

ICAO EUR/NAT Environment Workshop

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ICAO



The Austrian SAF Roadmap

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Republic of Austria

Overview



Strategic
background

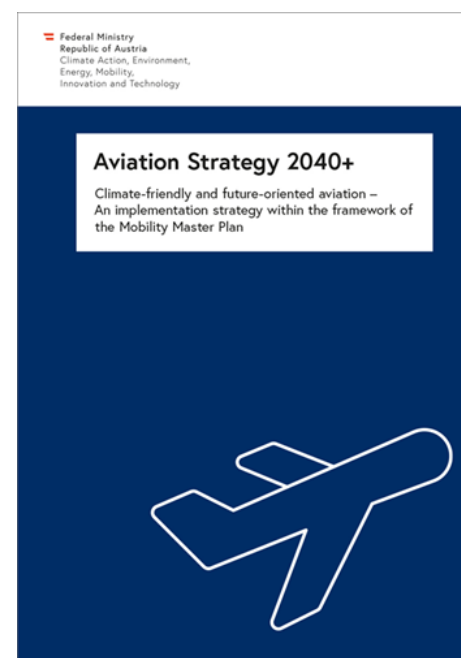


Regulatory and strategical framework

ReFuelEU Aviation Regulation

As of	Blending mandate	Sub mandate PtL
2025	2%	-
2030	6%	
2030 - 2031		1,2%
2032 - 2034		2,0%
2035	20%	5%
2040	34%	10%
2045	42%	15%
2050	70%	35%

Aviation Strategy 2040+



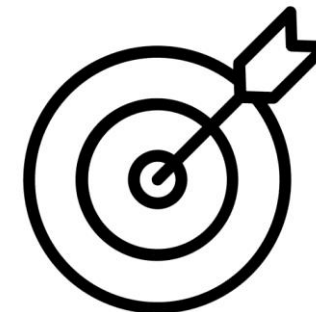
2022

SAF Roadmap



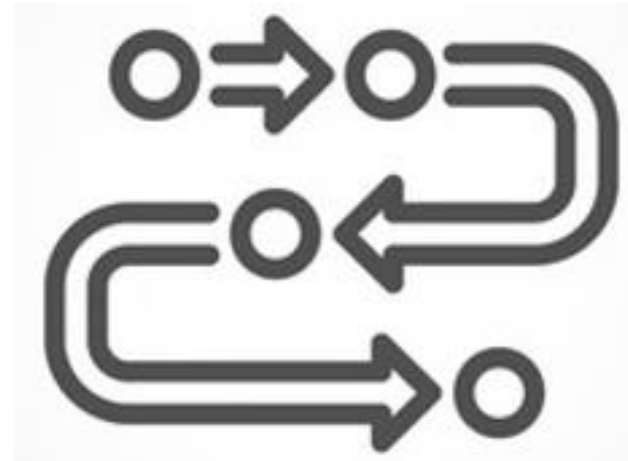
2024

Goals of the Austrian SAF Roadmap



- To ensure compliance with the requirements of the ReFuel EU Aviation Regulation
- To secure availability of SAF in Austria / for the Austrian industry
- To ensure a successful market ramp-up in Austria

02 Development Process



Expertise

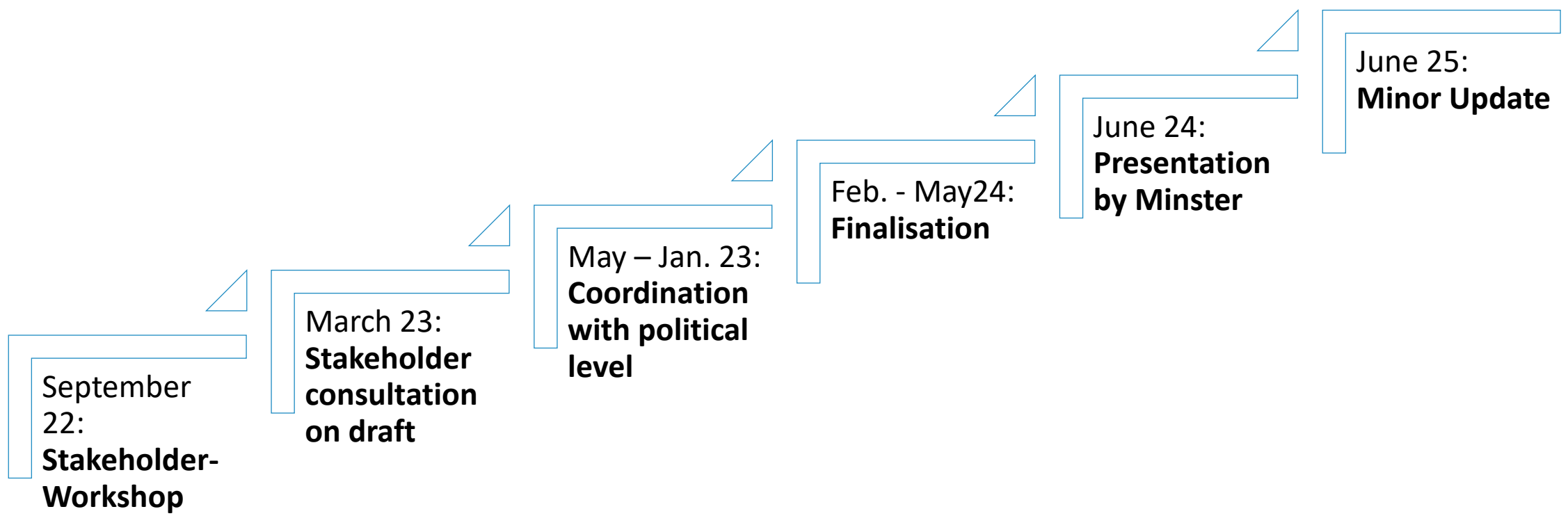
 Federal Ministry
Innovation, Mobility
and Infrastructure
Republic of Austria

