

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

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Abstracts

The global Biodiesel and Sustainable Aviation Fuel (SAF) market size is expected to reach \$ 133882 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

In 2025, global sales of biodiesel and sustainable aviation fuel (SAF) are projected to reach 65.45 million tons, with an average price of \$1,338 per ton.

Biodiesel and sustainable aviation fuel (SAF) are renewable fuels derived from sources such as vegetable oils, animal fats, waste cooking oils, and agricultural residues. Biodiesel is primarily used in diesel engines, while SAF is designed for aviation use, both offering lower carbon emissions and serving as sustainable alternatives to fossil fuels.

The feedstock sources for biodiesel and SAF (Sustainable Aviation Fuel) overlap significantly, primarily comprising waste oils and fats (such as used cooking oil and animal fats), vegetable oils (including rapeseed, palm, and soybean oils), and agricultural and forestry residues. China possesses abundant waste oil and fat resources, with an annual supply of approximately 4 to 6 million tons; as the world's largest exporter of waste oils and fats, the country provides a robust feedstock foundation for the production of both biodiesel and SAF. Feedstock costs constitute the dominant component, accounting for roughly 70% to 85% of the total production costs for both fuels. Consequently, fluctuations in the price of waste oils and fats directly impact product economics; for instance, under the HEFA production pathway, feedstock costs account for over 80% of the total SAF production cost.

Regarding cost structure, conventional biodiesel (FAME) is produced via a

transesterification process, which entails relatively low capital investment in equipment; however, the resulting product contains oxygen and exhibits poor low-temperature flow properties, leading to limited profit margins. In contrast, second-generation biodiesel (HVO) and SAF (produced via the HEFA pathway) utilize a hydrodeoxygenation and isomerization process. While this method requires higher capital intensity, it yields products with superior performance characteristics and significantly higher added value. Currently, the production cost of SAF (HEFA) is approximately two to three times that of conventional jet fuel. Feedstock costs account for the largest share of this total, while hydrogen consumption and catalyst replacement represent other significant cost components. Notably, a single hydrogenation unit can be flexibly configured by adjusting fractionation cut points to produce either HVO or SAF, thereby enabling the optimization of the product portfolio. Furthermore, the high-value utilization of byproducts such as glycerol (from the FAME pathway) or naphtha/diesel (from the HEFA pathway) can further enhance overall economic viability. As mandatory blending policies (such as the EU's *ReFuelEU* initiative) are implemented and economies of scale begin to take effect, the cost competitiveness of both fuels is expected to improve gradually.

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

This report is a detailed and comprehensive analysis of the world market for Biodiesel and 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 Biodiesel and Sustainable Aviation Fuel (SAF) that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

U.S. VS China: Biodiesel and Sustainable Aviation Fuel (SAF) domestic production,

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

This report profiles key players in the global Biodiesel and 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 Renewable Energy Group, Neste, ADM, Cargill, Valero Energy, Louis Dreyfus, Groupe Avril, Ag Processing, Wilmar International, Bunge, 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 Biodiesel and 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 Biodiesel and Sustainable Aviation Fuel (SAF) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Biodiesel and Sustainable Aviation Fuel (SAF) Market, Segmentation by Type:

Biodiesel

Sustainable Aviation Fuel (SAF)

Global Biodiesel and Sustainable Aviation Fuel (SAF) Market, Segmentation by Raw Materials:

Edible Vegetable Oil

Waste Oils/Fats

Others

Global Biodiesel and Sustainable Aviation Fuel (SAF) Market, Segmentation by Chemical Composition:

Ester-based Fuels

Alkane-based Fuels

Synthetic Hydrocarbons

Global Biodiesel and Sustainable Aviation Fuel (SAF) Market, Segmentation by Application:

Vehicle Fuels

Industrial Fuels

Chemical Industry

SAF

Companies Profiled:

Renewable Energy Group

Neste

ADM

Cargill

Valero Energy

Louis Dreyfus

Groupe Avril

Ag Processing

Wilmar International

Bunge

Greenergy

Verbio

Argent Energy

Moeve

Marathon Petroleum Corporation

Zhuoyue New Energy

Jiaao Enprotech

Hebei Jingu

Anhui Tianyi

Shanghai Zhongqi

Tangshan Jinlihai

Shandong Fenghui

Longhai Bioenergy

Key Questions Answered:

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

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