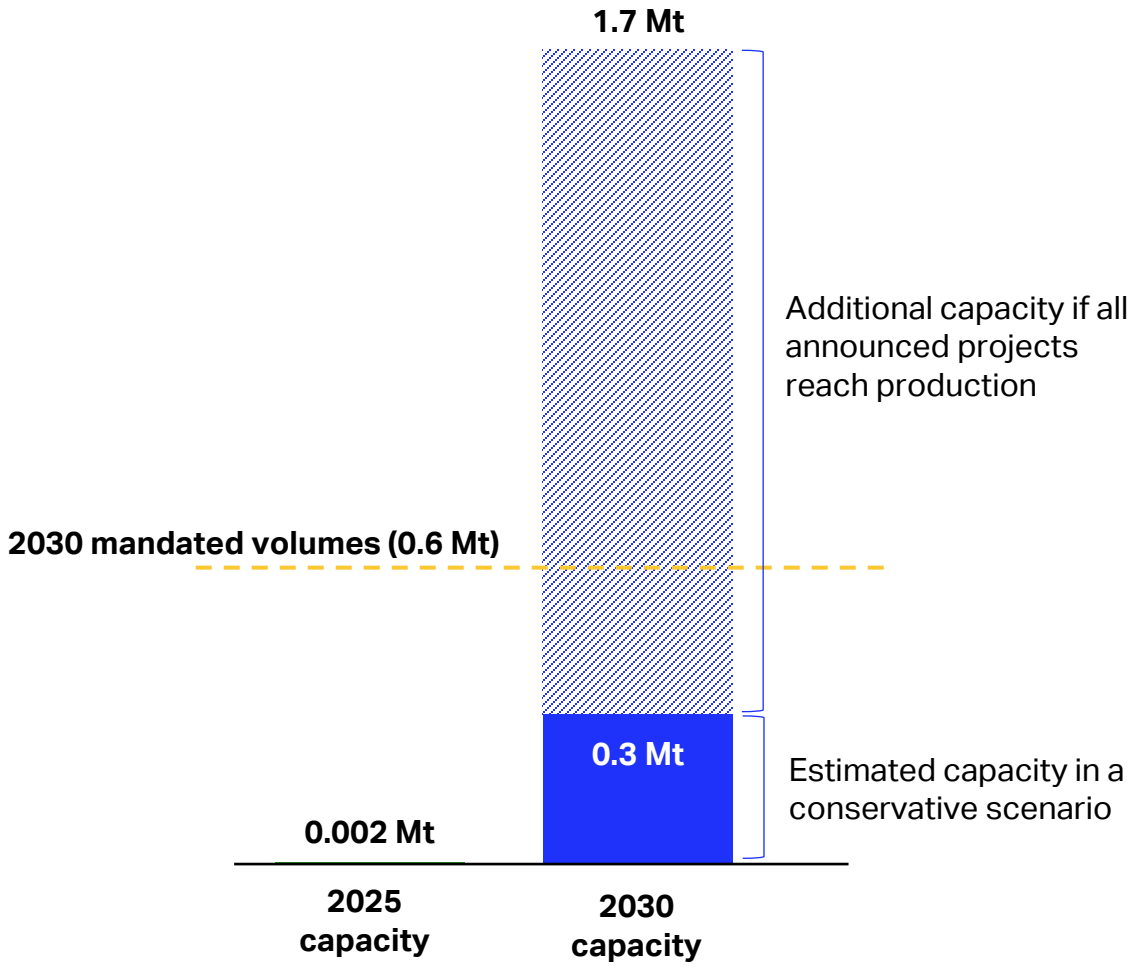
Power-to-Liquid SAF outlook in 2030



- Mandated volumes in the **EU** and the **UK** will account for around **0.6 Mt of PtL in 2030.**
- **Out of 60 PtL projects** scheduled by 2030, 90% are still at the announcement stage.
- **Only 1** commercial-scale **project under construction** in the US (23 Kt capacity).

