

Global SAF Production Technology Licensing Service Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global SAF Production Technology Licensing Service market size is expected to reach \$ 1576 million by 2032, rising at a market growth of 17.8% CAGR during the forecast period (2026-2032).

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 studies the global SAF Production Technology Licensing Service demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for SAF Production Technology Licensing Service, 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 SAF Production Technology Licensing Service that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global SAF Production Technology Licensing Service total market, 2021-2032, (USD Million)

Global SAF Production Technology Licensing Service total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: SAF Production Technology Licensing Service total market, key domestic companies, and share, (USD Million)

Global SAF Production Technology Licensing Service revenue by player, revenue and market share 2021-2026, (USD Million)

Global SAF Production Technology Licensing Service total market by Type, CAGR, 2021-2032, (USD Million)

Global SAF Production Technology Licensing Service total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world SAF Production Technology Licensing Service market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 SAF Production Technology Licensing Service Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global SAF Production Technology Licensing Service Market, Segmentation by Type:

Hydroprocessed Esters and Fatty Acids

Alcohol-to-Jet

Fischer-Tropsch

e-SAF and Power-to-Liquid

Catalytic Hydrothermolysis and Other

Global SAF Production Technology Licensing Service Market, Segmentation by Service Scope:

Patent and Process License

Process Design Package

Basic Engineering and FEED

Integrated License and EPC Support

Revamp and Optimization Service

Global SAF Production Technology Licensing Service Market, Segmentation by Feedstock Compatibility:

Lipids and Waste Oils

Alcohol Feedstocks

Syngas Feedstocks

CO₂ and Green Hydrogen

Lignocellulosic and Waste Biomass

Mixed and Other Feedstocks

Global SAF Production Technology Licensing Service Market, Segmentation by Deployment Model:

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

Global SAF Production Technology Licensing Service Market, Segmentation 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

Companies Profiled:

- 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

Key Questions Answered

1. How big is the global SAF Production Technology Licensing Service market?
2. What is the demand of the global SAF Production Technology Licensing Service market?
3. What is the year over year growth of the global SAF Production Technology Licensing Service market?
4. What is the total value of the global SAF Production Technology Licensing Service market?
5. Who are the Major Players in the global SAF Production Technology Licensing Service market?
6. What are the growth factors driving the market demand?

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