International Civil Aviation Organization

ATConf/7-WP/171[1]
25/9/26

WORKING PAPER

SEVENTH WORLDWIDE AIR TRANSPORT CONFERENCE (ATCONF/7)

Montréal, HQ, 16 to 20 November 2026

Agenda Item 4: Emerging technologies, new business models and other associated aspects
4.2: Support and economic opportunities of access to aviation cleaner energies

STRENGTHENING TECHNICAL ASSISTANCE FOR THE DEVELOPMENT OF SUSTAINABLE AVIATION FUELS (SAF): PERU'S EXPERIENCE UNDER THE ACT-SAF PROGRAMME AND OPPORTUNITIES FOR REGIONAL COOPERATION

(Presented by Peru and supported by 18 LACAC Member States)[2]

EXECUTIVE SUMMARY

This working paper presents Peru's experience as a beneficiary State under the International Civil Aviation Organization (ICAO) Assistance, Capacity-building and Training for Sustainable Aviation Fuels (ACT-SAF) Programme, under which the Feasibility Study on the Use of Sustainable Aviation Fuels in Peru was concluded in 2026. The study was funded by a contribution from Airbus to the ICAO Environment Fund. Peru's experience demonstrates the value of technical assistance and capacity building to translate global decarbonization goals into national capabilities. It also highlights the need for project support continuity from feasibility study to project development and business case, resource mobilization and access to funding. On this basis, Peru proposes that the continuity of ACT-SAF be geared toward business implementation and further proposes exploring a regional SAF information platform to facilitate cooperation, the identification of synergies and a greater focus on technical assistance among States.

Action: The Conference is invited to:

a) encourage ICAO to further support developing States under ACT-SAF to ensure that feasibility studies lead to business implementation studies, business cases, investment roadmaps and, where necessary, matchmaking mechanisms to link projects and investment opportunities/resource mobilization; and
b) request that ICAO, leveraging existing mechanisms in coordination with regional civil aviation commissions, explore the development of a regional SAF information platform to catalogue raw material potential, regulatory progress, existing capabilities and technical assistance needs in each State with a view to supporting evidence-based decisions, identifying synergies and strengthening regional cooperation.

Strategic Goals:	This working paper relates primarily to Strategic Goals: *"Aviation is Environmentally Sustainable"* and *"No Country Left Behind"*. It also relates to High-Priority Enabler

[1] Spanish version provided by Peru

[2] Belize, Bolivia (Plurinational State of), Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Guyana, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Uruguay.

	"Partnerships, Resource Mobilization and Financial Sustainability" of the ICAO Strategic Plan 2026-2050.
Financial implications:	The proposed measures are aimed at strengthening and targeting technical assistance, cooperation and resource mobilization mechanisms. Their implementation should be subject to available ICAO resources, extra-budgetary contributions, partnerships and regional mechanisms to be determined.
References:	ICAO Strategic Plan 2026–2050 ICAO Business Plan 2026–2028 ICAO Assembly Resolution A42-21 ICAO Global Framework for SAF, LCAF and other Cleaner Aviation Energies (CAAF/3, 2023) Feasibility Study on the Use of Sustainable Aviation Fuels in Peru (ICAO/ACT-SAF, 2026) Eighteenth Meeting of Civil Aviation Authorities of the SAM Region (RAAC/18, February 2025)

1. INTRODUCTION

1.1 In 2022, ICAO created its Assistance, Capacity-building and Training for Sustainable Aviation Fuels (ACT-SAF) Programme to help States develop and deploy SAF by providing instruction and technical assistance and facilitating the exchange of best practices and the conduct of feasibility studies and cost-benefit analysis. In November 2023, the Third ICAO Conference on Aviation and Alternative Fuels (CAAF/3) adopted the ICAO Global Framework for SAF, LCAF and other Cleaner Aviation Energies, reinforcing the importance of capacity building, implementation support and funding to achieve the long-term global aspirational goal for international aviation (LTAG) of net-zero carbon emissions by 2050.

1.2 The ICAO Strategic Plan 2026–2050 provides an additional framework for this work. ACT-SAF is directly linked to the Strategic Goal *Aviation is Environmentally Sustainable* and, by virtue of its assistance and capacity-building characteristics, also contributes to the *No Country Left Behind* goal. For its part, transitioning from exploratory studies to viable projects calls for the high-priority enabler relating to "Partnerships, Resource Mobilization and Financial Sustainability" to come into play. In this context, Peru's experience demonstrates how technical assistance can evolve from SAF potential identification to active implementation.

