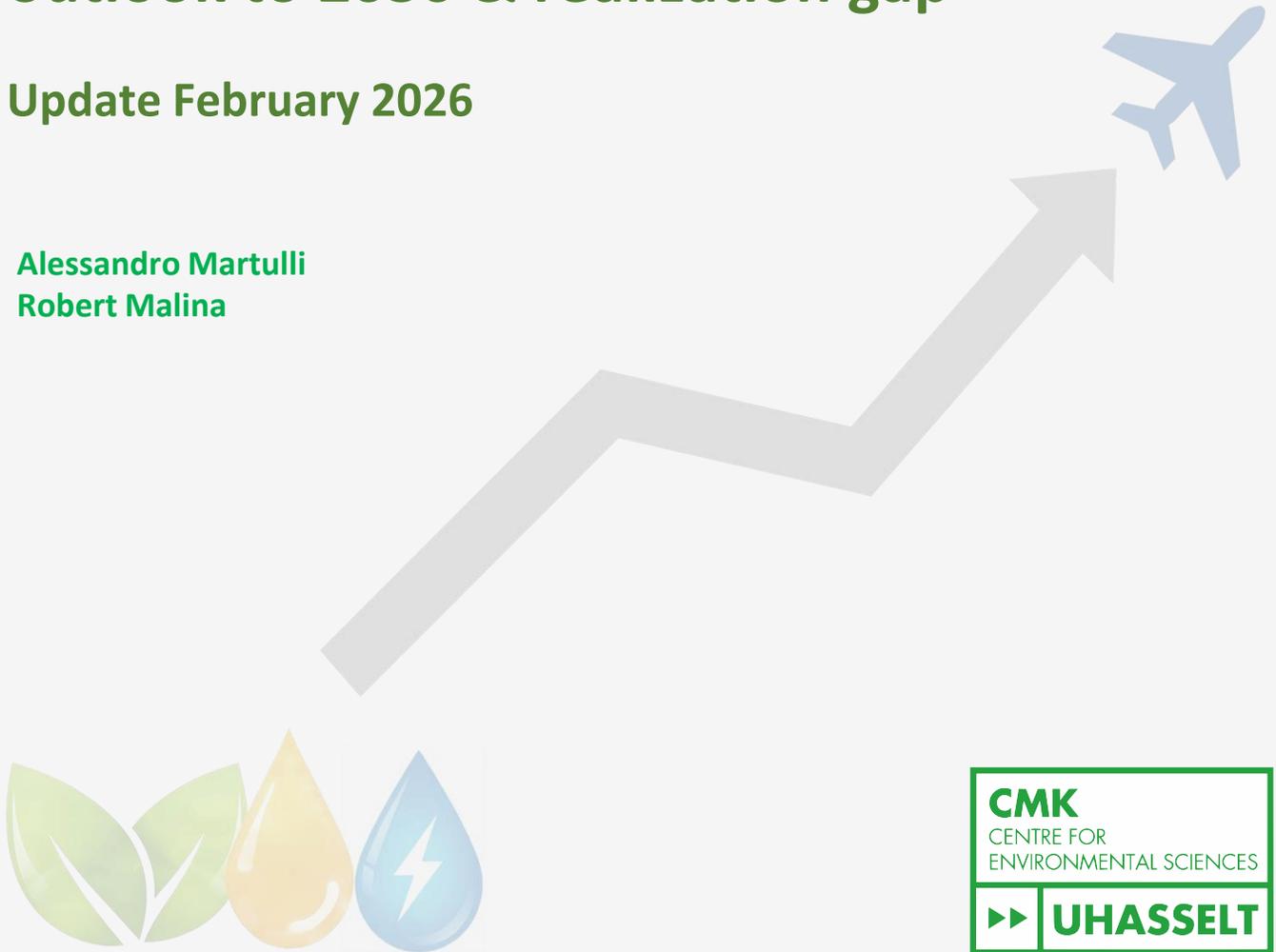


Sustainable Aviation Fuels:

Global production capacity outlook to 2030 & realization gap

Update February 2026

Alessandro Martulli
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February 2026 update

In our last paper (*The potential scale-up of sustainable aviation fuels production capacity to meet global and EU policy targets*, published in Nature Communications, <https://doi.org/10.1038/s41467-025-66686-9>), we explored how far current SAF production falls short of the industry's ambition.

