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Global Electro-sustainable Aviation Fuel (e-SAF) Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Electro-sustainable Aviation Fuel (e-SAF) market size is predicted to grow from US$ 34.24 million in 2025 to US$ 98 million in 2032; it is expected to grow at a CAGR of 16.6% from 2026 to 2032.

Electric sustainable aviation fuel is a low-carbon or near-zero fossil carbon aviation fuel produced through a "power-hydrogen-synthetic fuel" pathway, using renewable electricity as its core energy input. It is also commonly referred to as Power-to-Liquid SAF (PtL-SAF), electric aviation fuel, or synthetic aviation fuel. A typical production process utilizes low-carbon electricity from wind, solar, or hydropower to drive water electrolysis equipment to produce green hydrogen. Simultaneously, carbon dioxide is obtained from direct air capture (DAC), bio-based processes, or industrial emission sources that comply with relevant regulations. The hydrogen and carbon dioxide are then converted into syngas, methanol, or other intermediates, which are further synthesized into liquid hydrocarbon products that meet aviation fuel performance requirements through Fischer-Tropsch synthesis, methanol-to-jet, and other routes. Unlike HEFA-type bio-SAF, which uses waste oils, animal and vegetable oils as raw materials, e-SAF, in principle, does not rely on limited biomass resources. Its core raw materials are renewable electricity, water, green hydrogen, and sustainable carbon sources, thus possessing greater long-term scalability potential. After meeting ASTM and other airworthiness fuel technical specifications, the final product can be blended with traditional aviation kerosene according to approved pathways and prescribed ratios, and utilized in existing aviation fuel storage and transportation, airport refueling, and aircraft engine systems.

The e-sustainable aviation fuel industry chain exhibits a clear cross-industry integration characteristic, encompassing "new energy power—green hydrogen—carbon

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capture—synthetic fuel—aviation consumption." The upstream mainly includes renewable energy power generation facilities such as wind power, photovoltaic power, and hydropower, as well as green hydrogen production equipment such as electrolyzers, power systems, pure water treatment equipment, hydrogen storage equipment, and compressors. It also involves carbon dioxide capture, purification, compression, and transportation. Carbon sources can come from direct air capture, biomass conversion processes, or industrial point sources that meet policy standards. The midstream is the core of the e-SAF industry chain. First, green hydrogen is produced through water electrolysis. Then, the green hydrogen and captured carbon dioxide are combined using processes such as reverse water-gas conversion to produce syngas. Subsequently, synthetic aviation kerosene is produced using Fischer-Tropsch synthesis and processes such as hydrocracking, isomerization, and distillation. Another technical route first synthesizes green methanol and then converts it into aviation fuel through processes such as Methanol-to-Jet. Midstream companies also need to configure large-scale electrolytic hydrogen production, carbon capture, synthesis reactors, refining and upgrading facilities, product testing, and storage and transportation facilities, resulting in large-scale investment and high system integration complexity. Downstream companies mainly include aviation fuel traders, refining and blending companies, airport fuel suppliers, and airlines, ultimately applying the technology to commercial passenger transport, air cargo, business aviation, and other air transport sectors. The economic viability of the entire industry chain is highly dependent on factors such as renewable electricity prices, electrolyzer efficiency and investment costs, green hydrogen costs, carbon dioxide sources and capture costs, synthesis unit utilization rates, and SAF mandatory blending policies. Among these, renewable electricity supply is typically a key fundamental condition determining e-SAF production costs and lifecycle emission reduction levels.

In the long term, e-SAF is considered one of the most strategically valuable technological routes for achieving deep decarbonization in the aviation industry, particularly suitable for medium- and long-haul aviation markets where large-scale substitution through battery-powered or direct hydrogen energy is difficult. Compared to the most commercially viable HEFA-type SAF, e-SAF currently faces challenges such as high production costs, relatively low energy conversion efficiency, large capital investment, and insufficient supply of green hydrogen and sustainable carbon dioxide. However, its greatest long-term advantage lies in its freedom from the fundamental constraints of sustainable biomass feedstocks like waste oils, allowing for greater capacity expansion in regions rich in renewable energy resources. As the global aviation industry strives for net-zero emissions by 2050, and as markets like the EU gradually establish specific requirements for the use of SAF and synthetic aviation fuels,

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e-SAF is expected to gradually move from current demonstration projects and the first batch of commercial installations into large-scale construction. Future industry competition will extend from single fuel production technology to a comprehensive range of capabilities, including low-cost green electricity acquisition, large-scale green hydrogen production, low-carbon carbon dioxide sources, FT or methanol route conversion efficiency, financing costs, and long-term airline purchase agreements. In the short to medium term, the cost of e-SAF is expected to remain significantly higher than that of traditional aviation kerosene and some bio-based SAFs, requiring policy subsidies, mandatory blending mechanisms, carbon pricing, and long-term procurement agreements to drive market formation. However, with the continued cost reduction of renewable electricity, electrolyzers, direct air capture, and synthetic fuel plants, e-SAF is expected to become an important source of new global SAF supply after the 2030s, gradually forming a new energy industry chain connecting multiple trillion-dollar industries such as new energy, hydrogen energy, carbon capture, chemical refining, and air transport. IATA believes that SAF as a whole may account for a significant portion of the emissions reductions required for the aviation industry to achieve net-zero emissions by 2050, while EASA also lists PtL as one of the main SAF technology routes with high potential for future scale expansion.

Report Scope

LPI (LP Information)' newest research report, the “Electro-sustainable Aviation Fuel (e-SAF) Industry Forecast” looks at past sales and reviews total world Electro-sustainable Aviation Fuel (e-SAF) sales in 2025, providing a comprehensive analysis by region and market sector of projected Electro-sustainable Aviation Fuel (e-SAF) sales for 2026 through 2032. With Electro-sustainable Aviation Fuel (e-SAF) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Electro-sustainable Aviation Fuel (e-SAF) industry.

This Insight Report provides a comprehensive analysis of the global Electro-sustainable Aviation Fuel (e-SAF) landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Electro-sustainable Aviation Fuel (e-SAF) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Electro-sustainable Aviation Fuel (e-SAF) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors

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shaping the global outlook for Electro-sustainable Aviation Fuel (e-SAF) and breaks down the forecast by CO? Source, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Electro-sustainable Aviation Fuel (e-SAF).

This report presents a comprehensive overview, market shares, and growth opportunities of Electro-sustainable Aviation Fuel (e-SAF) market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by CO? Source:

DAC-based E-SAF

Biogenic CO?-based E-SAF

Industrial Point-source CO?-based E-SAF

Others

Segmentation by Product Usage State:

Neat e-SAF

Blended e-SAF

Segmentation by e-SAF Volumetric Blend Ratio:

?10%

10%–30%

30%–50%

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?50%

Segmentation by Application:

Military Aviation (Fighter Jets, Transport Aircraft, Aerial Refueling Tankers, Airborne Early Warning Aircraft, Patrol Aircraft, etc.)

Civil Aviation (Passenger Aircraft, Cargo Aircraft, Business Jets, General Aviation Aircraft, etc.)

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

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- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa
  - Egypt
  - South Africa
  - Israel
  - Turkey
  - GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

- Twelve
- Metafuels AG
- Norsk e-Fuel
- Power2X
- SAF+ Consortium

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P2X Europe

Arcadia eFuels

Infinium

HIF Global

INERATEC GmbH

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