

The Future of Jet Fuel and Sustainable Aviation Fuel

Post-COVID recovery, long-term outlook to 2050, decarbonization impacts, sustainable aviation fuels, and new technology and players

Multi-Client Study Prospectus



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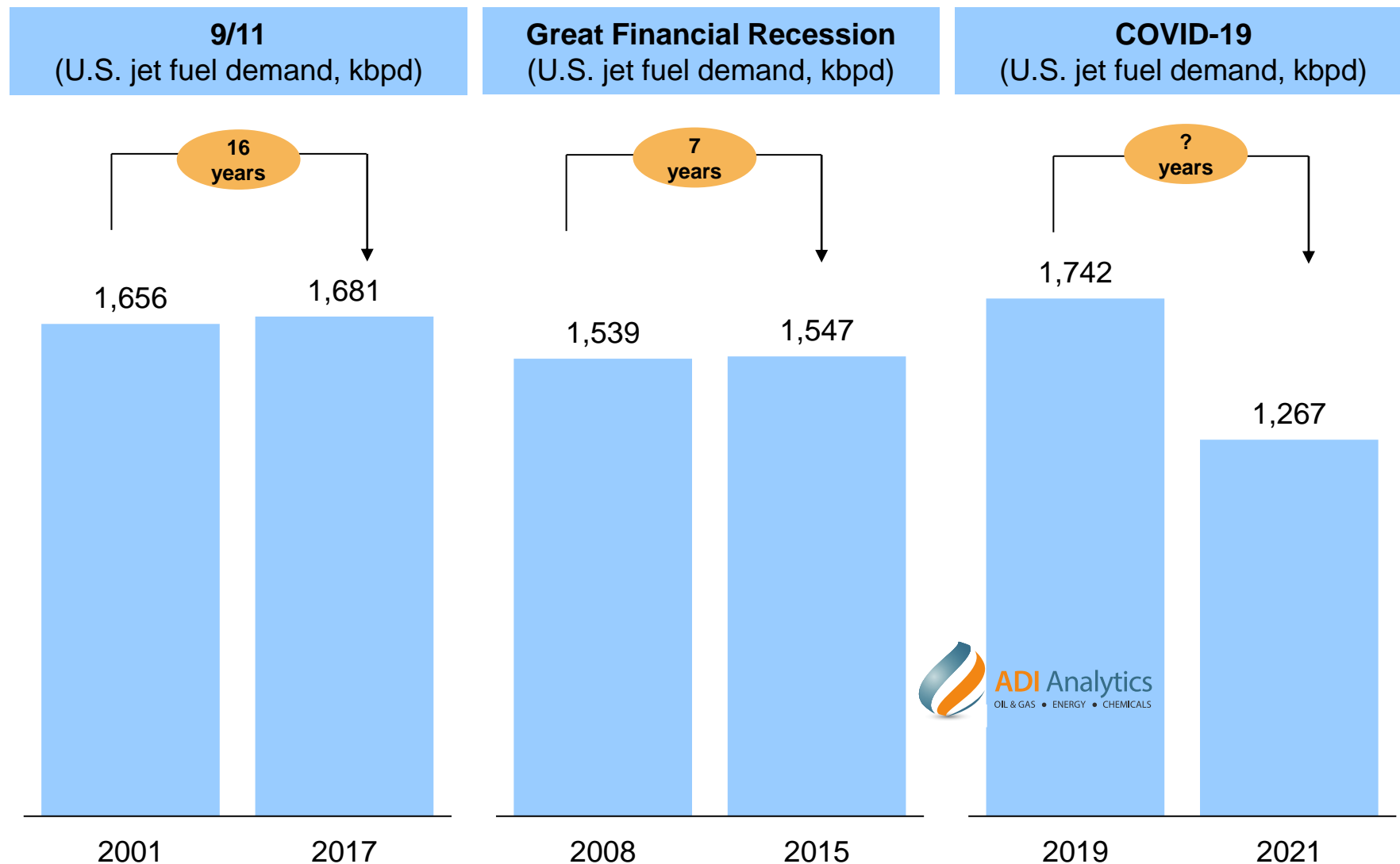
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Outline

