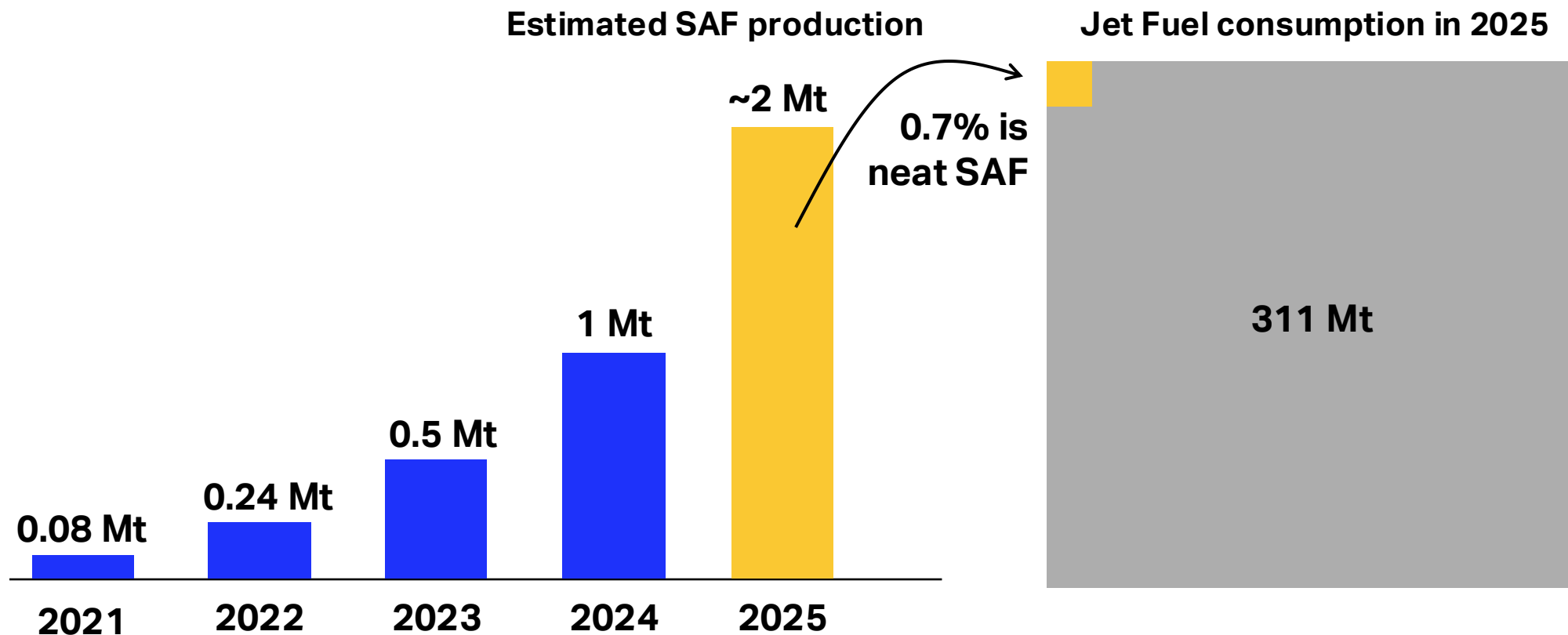


Panel Discussion – Global SAF Perspectives and Policies: Crossing Continental Divides

2025 ISCC Technical Stakeholder Meeting
– Sustainable Aviation Fuels (SAF)



Global SAF production status



- **SAF production is expected to double** in 2025, but the share remains very small in the jet fuel pool.
- Around **1.2 Mt** of SAF is required to cover the **EU and UK mandates in 2025**.

Source: IATA Sustainability & Economics

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**Moderator:**

Azim Norazmi
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Panellists:

Diego Martinez Del Rio Samper
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Global SAF Policy Landscape (as of Aug 2025)

North America

In the US, The One Big Beautiful Bill (OBBB) was signed into law by President Trump on 4 July 2025. **Section 45Z – the Clean Fuel Production Credit** extends robust, dedicated support to SAF. Under 45Z, SAF producers earn tax credits based on lifecycle GHG reductions, essentially rewarding cleaner fuel pathways, incentivizing innovations, and narrowing the cost gap with CAF.

SAF policies are also being developed in **Canada and Mexico, etc.**

Europe

Initial observations of the **unintended consequences** on SAF mandate in the **EU and UK**:

- Partly unclear ReFuelEU Aviation regulation and national implementation
- SAF pricing intransparency
- Prevalence of SAF surcharges/compliance fees
- Obstacles in accessing sustainability documentation

Asia Pacific

Several states have already implemented or are developing SAF policies, including targets/mandates like **Singapore, India, Indonesia, Japan, Thailand, South Korea, and Malaysia, etc**

Lack of supply-side incentive measures

North Asia:

China requires 1% of SAF use to 8 airports, for domestic flights

Key Trends:

- The **number of SAF policies is increasing rapidly across the world**, with a large proportion being introduced in **emerging economies**.
- SAF policy developments around the world indicate **a mixture of "carrot", "stick", and novel policy approaches/instruments**.
- **Unintended consequences** encountered in countries/regions where SAF policies are already implemented reflect a "learning-by-doing" approach.