Source: IATA Sustainability and Economics

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Airlines' offtake commitments

First SAF commitment per airline/year, and cumulative number of announcements

Source: IATA Sustainability and Economics

*As of June 2025

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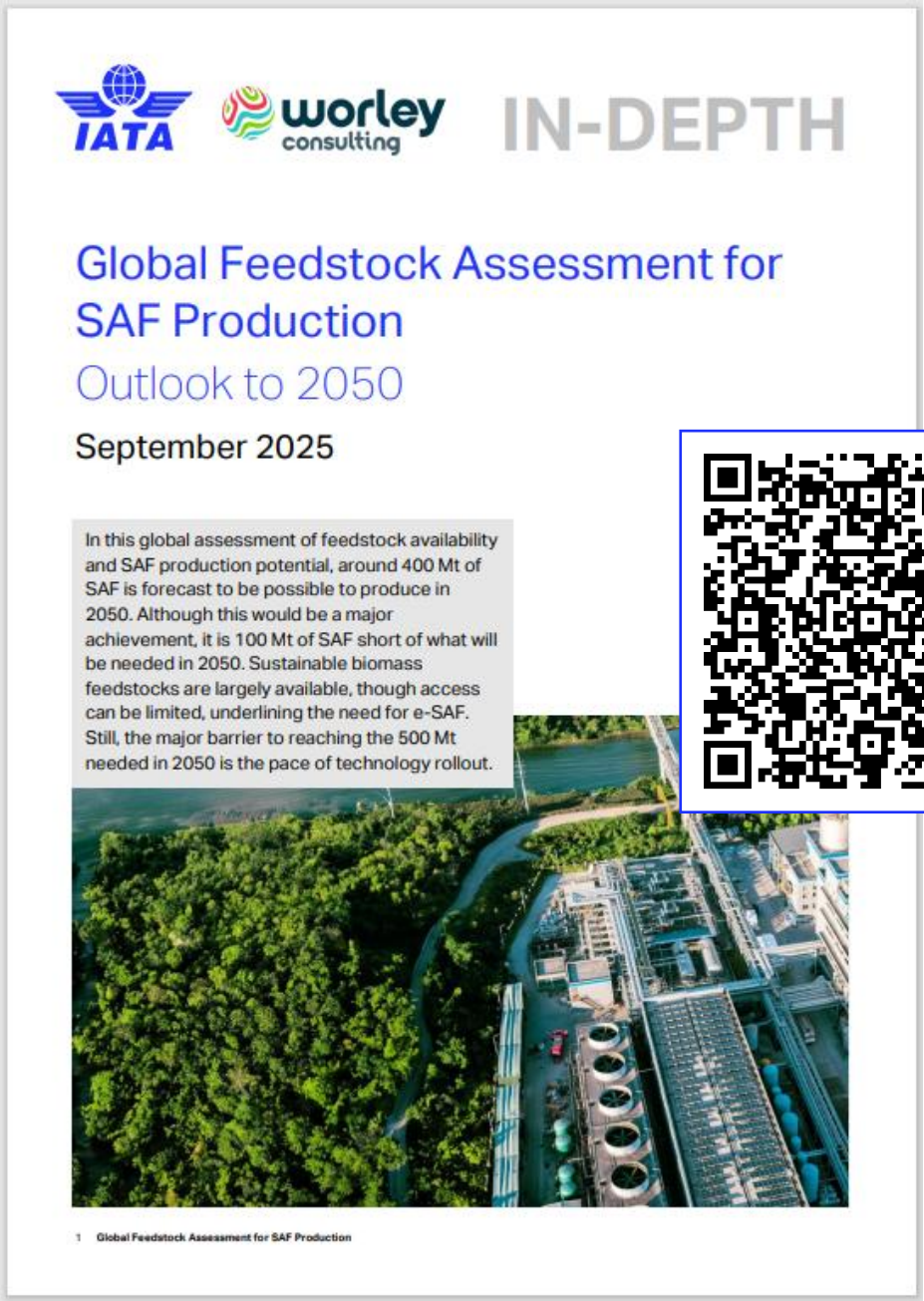

Study: Global Feedstock Assessment for SAF Production

- **Aim of the study:** demonstrate that sufficient SAF feedstock exists to enable the airline industry to achieve net zero by 2050.

- **Key finding:** SAF technology rollout is the main bottleneck to net zero, not feedstock availability.