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- ▶ About ADI

Jet fuel markets have taken a very long time to recover from past demand disruptions



Jet fuel markets face a very slow recovery post-COVID in the short term and critical disruptive challenges in the long term

Background and strategic questions

- Jet fuel markets are in a deep slump today due to COVID-19 and expectations for a quick recovery from pent-up economic and consumer demand have been stunted by new infection waves
- Historical analysis shows that prior demand disruptions, e.g., following 9/11 and the Great Financial Recession, took much longer to recover from
- Simultaneously, Energy Transition and decarbonization momentum is gaining pace very quickly posing a number of long-term challenges to the outlook for jet and aviation fuel markets

A

Demand / supply

- What will post-COVID jet fuel demand look like? Will it recover to 2019 levels?
- What do post-COVID demand drivers for jet fuel look like by region and why?
- What is jet fuel supply outlook including sustainability aviation fuels?

B

Regulations and innovation

- How are policies and regulations shaping aviation and jet fuel markets? Why?
- What innovation and technologies will allow decarbonization in aviation fuels?
- Which technologies are likely to achieve commercial status and scale?

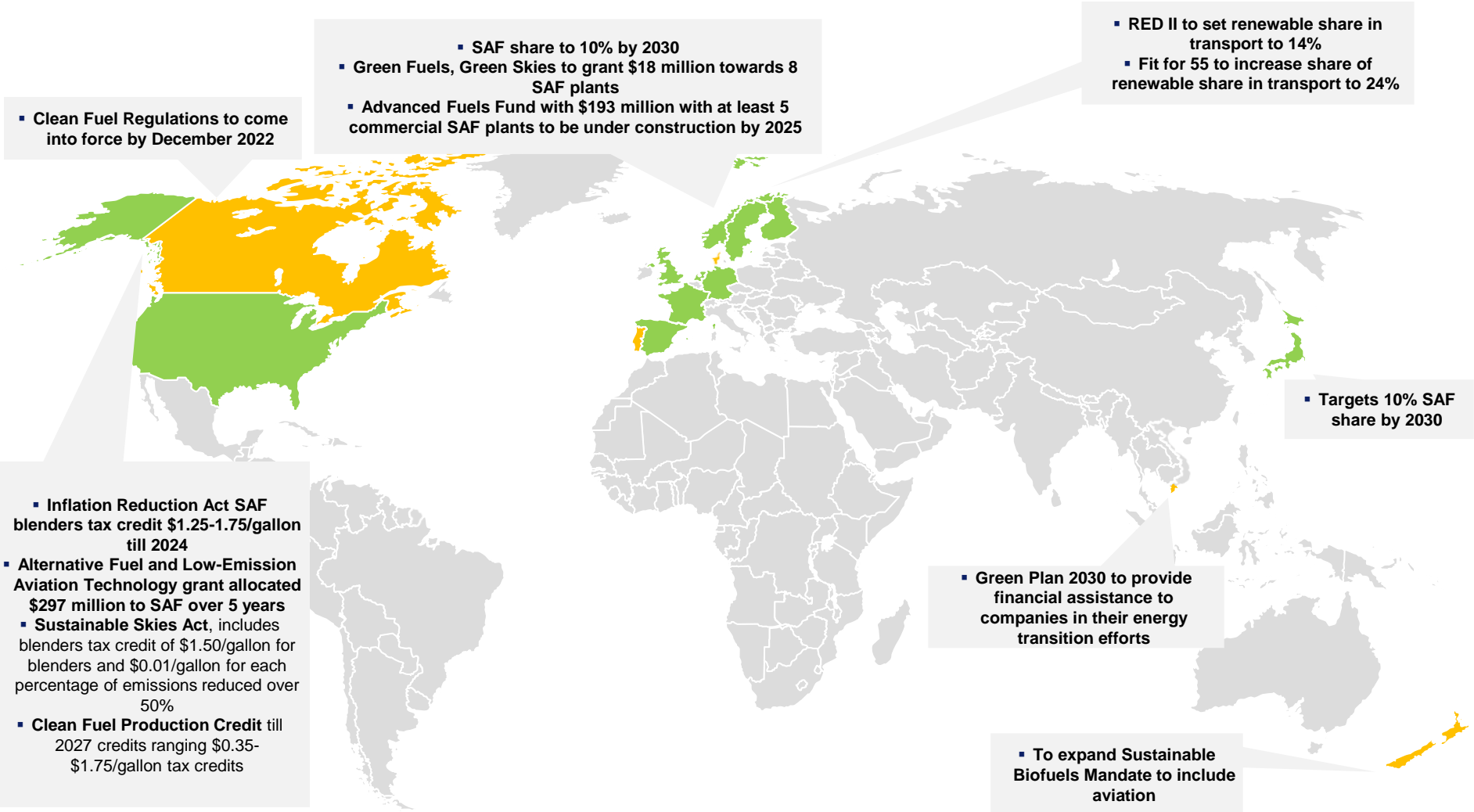
C

Value chain participants and strategic implications

- How are jet fuel customers and suppliers adjusting strategies? Why?
- Who is likely to succeed and where? Implications for supply and demand?
- What should jet fuel value chain participants do and prepare for the future?

A handful of countries in Europe along with the U.S. are driving SAF adoption policies

Countries Promoting SAF Adoption



These factors will be addressed by ADI's multi-client study as reflected by its comprehensive table of contents

1	Executive Summary <i>Key conclusions, findings, and strategic implications with a review workshop and data spreadsheet</i>	7	Low-Carbon / Sustainability Aviation and Jet Fuels <i>Inventory and profiles of sustainable aviation and jet fuel supply processes, pathways, and technologies</i>