commissioned

umweltbundesamt^U
ENVIRONMENT AGENCY AUSTRIA

with the elaboration of a SAF Roadmap in June 2022 in close cooperation with the relevant stakeholders in Austria.

Timeline



Stakeholder Involvement

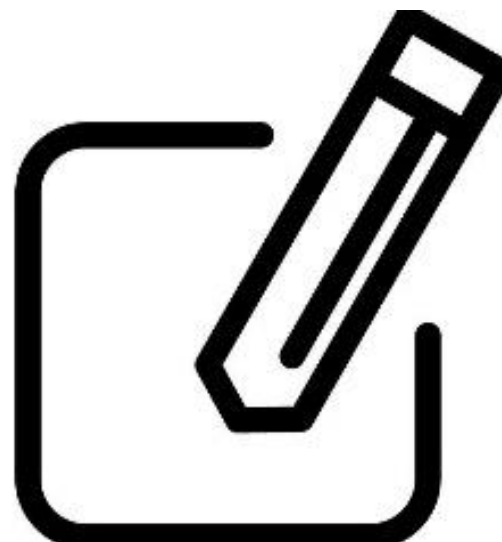
- Close cooperation with stakeholders via:
 - Workshop on SAF Roadmap
 - Regular meetings of bodies implementing the Aviation Strategy
 - Individual appointments with key partners
- Involved partners: Ministries, social partners, companies (airlines, airports, fuel and energy providers etc.), NGOs

Lessons learned

- Political coordination can be time-consuming
- Weighing up the advantages of a government versus ministry level roadmap:
 - Commitment from entire government vs. longer coordination process
- Stakeholder involvement in the process is very important
- Continuous updates are necessary as conditions are changing and new developments arise

