

Global Bio-based Sustainable Aviation Fuel (SAF) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Bio-based Sustainable Aviation Fuel (SAF) market size is expected to reach \$ 18643 million by 2032, rising at a market growth of 15.2% CAGR during the forecast period (2026-2032).

Bio-based Sustainable Aviation Fuel (SAF) is an alternative jet fuel produced from renewable biomass sources such as plant oils, animal fats, algae, agricultural residues, and waste materials. Unlike conventional aviation fuels derived from fossil resources, bio-based SAF offers significant environmental benefits, including reduced greenhouse gas emissions and lower levels of sulfur and other pollutants. SAF can be blended with conventional jet fuel (up to 50% as permitted by ASTM D7566) or used as a drop-in replacement, requiring no modifications to aircraft engines or fueling infrastructure .

The upstream segment includes raw material suppliers of vegetable oils (soybean, palm, rapeseed), animal fats, used cooking oil (UCO), agricultural and forestry residues, municipal solid waste, and industrial off-gas. The midstream segment encompasses SAF production processes including Hydroprocessed Esters and Fatty Acids (HEFA), Fischer-Tropsch (G+FT), Alcohol-to-Jet (AtJ), and Power-to-Liquid (PtL), performed by specialized bio-refineries and integrated energy companies. The downstream segment comprises distribution channels including direct sales to airlines, fuel blending/suppliers, and airport into-plane fueling services, serving end-users in commercial aviation, business aviation, military aviation, and cargo/freight airlines .

The global average selling price for bio-based SAF is approximately US\$1,654 per ton, with annual sales volume reaching approximately 3.76 million tons in 2025. The industry maintains gross margins between 30% and 35%, reflecting the premium positioning of sustainable fuels versus conventional jet fuel and the cost pressures from feedstock

price volatility and production technology maturity .

The global bio-based sustainable aviation fuel market is experiencing unprecedented growth, driven by escalating regulatory mandates across major economies. The aviation industry, which accounts for approximately 2-3% of global CO₂ emissions, faces mounting pressure to decarbonize. SAF is widely regarded as the most promising near-term solution for aviation decarbonization, as it can reduce lifecycle greenhouse gas emissions by 50-80% compared to conventional jet fuel while requiring no modifications to existing aircraft or fueling infrastructure .

A defining trend reshaping the market is the implementation of mandatory SAF blending mandates. The European Union's ReFuelEU Aviation regulation, which took effect in 2025, requires a 2% SAF blend at EU airports, progressively increasing to 6% by 2030 and 70% by 2050. This policy has created substantial demand pull, with EU SAF consumption expected to reach approximately 1.9 million tons in 2025. The United Kingdom has also implemented a 2% SAF mandate starting in 2025. These regulatory drivers have fundamentally shifted SAF from a voluntary niche market to a compliance-driven mass market .

This report studies the global Bio-based Sustainable Aviation Fuel (SAF) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Bio-based Sustainable Aviation Fuel (SAF) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Bio-based Sustainable Aviation Fuel (SAF) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Bio-based Sustainable Aviation Fuel (SAF) total production and demand, 2021-2032, (Kilotons)

Global Bio-based Sustainable Aviation Fuel (SAF) total production value, 2021-2032, (USD Million)

Global Bio-based Sustainable Aviation Fuel (SAF) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Bio-based Sustainable Aviation Fuel (SAF) consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Bio-based Sustainable Aviation Fuel (SAF) domestic production,

consumption, key domestic manufacturers and share
Global Bio-based Sustainable Aviation Fuel (SAF) production by manufacturer,
production, price, value and market share 2021-2026, (USD Million) & (Kilotons)
Global Bio-based Sustainable Aviation Fuel (SAF) production by Type, production,
value, CAGR, 2021-2032, (USD Million) & (Kilotons)
Global Bio-based Sustainable Aviation Fuel (SAF) production by Application,
production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Bio-based Sustainable Aviation Fuel (SAF) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Neste, World Energy, TotalEnergies, Honeywell, LanzaJet, EcoCeres, SkyNRG, Swedish Biofuels AB, Eni, Johnson Matthey (Virent), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Bio-based Sustainable Aviation Fuel (SAF) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Bio-based Sustainable Aviation Fuel (SAF) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Bio-based Sustainable Aviation Fuel (SAF) Market, Segmentation by Type:

HEFA

G+FT

AtJ

Other

Global Bio-based Sustainable Aviation Fuel (SAF) Market, Segmentation by Blend Ratio:

Below 10%

10% ? 30%

30% ? 50%

Above 50%

Global Bio-based Sustainable Aviation Fuel (SAF) Market, Segmentation by Lifecycle Carbon Reduction:

Low Reduction (40% ? 60%)

Medium Reduction (60% ? 75%)

High Reduction (75% ? 90%)

Ultra-High Reduction (>90%)

Global Bio-based Sustainable Aviation Fuel (SAF) Market, Segmentation by Application:

Commercial Aircraft

Military Aircraft

Other

Companies Profiled:

Neste

World Energy

TotalEnergies

Honeywell

LanzaJet

EcoCeres

SkyNRG

Swedish Biofuels AB

Eni

Johnson Matthey (Virent)

Key Questions Answered:

1. How big is the global Bio-based Sustainable Aviation Fuel (SAF) market?

2. What is the demand of the global Bio-based Sustainable Aviation Fuel (SAF) market?
3. What is the year over year growth of the global Bio-based Sustainable Aviation Fuel (SAF) market?
4. What is the production and production value of the global Bio-based Sustainable Aviation Fuel (SAF) market?
5. Who are the key producers in the global Bio-based Sustainable Aviation Fuel (SAF) market?
6. What are the growth factors driving the market demand?

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