2	Jet Fuel Demand Outlook to 2050 <i>Forecasts for jet fuel demand by type through 2050 with key drivers and corresponding scenarios by region</i>	8	Sustainable Aviation Fuel Market Drivers <i>Population / economic growth, business / consumer travel, infrastructure investments, regulations / policies</i>
3	Jet Fuel Demand Recovery Post-COVID <i>Analysis of jet fuel demand recovery pathways and drivers including historical recovery analyses</i>	9	Cost and Economic Analysis <i>Regional and technology analyses around costs and economics of various jet fuel supply options</i>
4	Jet Fuel Supply Outlook to 2050 <i>Jet fuel supply outlook by region through 2050 in key scenarios including new, sustainable supply options</i>	10	Corporate Landscape Analysis <i>Lists of key jet fuel users and their initiatives around long-term decarbonization and sustainability improvements</i>
5	Aviation and Jet Fuel Regulatory and Policy Review <i>Review of policies and regulations on decarbonization and sustainability of aviation and jet fuels</i>	11	Suppliers' Competitive Analysis <i>Lists of key jet fuel suppliers including new technology and process developers and competitive landscaping</i>
6	Decarbonization Challenges in Jet Fuel Value Chain <i>Aviation and jet fuel value chain's carbon footprint and challenges with decarbonization</i>	12	Strategic Implications and Opportunity Analysis <i>Findings and conclusions, strategic implications, risks and mitigation strategies, and opportunity analyses for jet fuel suppliers</i>

Key deliverables of ADI's "Future of Jet Fuel and Sustainable Aviation Fuel" study

Outcomes	Deliverables
1 In-depth coverage of jet fuel markets globally and across key regions	~100-page report
2 Jet fuel supply-demand through 2050 and near-term demand recovery analysis	~20-page executive summary deck
3 Decarbonization and sustainability in jet and aviation fuel markets globally	Spreadsheet data package
4 Economics and competitive landscape of jet and aviation fuels	Review workshop and analyst access
5 Global feedstock supply availability and analysis	Quarterly subscription option to stay updated

Contact Uday Turaga, +1.281.506.8234 or info@adi-analytics.com to purchase this study.