1.3 In February 2025, ICAO notified Peru's Directorate General of Civil Aviation (DGCA) that Peru had been selected to receive one of a number of feasibility studies funded by a contribution from Airbus to the ICAO Environment Fund. The Feasibility Study on the Use of Sustainable Aviation Fuels in Peru was concluded in 2026. This working paper describes the salient features of this experience and proposes measures to strengthen the continuity of technical assistance and regional cooperation, in accordance with ATConf/7 agenda item 4.2 on support and economic opportunities **to** access cleaner aviation energies.

2. DISCUSSION

2.1 Potential identified in Peru: The study estimates that Peru has a maximum theoretical SAF production potential of 39 096 Kt/year, equivalent to almost eight times the projected domestic consumption of Jet-A1 fuel in 2050. Incorporating technical, logistical and feedstock collection restrictions, the "most probable" scenario is 8 217 Kt/year, equivalent to approximately 1.7 times projected demand. These results are indicative of a significant opportunity, but they also show that a theoretical availability of raw materials is by itself insufficient: viability depends on logistical, regulatory, technological, economic and investment conditions allowing that potential to actualize into production.

2.2 Governance and capacity building: One of the main policy implications identified by the study is the need for a permanent multisectoral committee to bring together relevant ministries, academia, the refining industry, airlines and regional governments. This mechanism would enable consensus building on regulatory, economic and technological conditions for SAF development, coordinating national information and channelling international technical cooperation more efficiently. Experience demonstrates that the aviation energy transition requires capabilities that go beyond the purview of the aviation authority and require sustained intersectoral governance.

2.3 From feasibility to implementation: The main lesson learned from the Peruvian experience is the need to ensure continuity between the identification of potential and the structuring of specific projects. Within the ACT-SAF framework, business implementation studies are used to deepen feasibility findings by developing business cases, economic and financial analyses and investment roadmaps for raw materials and prioritized technological pathways. For developing States, such continuity is a practical mechanism to prevent studies from stagnating at the diagnostic stage and to match identified opportunities to investment and implementation decisions.

2.4 Alignment with the ICAO Strategic Plan 2026–2050: Peru's experience relates primarily to the strategic goal "Aviation is Environmentally Sustainable", by contributing to the development of cleaner energies and the LTAG of net-zero carbon emissions by 2050. Secondarily, it relates to "No Country Left Behind", since ACT-SAF helps reduce technical capacity and implementation gaps between States. The ICAO Business Plan 2026–2028 strengthens this link by expressly envisaging ACT-SAF as a capacity-building and implementation support instrument, identifying "No Country Left Behind" as a further goal advanced by the programme. At the same time, progress towards bankable projects is supported by the high-priority enabler "Partnerships, Resource Mobilization and Financial Sustainability".

2.5 Regional cooperation based on information. The regional forerunners to ACT-SAF create an opportunity to complement individual assistance to States with a regional vision of capabilities and needs. Peru considers that a regional information platform using comparable methodologies could generate a systematic catalogue of raw material potential, status of regulatory progress, production and refining capacity, technical assistance needs and, where appropriate, project maturity. This information would make it possible to identify synergies between States, better target technical cooperation and facilitate evidence-based decisions, without replacing existing ICAO mechanisms or national planning processes.

2.6 Relevance to ATConf/7: Conference agenda item 4.2 provides scope to examine not only the environmental dimension of cleaner energies, but also the economic conditions that enable access and deployment. From this standpoint, Peru's experience suggests that technical assistance produces greater value when there is a sequence connecting capacity building, feasibility studies, business structuring, regional cooperation and access to resource mobilization and funding mechanisms. The strengthening of this continuity would contribute to the geographical expansion of SAF-related opportunities and to enabling developing States to participate effectively in the aviation energy transition.

3. CONCLUSION

3.1 Peru's experience under ACT-SAF demonstrates that ICAO's technical assistance and capacity building are concrete tools for translating global decarbonization goals to the national level. Peru's feasibility study served to define its potential and, at the same time, to identify the institutional, regulatory, logistical, economic and financial conditions that should be addressed to progress towards its materialization.

3.2 Continuity of support from feasibility to business implementation stage would directly contribute to achieving the Strategic Goals "*Aviation is Environmentally Sustainable*" and "*No Country Left Behind*", by making it easier for developing States to transform potential and studies into projects. The connection to partnerships and resource mobilization mechanisms would also boost the economic viability of that transition.

3.3 The Conference is therefore invited to consider the action proposed in the executive summary of this paper, i.e. to reinforce ACT-SAF continuity into business implementation stage, and to explore the development of a regional information platform to facilitate cooperation, targeted assistance and the identification of synergies between States.

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