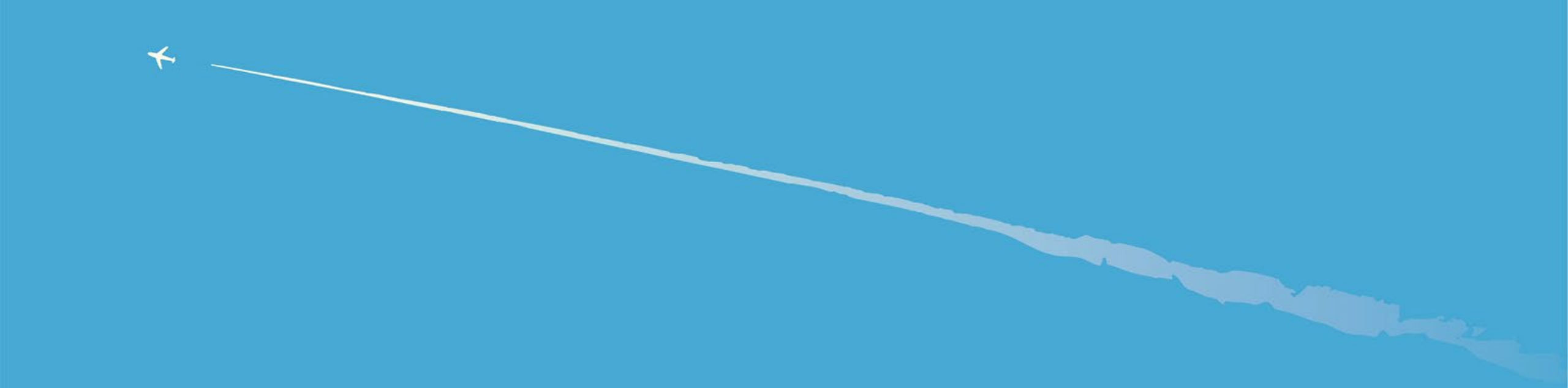

APAC SAF Outlook 2025

Highlights

ASAFA argus

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Presentation

APAC SAF Outlook 2025

Gabriel Ho

11 November 2025

The inaugral APAC SAF Outlook 2025 outlines the state of sustainable aviation fuel (SAF) development across Asia-Pacific, emphasizing rapid growth in mandates, investment, and cross-border trade. While Europe leads with firm SAF mandates, Asia's progress varies, with Singapore pioneering implementation. Survey findings reveal that stakeholders expect only a 2–5% blend by 2030 without stronger incentives. Key barriers include high costs, feedstock shortages, and policy uncertainty. ASAFA advocates coordinated regional policies, lifecycle-based (CI) frameworks, and support for alternative pathways like Alcohol-to-Jet and Power-to-Liquids. Asia could emerge as both a major SAF consumer and exporter if these systemic challenges are addressed

Decarbonization, Policy Harmonization, Investment, Feedstocks, Regional Cooperation.

Details & Download

Scan the QR code or click the link to download the full APAC SAF Outlook 2025 report.

https://www.asiasaf.org/publications

31 International Members & Partners Across SAF

PLATINUM: KOREAN AIR, 1POINTFIVE

GOLD: Axens (Powering integrated solutions, An IFP Group company), argus

SILVER: TotalEnergies, DHL, Honeywell UOP, EU-ASEAN Business Council (The Voice of Europe), VELOCYS, tripatra, Bureau Veritas, AIRBUS, LANZAJET, TOPSOE

SME: gevo, FatHopes Energy, GEU, SAF One, SKYNRG, Marquis Energy Global, Quantum Commodity Intelligence

PARTNERS: Sustainable Aviation Futures APAC, KEY (Korea Europe & You), World Bioenergy Association, FTI Renewable Energy Industry Club, Agency for Science, Technology and Research (Singapore), General Index, aireg, SAF Association, Aer for Sky

Memberships and Partnerships are open to companies, business organizations, research institutes and associations.

Why SAF Matters?

Aviation is the only transport sector expected to keep growing in liquid-fuel demand to 2050.

