

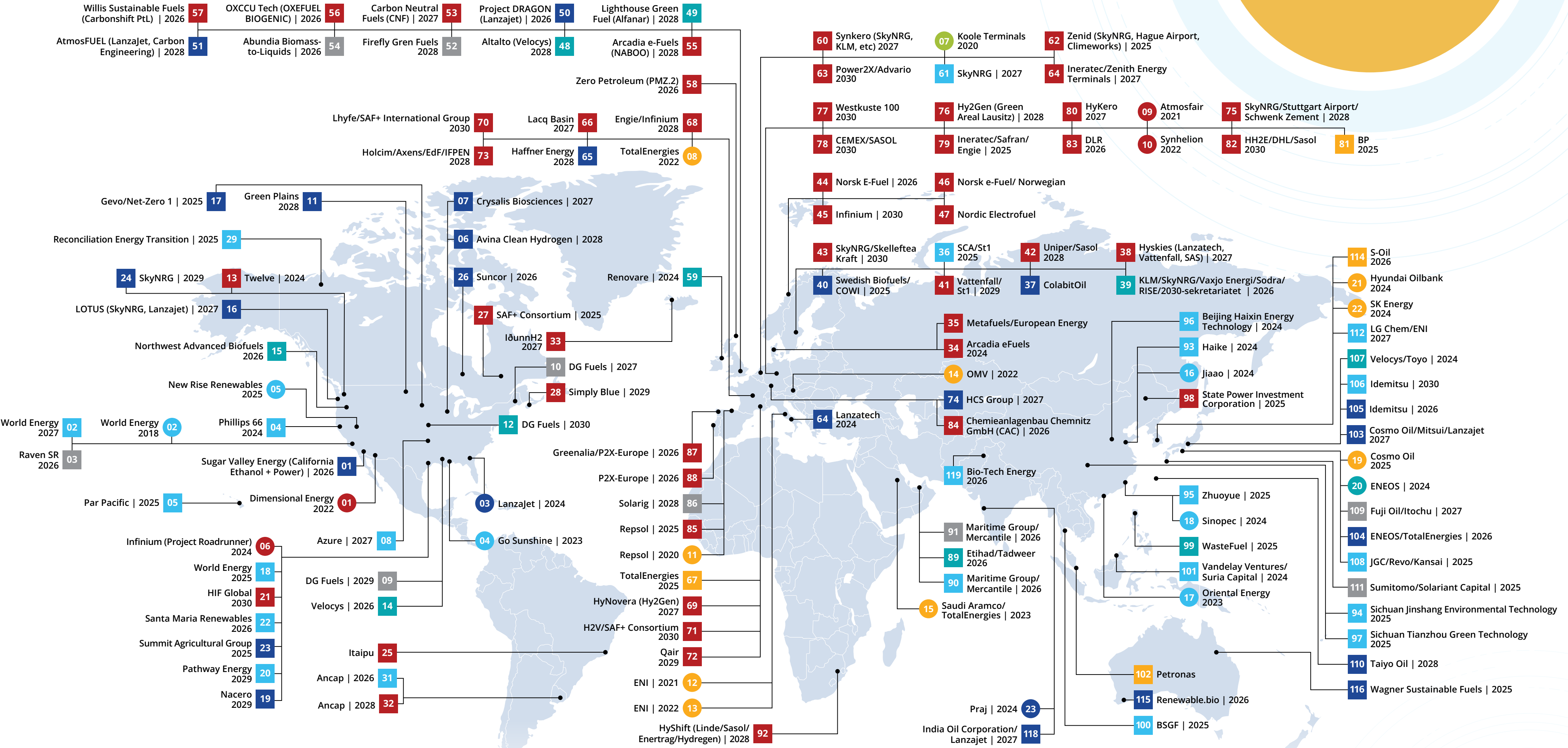
SAF Capacity Map

With mounting pressure from government mandates and directives from the global aviation industry, global airlines are being pushed to use more renewable fuels. As demand intensifies, understanding the market and where the global capacity lies is important.

