

Global Carbon-Neutral Jet Fuel Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Carbon-Neutral Jet Fuel market size was valued at US\$ 6725 million in 2025 and is forecast to a readjusted size of US\$ 20965 million by 2032 with a CAGR of 17.6% during review period.

In 2025, the global production of carbon-neutral jet fuel reached approximately 4.19 million tons, with an average global market price of around US\$1560/ton. In the same year, the global total production capacity of carbon-neutral jet fuel reached 5.23 million tons. The industry average gross profit margin of this product reached 32%. Carbon-neutral aviation fuel refers to alternative aviation fuels that significantly reduce or achieve net-zero carbon emissions throughout their lifecycle. It primarily utilizes renewable feedstocks or power-to-liquid (PtL) technology to synthesize hydrocarbon fuels from green hydrogen and captured carbon dioxide. While CO₂ emissions still occur during combustion, they are offset throughout the entire lifecycle through feedstock absorption or carbon capture, resulting in a 50%-90% reduction in carbon emissions compared to traditional jet fuel (Jet A-1).

The carbon-neutral aviation fuel industry chain can be divided into three main segments: upstream feedstock supply, midstream conversion and production, and downstream application. The upstream segment includes waste oil (UCO), agricultural straw, lignocellulosic acid, biomass, municipal solid waste, and green electricity-to-hydrogen and CO₂ capture systems. The midstream segment focuses on core production technologies, including HEFA, FT, ATJ, and PtL/e-SAF, converting feedstocks into aviation fuels that meet ASTM standards. The downstream segment involves demand driven by airlines, airport fuel supply systems, fuel blending, and international carbon emission reduction compliance systems.

Carbon-neutral aviation fuel is one of the core pathways for decarbonization in the aviation industry. It cannot be completely replaced by electric or hydrogen-powered aviation in the short to medium term, thus ensuring extremely strong demand. With the continued strengthening of international aviation emissions reduction policies, airlines are rapidly increasing their long-term SAF (Sustainable Aviation Fuel) procurement agreements, driving the industry from demonstration to large-scale production. In the next 10-20 years, SAF will gradually shift from "policy-driven" to "cost reduction + scale expansion-driven," especially with the PtL (Polymerized Tolerant Lift) route expected to become the mainstream source of incremental growth after 2030. The industry will exhibit a pattern of high growth, high capital investment, and a coexistence of various technological approaches.

This report is a detailed and comprehensive analysis for global Carbon-Neutral Jet Fuel market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Carbon-Neutral Jet Fuel market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Carbon-Neutral Jet Fuel market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Carbon-Neutral Jet Fuel market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Carbon-Neutral Jet Fuel market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Carbon-Neutral Jet Fuel

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Carbon-Neutral Jet Fuel market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Neste, TotalEnergies, Repsol, Shell, LanzaJet, Aemetis, Sinopec, Zhejiang Jiaao Enprotech, Cosmo Energy Holdings, ENEOS Corporation, etc.

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

Market Segmentation

Carbon-Neutral Jet Fuel market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

HEFA

FT

ATJ

PtL

Market segment by Raw Material Sources

Waste Oils

Biomass Cellulose

Municipal Solid Waste

CO₂ + Green Hydrogen Synthesis

Others

Market segment by Application

Military Aircraft

Civil Aircraft

Commercial Aircraft

Major players covered

Neste

TotalEnergies

Repsol

Shell

LanzaJet

Aemetis

Sinopec

Zhejiang Jiaao Enprotech

Cosmo Energy Holdings

ENEOS Corporation

SK Energy

Moeve

World Energy

Honeywell

EcoCeres

SkyNRG

Swedish Biofuels AB

Eni

Johnson Matthey (Virent)

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Carbon-Neutral Jet Fuel product scope, market overview, market

estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Carbon-Neutral Jet Fuel, with price, sales quantity, revenue, and global market share of Carbon-Neutral Jet Fuel from 2021 to 2026.

Chapter 3, the Carbon-Neutral Jet Fuel competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Carbon-Neutral Jet Fuel breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Carbon-Neutral Jet Fuel market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Carbon-Neutral Jet Fuel.

Chapter 14 and 15, to describe Carbon-Neutral Jet Fuel sales channel, distributors, customers, research findings and conclusion.

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