- SAF is the single most impactful lever for near- and mid-term CO_2 reduction.
- Complementary measures include aircraft efficiency, operational improvements, and market-based mechanisms Without SAF scale-up, net-zero 2050 goals remain out of reach.
- ICAO's CORSIA aviation decarbonization strategy relies on a "basket of measures" to achieve net-zero CO2 emissions by 2050

ICAO's Main Decarbonization Levers

Lever	Focus Area	Highlights
Aircraft Technology	Efficiency & Innovation	Continuous improvements in engine design, lightweight materials, and wing optimization. Research into electric & hydrogen propulsion.
Sustainable Aviation Fuels	Deep Emissions Cuts	Most significant lever for decarbonizing long-haul flights; ICAO aims for 5% CO_2 reduction by 2030 from SAF use.
Operational Efficiency	Air Traffic & Ground Ops	Flight optimization, improved routing, and efficient ground operations.
Market-based Measure	Complementary Offsets	Addresses residual emissions that cannot yet be reduced in-sector.

Methodology

Survey Backbone

- The outlook is underpinned by a comprehensive industry survey conducted by ASAFA, capturing perspectives across the SAF value chain — including producers, feedstock suppliers, policymakers, airlines and corporate buyers.
- Respondent demographics ensure broad representation across the APAC region, with insights from senior leaders in sustainability, strategy and R&D roles.

Stakeholder Engagement

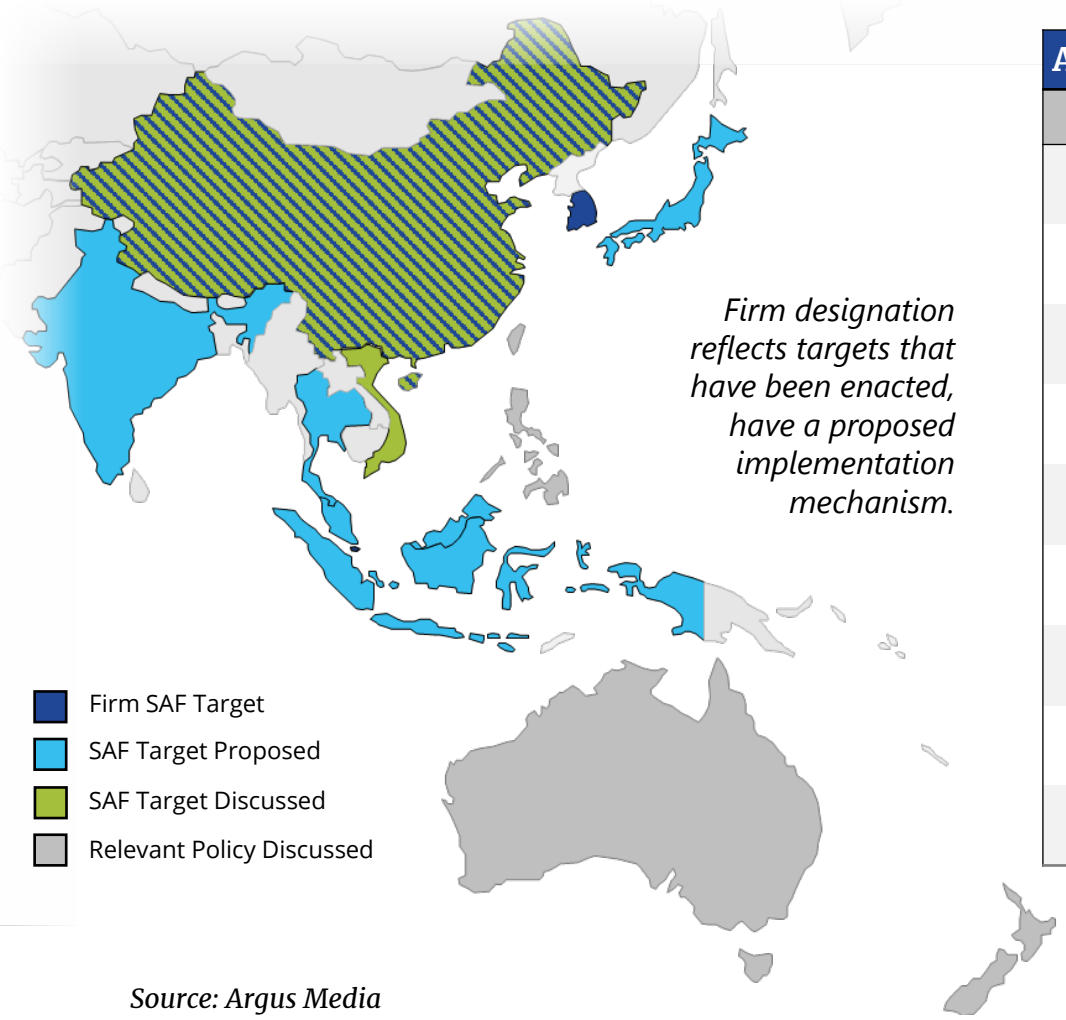
- ASAFA has engaged with numerous discussions with SAF ecosystem participants: policymakers, airlines, corporate offtakers, financiers and technology developers to supplement the survey data.
- These conversations provided qualitative insights into regional policy frameworks, market dynamics and investment trends.

