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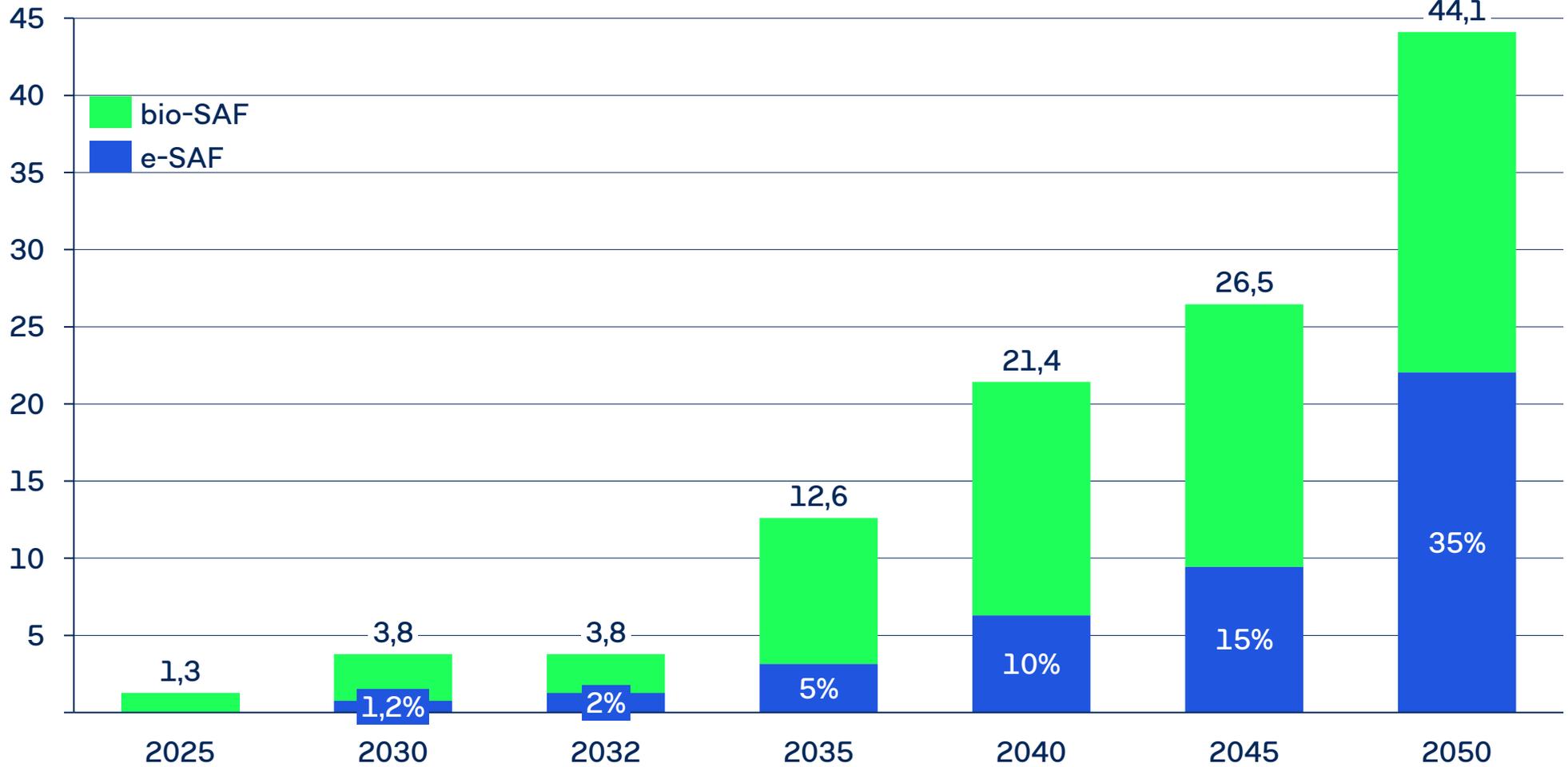
eSAF from a Refiner's Perspective