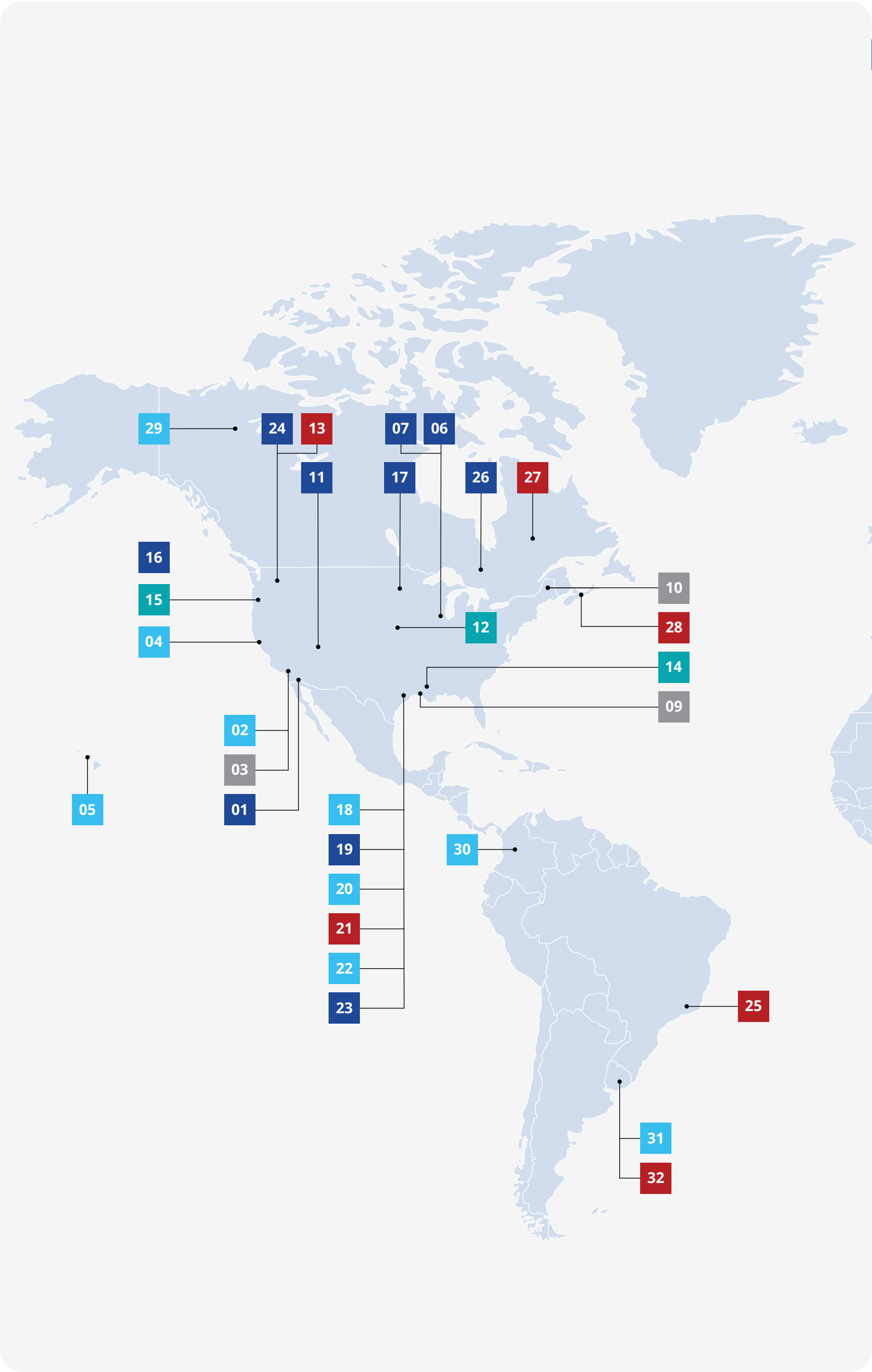
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With industry leading news, analysis, and forecasts, Argus brings transparency and reliability to how SAF is priced, produced, and delivered.