Collaboration with Argus Media

- The analysis and market validation were developed in collaboration with Argus Media, leveraging their expertise in energy market intelligence, price benchmarks and supply chain data to build a consolidated view of SAF production, demand and policy outlooks through 2025.
- Argus contributed quantitative inputs and validation to ensure analytical rigour and consistency with global SAF market trends.

The resulting report provides data-backed insights and actionable recommendations for stakeholders across the SAF ecosystem

Policy Landscape: Many Asian targets are uncertain – but could significantly swing regional demand if firmed



Firm designation reflects targets that have been enacted, have a proposed implementation mechanism.

Asia Pacific – Firm + Proposed and Discussed SAF Targets (% vol.)

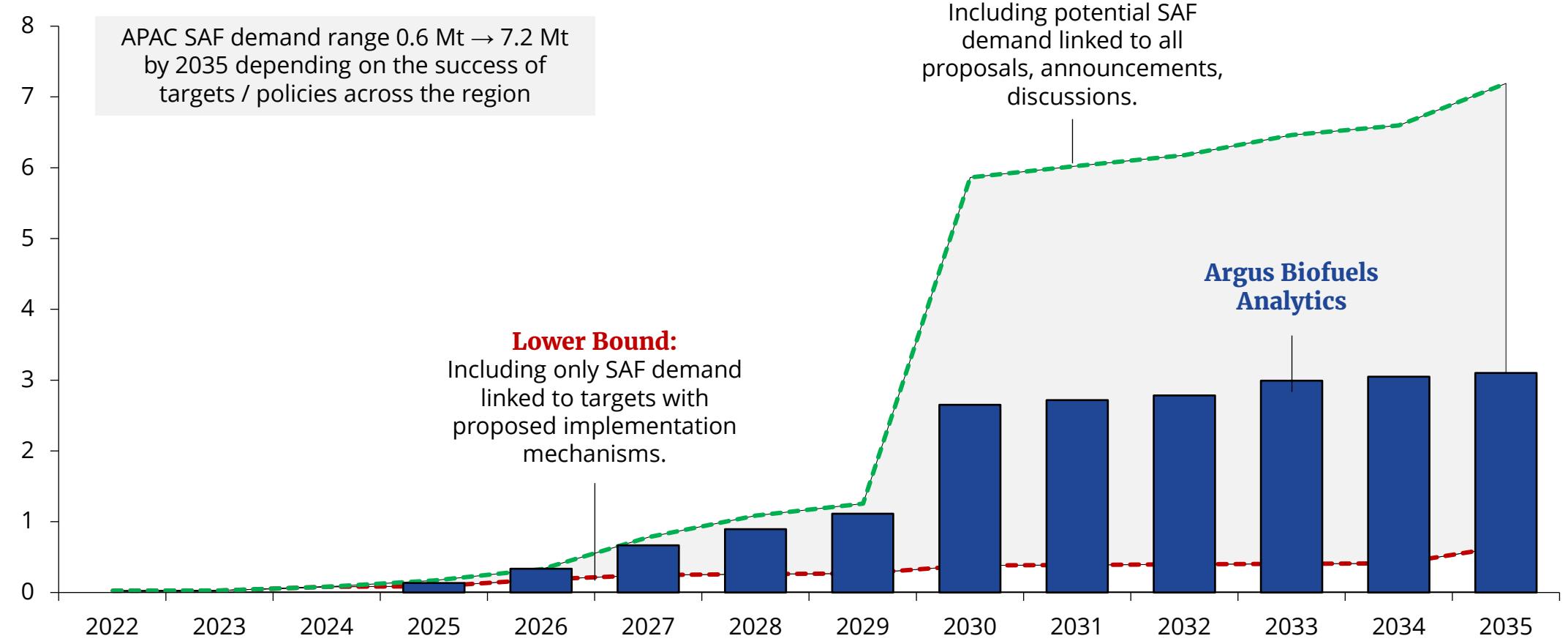
Country	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
Thailand	-	1.0	1.0	1.0	1.0	3.0	3.0	3.0	5.0	5.0	5.0
Japan	-	-	-	-	-	10.0	10.0	10.0	10.0	10.0	10.0
Singapore	-	1.0	1.0	1.0	1.0	3.0-5.0	3.0-5.0	3.0-5.0	3.0-5.0	3.0-5.0	3.0-5.0
Indonesia #	-	-	1.0	1.0	1.0	2.5	2.5	2.5	2.5	2.5	5.0
Malaysia	-	-	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
China	Targets beyond 2025 under discussion										
South Korea^	-	-	1.0	1.0	1.0	3.0-5.0	3.0-5.0	3.0-5.0	3.0-5.0	3.0-5.0	7.0-10.0
Australia	-	-	-	-	-	-	-	-	-	-	-
India^	-	-	1.0	2.0	2.0	5.0	5.0	5.0	5.0	5.0	5.0