Outline

▶ Study Prospectus

▶ **About ADI**

ADI is a consulting firm serving oil & gas, energy, chemicals, and industrial clients with expertise, rigor, and passion

Operators

Investors

Industrials

Traders

Government



Oil



Gas & LNG



Midstream & NGLs



Refining



Fuels



Feedstocks



Petrochemicals



Basic Chemicals



Polymers & Plastics



Specialty Chemicals



Power generation



Renewables



Transmission



Energy Transition



Transportation

Markets

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Technology

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Policy

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Downstream Market Advisory [↗](#)

Monthly intel, oil prices, fuels supply & demand, capex, margins, downstream and refining insights



Gas Monetization Advisory [↗](#)

Review of natural gas to power, LNG, fuels (GTL), and chemicals costs, economics, and markets



LNG Analytics [↗](#)

LNG project benchmarking tool; global and NA small-scale LNG studies; and global LNG database



Energy Transition Advisory [↗](#)

Monthly energy transition deep dives, e.g., biofuels, hydrogen, low-carbon, CCS, flaring, biomaterials



Global CapEx Outlook [↗](#)

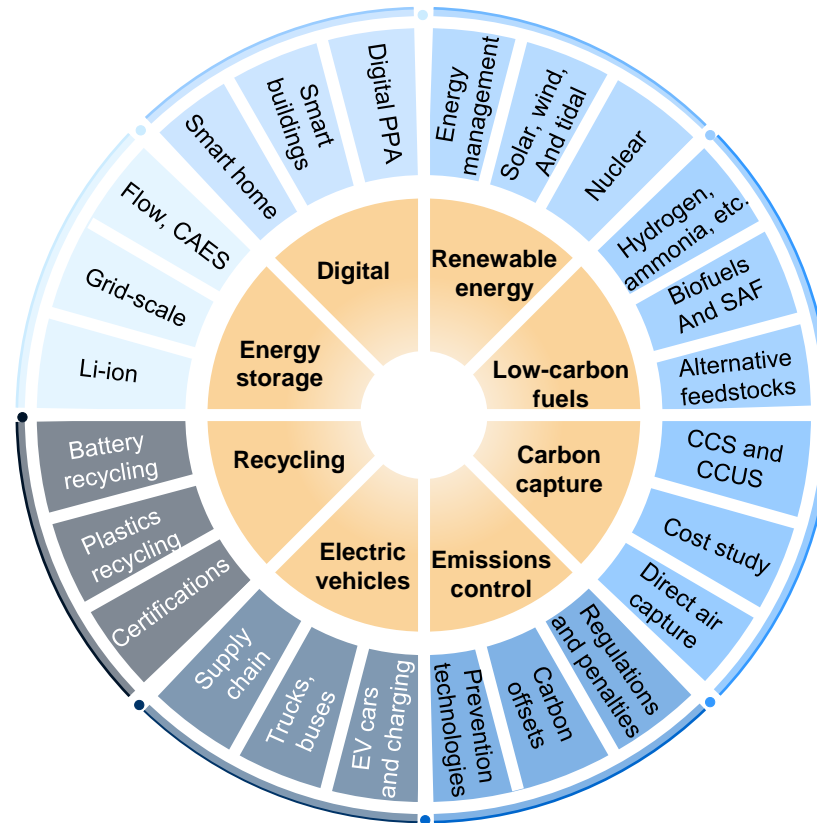
Quarterly forecast and analysis of global capital spending in E&P, midstream, refining, LNG, petchem



Global OpEx Outlook [↗](#)

Quarterly forecast and analysis of operating expenses in upstream, midstream, downstream, and LNG

ADI is increasingly helping clients with their energy transition needs across the board driving sustainability in oil & gas





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