South America

Brazil sets an emissions-based mandate beginning from 2027, increasing to 10% by 2037, through the use of SAF in domestic flights
The region would benefit from a regional integration approach (i.e. economies of scale, feedstock availability, etc)

Ongoing developments in other countries, including **Mexico, Colombia, Ecuador, Argentina, Chile, and Peru**.

Africa

Early stages SAF policy development in **Kenya**

SAF feasibility studies being conducted

Middle East

UAE aims to supply 1% of locally-produced SAF to national carriers

Oman is also in the process of developing its SAF policies

This is a non-exhaustive list of SAF policies across the world.

Source: IATA Sustainability & Economics

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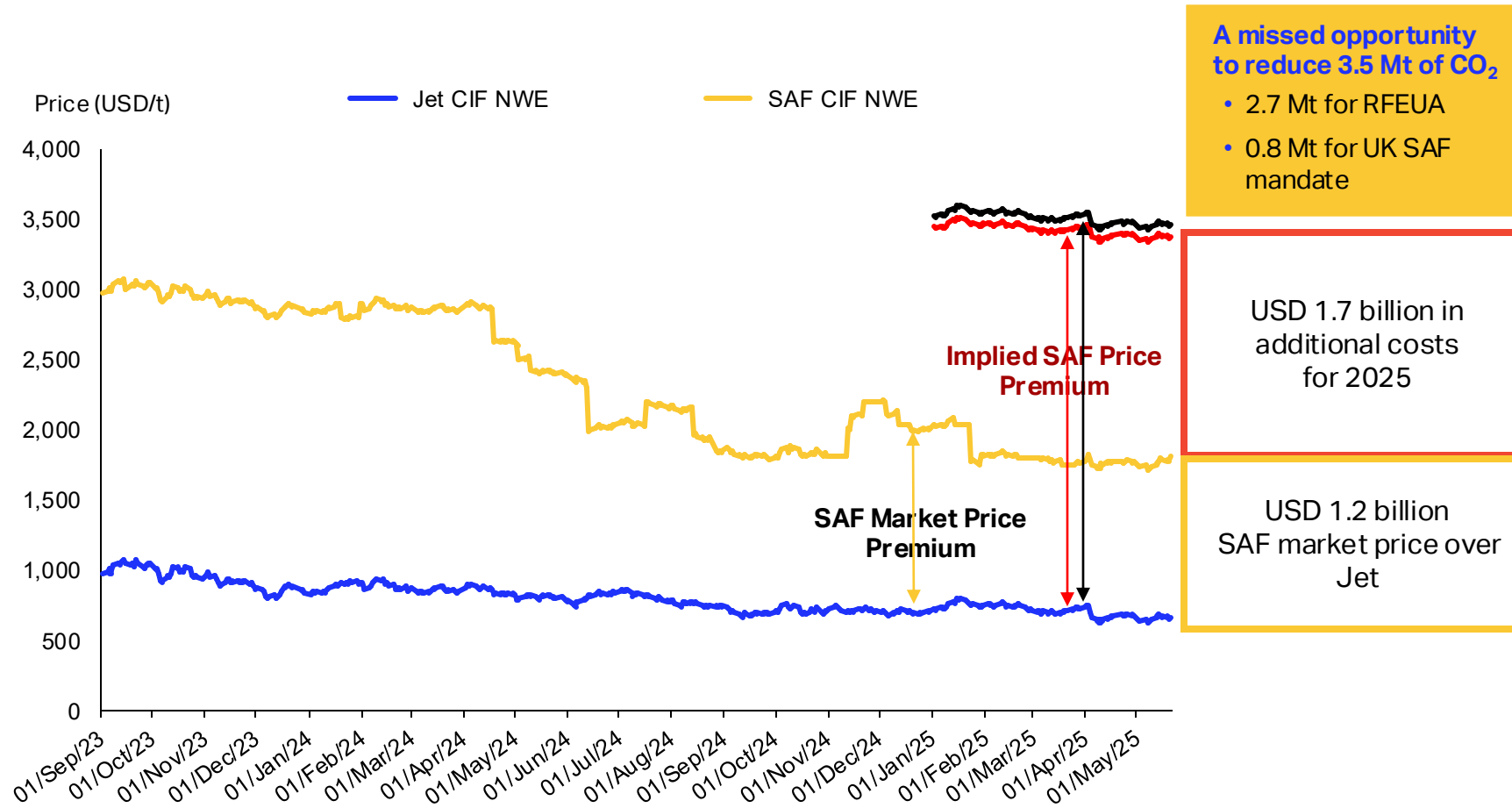


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Unintended Consequences from the EU & the UK SAF Mandates – they must be corrected



The implied SAF price as shown is derived from the average SAF compliance fee aggregated across several EU airports. The data is obtained from a sample of airlines operating at these EU airports. The sample may not be representative. Further, compliance fees vary significantly across different airports. In addition, airlines may have different fuel supply models, and not every airline will have the same fuel cost structure or exposure to the SAF compliance fees.

Urgent needs

1. **Transparency** on how SAF and associated costs are included in fuel supply contracts
2. **Certainty** that airlines will receive the sustainability certificates for claims under EU/UK ETS and CORSIA
3. **Options** for airlines to choose SAF-specific supply contracts, including the possibility of self-supply

Source: S&P Global Commodity Insights & IATA Sustainability and Economics