From Public Policy to SAF Implementation

ONE ASIA, ONE SKY

An Asian perspective on building the SAF ecosystem

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

Policy Design Considerations for SAF

- %Volume, CI basis, technology pathway type for SAF
- Starting Point and the ‘Ramp-Up’ (Time Horizon)
- Supply (Import/export) & synergies with existing biofuels/biogas/renewable power
- Sustainability & Traceability
- Environmental Attributes & Accounting, Book & Claim
- Incentives (Capex/Opex) and/or ‘Penalties’
- Who is responsible?
- Domestic vs International flights (passengers & freight)

Coordination across ministries (aviation, energy, agriculture, trade)

COMPARISON

Ten Trajectories

Jurisdiction	Instrument	2027	2030	2035
Singapore	Passenger and cargo levy	1%	3-5%	—
Japan	Supplier obligation, 7 airports	—	1%	5%
Korea	Refiner blending obligation	1%	3-5%	7-10%
China	Pilot and export quotas only	—	—	—
Hong Kong	Five-Year Plan target	—	1-3%	—
India	Indicative, not notified	1%	5%	—
Indonesia	Mandate at two hubs	1%	5%	—
Malaysia	NETR mandate	1%	—	—
Thailand	Phased, 8% by 2036	1-2%	1-2%	5-8%
Australia	Under consultation	—	tbc	tbc

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Japan's 1% is the binding supply obligation at seven airports. The 10% often quoted is a separate airline target.

CASE ONE

Singapore: The Fixed Cost Envelope

1% target from 2027, with a goal of 3 to 5% by 2030.

The levy is sized from the volume needed to hit 1% and the projected premium, including certification, blending and delivery. It is not a percentage of the fare.

Tickets sold from 1 October 2026, flights from 1 January 2027. Does not apply to transit passengers.

Receipts go to a statutory SAF Fund. SAFCo aggregates demand, procures CORSIA-eligible fuel and allocates the attributes separately from the physical molecules.

Tender by end 2026, first uplift mid-2027.

Year 2027

Band	Destination	Economy	Premium
I	Southeast Asia	S$1.00	S$4.00
II	NE/S Asia, Australia	S$2.80	S$11.20
III	Europe, MEA, C. Asia	S$6.40	S$25.60
IV	Americas	S$10.40	S$41.60

TBC: Cargo runs S$0.01 to S$0.15 per kg. Business aviation runs S$40 to S$6,500 by wingspan code and band. Transit passengers are exempt. **Levies on cargo deferred a year.**

Source: CAAS media releases of 10 November 2025, 25 March 2026 and 3 September 2026

CASE TWO

Japan: 1%, Not 10% starting 2030

MLIT Ministry of Land, Infrastructure, Transport and Tourism

METI Ministry of Economy, Trade and Industry

The obligation

The energy agency proposed a supplier obligation on 23 July 2026: **1% in FY2030, 3% in FY2031, then 5% from FY2032 to FY2034.**

It binds jet fuel suppliers, sits with METI, carries penalties and is reported airport by airport.

The scope

International departures only, passenger and cargo, from seven airports: Narita, Haneda, Kansai, Chubu, New Chitose, Fukuoka and Naha.

Those seven handle roughly 99% of Japan's international refuelling.

The money

MLIT plans a distance-scaled charge on departing international passengers and cargo at those airports from FY2030, paying carriers per unit uplifted.

The 30 yen per litre production credit and Green Transformation (GX) capital support continue alongside.

The 10% still in circulation is an older airline target on a voluntary basis. Final investment decisions have to land in 2026 for meaningful domestic supply to exist by 2030.

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CASE THREE

Korea: The Export Refiner's Bet

Ministry of Trade, Industry and Resources

Ministry of Land, Infrastructure and Transport

The obligation

Expansion Strategy of 30 August 2024, then the Blending Mandate Roadmap of 19 September 2025.

1% in 2027, 3 to 5% in 2030, 7 to 10% in 2035, on international departures. The obligation falls on refiners and importers.

From 2028, at least 90% of jet fuel for international departures must be uplifted at the departure airport.

The carrots

Carriers exceeding the quota get 3.5 points* in international air transport rights, up from one.

Facility fee reductions of 500m won at Incheon and 100m won across other KAC airports, with a shift toward direct subsidy from 2027.

An Alternative Fuel Center inside K-Petro by 2027. Nine domestic airlines already run 1% blends on selected routes.

Korea is the world's largest jet fuel exporter. Co-processing of waste oils inside existing refineries is the cost-effective route to compliance and the fast route to export.

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MOLIT runs a competitive points-based evaluation to decide which carrier gets international routes. Source: MOTIE and MOLIT, SAF Expansion Strategy

CASE FOUR

China: Pilot, Standard, But Not a Mandate

Civil Aviation Administration of China

中国民用航空第二研究所 THE SECOND RESEARCH INSTITUTE OF CAAC

What is running

NDRC and CAAC opened phase one on 18 September 2024: twelve flights, three carriers, four airports.

Phase two, from 19 March 2025, covers all domestic flights departing those four airports at about 1%.

It works on book and refuelling. Physical fuel enters a few airports; carriers claim against the pooled supply.

