OMV



SAF Supply: State of play, challenges & development from the supplier perspective

3rd ISCC SAF Stakeholder Meeting September 12, 2024



OMV's journey to becoming a leading European sustainable fuels, chemicals, and energy company









Chemicals

- → Base chemicals
- → Polyolefins

Fuels & Feedstock

- → Refining
- → Marketing

Energy

- → Exploration & Production
- → Gas Marketing & Power

Growth areas

- → Middle East, Asia & US
- → Specialty products
- → Circular chemicals
- → Diversification

- → Sustainable Aviation Fuels
- → Retail mobility and convenience

Clean CCS ROACE ≥12%

- → Geothermal energy
- → Renewable power
- → Gas production (e.g., Neptun Deep)

Net Zero by 2050

in scope 1, 2 and 3

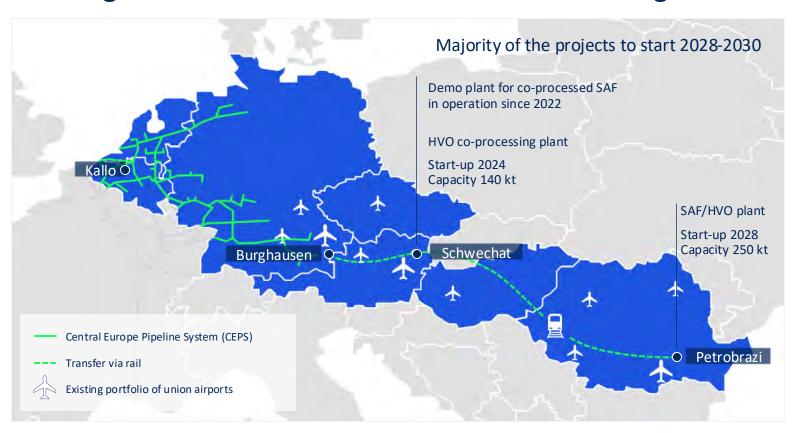
EUR 3.8 bn² p.a. organic investments

thereof 40-50% in sustainable projects

Project pipeline in place to build up 1.5 million tons of renewable fuels & chemical feedstock production capacity



Securing outlets in OMV aviation hubs and entering new markets



Actively growing SAF demand

- Continuing successful pre-marketing
- Scouting market entries in ARAregion, Germany, and other adjacent airports
- Additional growth opportunities outside Europe

Successful pre-marketing of SAF volumes and development of innovative business solution

Signed MoUs to supply SAF 2024-2030













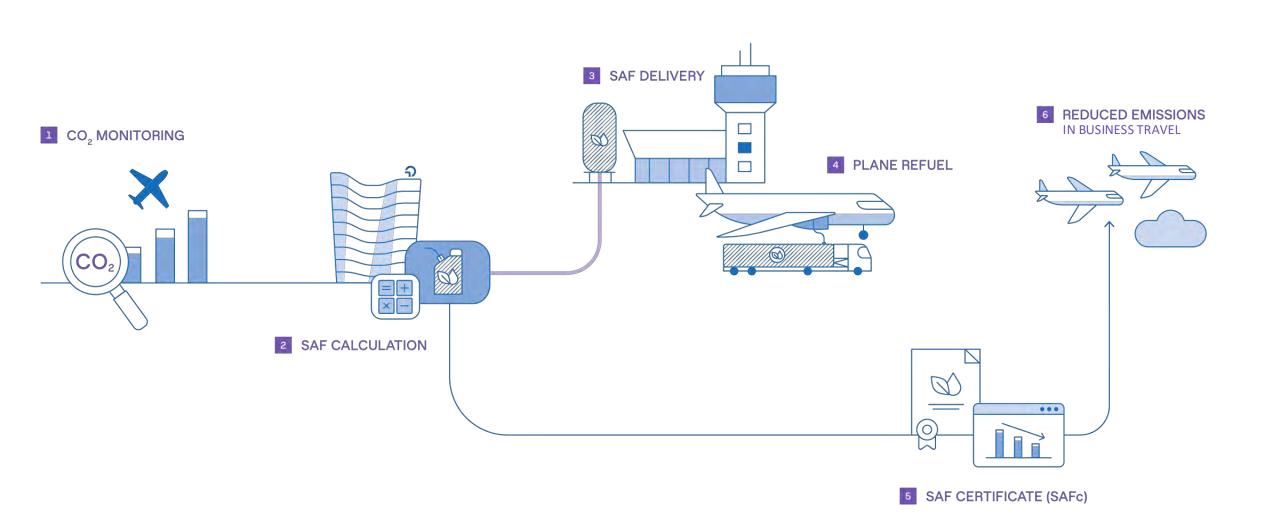
OMV SAF Business Solutions to accelerate decarbonization of corporate market

SAF-certificates sold to

- Microsoft
- Chain-of-custody model guided by ISCC Credit Transfer System

SAF Certificates for Companies





Challenges for ramping-up SAF supply





Limited regulatory clarity and coherence

Alignment of ReFuel EU, ETS and Corsia needed to establish a level playing field internationally.



Limited voluntary demand

Stimulating voluntary demand is crucial to accelerate decarbonization in Aviation.

Harmonization and data exchange by book & claim platform providers.



Barriers for investment scale-up

Both legislative stability and firm customer commitment needed to secure investments and facilitate SAF scaling.

We are on a path of transformation to become a leading sustainable fuels producer in Europe.

Opportunities for growth

- More innovative production pathways and feedstocks
- Increasing voluntary commitments and SBTi targets set by corporations
- Partnerships across the value chain will facilitate the aviation decarbonization





Thank you!



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