[IATA - Global Feedstock Assessment for SAF Production]

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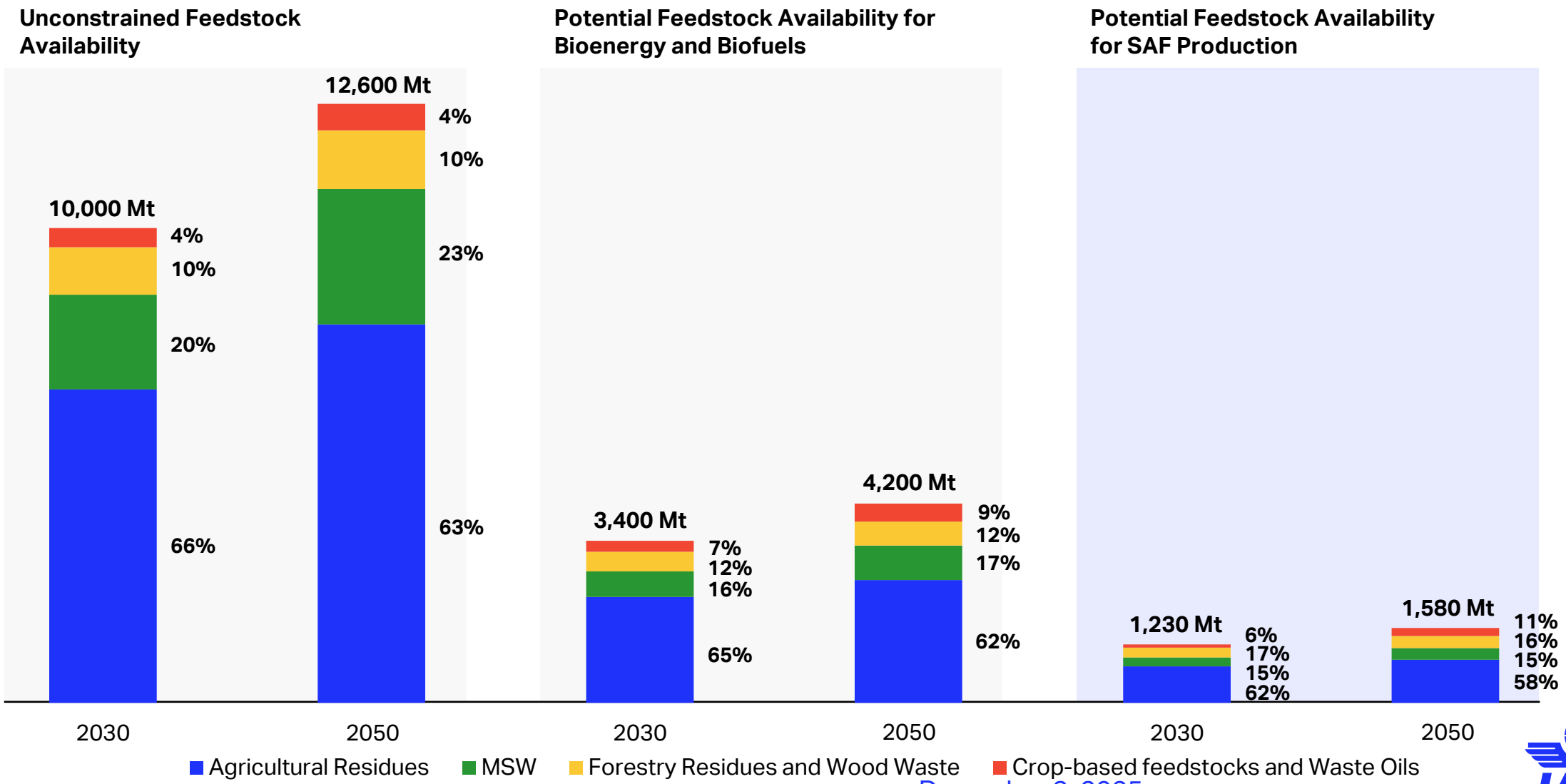
Potential availability of global biomass feedstock



