



ICAO

ENVIRONMENT

ICAO STOCKTAKING SEMINAR
TOWARD THE 2050 VISION FOR
SUSTAINABLE AVIATION FUELS



Stocktaking results

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Stocktaking objective - assess progress on SAF development and deployment

- 25 questionnaires submitted with information on SAF deployment
- 26 presentations made through the Seminar (many with quantified information)

**Data was aggregated to provide a view on
SAF deployment progress**



- Data was processed to allow reasonable conclusions**

Some fuel production numbers were provided by different stakeholders (e.g. Fuel producers, States, Airlines)



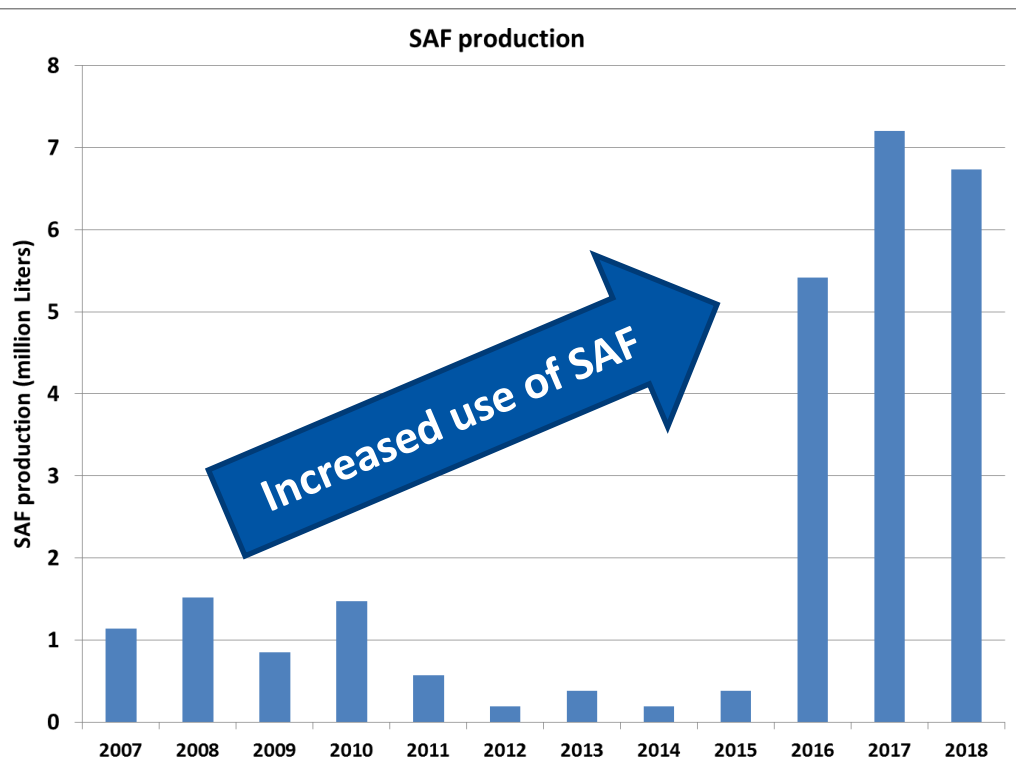
Only one dataset was considered to avoid double counting

Some data was provided in terms of “total production capacity”, which includes SAF + other fuels



