



ICAO

ENVIRONMENT



2023 ICAO STOCKTAKING AND PRE-CAAF/3 POLICY AND FINANCE CONSULTATION



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Montréal, ICAO Headquarters



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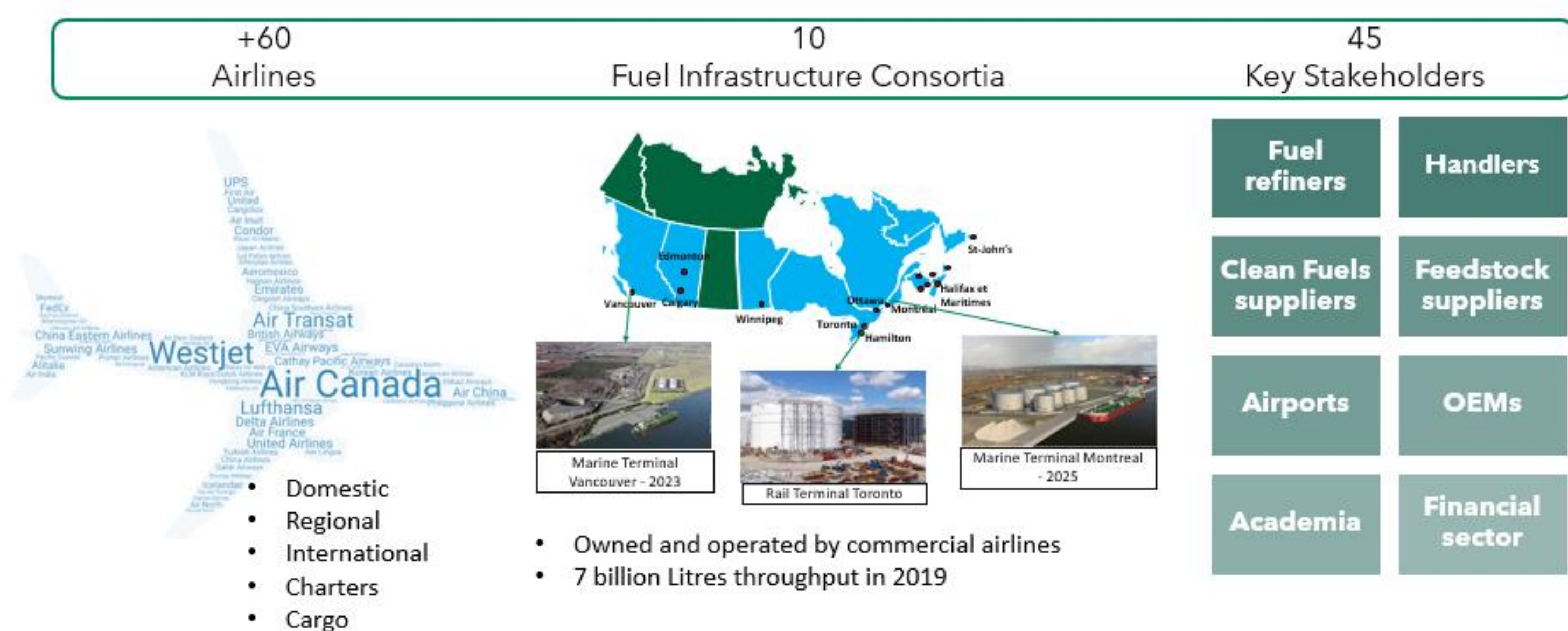
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www.c-saf.ca/roadmap/

Canadian Council for Sustainable Aviation Fuels (C-SAF)

Facilitate the **production** and **use** of sustainable aviation fuels (SAF) in Canada
by **catalyzing** an ecosystem to activate value chains



Canada's Climate Framework and Regime

Net zero emissions accountability act

Commitment to achieve net-zero GHG emissions by 2050

Setting 5-year national emissions reduction targets

And credible, science-based emissions reduction plans



Clean Fuels Regulations

Primarily targeted to reduce GHG emissions from ground fuels

Blending requirements for gas and diesel

SAF can generate carbon credits on a voluntary basis

What is missing?

Clear market signals to build a domestic SAF Market

Opportunities and gaps to create a Canadian SAF market?