Source: IATA Sustainability and Economics, Worley Consulting

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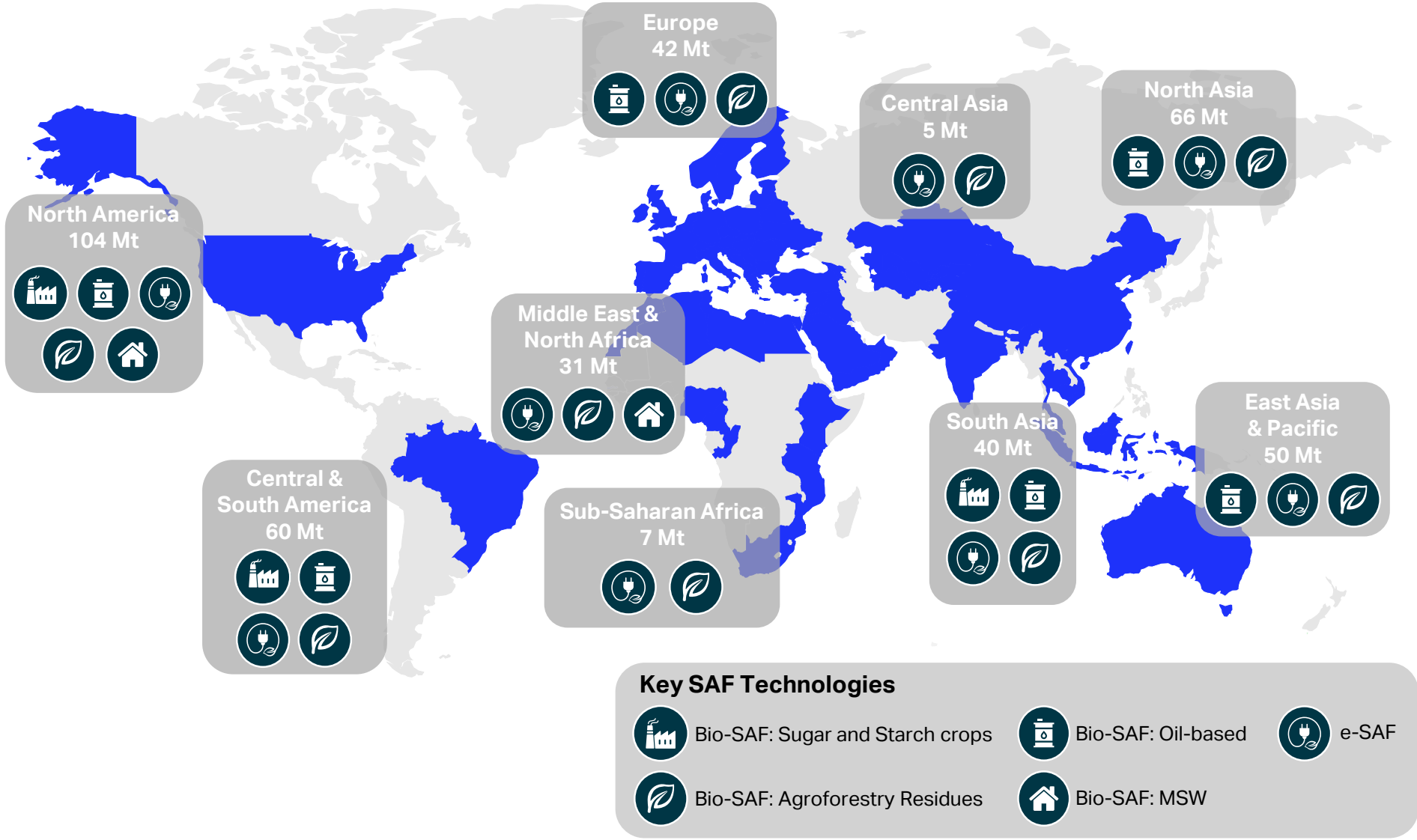
Regional SAF blueprint 2050