Challenges and Opportunities

International Conference on Sustainable Aviation Fuels (SAFs) topics 2025

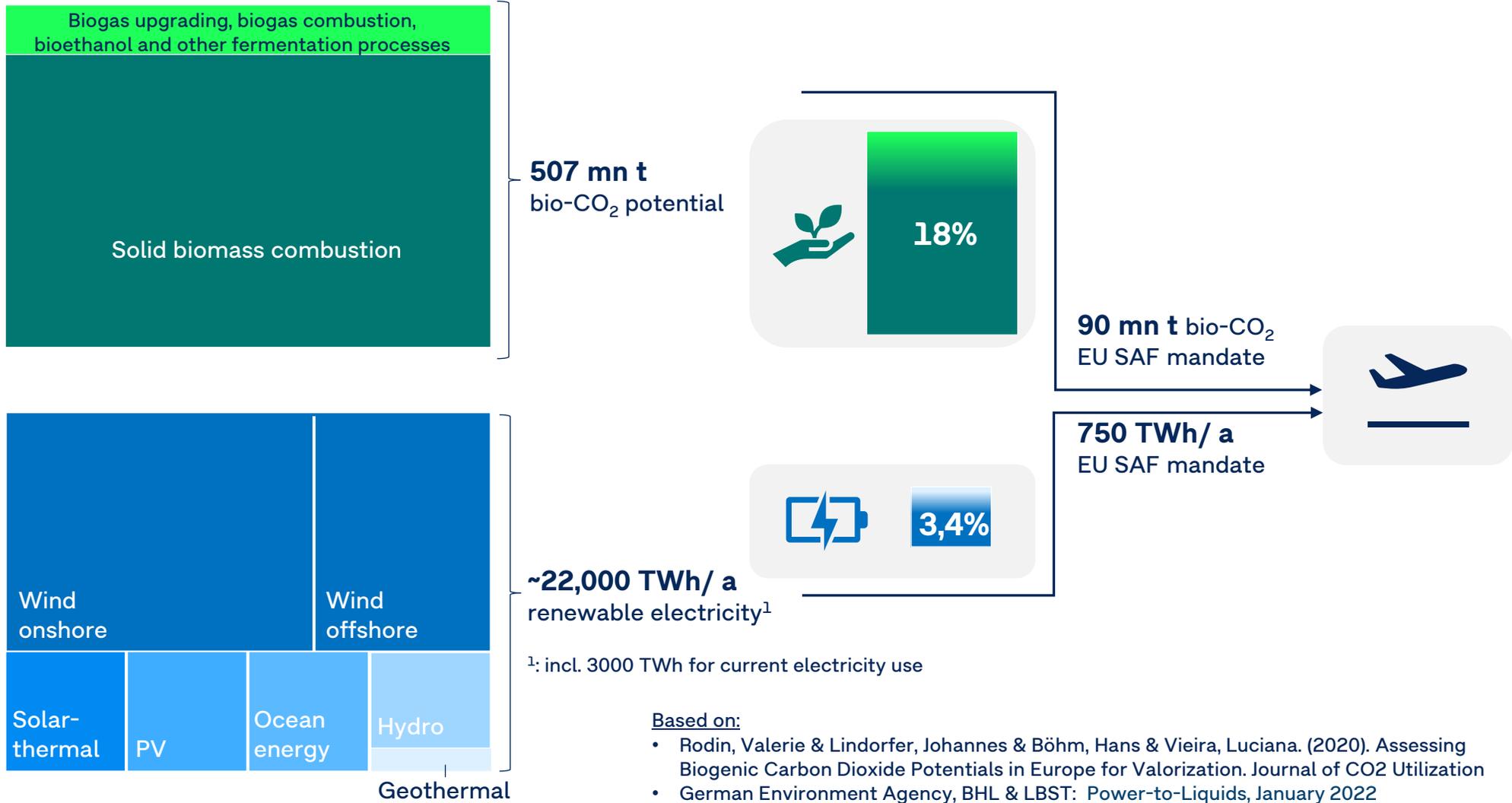


ReFuelEU Aviation defines SAF demand in Europe till 2050 (mn. t)