Canada **has enough feedstock** to meet 100% Canada's aviation fuel needs in 2030 (if SAF is prioritized)

Canada **has entities in all parts** of the renewable fuels supply chain but **needs investment** to activate all SAF pathways

FIG 5 SAF POTENTIAL FROM AVAILABLE CANADIAN FEEDSTOCKS (2022 VOLUMES)²²

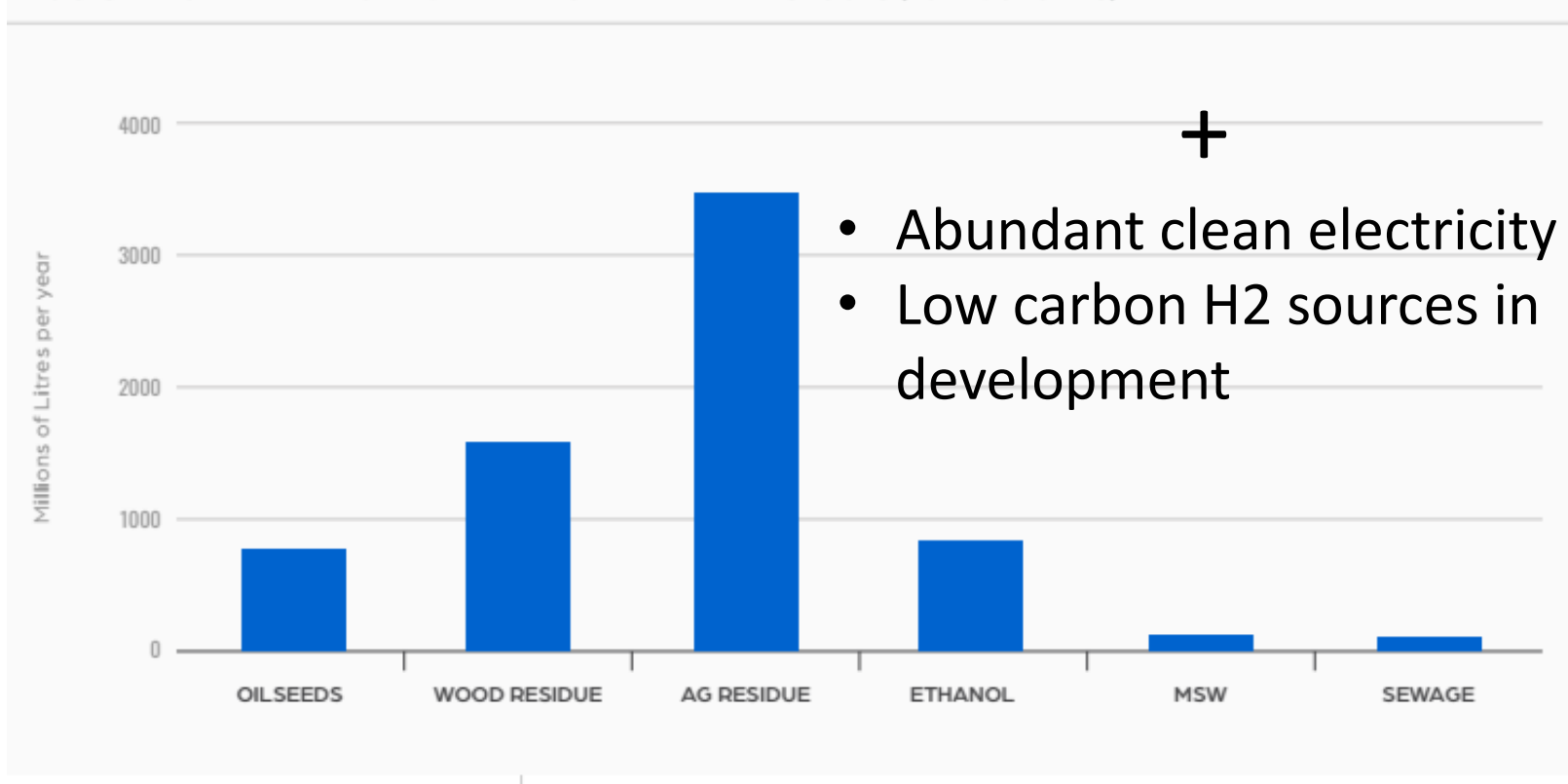
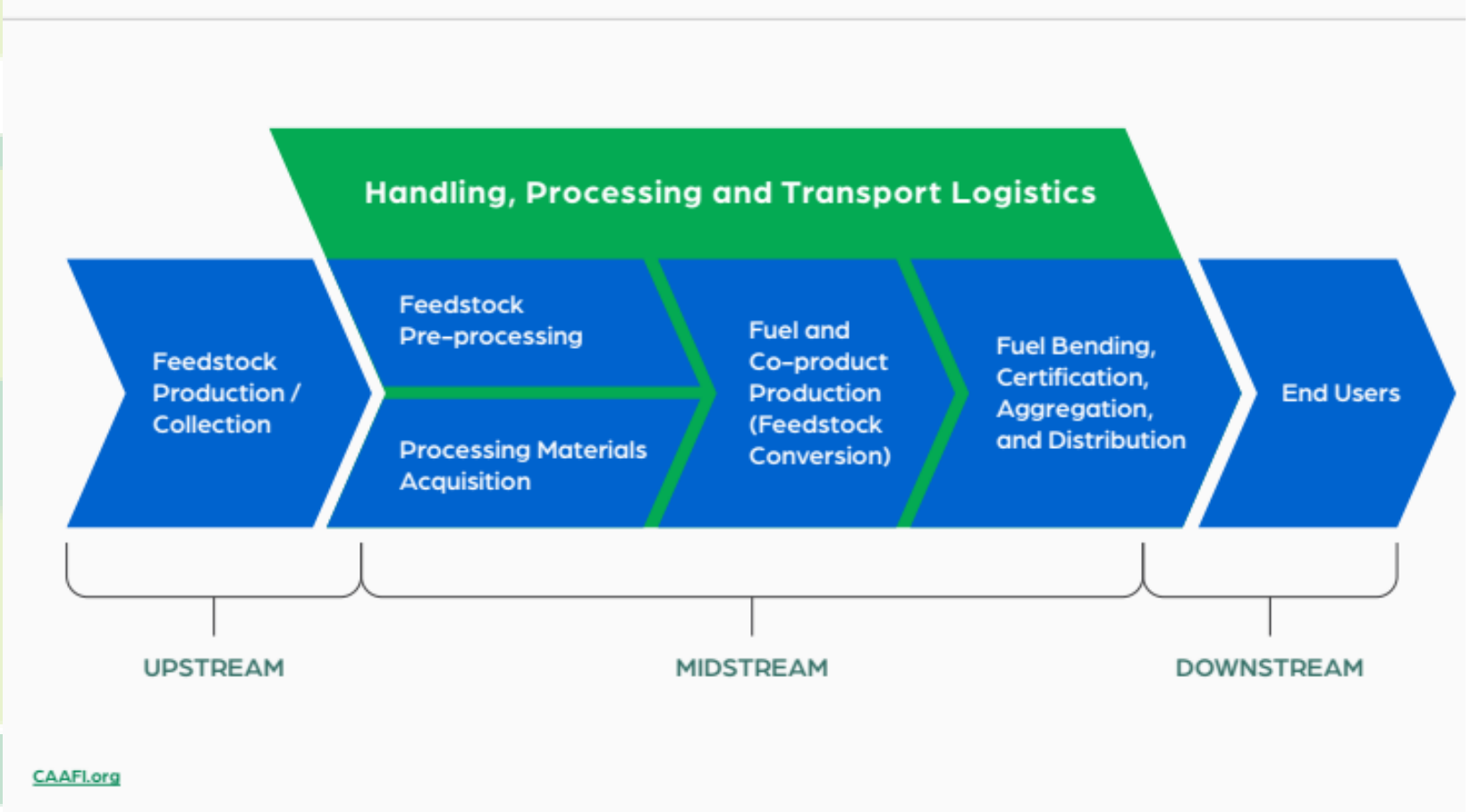