Source: IATA Sustainability and Economics, Worley Consulting

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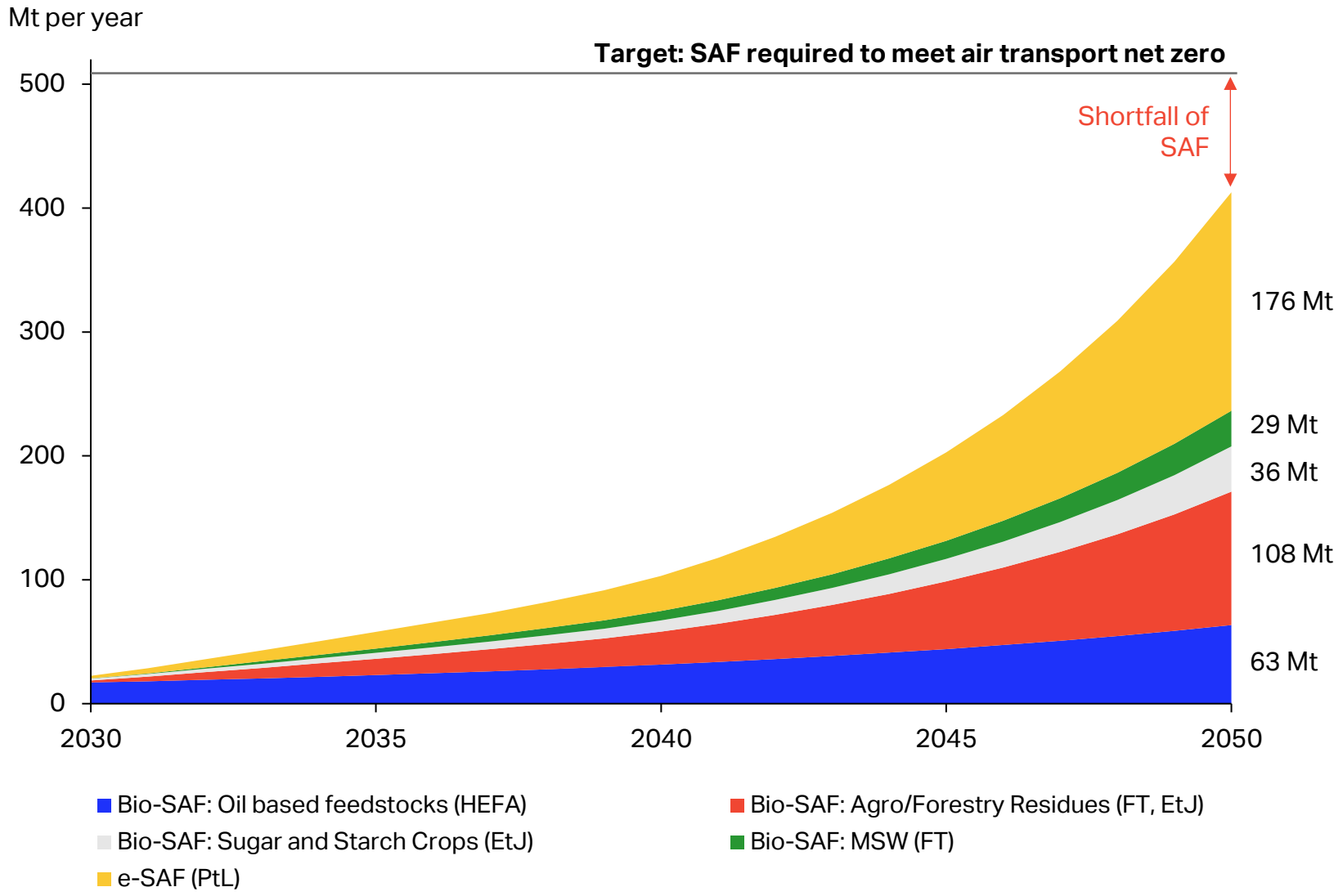
Estimated global SAF production potential

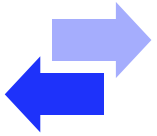


Source: IATA Sustainability and Economics, Worley Consulting

Key net zero enablers

Industrial partnerships to de-risk projects through supply/demand guarantees between fuel producers and airlines

Policy incentives in support of SAF that promote the uptake of new technologies through funding or price support



Building **durable trust among stakeholders**, supporting engagement, collaboration, information sharing, transparency and value sharing

Shifting value beyond solely financial to include **environmental and social value**

Development of **renewable power capacity** and **grid infrastructure**

Government and private sector support for SAF, promoting production in all regions and maximizing utilization of all feedstocks

Maximizing commercially developed production routes and feedstocks, while **supporting development** of **new feedstocks** and **technologies**

Strengthening **OEMs and equipment supply chains**, and fostering early collaboration with project developers

Supporting **global access to biomass feedstock** by addressing any logistics, infrastructure, and supply chain bottlenecks

Standardization, replicate designs and build in parallel

Thanks