

Global SAF Production Technology Licensing Service Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global SAF Production Technology Licensing Service market size is predicted to grow from US\$ 475 million in 2025 to US\$ 1585 million in 2032; it is expected to grow at a CAGR of 18.9% from 2026 to 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.

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

This Insight Report provides a comprehensive analysis of the global SAF Production Technology Licensing Service 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 SAF Production Technology Licensing Service portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global SAF Production Technology Licensing Service market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for SAF Production Technology Licensing Service 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 SAF Production Technology Licensing Service.

This report presents a comprehensive overview, market shares, and growth

opportunities of SAF Production Technology Licensing Service market by product type, application, key players and key regions and countries.

Segmentation by Type:

Hydroprocessed Esters and Fatty Acids

Alcohol-to-Jet

Fischer-Tropsch

e-SAF and Power-to-Liquid

Catalytic Hydrothermolysis and Other

Segmentation by Service Scope:

Patent and Process License

Process Design Package

Basic Engineering and FEED

Integrated License and EPC Support

Revamp and Optimization Service

Segmentation by Feedstock Compatibility:

Lipids and Waste Oils

Alcohol Feedstocks

Syngas Feedstocks

CO₂ and Green Hydrogen

Lignocellulosic and Waste Biomass

Mixed and Other Feedstocks

Segmentation by Deployment Model:

Refinery Retrofit

Grassroots SAF Plant

Modular Small-Scale Unit

Integrated Biorefinery

Demonstration and FOAK Plant

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

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.

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

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