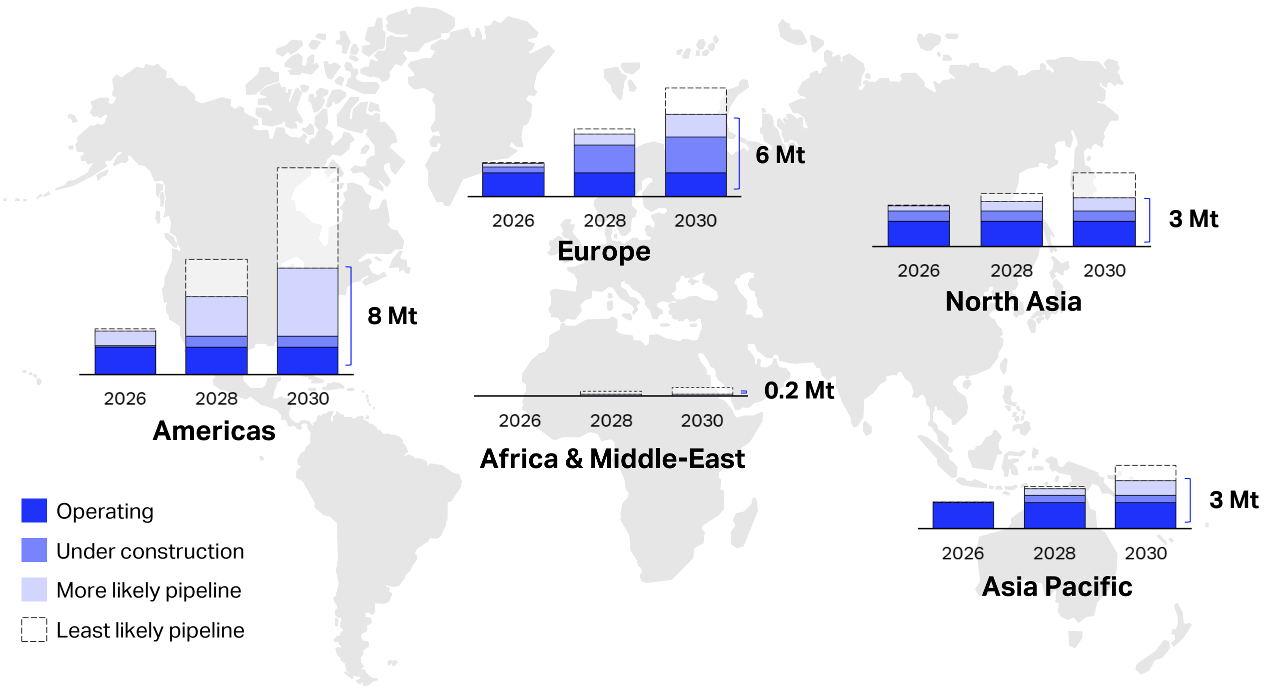
Chart of the Week

26 June 2026

A Third of Announced SAF Capacity May Never Take Off

Announced SAF production capacity by project status through 2030, in million tonnes



Source: IATA Sustainability and Economics

- Around 200 SAF projects have been announced globally, representing up to 30 Mt of production capacity by 2030. However, only around 60% of this capacity is expected to materialize. Many projects remain at an early stage and risk being delayed or canceled. At present, as little as 35% of announced capacity is operational or under construction. Actual SAF capacity is estimated to reach around 20 Mt by 2030.
- Hence, as much as one-third of announced projects are unlikely to proceed. Insufficient policy support and the related limited access to funding are part of the root causes. HEFA, the only mature SAF production pathway that can scale up near-term, is not being fully utilized, and emerging bio-SAF production pathways, such as Alcohol-to-Jet (AtJ) and gasification Fischer-Tropsch (GFT), are not gaining commercial maturity. Interest seems to center on Power-to-Liquid (PtL), though this pathway is still nascent and unlikely to be produced at scale until closer to 2040. Should this situation prevail, current SAF targets will not be reached.
- At a regional level, the Americas are expected to account for around 40% of global SAF capacity, driven mostly by projects in the US. Europe, North Asia, and Asia-Pacific will likely contribute a combined 12 Mt. Asia-Pacific has the most advanced project pipeline, with more than 40% of the region's announced capacity already operational. Africa & the Middle East look set to lag, despite their feedstock availability.
- Converting announcements into operating capacity and allowing more projects to emerge requires predictable, well-sequenced policies and coordinated energy-system development. Moreover, it is too early to pick the winners and much too early to eschew the only commercially viable option at hand if we really want to see meaningful emissions reductions this side of 2050.

IATA Sustainability & Economics

economics@iata.org