

Global Ethanol-based Aviation Fuel (ETJ) Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Ethanol-based Aviation Fuel (ETJ) market size is predicted to grow from US\$ 54.78 million in 2025 to US\$ 273 million in 2032; it is expected to grow at a CAGR of 25.9% from 2026 to 2032.

Ethanol-based aviation fuel (ETJ) is a sustainable aviation fuel (SAF) that meets aviation fuel standards, produced from bioethanol, cellulosic ethanol, waste ethanol, or low-carbon ethanol through processes such as dehydration, oligomerization, and hydrogenation. ETJ fuel can be directly blended with conventional Jet A or Jet A-1 aviation kerosene without requiring modifications to existing aircraft engines and airport refueling infrastructure. Compared to traditional fossil aviation kerosene, ETJ fuel typically achieves greenhouse gas emission reductions of 50%–80% or more over its entire lifecycle, making it a key technological route for the international air transport industry to achieve net-zero emissions.

The upstream of the ETJ industry chain mainly includes the supply of raw materials such as corn, sugarcane, lignocellulosic acid, biomass waste, and industrial tail gas fermentation ethanol, as well as ethanol production enterprises; the midstream is the ETJ fuel manufacturing stage, including ethanol pretreatment, ATJ conversion, fuel refining, and certification; and the downstream includes airlines, airport fuel suppliers, military aviation departments, and carbon trading markets. With the gradual implementation of mandatory blending policies for SAF globally, ETJ is becoming the most important large-scale supplementary pathway besides HEFA (Heated, Unsaturated, and Fertilized) fuels, with the advantage of leveraging the existing massive global ethanol industry infrastructure to achieve rapid capacity expansion. ETJ is considered one of the fastest-growing SAF routes over the next decade. Currently, the global SAF market remains undersupplied, with SAF production accounting for only

about 0.7% of global aviation fuel consumption in 2025, far below the aviation industry's decarbonization targets. Due to limited waste oil resources, the HEFA route faces raw material bottlenecks in the future, while ETJ can expand based on the global annual ethanol production capacity of over 100 billion liters. Therefore, it is widely regarded by the International Air Transport Association (IATA), airlines, and fuel producers as a key development direction for the next stage. Driven by policies such as the US IRA Act and the EU's ReFuelEU Aviation, investment in ETJ projects has accelerated significantly, and it is expected to become the second most popular SAF production route after HEFA in the future.

United States market for Ethanol-based Aviation Fuel (ETJ) is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Ethanol-based Aviation Fuel (ETJ) is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Ethanol-based Aviation Fuel (ETJ) is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Ethanol-based Aviation Fuel (ETJ) players cover LanzaJet, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

This Insight Report provides a comprehensive analysis of the global Ethanol-based Aviation Fuel (ETJ) 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 Ethanol-based Aviation Fuel (ETJ) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Ethanol-based Aviation Fuel (ETJ) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Ethanol-based Aviation Fuel (ETJ) and breaks down the forecast by Type, 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 Ethanol-based Aviation Fuel (ETJ).

This report presents a comprehensive overview, market shares, and growth opportunities of Ethanol-based Aviation Fuel (ETJ) market by product type, application, key players and key regions and countries.

Segmentation by Type:

Corn Ethanol ETJ

Sugarcane Ethanol ETJ

Cellulose Ethanol ETJ

Industrial Waste Gas Ethanol ETJ

Waste Ethanol ETJ

Segmentation by Carbon Sources:

First-Generation Bioethanol ETJ

Second-Generation Cellulose ETJ

Waste Recycled Carbon ETJ

Carbon Capture Ethanol ETJ

Segmentation by Application:

Military Aircraft

Civil Aircraft

Commercial Aircraft

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

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.

LanzaJet

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