We quantified SAF production capacity by developing the Global SAF Capacity Database, which contains data on companies that produce or plan to produce SAF. This data was sourced from public announcements between 2013 and 2024.

Here, we update the SAF global production capacity outlook to 2030, based on new **data collected through 2025**.

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More installed capacity, but an increasing realization gap to 11.6 million tonnes, and lagging production

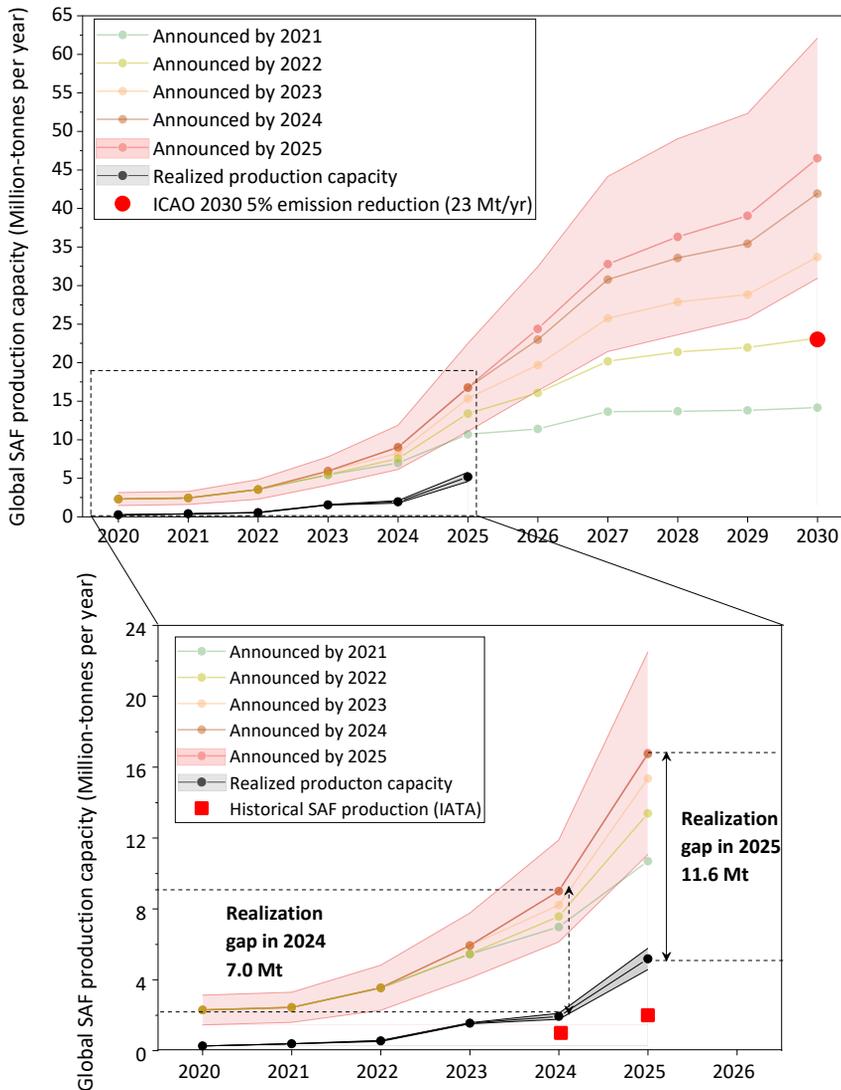


Figure 1. Cumulative SAF production capacity globally announced during and before a specific year versus realized SAF capacity.

The shaded red area defines the SAF capacity range under high and low jet ratios. The range between low and high jet fuel ratios is shown for announcements made by 2025, for realized capacity, and for capacity reflecting the average jet fuel ratio. Global SAF production volumes in 2024 and 2025 are 1 and 1.9 Mt/year, respectively, as reported by the [International Air Transport Association \(IATA\)](#).

