

Global SAF Production Technology Licensing Service Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global SAF Production Technology Licensing Service market size was valued at US\$ 500 million in 2025 and is forecast to a readjusted size of US\$ 1576 million by 2032 with a CAGR of 17.8% during review period.

SAF production process technology licensing services are B2B process technology offerings for sustainable aviation fuel projects. They typically include patent or proprietary process licensing, process packages, PDP/basic engineering, catalyst or proprietary equipment interfaces, and start-up and performance test support, covering HEFA, alcohol-to-jet, Fischer-Tropsch synthesis, PtL/e-SAF, catalytic hydrothermal, and other routes. The product's gross margin is approximately 58%.

Demand is driven by aviation decarbonization targets, blending obligations in regions such as the EU and UK, long-term airline offtake agreements, and low-carbon transformation of refineries. SAF production still accounts for less than 1% of global jet fuel consumption, but the number of projects under development is growing rapidly. Project owners rely more on process licensors with existing commercial or demonstration track records for financing, certification, and start-up assurance. Therefore, this service is not ordinary engineering consulting, but a high-value front-end technical service that packages ASTM pathways, yield models, feedstock windows, and operating experience.

On the supply side, the market is still dominated in the short term by HEFA and renewable diesel/SAF co-production technologies. Honeywell UOP, Topsoe, Axens, NEXTCHEM, and others benefit from the implementation of waste oil and lipid

hydrotreating projects. In the medium to long term, incremental growth will come from alcohol-to-jet, Fischer-Tropsch synthesis, biomass/waste routes, and PtL/e-SAF pathways, supporting commercialization of technology packages from LanzaJet, KBR, Johnson Matthey, Velocys, Lummus, and others. Market constraints mainly include project FID delays, feedstock availability, green hydrogen costs, and long-term offtake pricing, but once projects enter the FEED and financing stages, licensing and PDP expenditure becomes relatively rigid.

Medium-term growth is expected to be lower than the growth rate of SAF fuel sales because licensing revenue is front-end, one-off, and milestone-based. However, as more projects move from feasibility studies into FEED/FID, the revenue density and gross margin level of technology licensing services will continue to exceed those of conventional engineering services.

This report is a detailed and comprehensive analysis for global SAF Production Technology Licensing Service market. Both quantitative and qualitative analyses are presented by company, 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 SAF Production Technology Licensing Service market size and forecasts, in consumption value (\$ Million), 2021-2032

Global SAF Production Technology Licensing Service market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global SAF Production Technology Licensing Service market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global SAF Production Technology Licensing Service market shares of main players, in revenue (\$ Million), 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 SAF Production Technology Licensing Service

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 SAF Production Technology Licensing Service market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Honeywell UOP, Topsoe, Axens, LanzaJet, KBR, Johnson Matthey, Velocys, Chevron Lummus Global, NEXTCHEM, Lummus Technology, etc.

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

Market segmentation

SAF Production Technology Licensing Service 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. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Hydroprocessed Esters and Fatty Acids

Alcohol-to-Jet

Fischer-Tropsch

e-SAF and Power-to-Liquid

Catalytic Hydrothermolysis and Other

Market segment by Service Scope

- Patent and Process License
- Process Design Package
- Basic Engineering and FEED
- Integrated License and EPC Support
- Revamp and Optimization Service

Market segment by Feedstock Compatibility

- Lipids and Waste Oils
- Alcohol Feedstocks
- Syngas Feedstocks
- CO₂ and Green Hydrogen
- Lignocellulosic and Waste Biomass
- Mixed and Other Feedstocks

Market segment by Deployment Model

- Refinery Retrofit
- Grassroots SAF Plant
- Modular Small-Scale Unit
- Integrated Biorefinery
- Demonstration and FOAK Plant

Market segment by Application

HEFA SAF Plants

Alcohol-to-Jet SAF Plants

Fischer-Tropsch SAF Plants

e-SAF and PtL Plants

Renewable Diesel and SAF Co-Production

Refinery Co-Processing and Revamp

SAF Project FEED and EPC Packages

Market segment by players, this report covers

Honeywell UOP

Topsoe

Axens

LanzaJet

KBR

Johnson Matthey

Velocys

Chevron Lummus Global

NEXTCHEM

Lummus Technology

Shell Catalysts & Technologies

Technip Energies

Neste Engineering Solutions

Applied Research Associates

Licella

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe SAF Production Technology Licensing Service product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of SAF Production Technology Licensing Service, with revenue, gross margin, and global market share of SAF Production Technology Licensing Service from 2021 to 2026.

Chapter 3, the SAF Production Technology Licensing Service competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and SAF Production Technology Licensing Service market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of SAF Production Technology Licensing Service.

Chapter 13, to describe SAF Production Technology Licensing Service research findings and conclusion.

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