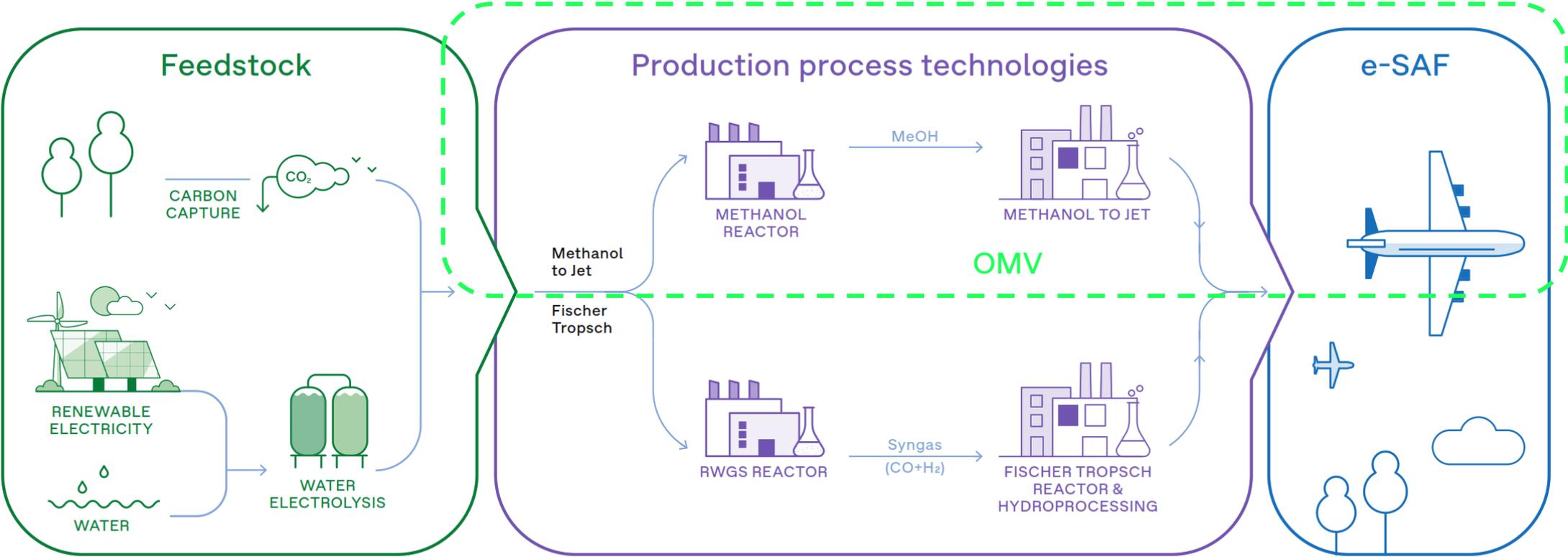


Assumption: ~63 mio. tons aviation fuels in 2050 (source: German Environment Agency, BHL & LBST: Power-to-Liquids, January 2022)
Percentages show e-SAF share of total sustainable aviation fuel volumes

Bio-CO₂ and renewable electricity available vs. demand for EU SAF mandates until 2050

