



Sustainable Aviation Fuel

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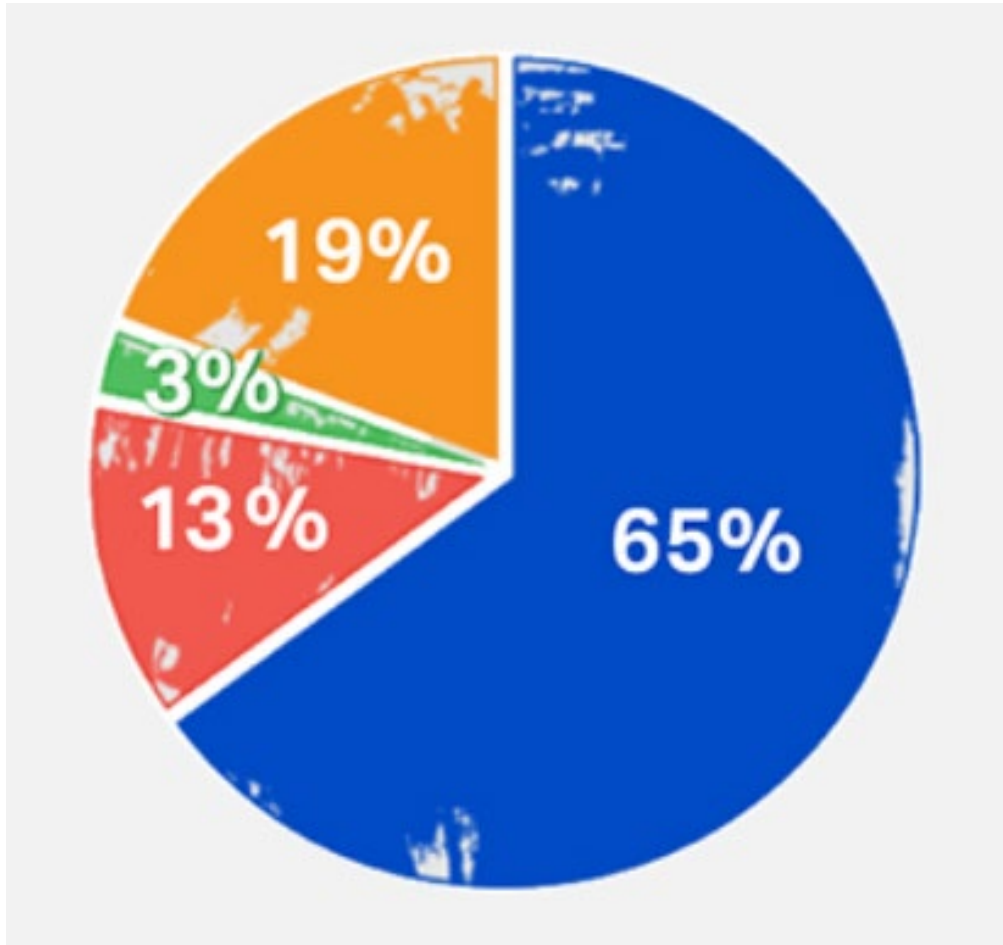
- ✦ IATA AGM 2021 adopted Net Zero industry target
- ✦ ICAO Assembly 2022 adopted Net Zero Long Term Aspirational Goal
- ✦ Sustainable Aviation Fuel is cornerstone of strategy

Net-Zero reliance on SAF



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- 65% Sustainable Aviation Fuel (SAF)
- 13% New technology, electric and hydrogen
- 3% Infrastructure and operational efficiencies
- 19% Offsets and carbon capture



SAF production



**8 million
liters
2016**



**350
million
liters
2022**



**1.9
billion
liters
2024**



**234
billion
liters
2050**



SAF price 2-3x Jet A-1



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Note: All prices in U.S. cents per gallon
Source: Argus Media | Graphic by Sourasis Bose

Challenges

- 🌿 Current cost of SAF
- 🌿 Government support to attract the financial community and fuel manufacturers to invest in SAF production capability
- 🌿 Need to achieve economies of scale to support transition to SAF
- 🌿 Increase global accessibility



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- ✦ Availability of feedstock
- ✦ Avoidance of impact on global food security
- ✦ The need to attract significant levels of investment in production capabilities.
- ✦ The need to ensure that the technology is made available to all states in all parts of the world so SAF production can become universal.

Government support

- 🌿 US has introduced production tax credits for SAF under the US Inflation Reduction Act
- 🌿 The EU ReFuelEU Aviation regulation, promotes the increased use of sustainable aviation fuels. Obliges aviation fuel suppliers to ensure that all fuel made available to aircraft operators at EU airports contains a minimum of 2% SAF from 2025
- 🌿 book and claim programs to address inconsistent availability



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Thank you