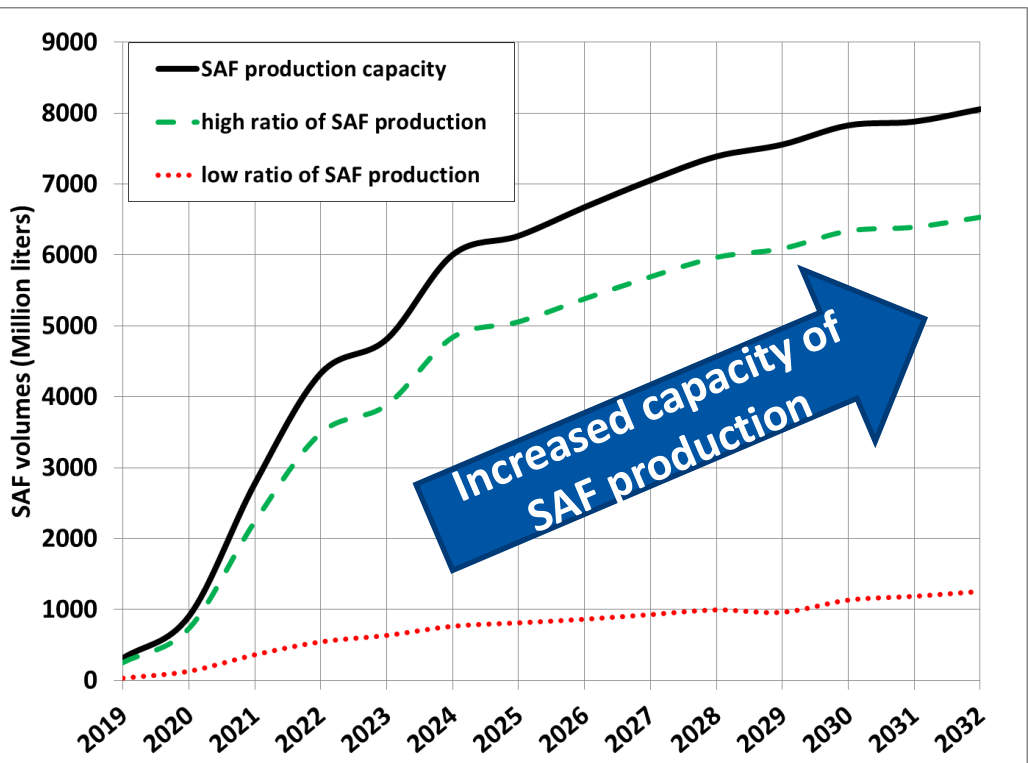
For these cases, three SAF deployment scenarios were assumed:

- **total capacity (100%)**
- **high SAF ratio (80% SAF)**
- **low SAF ratio (10% SAF)**



ICAO Vision is based on the assumption of a progressive increase in the use of SAF

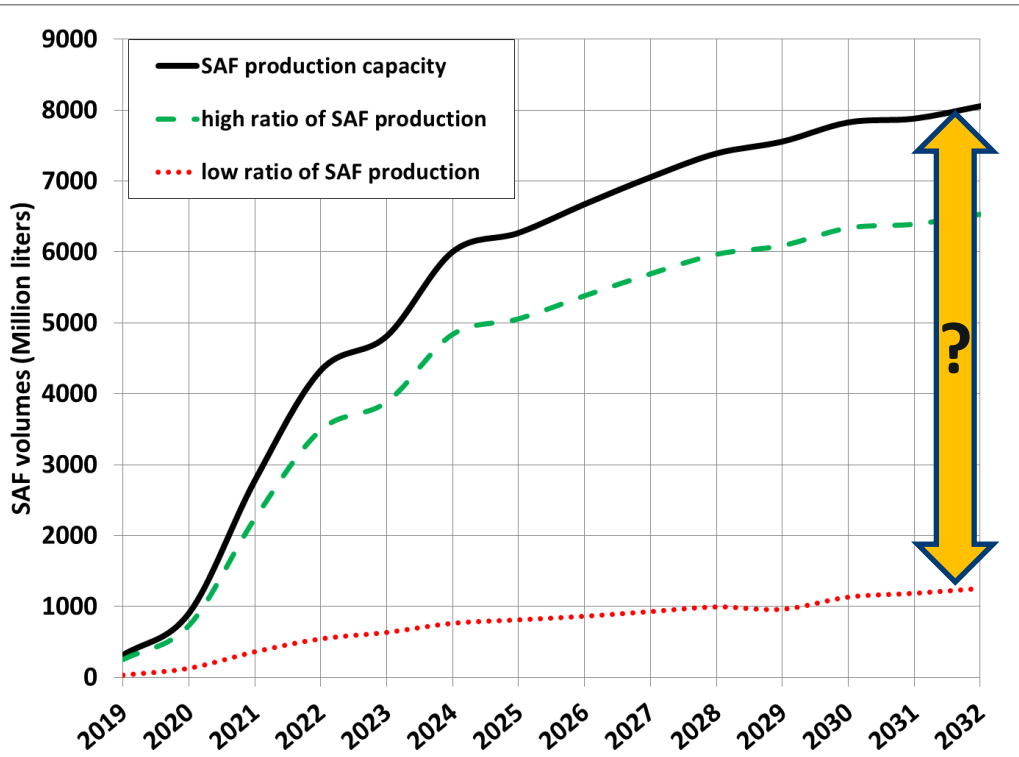
Looking back, there was a great increase in the last three years.