The 5% reduction in emissions aligns with the [CAAF/3 global aspirational vision](#), which includes SAF, lower-carbon aviation fuels (LCAF), and other cleaner aviation fuels.

The US, Europe, and China accounted for more than 85% of production capacity additions in 2025

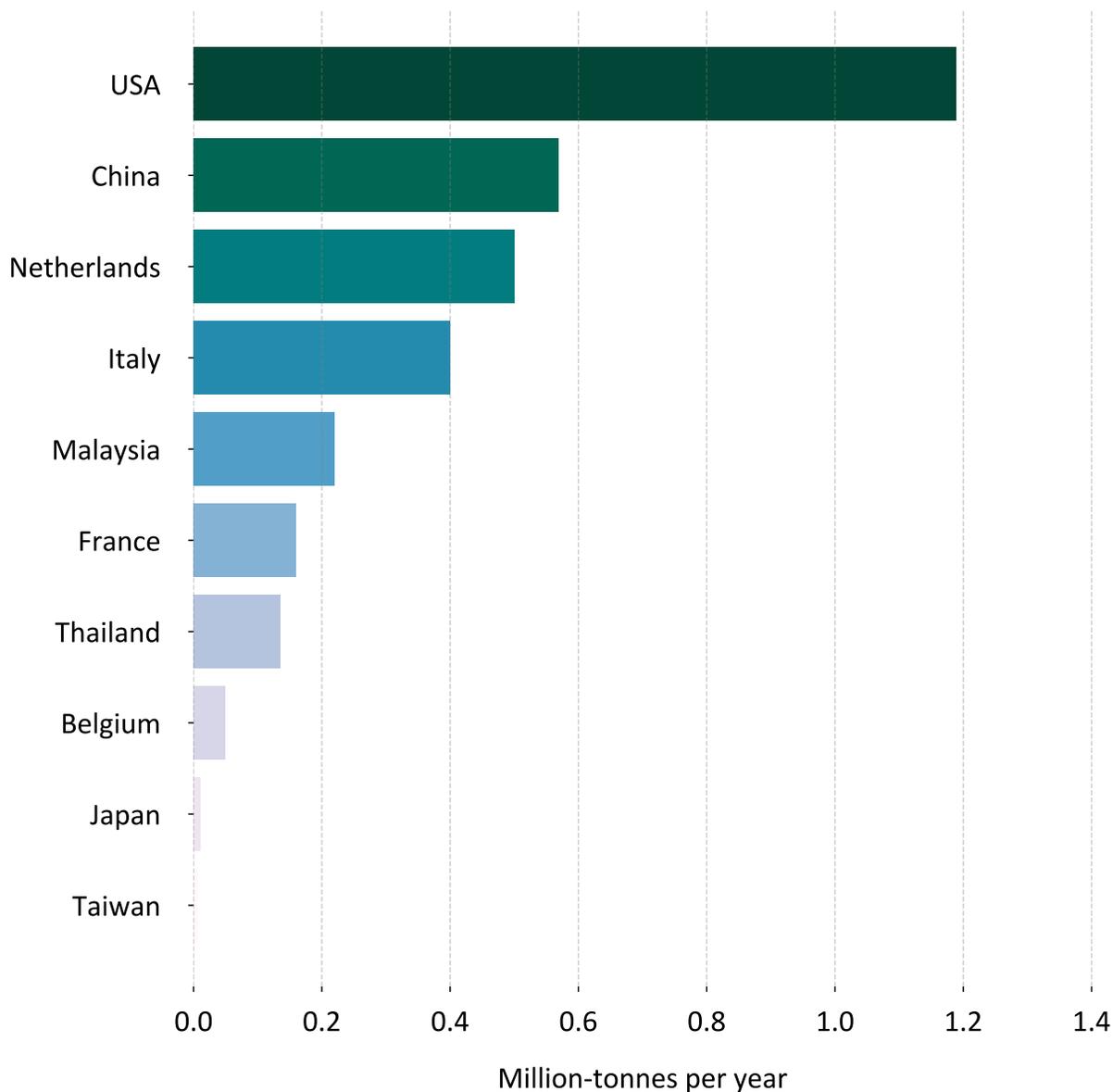


Figure 2. Newly added SAF production capacity in 2025, by country

30% of announced SAF production capacity by 2025 has been completed, roughly the same has been paused/cancelled/not updated