 # Indonesia's recent roadmap would replace previously enacted policies relating to biogenic jet fuel
^ international aviation fuel only

Source: Argus Media

Market Outlook: SAF demand expected to accelerate after 2026, rising with new mandates.

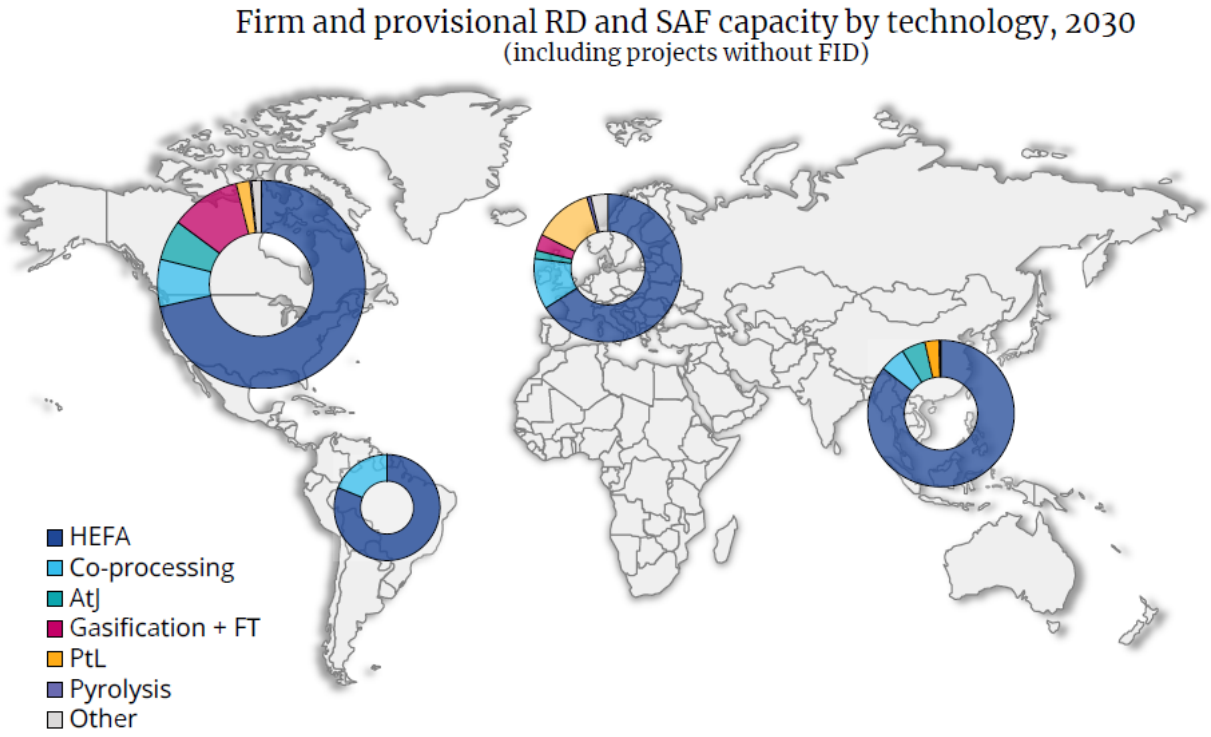
Asia Pacific SAF Demand (mn t)

