

# A comparative analysis of SAF policies

## ICARUS Project

**Kyriakos Maniatis PhD**

Independent Consultant  
Biomass, bioenergy, and low carbon fuels





## Preliminary analysis from the ICARUS Project

The existing policies to support SAF for the EU, Brazil, Canada, China, India and the US were collected and analysed.

A comparative assessment has been done.

### Partners



### Associated Partners



## SAF Policies and support actions in the EU, Brazil, Canada, China, India, and USA

Region/Country	Key initiatives	Type	Comments
EU	ReFuelEU Aviation Regulation, legislation	Legislation & Mandates	Complex legislation in relation to feedstocks. Mandate targets very ambitious and in short time. High GHG minimum targets. Obligation is upon the fuel suppliers. Mandate targets also on eSAF; nuclear included.
Brazil	Policy on forthcoming mandate	Mandate	Forthcoming mandate set for 2027 aiming to reduce Brazil's aviation emissions by 1% of the sector's total emissions in 2026. Strong relationship to the ethanol route for SAF.
Canada	Policy on targets	Target	1 billion litres of SAF by 2030. By 2035, Canada should be ready to produce SAF to meet 25 percent of total jet fuel demand.
China	Short term goal for biofuel uses in aviation	Target	Cumulatively consuming 50,000 tons of SAF by 2025. No reference yet to sustainability certification. No relationship to ASTM, thus need to develop own standards.
India	Policy on forthcoming mandate	Mandate	Use of 1% SAF for domestic airlines by 2025. The policy also aims to support farmers and rural job creation.
USA	Sustainable Aviation Fuel tax credit, legislation	Production Target	Expand production to achieve 3 billion gallons (11.4billion litres) per year of domestic SAF production that achieve a minimum of a 50% reduction in life cycle GHG emission compared to conventional fuel by 2030. Strong support for new types of feedstock development. Loan guarantees.

## Preliminary conclusions

- At present only the EU and US have enacted legislation for the deployment of SAF.
- Mandates have been adopted in the EU and are planned in Brazil and India while Canada, China and the USA are basing their policies on volumetric targets.
- Only the EU has a specific mandate for eSAF and this also includes hydrogen from nuclear electricity.
- There is strong reference to develop new crops in Canada, India, and USA to ensure that biomass resources will be available to meet the production targets.
- USA has clear and specific loan guarantees to support the deployment of SAF facilities in the USA.
- India, further prominently considers support to farmers and improving local employment.
- Policies in China do not refer to sustainability certification. There is no relationship with ASTM so China must develop its own national SAF standards and certification.