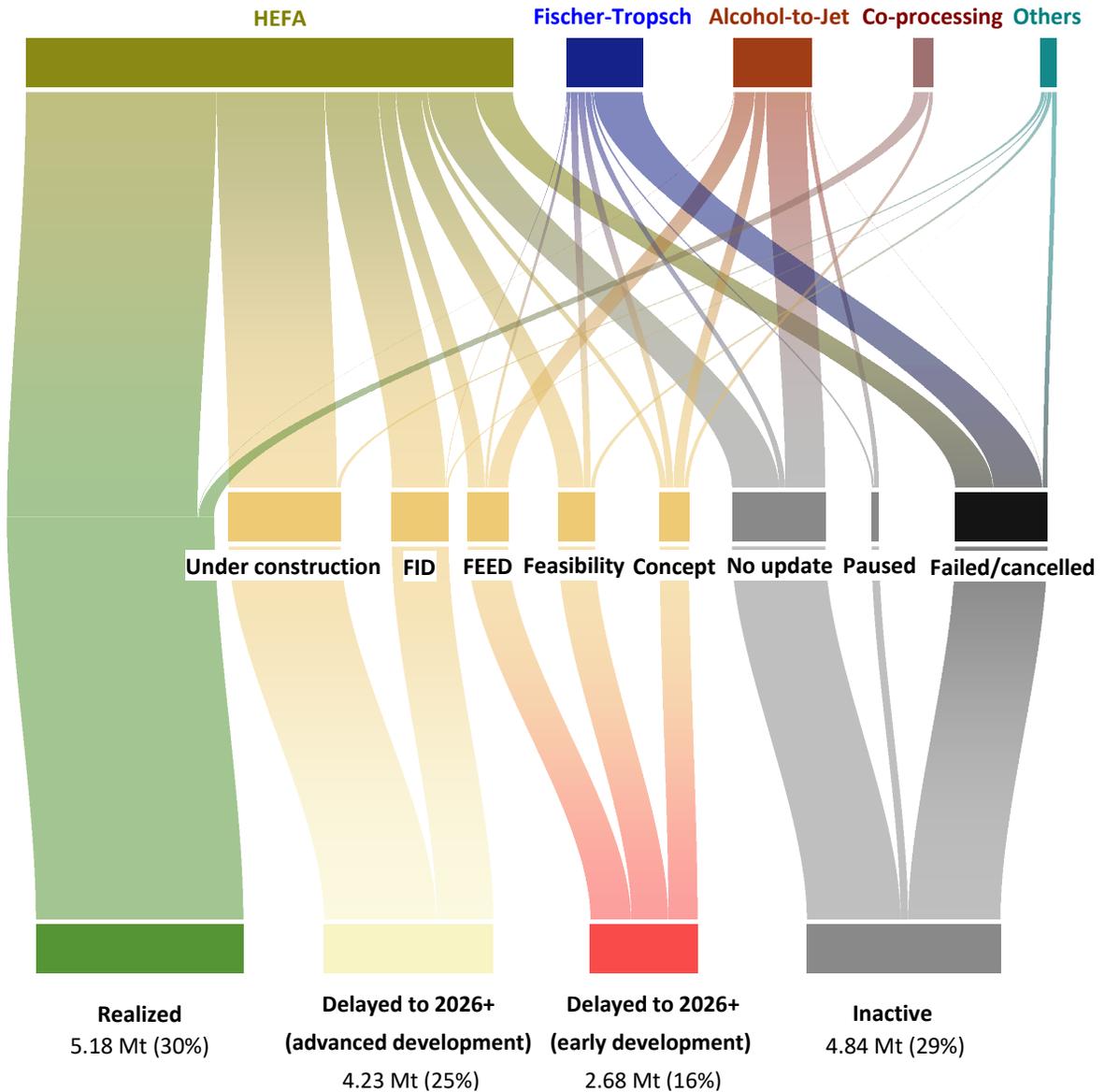


Figure 3. Announced capacity to be completed by the end of 2025, categorized by current development status