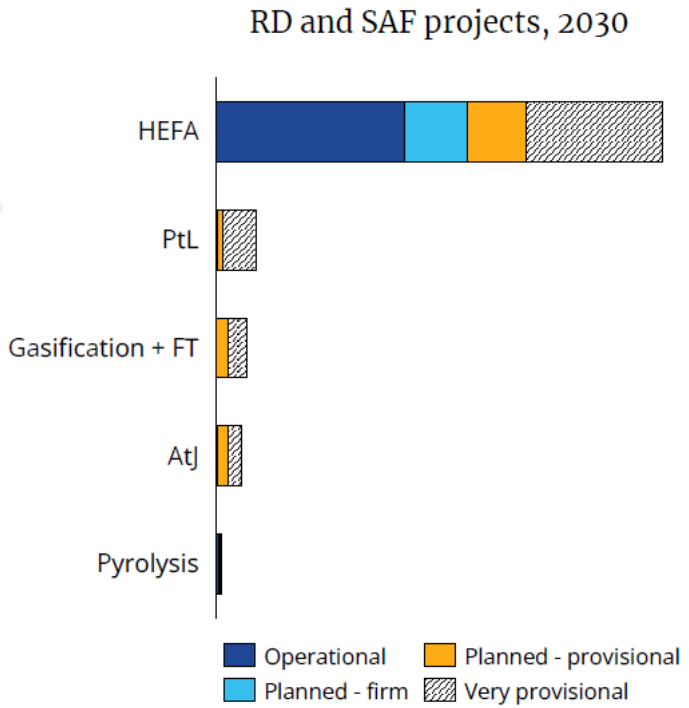


Source: Argus Media – Consulting Services

Feedstock and Technology: Capacity pipeline dominated by HEFA and few other projects are at FID

- Near term: UCO & POME remain dominant feedstocks for HEFA SAF.
- AtJ expected to scale by 2030.FT gasification and PtL hold long-term potential but need cost drops.
- Survey shows support for diversifying pathways & regional R&D collaboration.

