

Bio-Synthetic Fuel Market Forecasts to 2034 – Global Analysis By Fuel Type (Bio-Synthetic Diesel, Bio-Synthetic Gasoline, Bio-Synthetic Jet Fuel (SAF), Bio-Synthetic Methanol and Bio-Synthetic Natural Gas (Bio-SNG)), Feedstock, Technology, Application, End User and By Geography

<https://marketpublishers.com/r/B937196A7416EN.html>

Date: July 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: B937196A7416EN

Abstracts

According to Statistics MRC, the Global Bio-Synthetic Fuel Market is accounted for \$45.8 billion in 2026 and is expected to reach \$91.2 billion by 2034 growing at a CAGR of 9.0% during the forecast period. Bio-synthetic fuels are sustainable energy sources created by integrating biomass with modern chemical conversion techniques. Raw materials like crop waste, algae, and biodegradable matter are processed into usable fuels through methods such as fermentation, gasification, and catalytic synthesis. These fuels serve as eco-friendly substitutes for conventional fossil fuels, helping to lower carbon emissions and enhance energy independence. Suitable for sectors like transport, aviation, and industry, they require minimal modifications to existing systems. Growing research, innovation, and funding are driving their adoption, positioning bio-synthetic fuels as an effective pathway to support global efforts in reducing environmental impact and promoting a cleaner, more sustainable energy future.

According to the International Renewable Energy Agency (IRENA), advanced biofuels could supply up to 10% of transport energy demand by 2050, contributing to a reduction of 2.1 gigatonnes of CO₂ annually if scaled globally.

Market Dynamics:

Driver:

Rising demand for low-carbon energy solutions

The increasing need to cut greenhouse gas emissions is strongly boosting the bio-synthetic fuel market. Governments and industries are focusing on eco-friendly energy sources to address climate concerns and meet strict regulations. Bio-synthetic fuels, produced from renewable biomass, emit fewer pollutants throughout their lifecycle than fossil fuels. Their ability to work with current infrastructure makes them highly practical. As nations aim for carbon neutrality, the demand for cleaner fuels is growing rapidly. This transition toward sustainable energy is encouraging technological advancements, higher investments, and wider adoption of bio-synthetic fuel solutions across various sectors globally.

Restraint:

Limited feedstock supply chain infrastructure

An underdeveloped supply chain for biomass materials significantly restricts the expansion of the bio-synthetic fuel market. The process of gathering, storing, and transporting feedstock from various locations is both complicated and expensive. Variations in availability and quality due to seasonal factors add further challenges. In many areas, insufficient infrastructure makes large-scale production difficult to achieve. These inefficiencies create uncertainty for producers and affect output consistency. Improving logistics, storage systems, and supply chain organization is crucial for addressing this issue and enabling steady and reliable production of bio-synthetic fuels.

Opportunity:

Expansion in aviation sustainable fuel demand

The rising demand for sustainable fuels in the aviation industry creates strong growth prospects for the bio-synthetic fuel market. Airlines are focusing on reducing emissions and meeting environmental goals by using cleaner fuel alternatives. These fuels can be used in current aircraft systems without major modifications, enhancing their feasibility. Increasing air travel and strict emission norms are boosting their adoption. Support from governments and investments in production facilities are also contributing to expansion. As the aviation sector aims for sustainability, bio-synthetic fuels are likely to play a crucial role in future fuel strategies.

Threat:

Policy uncertainty and regulatory changes

Changing government rules and uncertain policy environments create risks for the bio-synthetic fuel market. Adjustments in financial incentives, taxes, and renewable energy goals can influence the economic viability of projects. Differences in regulations between regions add complexity for companies operating globally. Businesses that depend on policy support may face losses if benefits are withdrawn. Such unpredictability discourages investment and delays project execution. Without stable and clear long-term policies, the market may struggle to grow consistently, making regulatory uncertainty a key threat to the development of bio-synthetic fuels.

Covid-19 Impact:

The outbreak of COVID-19 affected the bio-synthetic fuel market in both negative and positive ways. In the early stages, restrictions disrupted supply chains, slowed production, and postponed ongoing and planned projects. Lower demand for energy, especially in aviation and transportation, reduced fuel usage significantly. Financial uncertainty caused delays in investments and development activities. Despite these setbacks, the situation underscored the need for cleaner and more reliable energy sources. As economies recover, governments and industries are prioritizing sustainable solutions, increasing attention toward renewable fuels, which is likely to drive future growth in the bio-synthetic fuel market.