FIG 3 THE SAF SUPPLY CHAIN



C-SAF mobilized industry stakeholders to develop a Roadmap to inform policy and market signal development

SAF Roadmap embeds Clean Competitiveness Principles

SAF is a **net-zero economic opportunity** for Canada

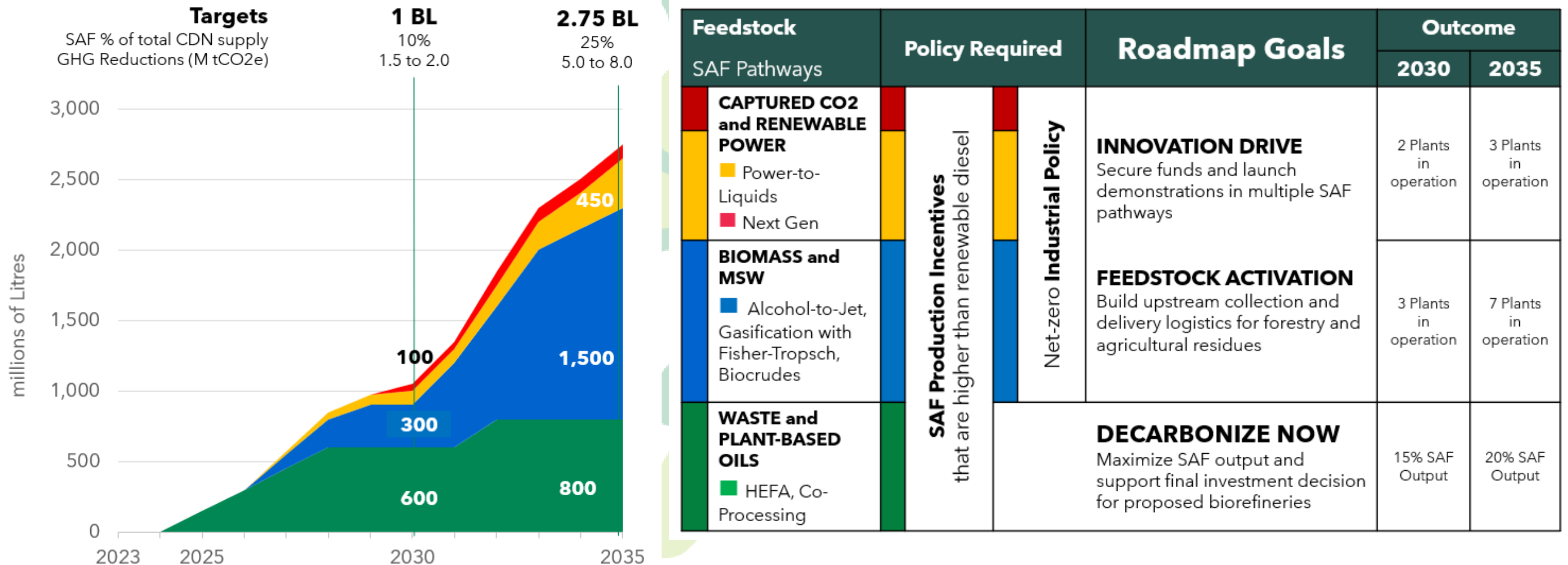
Value-add, future proof, create resilient **regional innovation economies**

SAF's role in Canada's **energy system** transition

1. Strategy to **build the industries needed** for achieving net-zero targets home and abroad
2. **Aligns the whole value chain** from upstream to downstream users and markets with targets and
3. Working together to create **clear timelines and action sequences**
4. Sets priorities and action to **catalyze investments** for industrial transformation

Roadmap: SAF flight plan to 2030

Produce real SAF volumes now while creating conditions for scaling rapidly during the 2030s



2 year Action Plan/Priorities

Roadmap broken down into **5 Action Areas** and we used workshops to develop specific actions and priorities



1. Policy and programs

- Advance a policy package that will incentivize SAF investment and use in Canada today
- Ensure that SAF production incentives are higher than renewable diesel to improve SAF project returns
- Build strategic collaborations to advance a SAF industrial policy for SAF development in Canada

2. Sustainability

- Prioritize Canadian sustainable feedstocks for SAF production
- Articulate sustainability case for Canadian feedstocks, including plant-based oils
- Harmonize SAF accounting and certification methodologies given international sustainability framework (i.e. CORSIA)

3. Feedstocks

- Build regional value chains by scaling up collection and delivery logistics for advanced feedstocks like forestry and agriculture residues

4. SAF Production Capacity

- Create an active project pipeline with first commercial, demonstrations, and pilots in critical SAF production pathways

5. Technology and Innovation

- Create clear technology development plans for SAF
- Secure demonstration funds for SAF
- Coordinate R&D with leading universities and international partners

What's next – To Make or Buy SAF, that is the question!

SAF Financing Support	Initiative	Status
Investment Goal	The Roadmap delineates various production pathways and subtargets to achieve 1 billion of SAF produced in Canada	●
Stakeholder Engagement	C-SAF has catalyzed an ecosystem of SAF stakeholders and created a platform to work together and with government	●
Minimize Project Risks	The Roadmap identifies a 2 year plan of actions and priorities to de-risk projects but needs to be implemented	●
Competitive Regulatory Environment	Canada has some regulatory elements that support SAF, but more is needed to make Canada's SAF renewable fuels investment environment more competitive with other jurisdictions and products	●

Thank You



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