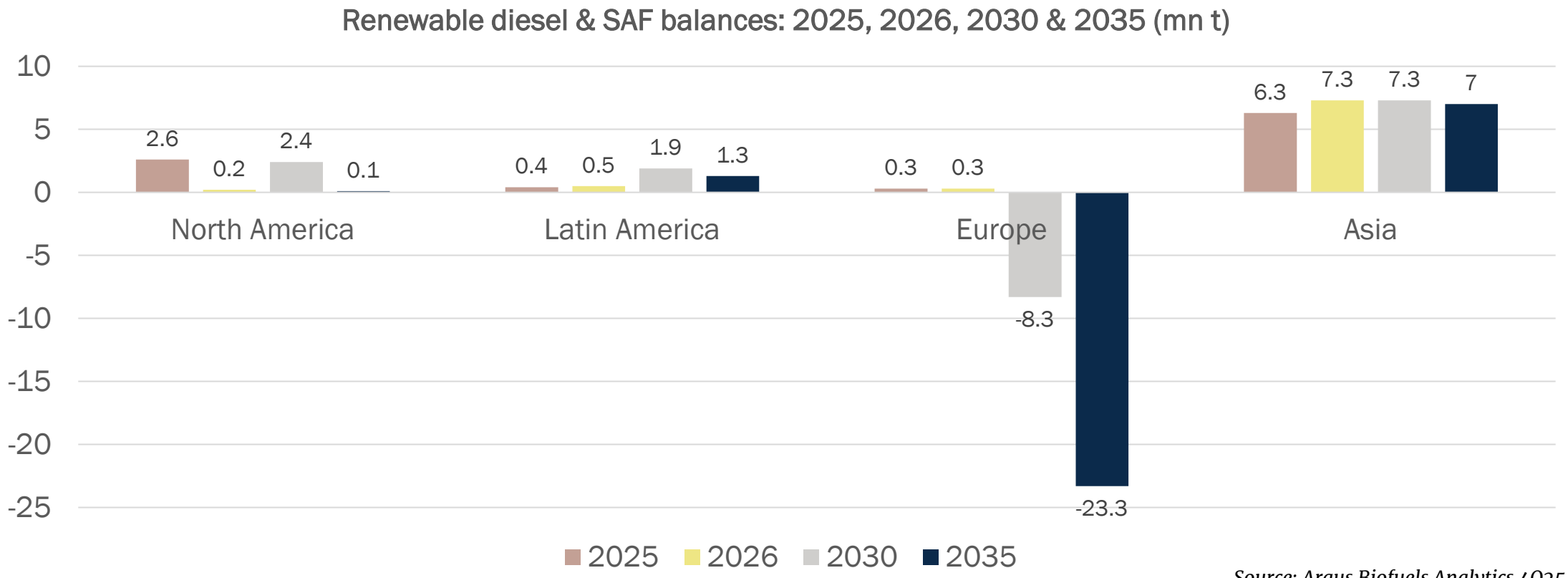




Source: Argus Media – Consulting Services

Investment & Trade: The outlook for RD & SAF varies significantly from region to region

- SAF capacity rising fast across APAC (China, Singapore, Japan, Korea).
- Growing exports to Europe as ReFuelEU aviation and RED III mandates increase.
- Stakeholders see strong potential for APAC exports by 2030.

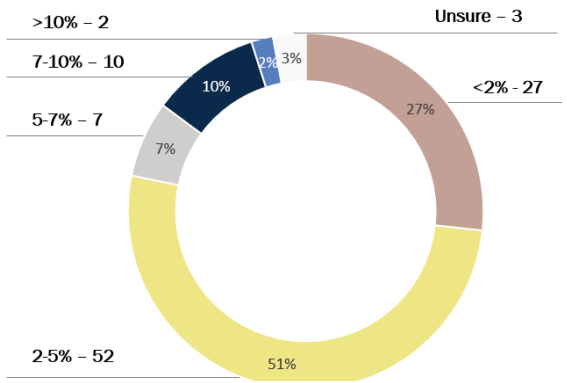


Source: Argus Biofuels Analytics 4Q25

Survey Result Preview

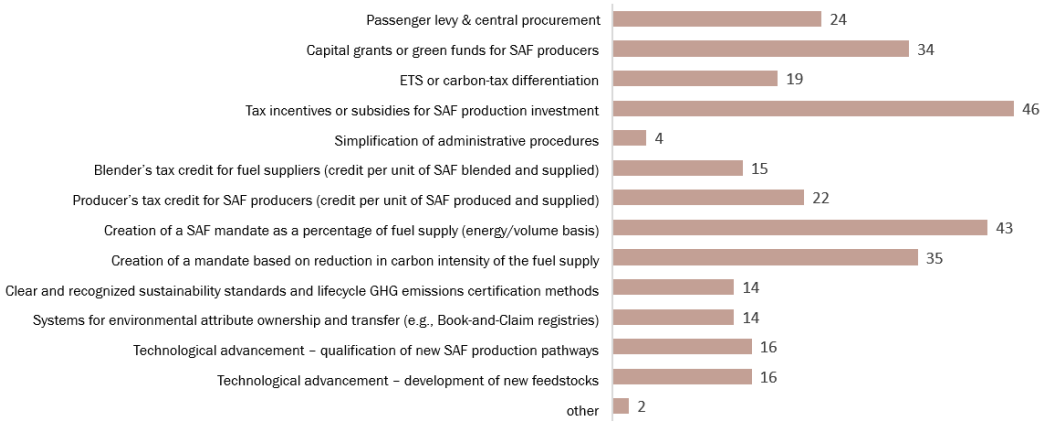
A1 SAF Blend Outlook for 2030

What blend level of APAC (not Global) SAF (as a percentage of total aviation fuel volume) do you believe is achievable by 2030 under current policy and industry support?