Learn more at www.argusmedia.com/SAF



Planned facilities | North America & South America



Operational | Operational Year

Type of facility

AtJ

Alcohol-to-Jet Synthetic Paraffinic Kerosene

HEFA

Hydroprocessed Esters and Fatty Acids

Co-processing

Distillation

FT-SPK

Fischer-Tropsch Synthetic Paraffinic Kerosene

PtL

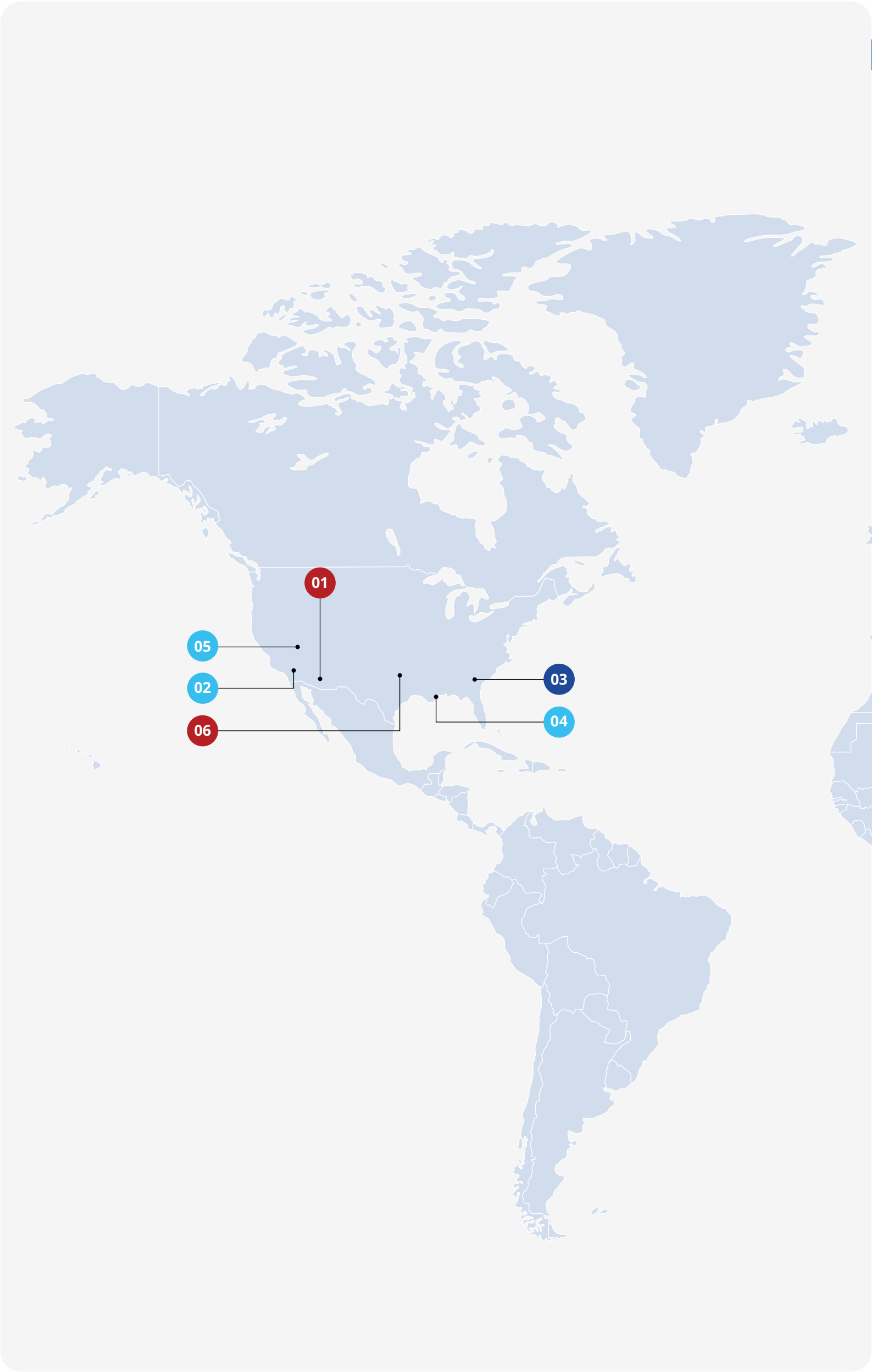
Power-to-Liquid

Other

(CHJ/HEFA-SPK, Gasification/methanol-to-jet, HTL, Pyrolysis, Pyrolysis/hydrotreating, Sun-to-Liquid, Thermal cracking)

Country	Location	Company	Type of Facility	Total plant capacity [mn USG/yr]	Total SAF capacity [MT/yr]	Operational Year
US	Imperial Valley, California	01 Sugar Valley Energy (California Ethanol + Power)	AtJ-SPK	61	175,000	2026
US	Paramount, California	02 World Energy	HEFA-SPK	200	576,000	2027
US	Richmond, CA	03 Raven SR	GtL	17	51,784	2026
US	Rodeo, California	04 Phillips 66	HEFA-SPK	77	220,000	2024
US	Hawaii	05 Par Pacific	Co-processing	61	176,412	2025
US	Illinois	06 Avina Clean Hydrogen	AtJ	120	343,867	2028
US	Sauget, IL	07 Crysallis Biosciences	AtJ	29	86,307	2027
US	Cherryvale, Kansas	08 Azure	HEFA-SPK	135	389,000	2027
US	Louisiana	09 DG Fuels	GtL	208	600,000	2028
US	Maine	10 DG Fuels	GtL	175	516,708	2027
US	Mid-continent	11 Green Plains	AtJ-SPK	134	387,000	2028
US	Minnesota	12 DG Fuels	FT-SPK	192	555,000	2030
US	Moses Lake, Washington	13 Twelve	PTL	0.04	14	2024
US	Natchez, Mississippi	14 Velocys	FT-SPK + GtL	34	100,692	2028
US	Oregon	15 Northwest Advanced Biofuels	FT-SPK + GtL	59	172,615	2026
US	Pacific Northwest	16 LOTUS (SkyNRG, Lanzajet)	AtJ-SPK	4	14,000	2027
US	Lake Preston, South Dakota	17 Gevo/Net-Zero 1	AtJ-SPK	65	187,245	2026
US	Houston, Texas	18 World Energy	HEFA-SPK	250	719,228	2025
US	Penwell, TX	19 Nacero	AtJ	148	428,130	2029
US	Port Arthur, Texas	20 Pathway Energy	FT-SPK + GtL	30	86,307	2029
US	Texas	21 HIF Global	PTL	168	485,000	2030
US	Texas	22 Santa Maria Renewables	HEFA-SPK	25	71,000	2026
US	Texas	23 Summit Agricultural Group	AtJ-SPK	250	716,000	2025
US	Washington	24 SkyNRG	AtJ	49	143,278	2029
Brazil	Rio de Janeiro	25 Itaipu	PTL	1	2,200	-
Canada	Ontario	26 Suncor	AtJ-SPK	60	172,000	2025
Canada	Quebec	27 SAF+ Consortium	PTL	8	23,000	2025
Canada	Nova Scotia	28 Simply Blue	PTL	52	150,000	2029
Canada	Northwest Territories	29 Reconciliation Energy Transition	HEFA-SPK	9	28,769	2025
Colombia	Facativata or eastern Llanos	30 Bio D	HEFA-SPK	50	144,000	2027
Uruguay	La Teja, Montevideo	31 Ancap	HEFA-SPK	62	180,000	2026
Uruguay	Paysandú	32 Ancap	PTL	0.0467	137	2028

