## **Global SAF policy landscape**

## **North America**

In the **United States**, change in administration has given rise to political uncertainties in maintaining the sustainabilityrelated policy/regulatory instruments

SAF policies being developed in **Canada and Mexico, etc** 

South America Brazil sets an emissions-based mandate beginning from 2027, increasing to 10% by 2037, through the use of SAF in domestic flights

Ongoing developments in other countries, including **Colombia** and Chile, etc

Europe Initial observations of the unintended consequences on SAF mandate in the EU and UK: SAF pricing intransparency, prevalence of SAF surcharges/compliance fees, obstacles in accessing sustainability documentation

> <u>Africa</u> Early stages SAF policy development in **Kenya**

SAF feasibility studies being conducted

North Asia: China requires 1% of SAF use to 4 airports, for domestic flights

**Asia Pacific** 

implemented or are developing

Several states have already

Singapore, India, Indonesia,

Japan, Thailand, South Korea,

**Middle East** 

locally-produced SAF to national

**Oman** is also in the process of

developing its SAF policies

**UAE** aims to supply 1% of

Malaysia, Australia, and New

SAF policies, including

targets/mandates like

carriers

Zealand, etc

## 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" and "stick" policy instruments.**
- Unintended consequences encountered in countries/regions where SAF policies are already implemented reflect a "learningby-doing" approach.



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