GBTA Global Business Travel Association

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Sustainable Aviation Fuel – All of the Above for U.S. Energy

Background: GBTA research on the U.S. economic impact of business travel shows there were a total of 429.9 million business trips taken within the U.S. Nearly 35% of business trips involve air travel – second only to personal vehicles – meaning business travelers rely heavily on-air travel.[1]

The US Energy Information Administration reports that increased demand for air travel has increased U.S. jet fuel consumption every year since 2020 and is expected to reach a record high in 2026.[2]

Sustainable aviation fuel (SAF) has emerged as a leading solution to support growing fuel demand, achieve energy dominance, and create opportunities for rural economies. Since SAF is made from a variety of renewable feedstocks, it helps to establish new markets for American agriculture, bioenergy, and technology developers. SAF also creates good-paying jobs and new economic opportunities for U.S. farmers and in rural communities.

SAF can be produced domestically and blended with traditional jet fuel without the need to modify existing aircraft, meaning SAF can be immediately used.

The rising demand for jet fuel means that the market opportunity for SAF producers is bullish for the foreseeable future. It is critical to ensure that US fuel and feedstock producers are competitively postured to capitalize on this tremendous market opportunity.

Companies and airlines are increasingly interested in the use of Sustainable Aviation Fuel (SAF) in addition to traditional fuel. While the production of SAF is currently expensive to produce, it is viewed as a short-term viable solution to hedge against future fossil fuel volatility and carbon pricing.

There are many examples of corporate buyers investing in SAF or claiming its usage on flights. Demand is growing, but not enough - only 12% of companies are currently purchasing Sustainable Aviation Fuel certificates (SAFc), spending on average $400,000 USD annually. However, the practice is set to double over the next year, with 15% of companies planning to be on the market for SAFc. This is a good start, but more production is needed.

Issue: SAF is a key solution for strengthening U.S. energy dominance, driving investment in rural economies, and positioning the United States as a global leader in SAF production. For a variety of reasons, including the size of the jet fuel market vs. the on-road fuels market, and relative industry maturity, SAF is not yet commercially available at scale and remains considerably more expensive than conventional jet fuel. To launch a robust industry that the U.S. can lead,

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[1] GBTA U.S. Business Travel Economic Impact Report 2024
[2] US Energy Information Administration: *Short-Term Energy Outlook 2025*. Accessed here: https://www.eia.gov/outlooks/steo/

government incentives are required, as the scale of investment needed is colossal. Industry experts predict that $175 billion in annual investment is needed to scale SAF if we are to reach Net Zero by 2050.[3] Congressional action is needed to spur the production of SAF.

Congress has encouraged the production of SAF through the current reconciliation bill that extends SAF production credits until 2031 for eligible U.S. entities. This critical legislation provides long-term certainty for SAF producers, incentivizes private sector investment, and builds a robust domestic supply chain.

Action: As Congress debates the Reconciliation bill, language should be kept that supports the inclusion of the extension of the Clean Fuel Production Credit (45Z) through 2031 in the bill passed through the House of Representatives.