03 Content

of the SAF Roadmap



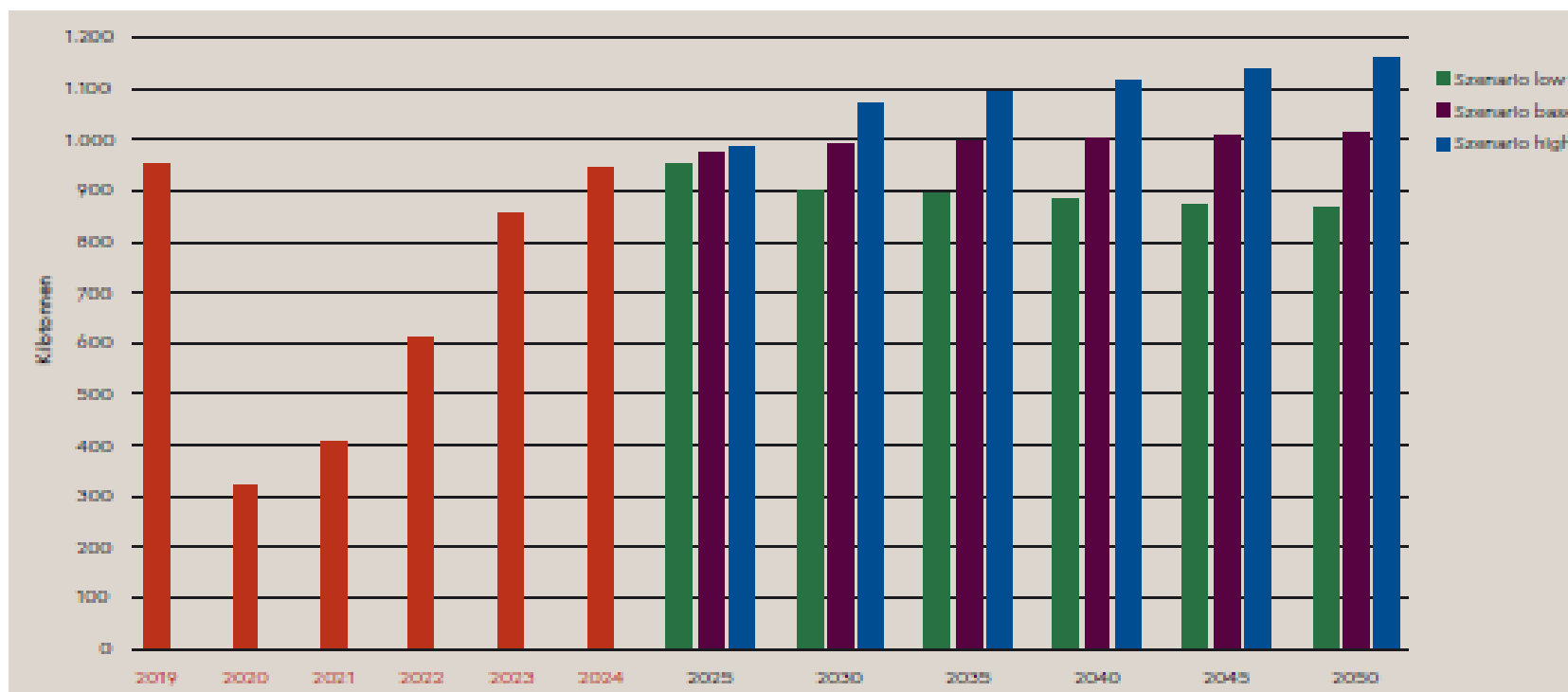
Structure of the SAF Roadmap

5 chapters:



Calculation of SAF demand in Austria

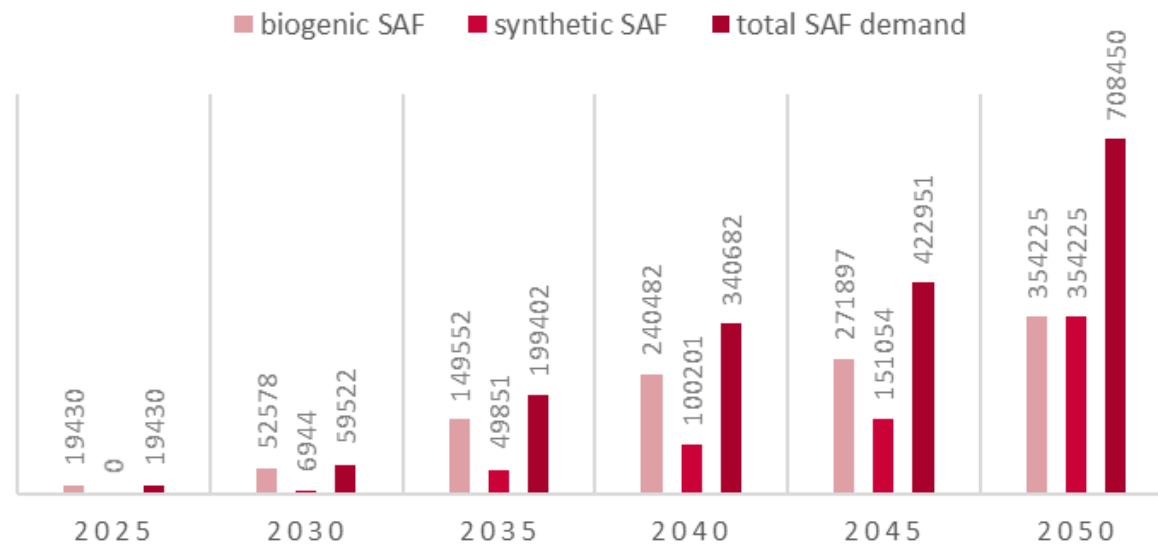
Based on current and estimated jet fuel consumption in Austria:



in 3 different
growth
scenarios

SAF demand in Austria

Estimated total SAF demand in Austria in tons



- 2025: 19.000 t (2%)
- 2030: 60.000 t (6%)
- 2040: 340.000 t (34%)
- 2050: 700.000 t (70%)

Key messages

- The future demand for SAF in Austria is enormous – approx. 700.000 t in 2050.
- Demand for feedstock or energy is currently not met due to high competition with other sectors.
- Current production capacities in Austria are limited. Production facilities with potential for a scale-up are missing (one Co-processing plant and one demonstration plant for PtL technology).
- Imports will play a crucial role in securing the availability of SAF in Austria.

Conclusions

⇒ Policy measures (including financial support) are needed to secure availability of SAF!