FID: Final investment decision; FEED: Front-end engineering design. No update concerns planned production capacity, for which no public announcements have been made after 2022, and was expected to be operational by 2025

82% of the announced production plans out to 2030 are in North America, Europe, and South and East Asia

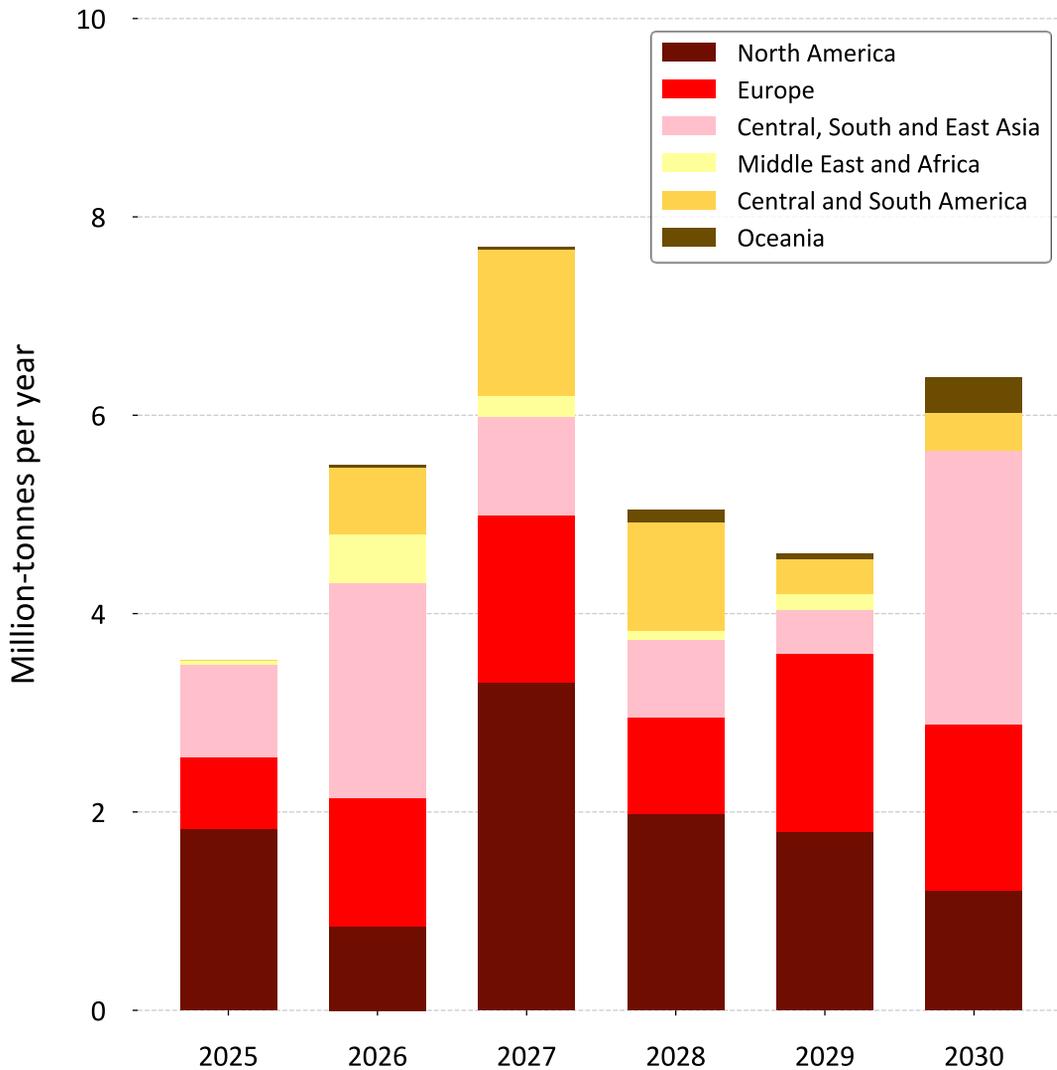


Figure 4. Newly announced SAF production capacity to be operational by 2030, by world region