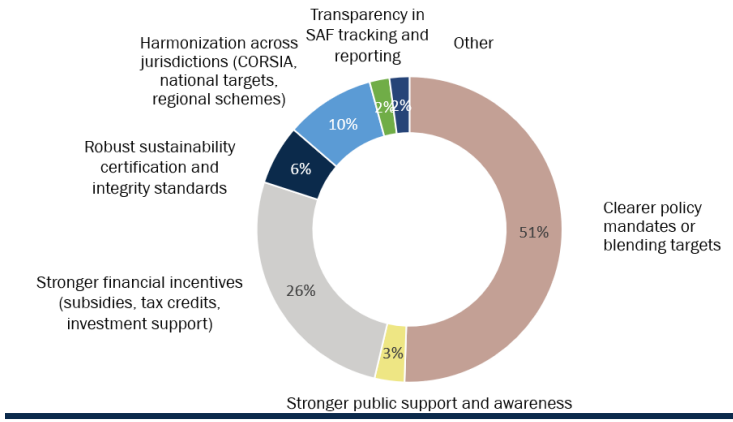
A2 Effective Levers for SAF Adoption

What are the 3 most effective tools to accelerate adoption by 2030?



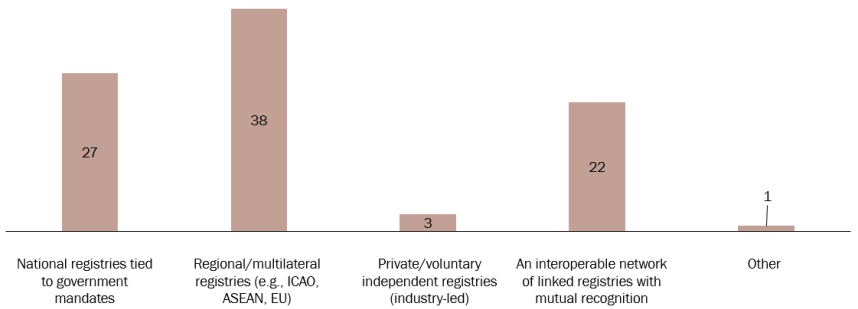
B7 – Single Most Effective Policy/Measure

If there were one policy or integrity measure that would most accelerate SAF adoption, what would it be?



D4 - Registry Preferences for Tracking

What registry strategy do you believe is most practical to support global SAFc deployment?



Key Takeaway and Next Steps

Asia-Pacific has the ambition, alignment and opportunity to lead in sustainable aviation fuels but must act now. Coordinated policies, market innovation and regional collaboration are essential to close the price and supply gaps and make cleaner skies by 2030 achievable.

Strengthen Regional Collaboration & Standards

- Harmonize certification, registries and sustainability standards.
- Ensure trust and interoperability in entire SAF ecosystem

Educate & Engage the Market

- Boost awareness among airlines, corporates and passengers through visible SAF programs and reporting.
- Share success stories to normalize SAF adoption.

Plan for CORSIA & Long-Term Integration

- Build national CORSIA frameworks now; allow use of SAF and credits for compliance.
- Integrate SAF into broader net-zero and ETS policies.

Set Clear Long-Term Targets

- Implement SAF blending mandates with Book-and-Claim ad CI-based frameworks to balance scale and sustainability.
- Allow flexibility for airlines to meet targets efficiently.

Expand Feedstock Resources

- Support waste oil collection, agricultural residue supply chains and sustainable energy crops.
- Fund R&D for novel feedstocks (e.g. algae, MSW).

Accelerate Emerging Technologies

- Back AtJ, FT and PtL pathways with grants, fast permitting
- Move beyond HEFA to diversify supply by 2030.

Join Us

Be a founding force in Asia's net-zero aviation transition

Gain direct access to Asia's SAF decision leaders and shape the future of SAF

Contact Us: memberships@asiasaf.org | www.asiasaf.org

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