8 Billion litres (6.5 MT) of SAF production capacity available by 2032, and 6.3 Billion litres (5 MT) in 2025.

ICAO Vision is based on the assumptions of a **progressive increase in the use of SAF.**

Looking to the future - Capacity for SAF production will continue to increase.



ICAO Vision has a view to include a **quantified** proportion of SAF use by 2050.

One major uncertainty exists :

What will be the share of SAF production compared to other fuels?

CAAF/2 encouraged States to develop policies that promote the use of SAF, or promote policies that strive to establish a level playing field between aviation and other transportation sectors on the use of sustainable fuels.



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Wrap up and closing

Jane Hupe

Deputy Director

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Meeting participants views on **Policies/regulatory frameworks**

- International collaboration for SAF certification should be pursued (simple, lower cost)
- CORSIA can incentivize the deployment of SAF
- **Stable policies will be required to incentivize SAF.**
 - Mandates and incentives that level the playing field for SAF, since SAF technologies can produce other fuels.
- **Harmonization of Sustainability and Life Cycle Assessment should continue.**
- Full set of sustainability criteria should be considered (Environmental, Social and Economic)
- SAF development and deployment should be tailored to the specific situation of the State and the production processes and not one solution for all.



Meeting participants views on **Financing**

- **Financing is needed to:**
 - ensure scaling up of SAF production
 - ensure flexibility and lower capital risk
 - maximize value across supply chain.
- **Utilization of existing facilities can reduce costs.**
- **Public/private co-funding is important**
- **Financing should support multiple feedstock projects**



Meeting participants views on Assistance

- Technical and financial assistance can be a catalyst to trigger initiatives at the State Level
- The development of SAF feasibility studies can help unlock the potential at ICAO Member States (NCLB)
- Advocacy and mobilization of different stakeholders/resources are important for SAF projects

ICAO will facilitate the development of future feasibility studies and Implementation Projects

- Contact ICAO if there is interest in supporting or benefitting from a Feasibility Study or Implementation project (officeenv@icao.int)



Meeting participants views on Outreach

- **Public outreach and communicating complex SAF aspects in a simple manner is important**
 - There is a need to find ways to make SAF appeal to passengers
 - Clarify misconceptions that create resistance to SAF (compete with food and water)
 - SAF Global events/concrete actions/outreach campaigns to showcase SAF progress

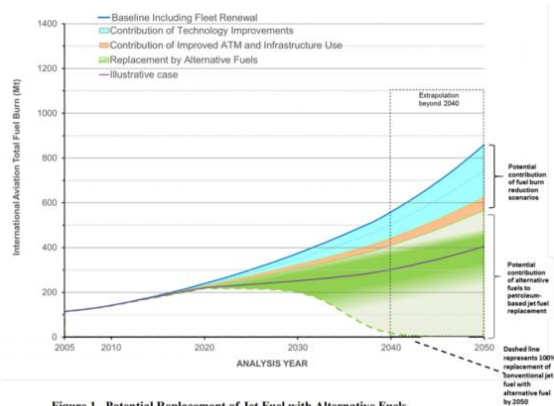


Figure 1. Potential Replacement of Jet Fuel with Alternative Fuels

- **Stocktaking data will complement the Environmental Trends analysis, to be updated at the 40th ICAO Assembly (September 2019).**
- **GFAAF is an important global information sharing platform and will continue to be updated with the latest news and best practices.**
- **ICAO SAF Stocktaking process will continue...**



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Second ICAO SAF Stocktaking Seminar

28 – 29 April 2020



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THANK YOU