The bio-synthetic jet fuel (SAF) segment is expected to be the largest during the forecast period

The bio-synthetic jet fuel (SAF) segment is expected to account for the largest market share during the forecast period because of rising demand from the aviation sector aiming to lower emissions. Airlines prefer SAF since it can be used in existing aircraft engines without significant changes, making it highly practical. Strict environmental regulations and global decarbonization goals are accelerating its usage worldwide. Unlike other transport modes, aviation has limited alternative energy options, which increases reliance on SAF. Ongoing investments, collaborations, and improvements in production processes are supporting its expansion, solidifying its leading position in the overall bio-synthetic fuel industry.

The transportation segment is expected to have the highest CAGR during the forecast

period

Over the forecast period, the transportation segment is predicted to witness the highest growth rate, mainly driven by the need to lower emissions and shift away from conventional fuels. The use of cleaner fuels in vehicles, aircraft, and ships is increasing significantly. Supportive government policies and strict environmental norms are encouraging the transition to sustainable fuel options. Bio-synthetic fuels are gaining traction because they can be used in current engines without major changes. Additionally, increasing investments in green mobility and the continuous rise in global transportation demand are fueling the expansion of this segment.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share owing to its advanced environmental policies, commitment to carbon neutrality, and early transition toward renewable energy solutions. Governments in the region enforce strict emission standards and encourage the use of sustainable fuels through incentives and regulations. Significant investments in technology development, infrastructure, and production capacity are driving market growth. The region also benefits from the presence of major industry players and innovation hubs. Rising demand from sectors like transportation and aviation further accelerates adoption, establishing Europe as a leading contributor to the global bio-synthetic fuel industry.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by strong economic development, increasing energy needs, and a shift toward cleaner energy solutions. Countries like China, India, and Japan are actively supporting renewable fuel adoption through favourable policies and initiatives. The region benefits from ample biomass availability and rising investments in advanced fuel technologies. Growing transportation and aviation industries are further boosting demand. With improving infrastructure and greater environmental consciousness, Asia-Pacific is becoming a major centre for expansion in the global bio-synthetic fuel market.

Key players in the market

Some of the key players in Bio-Synthetic Fuel Market include ExxonMobil, Shell, Chevron, BP, TotalEnergies, Neste, Renewable Energy Group (REG), Gevo, LanzaTech, Fulcrum BioEnergy, Velocys, Aemetis, Synata Bio, Enerkem, Marathon

Petroleum Corporation, Sasol, LanzaJet and SkyNRG.

Key Developments:

In April 2026, ExxonMobil strengthens collaboration with QatarEnergy to expand international LNG partnership portfolio. The enhanced partnership with QatarEnergy signals ExxonMobil's intent to secure long-term supply stability and expand its international LNG portfolio, showing how major players position themselves to meet energy needs, technological developments, and market growth.

In April 2026, TotalEnergies and Masdar have signed a binding agreement to establish a \$2.2 billion joint venture aimed at expanding renewable energy capacity in nine countries across Asia. The joint venture will have a portfolio capacity of 3 GW of operational assets and 6 GW of assets in advanced development, which are expected to be operational by the end of the decade.

In October 2025, bp pulse has extended its agreement with Transport for London (TfL) to 2029, continuing its commitment to providing reliable charging solutions across London. Since the framework began in 2018, bp pulse has been instrumental in supporting the adoption of electric vehicles, particularly for the ride-hail and taxi sectors.

Fuel Types Covered:

Bio-Synthetic Diesel

Bio-Synthetic Gasoline

Bio-Synthetic Jet Fuel (SAF)

Bio-Synthetic Methanol

Bio-Synthetic Natural Gas (Bio-SNG)

Feedstocks Covered:

Biomass

Municipal Solid Waste (MSW)

Industrial Waste

Algae & Microorganisms

Energy Crops

Technologies Covered:

Gasification & Fischer-Tropsch Synthesis

Pyrolysis & Hydro-processing

Fermentation & Biochemical Conversion

Power-to-Liquid (PtL) with Renewable Hydrogen Integration

Catalytic Conversion & Advanced Synthetic Pathways

Applications Covered:

Transportation

Power Generation

Industrial Heating & Processes

Residential & Commercial Heating

End Users Covered:

Automotive OEMs & Fleet Operators

Airlines & Aviation Sector

Shipping & Logistics Companies

Utilities & Independent Power Producers (IPPs)

Industrial Manufacturers

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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