⇒ Five focus areas with 15 measures

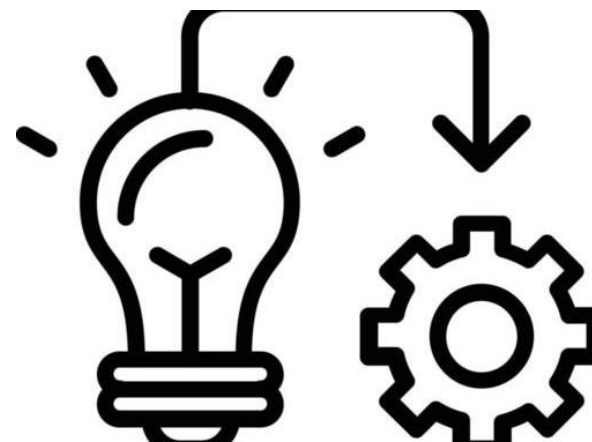


Catalogue of measures:

Focus area		Measures	
No.	Title	No.	Description
1	Incentives and impetus for the SAF ramp-up in Austria	1.1	Supporting research and development
		1.2	Promoting the domestic recycling of used cooking oil
		1.3	Examining the incentivisation of SAF production in Austria
2	Ensuring the availability and safeguarding of import capacities	2.1	Prioritising PtL fuels for use in the non-road and off-road sectors
		2.2	Continuous monitoring of implemented and planned international production capacities for SAF
		2.3	Establishing and expanding strategic partnerships at European and international level
		2.4	Establishing and expanding the infrastructure for SAF transport to and in Austria
3	Ensuring sustainability	3.1	Introducing (electronic) sustainability certificates for SAF
		3.2	Advocacy at the European level for the establishment of a monitoring, reporting and verification system for non-CO ₂ emissions in aviation
4	Cost transparency and competitiveness in aviation	4.1	Advocating for fair fuel taxation in the EU and at the global level
		4.2	Examining the inclusion of SAF use in relevant legislation
		4.3	Ensuring that distortions of competition are avoided
5	(Political) dialogue and stakeholder participation	5.1	Establishing a SAF Competence Circle in and for Austria
		5.2	Continued participation in relevant international expert committees
		5.3	Communicating and raising awareness

04 Implementation

of the SAF Roadmap

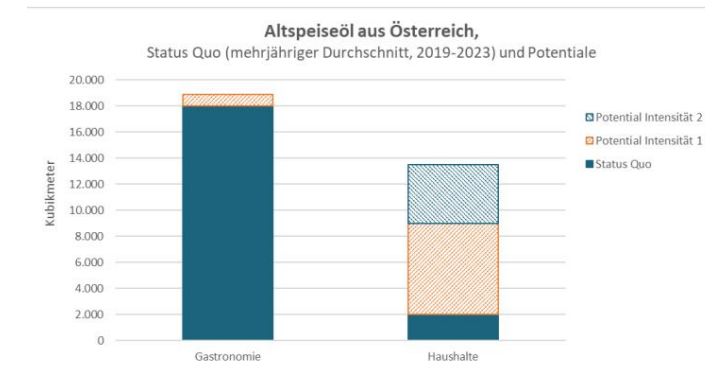


Implementation of the SAF Roadmap

- ✓ Increase of R&D budget
- ✓ Creation of SAF Competence Circle
- ✓ Analysis of the potential to increase availability of used cooking oil
- ✓ Active participation in ICAO ACT SAF Programme
- Examination of possible subsidies for production facilities
- Analysis of possible Austrian participation in emerging auction mechanisms for the import of synthetic SAF (H2Global)

Analysis of the potential to increase availability of used cooking oil

- Conducted by Austrian Environmental Agency in 2024
- Main outcomes:
 - the current level of collection is low, dependence on imports
 - the collection potential could be increased by improving the collection network (by around 40 – 60%)
 - competition for use in biodiesel production



SAF Competence Circle

- Participants: Relevant representatives from Ministries, research and development, production, feedstock suppliers, interest groups representing airlines and airports
- Purpose: Support the Ministry in the implementation of the SAF Roadmap
- 2 yearly meetings
- Discussions: work programme, outcome of used cooking oil analysis, monitoring of SAF production capacities, current topics (e.g. STIP, H2Global).



ACT SAF Training for Vietnam



- Training from 21 to 22 July 2025 in Hanoi, organized by ICAO, BMIMI and Vietnamese CAA
- Approximately 80 participants from aviation authorities, airlines, airports and fuel producers
- Training content: SAF production pathways, SAF certification and sustainability, Status of global SAF production, Overview of SAF policies, Creation of a SAF roadmap, SAF financing, ICAO Fininvest Hub, IRENA study 'Sustainable Aviation Fuels in Southeast Asia', SAF activities of the IATA



Thanks for your attention!

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Thank You