Operational facilities | North America & South America



Operational | Operational Year

Type of facility

●

AtJ
Alcohol-to-Jet Synthetic Paraffinic Kerosene

●

HEFA
Hydroprocessed Esters and Fatty Acids

●

Co-processing

●

Distillation

●

FT-SPK
Fischer-Tropsch Synthetic Paraffinic Kerosene

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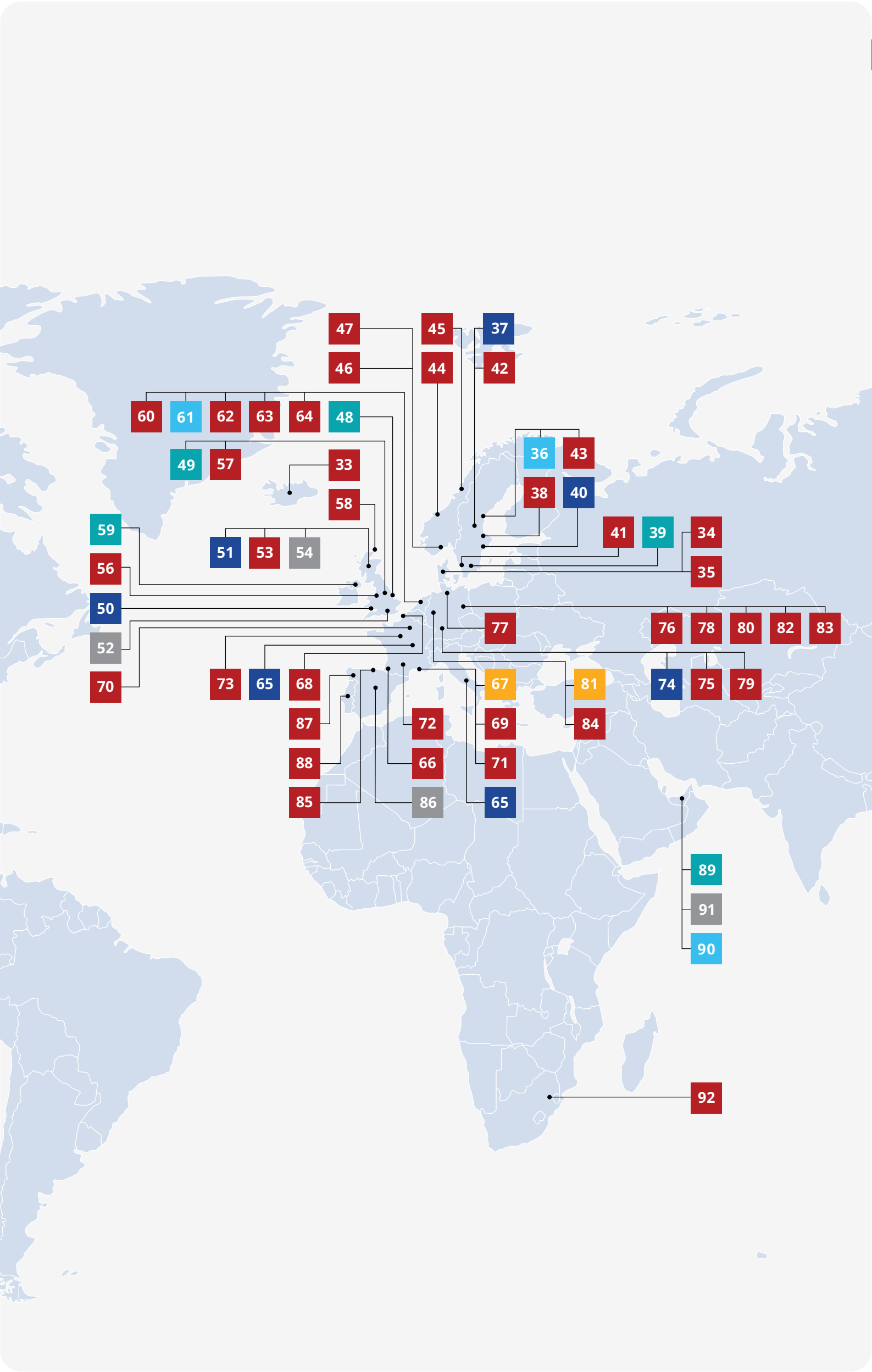
PtL
Power-to-Liquid

●

Other
(CHJ/HEFA-SPK, Gasification/methanol-to-jet, HTL, Pyrolysis, Pyrolysis/hydrotreating, Sun-to-Liquid, Thermal cracking)

Country	Location	Company	Type of Facility	Total plant capacity [mn USG/yr]	Total SAF capacity [MT/yr]	Operational Year
US	Tuscon, Arizona	01 Dimensional Energy	PtL	0.001825	1	2022
US	Paramount, California	02 World Energy	HEFA-SPK	50	144,000	2018
US	Soperton, Georgia (Freedom Pines Fuels facility)	03 LanzaJet	AtJ-SPK	10	29,000	2024
US	New Orleans, LA	04 Go Sunshine	HEFA-SPK	29	83,600	2023
US	Reno, Nevada	05 New Rise Renewables	HEFA-SPK	52	150,000	2024
US	Corpus Christi, Texas	06 Infinium (Project Roadrunner)	PtL	16	24,451	2024

Planned facilities | Europe, Middle East and Africa



Operational | Operational Year

Type of facility

AtJ

Alcohol-to-Jet Synthetic Paraffinic Kerosene

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Fischer-Tropsch Synthetic Paraffinic Kerosene

