

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

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Abstracts

The global Sustainable Aviation Fuel (SAF) Solution market size is expected to reach \$ 20989 million by 2032, rising at a market growth of 16.0% CAGR during the forecast period (2026-2032).

Sustainable Aviation Fuel (SAF) Solution refers to the integrated suite of drop-in alternative jet fuels produced from renewable and sustainable resources, encompassing both Bio-SAF (derived from biological sources) and Synthetic SAF (e-SAF) (produced via Power-to-Liquid pathways). Unlike fossil-based kerosene, SAF offers a significantly lower lifecycle carbon footprint and can be blended with conventional jet fuel (up to 50% as permitted by ASTM D7566) or used as 100% neat fuel in the future, requiring no modifications to existing aircraft or infrastructure.

The upstream segment includes suppliers of bio-feedstocks (used cooking oil, animal fats, agricultural residues) and synthetic inputs (green hydrogen via electrolysis, captured CO₂). The midstream segment encompasses conversion technologies such as Hydroprocessed Esters and Fatty Acids (HEFA), Fischer-Tropsch (FT), Alcohol-to-Jet (AtJ), and Power-to-Liquid (PtL). This segment also includes technology licensing, engineering services, and carbon accounting solutions provided by specialized firms. The downstream segment comprises direct fuel sales to airlines, logistics blending, airport into-plane fueling, and corporate off-take agreements, serving commercial aviation, cargo, military, and corporate Scope 3 buyers.

The global average selling price for SAF is approximately US\$1,720 per ton, with an annual sales volume of 3.91 million tons in 2025. Bio-SAF currently dominates about 95% of the market volume, while e-SAF holds a smaller but rapidly growing share due to its higher scalability potential.

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 Sustainable Aviation Fuel (SAF) Solution production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Sustainable Aviation Fuel (SAF) Solution total production and demand, 2021-2032, (K Tons)

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

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

Global Sustainable Aviation Fuel (SAF) Solution consumption by region & country, CAGR, 2021-2032 & (K Tons)

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

consumption, key domestic manufacturers and share

Global Sustainable Aviation Fuel (SAF) Solution production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Tons)

Global Sustainable Aviation Fuel (SAF) Solution production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Tons)

Global Sustainable Aviation Fuel (SAF) Solution production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Tons)

This report profiles key players in the global Sustainable Aviation Fuel (SAF) Solution 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 Sustainable Aviation Fuel (SAF) Solution market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Tons) 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 Sustainable Aviation Fuel (SAF) Solution Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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

Biological SAF

Synthetic SAF

Global Sustainable Aviation Fuel (SAF) Solution Market, Segmentation by Blend Ratio:

Below 10%

10% ? 30%

30% ? 50%

Above 50%

Global Sustainable Aviation Fuel (SAF) Solution Market, Segmentation by Carbon Reduction Rate:

Low Reduction (40% ? 60%)

Medium Reduction (60% ? 75%)

High Reduction (75% ? 90%)

Ultra-High Reduction (>90%)

Global Sustainable Aviation Fuel (SAF) Solution 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 Sustainable Aviation Fuel (SAF) Solution market?
2. What is the demand of the global Sustainable Aviation Fuel (SAF) Solution market?
3. What is the year over year growth of the global Sustainable Aviation Fuel (SAF) Solution market?
4. What is the production and production value of the global Sustainable Aviation Fuel (SAF) Solution market?

5. Who are the key producers in the global Sustainable Aviation Fuel (SAF) Solution market?
6. What are the growth factors driving the market demand?

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