Only 31% of announced SAF production capacity out to 2030 has reached at least a final investment decision

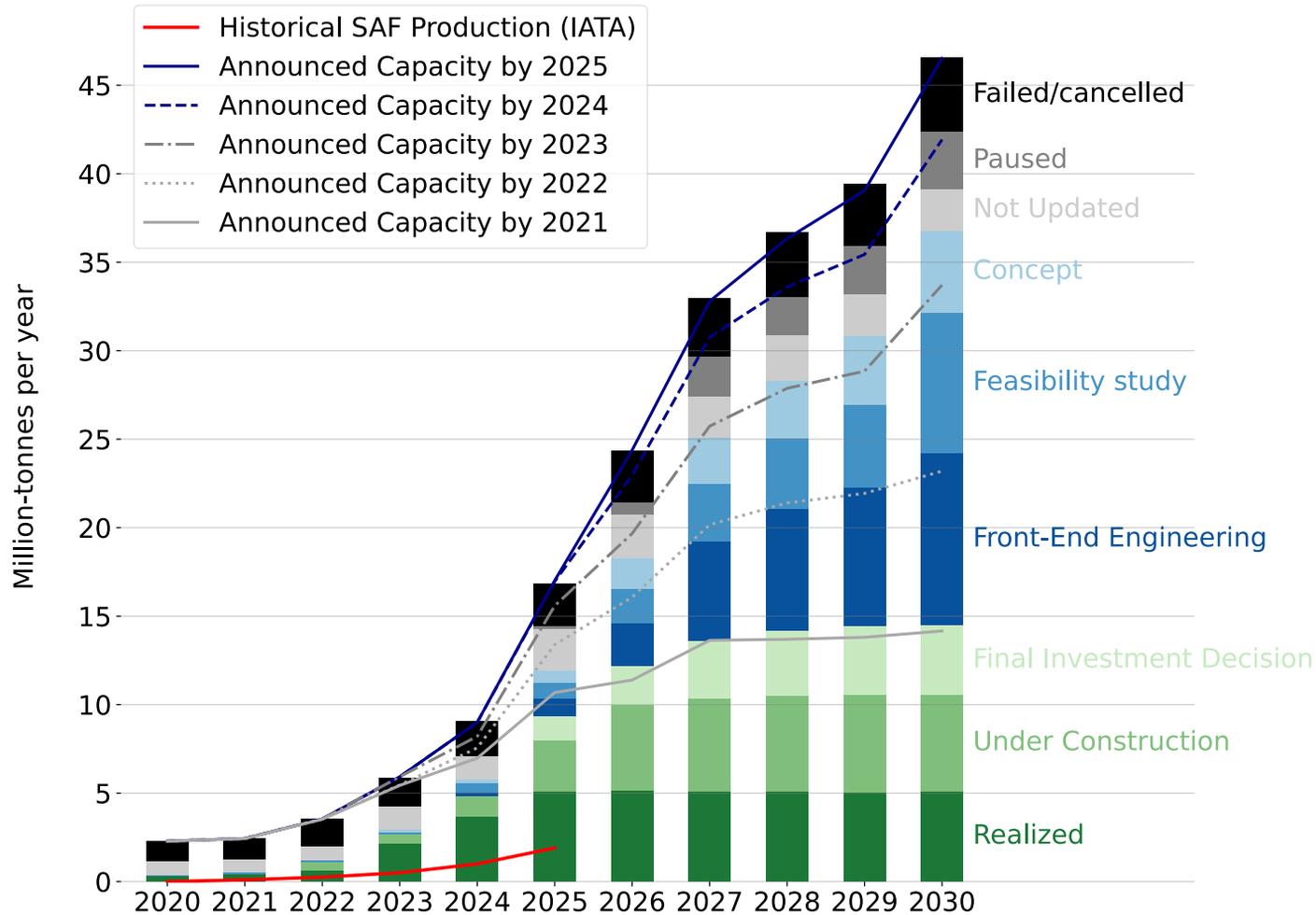


Figure 5. Cumulative announced SAF production capacity and current development status

48% of announced SAF production capacity out to 2030 is at an early development stage, and 21% has been paused/cancelled/not updated