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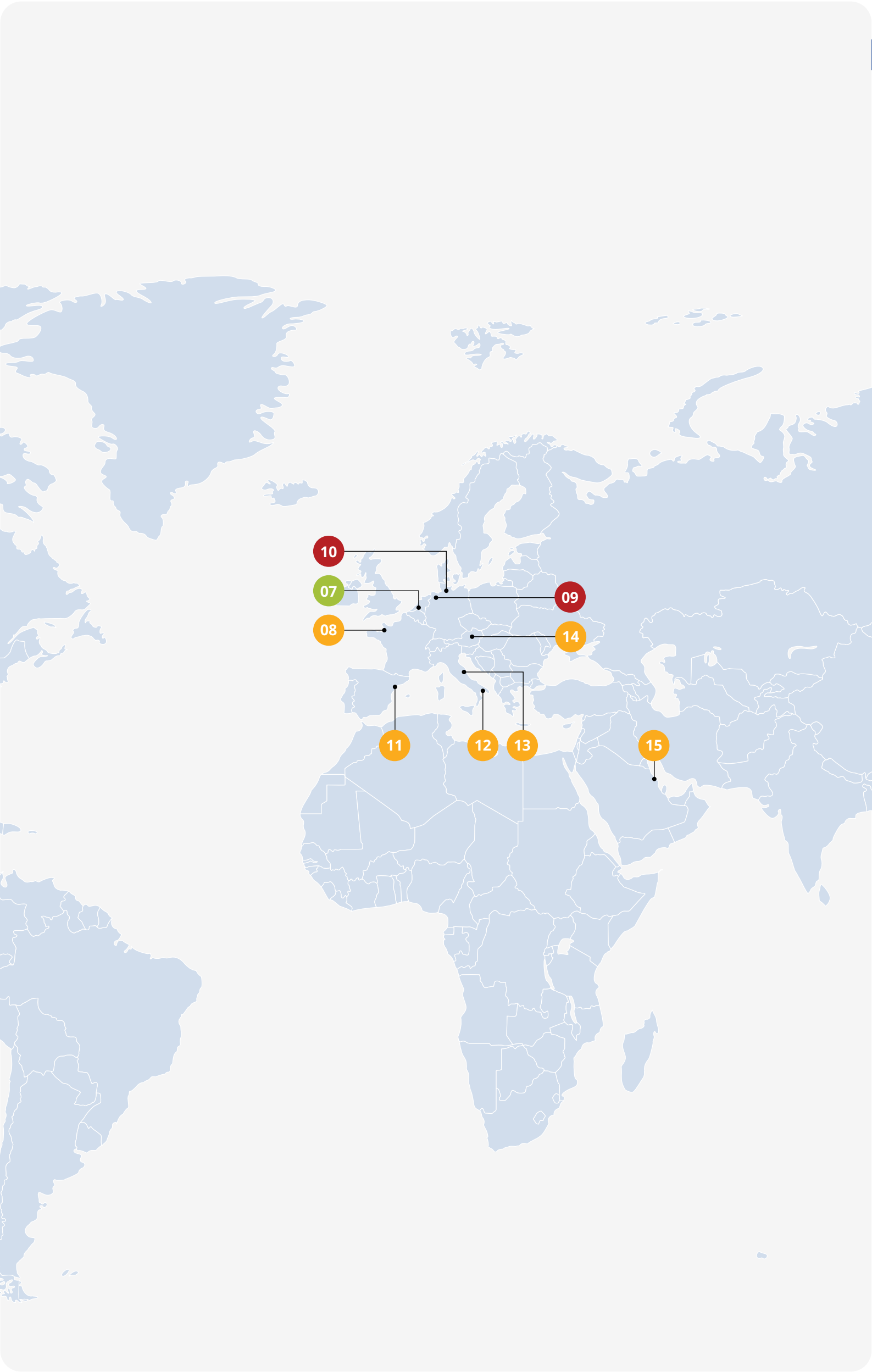
Power-to-Liquid

Other

(CHJ/HEFA-SPK, Gasification/methanol-to-jet, HTL, Pyrolysis, Pyrolysis/hydrotreating, Sun-to-Liquid, Thermal cracking)