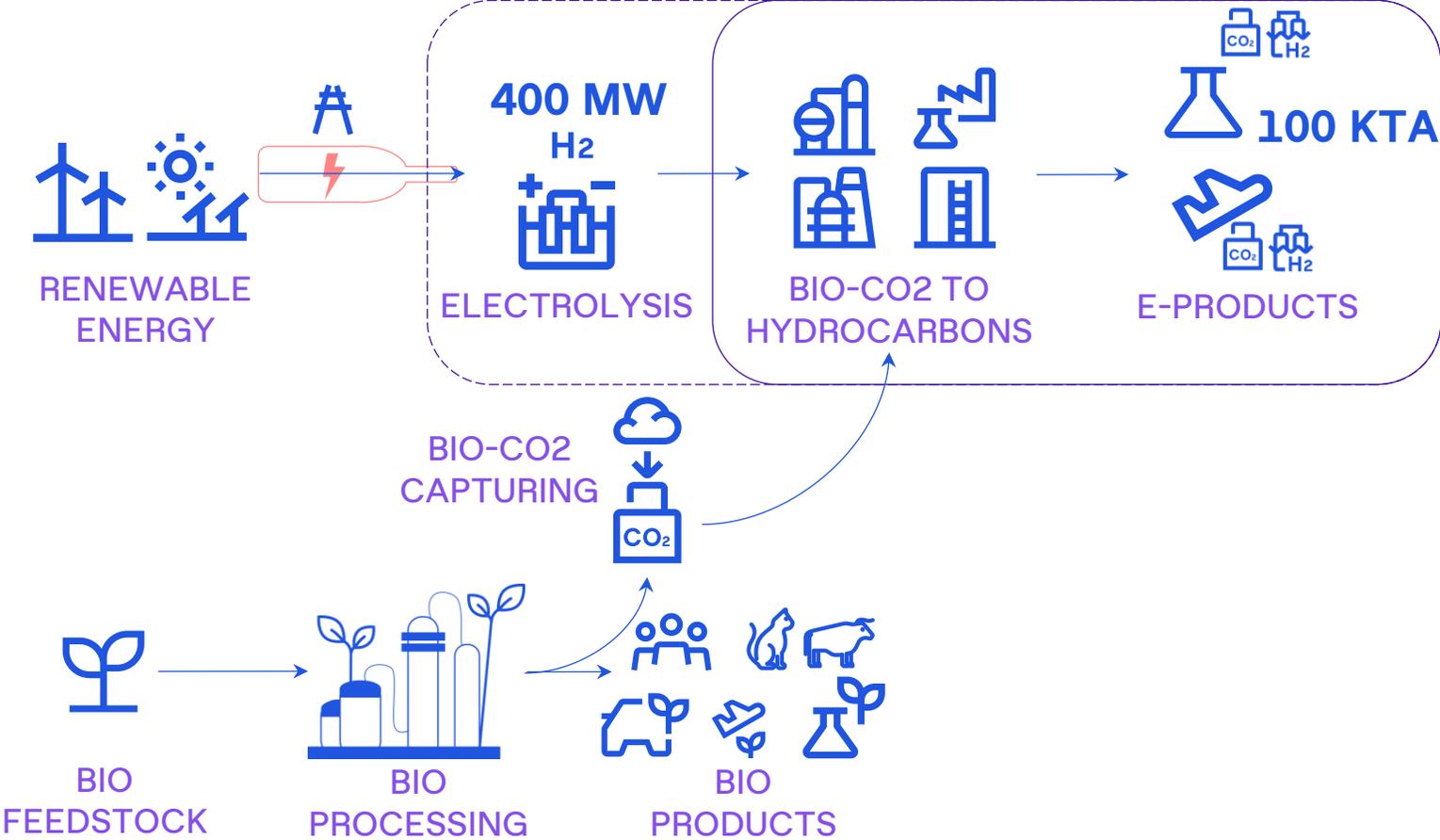


Two possible roads to eSAF

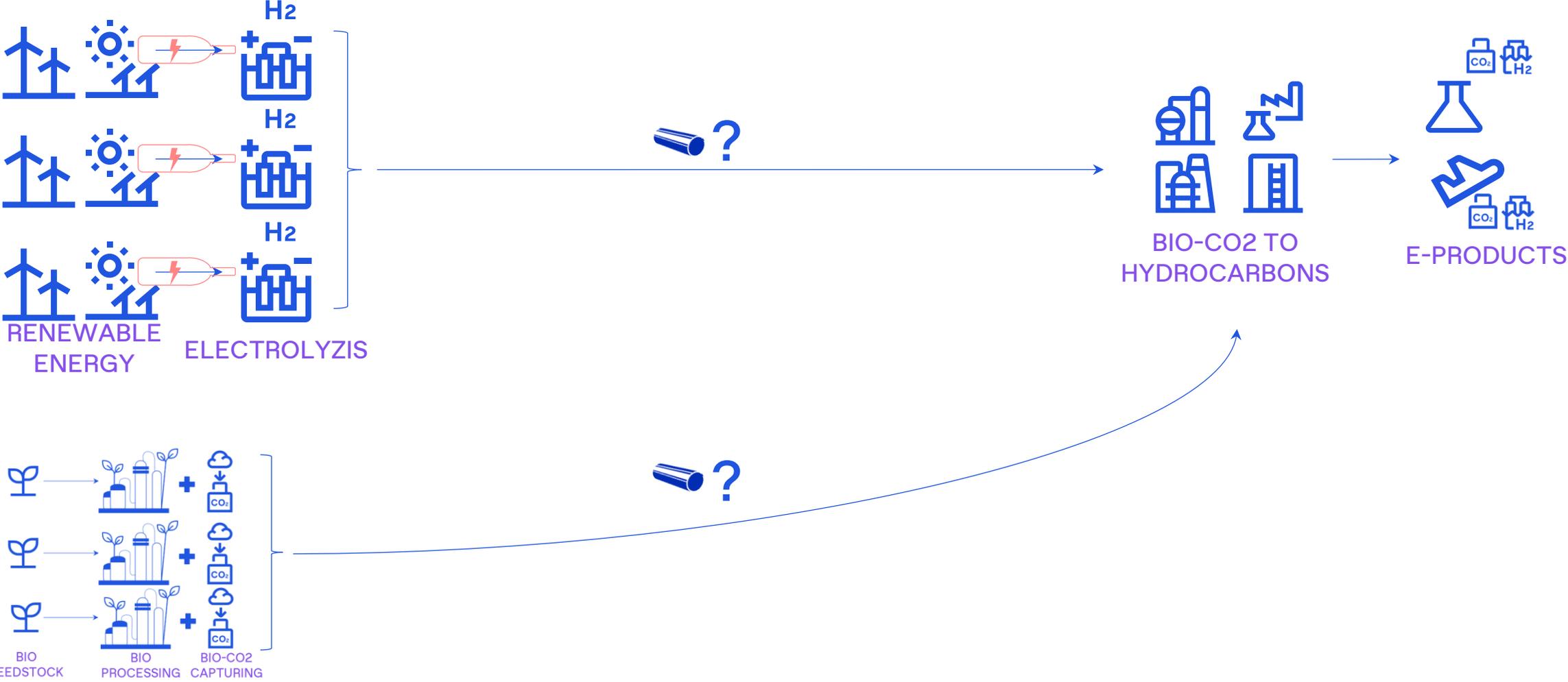


Source: OMV_2025_Factsheet_SAF_LO_08.pdf

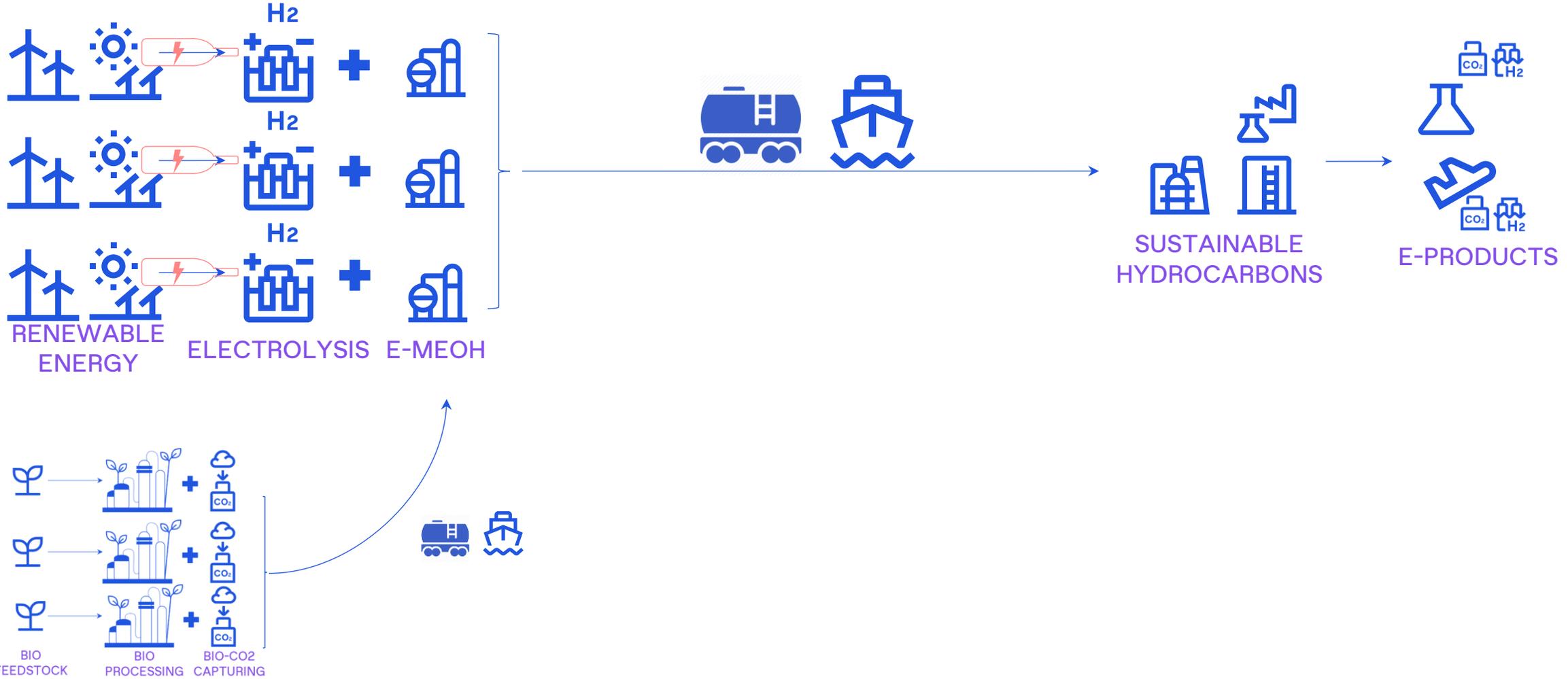
Limited and intermitted feedstock, and downscaling established processes are the big challenges



Secure decentralized feedstock supply and stick with known chemical processes at commercial scale



Balance between decentralized and centralized parts of value chain depends on set up of own assets



KEY TAKE AWAYS



- Bio-CO₂ based hydrocarbons are part of the future sustainable aviation fuels portfolio.
- For economies of scale, chemical processes downstream in the value chain should be placed in a refinery environment.
- Until the H₂/CO₂ infrastructure is in place, a partly decentralized set up might be favorable, especially for landlocked refineries.
- Clear regulatory framework is essential to trigger investments.



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Thank you!





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