

Global Sustainable Aviation Fuel (SAF) Solution Market Growth 2026-2032

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Abstracts

The global Sustainable Aviation Fuel (SAF) Solution market size is predicted to grow from US\$ 6579 million in 2025 to US\$ 21007 million in 2032; it is expected to grow at a CAGR of 17.0% from 2026 to 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 .

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Sustainable Aviation Fuel (SAF) Solution 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 Sustainable Aviation Fuel (SAF) Solution.

This report presents a comprehensive overview, market shares, and growth opportunities of Sustainable Aviation Fuel (SAF) Solution market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Biological SAF

Synthetic SAF

Segmentation by Blend Ratio:

Below 10%

10% ? 30%

30% ? 50%

Above 50%

Segmentation by Carbon Reduction Rate:

Low Reduction (40% ? 60%)

Medium Reduction (60% ? 75%)

High Reduction (75% ? 90%)

Ultra-High Reduction (>90%)

Segmentation by Application:

Commercial Aircraft

Military Aircraft

Other

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 analysing the company's coverage, product portfolio, its market penetration.

Neste

World Energy

TotalEnergies

Honeywell

LanzaJet

EcoCeres

SkyNRG

Swedish Biofuels AB

Eni

Johnson Matthey (Virent)

Key Questions Addressed in this Report

What is the 10-year outlook for the global Sustainable Aviation Fuel (SAF) Solution market?

What factors are driving Sustainable Aviation Fuel (SAF) Solution market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Sustainable Aviation Fuel (SAF) Solution market opportunities vary by end market size?

How does Sustainable Aviation Fuel (SAF) Solution break out by Type, by Application?

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