Country	Location	Company	Type of Facility	Total plant capacity [mn USG/yr]	Total SAF capacity [MT/yr]	Operational Year
Iceland	Helguvik Harbour	33 IðunnH2	PtL	22.6	65,000	2027
Denmark	Vordingborg, Zealand	34 Arcadia eFuels	PtL	26	76,000	2026
Denmark		35 Metafuels/European Energy	PtL	1	3,500	
Sweden	Ostrand, Timrå	36 SCA/St1	HEFA-SPK			2028
Sweden	Gävleborg, Norrsundet	37 Colabitoil	AtJ			
Sweden	Forsmark	38 Hyskies (Lanzatech, Vattenfall, SAS)	PtL	17	50,000	2027
Sweden	Vaxjo	39 KLM/SkyNRG/Vaxjo Energi/Sodra/RISE/2030-sekretariatet	FT-SPK	5	16,000	2026
Sweden	Stockholm	40 Swedish Biofuels/COWI	AtJ-SPK	6	20,000	2025
Sweden	West coast	41 Vattenfall/St1	PtL			2029
Sweden	Solleftea	42 Uniper/Sasol	PtL	0.3	762	2028
Sweden	Västerbotten, Port of Skellefteå	43 SkyNRG/Skelleftea Kraft	PtL	34	100,000	2030
Norway	Mosjoen	44 Norsk E-Fuel	PtL	13	38,000	2026
Norway	Mo I Rana	45 Infinium	PtL	31	90,000	2030
Norway	Nordland, Satakunta	46 Norsk e-Fuel/ Norwegian	PtL	26	76,000	
Norway	Porsgrunn, Herøya	47 Nordic Electrofuel	PtL	2	7,600	2025
UK	Immingham	48 Alitalo (Velocys)	FT-SPK	21	62,400	2028
UK	Billingham, Teeside	49 Lighthouse Green Fuel (Alfanar)	FT-SPK	43	124,400	2028
UK	Port Talbot, South Wales	50 Project DRAGON (Lanzajet)	AtJ-SPK	26	76,000	2026
UK		51 AtmosFUEL (Lanzajet, Carbon Engineering)	AtJ-SPK	26	76,100	2030
UK	Southeast UK	52 Firefly Gren Fuels	HTL	34	100,000	2028
UK		53 Carbon Neutral Fuels (CNF)	PtL	4	12,000	2027
UK		54 Abundia Biomass-to-Liquids	Pyrolysis/hydrotreating	1	2,600	2026
UK	Teeside	55 Arcadia e-Fuels (NABOO)	PtL	23	67,700	2028
UK	Sheffield	56 OXCCU Tech (OXEFUEL BIOGENIC)	PtL	2	7,400	2026
UK	Teeside	57 Willis Sustainable Fuels (Carbonshift PtL)	PtL	5	14,000	2026
UK	Orkney	58 Zero Petroleum (PMZ.2)	PtL	3	8,714	2026
UK	County Londonderry, Northern Ireland	59 Renovare	FT-SPK	0.3	761	2025
Netherlands	Amsterdam	60 Synkero (SkyNRG, KLM,etc)	PtL	34	100,000	2027
Netherlands	Delfzijl	61 SkyNRG	HEFA-SPK	34	100,000	2027
Netherlands	Rotterdam	62 Zenid (SkyNRG, Hague Airport, Climeworks)	PtL	0.1	280	2025
Netherlands	Rotterdam	63 Power2X/Advavrio	PtL	86	250,000	2030
Netherlands	Amsterdam	64 Ineratec/Zenith Energy Terminals	PtL	12	35,000	2027
Europe		64 Lanzatech	AtJ-SPK	10	29,000	2024
France	Châlons-en-Champagne	65 Haffner Energy	AtJ	10	30,000	2028
France	Lacq Basin	66 BioTJet	PtL	38	110,000	2027
France	Gonfreville	67 TotalEnergies	Co-processing	8	25,000	2025
France	Dunkirk	68 Engie/Infinium	PtL	24	71,000	2028
France	Gurdanne, France	69 HyNovera (Hy2Gen)	PtL	11	32,000	2027
France	Le Havre	70 Lhyfe/SAF+ International Group	PtL	25	72,000	2030
France	Marseille	71 H2V/SAF+ Consortium	PtL	27	80,000	2030
France	Occitania	72 Qair	PtL	24	70,000	2029
France	Loire-Atlantique	73 Holcim/Axens/EdF/IFPEN	PtL	17	50,000	2028
Germany	Speyer	74 HCS Group	AtJ-SPK	29	60,000	2027
Germany	Heidenheim-Mergelstetten	75 SkyNRG/Stuttgart Airport/Schwenk Zement	PtL	17	50,000	2028
Germany	Janschwalde, Brandenburg	76 Hy2Gen (Green Areal Lausitz)	PtL	22	64,000	2028
Germany	Schleswig-Holstein	77 Westkuste 100	PtL			2030
Germany	Rudersdorf	78 CEMEX/SASOL	PtL	5	15,000	2030
Germany	Frankfurt, Hesse	79 Ineratec/Safran/Engie	PtL	1	3,500	2025
Germany	Bohlen-Lippendorf, Saxony	80 HyKero	PtL	17	50,000	2027
Germany	Gelsenkirchen	81 BP	Co-processing			2025
Germany	Emsland	82 HH2E/DHL/Sasol	PtL	69	199,365	2030
Germany	Leuna	83 DLR	PtL	3	10,000	2026
Germany		84 Chemieanlagenbau Chemnitz GmbH (CAC)	PtL	0.1	369	2026
Spain	Bilbao	85 Repsol	PtL	1	2,319	2025
Spain	Castile and León, Garray	86 Solarig	Gasification + FT	20	400,000	2028
Spain	Curtis	87 Greenalia/P2X-Europe	PtL	6	20,000	2026
Portugal	Figueira da Foz	88 P2X-Europe	PtL	13	40,000	2026
UAE	Abu Dhabi	89 Etihad/Tadweer	FT-SPK	140	403,000	2026
UAE	Emirate of Fujairah	90 Maritime Group/Mercantile	HEFA-SPK	40	115,150	2026
UAE	Emirate of Fujairah, Mena Terminals	91 Maritime Group/Mercantile	Hydrotreatment	40	115,150	2026
South Africa	Secunda	92 HyShift (Linde/Sasol/Enertrag/Hydrogen)	PtL	17	50,000	2028

Operational facilities | Europe, Middle East and Africa



Operational | Operational Year

Type of facility

●

AtJ
Alcohol-to-Jet Synthetic Paraffinic Kerosene

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Hydroprocessed Esters and Fatty Acids

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Distillation

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FT-SPK
Fischer-Tropsch Synthetic Paraffinic Kerosene