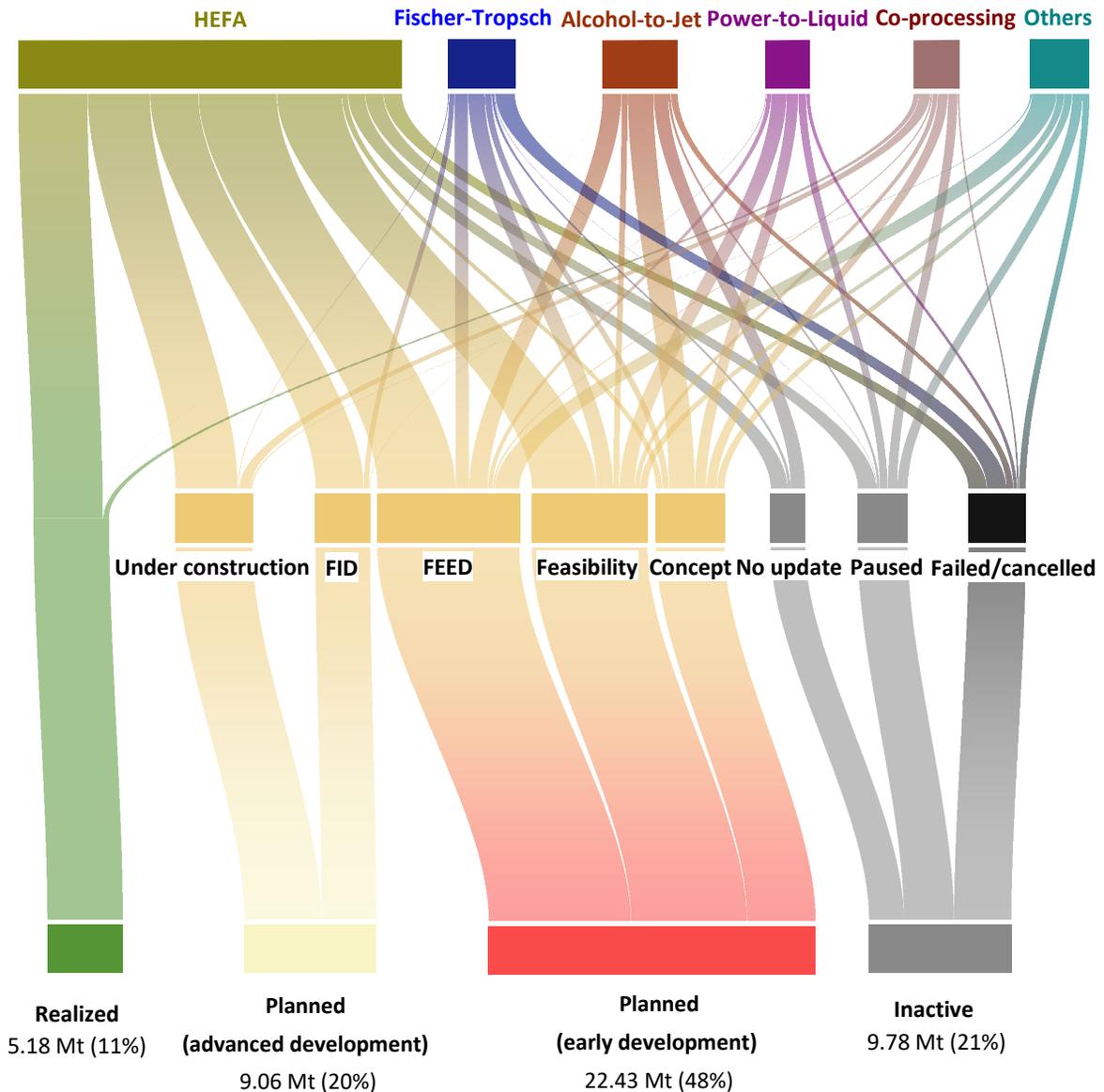


Figure 6. Announced capacity to be completed by the end of 2030, categorized by current development status

FID: Final investment decision; FEED: Front-end engineering design

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