The book-and-claim platform (AnchorTrace) now expands to corporates to build up voluntary demand

What is not

The 15th Five-Year Plan documents name SAF repeatedly but set no aviation blending target.

A phased 1 to 2% obligation on trunk airlines for 2026 to 2030 has been rumoured as an early draft. Nothing is published.

Sources: NDRC and CAAC; 15th Five-Year Plan for Renewable Energy Development (July 2026); S&P Global Platts (December 2025); Peking University NSD (December 2025)

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CASE FIVE

Hong Kong and the Greater Bay Area

Civil Aviation Department
The Government of the Hong Kong Special Administrative Region

The target

The first Five-Year Plan, published September 2026, sets SAF at **1 to 3% target of fuel for flights departing HKIA in 2030.**

The 2026 Policy Address commits to studying a mandatory consumption mechanism by 2028. It is a target, not yet an obligation.

Cathay Pacific runs its own internal target of 10% by 2030.

The supply and ecosystem

A production base in Dongguan, Guangdong: about 450,000 t a year of SAF and renewable diesel, due by 2030, serving Hong Kong, Shenzhen and Guangzhou.

A blending facility in Hong Kong itself, to cut logistics cost and improve availability.

The Business Environment Council convenes the Hong Kong SAF Coalition.

Hong Kong is the one Asian jurisdiction designing its fuel supply across a border by default.

CASE FIVE

India: Indicative, Not Notified

नागर विमानन मंत्रालय
MINISTRY OF CIVIL AVIATION

पेट्रोलियम एवं प्राकृतिक गैस मंत्रालय
MINISTRY OF PETROLEUM AND NATURAL GAS
Government of India

The policy

National Biofuels Coordination Committee indicative targets for international flights: **1% in 2027, 2% in 2028, 5% in 2030**.

Not notified. No domestic-flight target, and no airport yet designated for blending infrastructure.

India sat out the voluntary phases of CORSIA. DGCA has said CORSIA will be the only applicable framework from 1 January 2027.

The supply

Existing refinery co-processing is enough to cover 2027 and 2028. The 5% target needs standalone plants that do not yet exist.

IndianOil Panipat will run LanzaJet ATJ at roughly 110 million litres a year.

1.5 billion litres of sugarcane and molasses ethanol already feed the E20 program.

India is the one large Asian market whose SAF strategy rests on alcohol rather than waste oils. That insulates it from the UCO squeeze everyone else is facing.

CASE SIX- NINE

Southeast Asia – Soft Targets

Country	Policy	Supply
Indonesia	1% bioavtur from 2027, starting at Soekarno-Hatta and Ngurah Rai; 5% around 2029 to 2030; 30 to 50% by 2060	Pertamina Cilacap, ISCC CORSIA certified; co-processing trials at Dumai and Balongan
Malaysia	NETR mandate of 1% from 2027, with 47% floated for 2050	EcoCeres Johor, 420,000 t a year, running since October 2025; Petronas Pengerang, 650,000 t feed, around 2028
Thailand	DEDE phased mandate from 2026, reaching 8% by 2036	Bangchak Phra Khanong, 1 million litres a day; PTT GC co-processing at about 16,500 litres a day
Vietnam, Philippines	No mandate in force	Demonstration flights only; ICAO ACT-SAF feasibility study for Vietnam confirmed August 2026

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Sources: NETR (2023); Indonesian SAF roadmap and Pertamina; Thailand DEDE; company announcements; ICAO ACT-SAF

CASE TEN

Australia: Designing the Mechanism

Australian Government
Department of Climate Change, Energy, the Environment and Water

The consultation

DCCEEW opened "Securing Australia's Cleaner Fuels Industry" on 18 August 2026, closing 15 September 2026.

Two stages: a volumetric obligation on fuel suppliers through a market formation period to 2035, then a shift to carbon intensity targets.

Implementation is expected by 2029. No blend percentage has been published.

The money and the argument

A.1 billion of production incentive under the Cleaner Fuels Program, whose own design paper closed on 19 December 2025.

The department's cost benefit work found carbon intensity standards deliver higher net benefits than volumetric ones.

Qantas, Virgin, Air New Zealand, A4ANZ and Boeing all back a mandate, each with conditions attached.

Australia makes no advanced biofuel today, and submissions put the cost at 17 to 48 cents a litre. It is the only market in the region arguing about **carbon intensity** rather than volume.
Our own survey agrees: Asian policy has to make that move to CI.

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Phase 1 start is read as 2029 in some summaries and 2030 in others. Check the final design before quoting a date.

WHAT WOULD MOVE THINGS

Five Asks towards a more harmonized region

01 A common ASEAN registry with mutual recognition of certification to improve traceability and accountability

02 Acceptance of ring-fenced book-and-claim for compliance, with clear chain of custody rules

03 Regional actual lifecycle values for Southeast Asian feedstocks, starting with palm waste streams - POME and PFAD

04 Multi-year SAF central procurement by governments to instill confidence in the market

05 Regional funding for improving sustainability of all feedstocks and equity of small-holders

THANK YOU

Asia can supply its own mandates. The open question is how will Asia shape its sustainable Aviation future?

2026 Survey now Open! Share your insights



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