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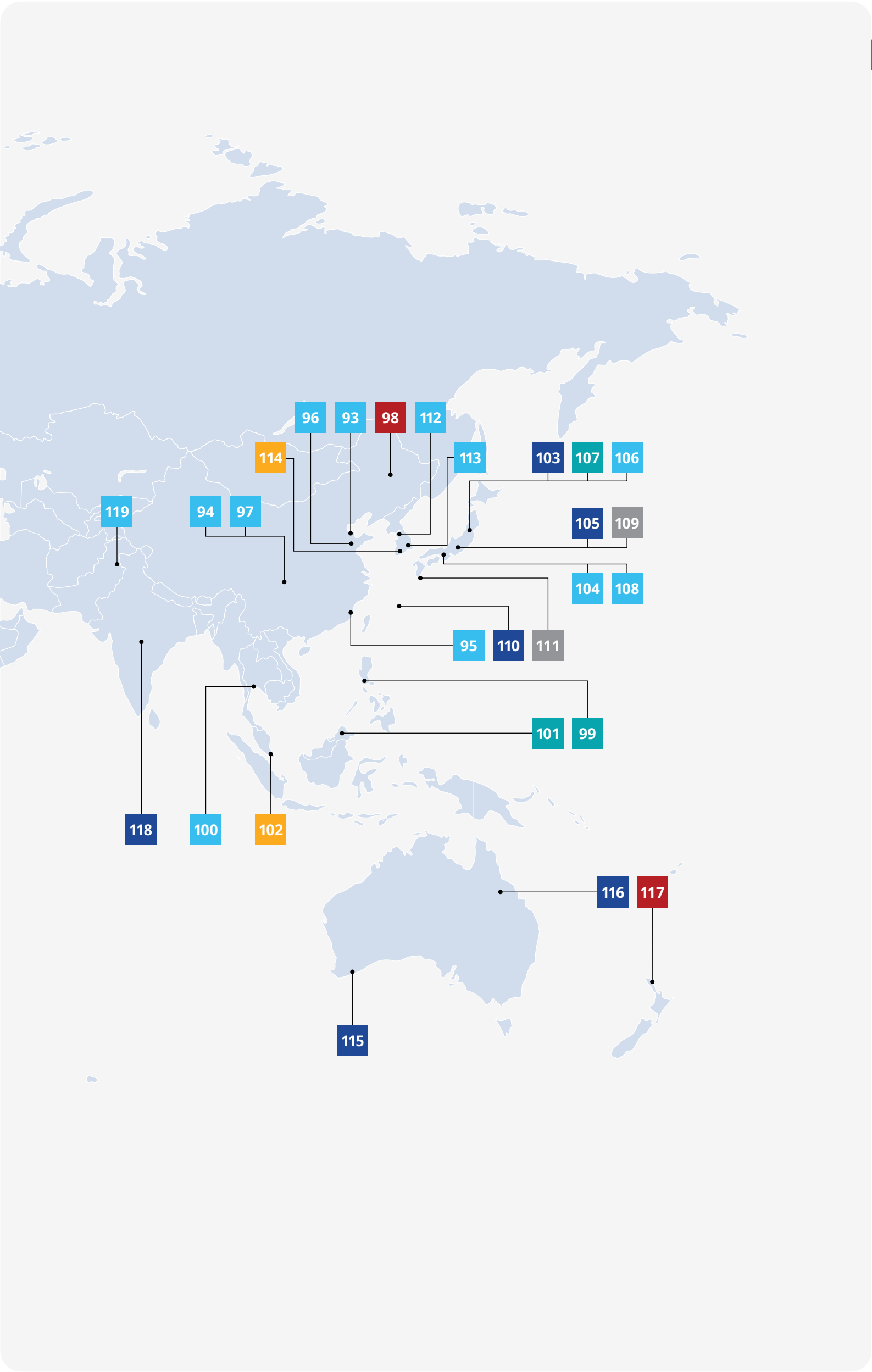
PtL
Power-to-Liquid

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Other
(CHJ/HEFA-SPK, Gasification/methanol-to-jet, HTL, Pyrolysis, Pyrolysis/hydrotreating, Sun-to-Liquid, Thermal cracking)

Country	Location	Company	Type of Facility	Total plant capacity [mn USG/yr]	Total SAF capacity [MT/yr]	Operational Year
Netherlands	Botlek, Rotterdam	07 Koole Terminals	Distillation	34	100,000	2020
France	Oudalle, Normandy	08 TotalEnergies	Co-processing			2022
Germany	Werlte	09 Atmosfair	PtL	0.127	365	2021
Germany	Lingen	10 Synhelion	PtL	0.0027	8	2022
Spain	Tarragona	11 Repsol	Co-processing			2020
Italy	Taranto	12 ENI	Co-processing	45	130,000	2021
Italy	Livorno	13 ENI	Co-processing	3.5	10,000	2022
Austria	Schwechat	14 OMV	Co-processing	1.4	4,000	2022
Saudi Arabia	Satorp, Jubail	15 TotalEnergies	Co-processing			2023

Planned facilities | Asia Pacific



Operational | Operational Year

Type of facility

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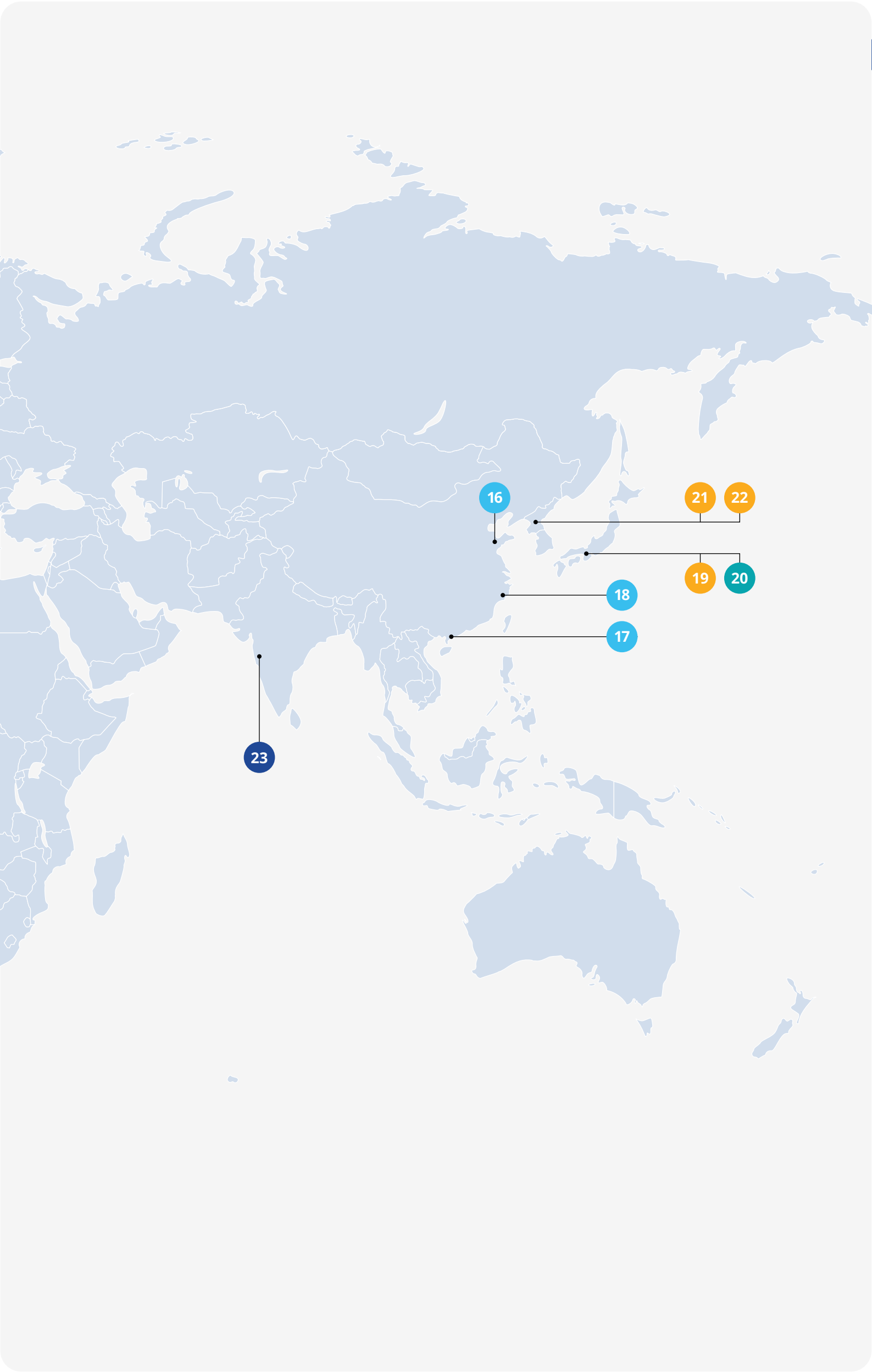
Power-to-Liquid

Other

(CHJ/HEFA-SPK, Gasification/methanol-to-jet, HTL, Pyrolysis, Pyrolysis/hydrotreating, Sun-to-Liquid, Thermal cracking)

Country	Location	Company	Type of Facility	Total plant capacity [mn USG/yr]	Total SAF capacity [MT/yr]	Operational Year
China	Dongying, Shandong	93 Haike	HEFA-SPK	173	500,000	2024
China	Suining, Sichuan	94 Sichuan Jinshang Environmental Technology	HEFA-SPK	104	300,000	2025
China	Fujian	95 Zhuoyue	HEFA-SPK	35	100,000	2025
China	Rizhao, Shandong	96 Beijing Haixin Energy Technology	HEFA-SPK	69	200,000	2025
China	Weiyuan, Sichuan	97 Sichuan Tianzhou Green Technology (Phase 1)	HEFA-SPK	69	200,000	2025
China	Qiqihaer, Heilongjiang	98 State Power Investment Corporation	PTL	3.5	10,000	2025
Philippines	Manila	99 WasteFuel	FT-SPK	30	86,309	2025
Thailand	Bangkok	100 BSGF	HEFA-SPK	96	315,000	2025
Malaysia	Kota Kinabalu, Sabah	101 Vandelay Ventures/Suria Capital	HEFA-SPK	87	250,000	2024
Malaysia	Sungai Udang, Melaka	102 Petronas	Co-processing			
Japan		103 Cosmo Oil/Mitsui/Lanzajet	ATJ-SPK	60	172,000	2027
Japan	Chiba	104 ENEOS/TotalEnergies	HEFA-SPK	106	304,000	2026
Japan	Chiba	105 Idemitsu	ATJ-SPK	26	76,000	2026
Japan		106 Idemitsu	HEFA-SPK	106	303,000	2030
Japan		107 Velocys/Toyo	FT-SPK			2024
Japan	Sakai, Osaka	108 JGC/Revo/Kansai	HEFA-SPK	8	22,800	2025
Japan	Sodegaura, Tokyo	109 Fuji Oil/Itochu		48	137,000	2027
Japan	Nansei Sekiyu, Okinawa	110 Taiyo Oil	ATJ-SPK	58	167,000	2028
Japan	Tanegashima island	111 Sumitomo/Solariant Capital	Thermal cracking			2025
South Korea	Daesan	112 LG Chem/ENI	HEFA-SPK	111	320,000	2026
South Korea	Ulsan	113 SK Energy	HEFA-SPK	174	500,000	2026
South Korea	Ulsan	114 S-Oil	Co-processing	52	150,000	2024
Australia	Esperance, WA	115 Renewable.bio	ATJ-SPK	10.5	30,000	2026
Australia	Queensland, EA	116 Wagner Sustainable Fuels	ATJ-SPK	27	86,298	2025
New Zealand	Marsden Point, Auckland	117 Fortescue Future Industries	PTL	15	45,600	2027
India		118 India Oil Corporation/Lanzajet	ATJ-SPK	30	88,000	2027
Pakistan	Sheikhupura	119 Bio-Tech Energy	HEFA-SPK	30	88,000	2027

Operational facilities | Asia Pacific



Operational | Operational Year

Type of facility

AtJ

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Fischer-Tropsch Synthetic Paraffinic Kerosene

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Country	Location	Company	Type of Facility	Total plant capacity [mn USG/yr]	Total SAF capacity [MT/yr]	Operational Year
China	Guanyun, Jiangsu	16 Jiaao	HEFA-SPK	174	500,000	2024
China		17 Oriental Energy	HEFA-SPK	173	500,000	2023
China	Zhenhai	18 Sinopec	HEFA-SPK	27	80,000	2022
Japan	Sakai	19 Cosmo Oil	Co-processing	7	21,778	2025
Japan	Yokohama	20 ENEOS	FT-SPK	0.0100	44	2024
South Korea	Daesan	21 Hyundai Oilbank	Co-processing	52	150,000	2024
South Korea	Ulsan	22 SK Energy	Co-processing	27	80,000	2024
India	Pune	23 Praj	AtJ-SPK			2024