

Webinar

H2B – Wasserstoff trifft Wirtschaft

Sustainable Aviation Fuels

Vienna, April 2024



Global SAF outlook

SAF demand of both biogenic -& synthetic SAF sees significant growth due to limited decarbonization options for aviation

Global

SAF remains the only decarbonization option for wide body, medium -& long-haul flights even beyond 2050

- Globally, **SAF capacity is forecasted to grow exceptionally quickly by 2030**, as a reaction to numerous existing and announced SAF policies
- **Voluntary demand is expected to have the highest increase in 2030**, then slowing its increase by 2040 and beyond
- There is **enough theoretical HEFA feedstock supply to meet 2030 SAF mandated demand worldwide, but not beyond**. Scaling cellulosic and Power-to-Liquid pathways is key to meeting 2050 mandates
- **Scaling up new technologies is key to Aviation decarbonization**

Europe

One of the main regions driving global SAF demand

- Demand is driven by the regulation, but production is limited by feedstock availability banned to reach limit by end of this decade
- **Voluntary demand is expected to exceed mandated requirements until 2035**, when ReFuelEU targets will become the primary demand driver in the region
- **European mandates to 2030 could be all fulfilled with SAF domestic capacity**, but without new additional capacity, demand is expected to outstrip production by 2030 and **market is forecasted to remain short beyond 2050**
- Projects for new routes to synthetic kerosene are being announced, while **many projects were postponed in the last 6 months**

What are our SAF activities?

OMV is an early mover in the SAF supply chain and meets the highest sustainability standards through local sourcing



We already **produce SAF today** in Schwechat, which meets **the highest sustainability standards** and are strategically focusing on **local supply chains for sustainable feedstocks**.

We have a clear **scaling plan to increase our production** of sustainable fuels and chemical feedstocks to 1.5 million metric tons per year by 2030.



Our production locations		SAF supply volumes today [kt/a]
Austria	Romania	4 kt
Germany	ARA ¹⁾ (planned)	



We are already **supplying SAF on the basis of** existing purchase agreements with various customers in the aviation industry.



1) Antwerp – Rotterdam – Amsterdam



Our product is **certified according to the standards of ISCC**



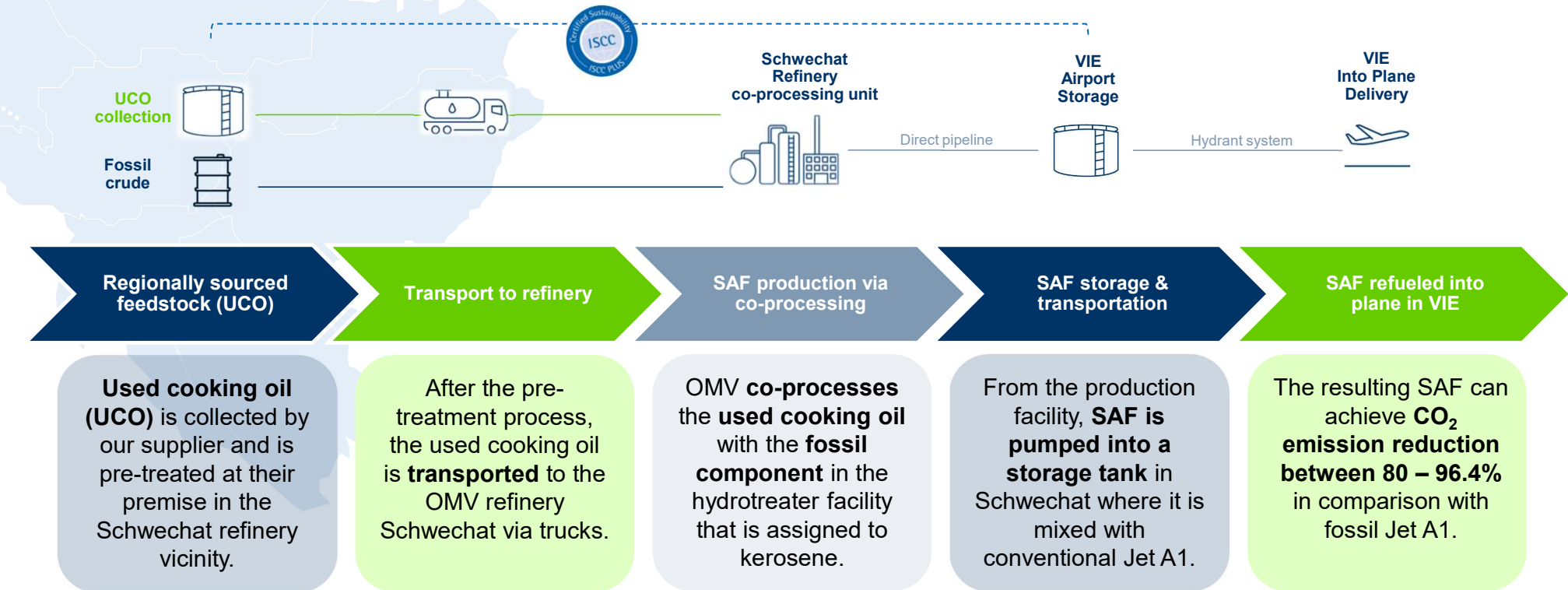
- **Traceability of sustainable materials** through international supply chains.
- **Greenhouse gas emissions savings calculated and certified** according to the highest European standards.
- **Fully compliant with RED II sustainability criteria.**

How is SAF produced in OMV?

SAF produced in Schwechat via co-processing assures a short, reliable and sustainable supply chain

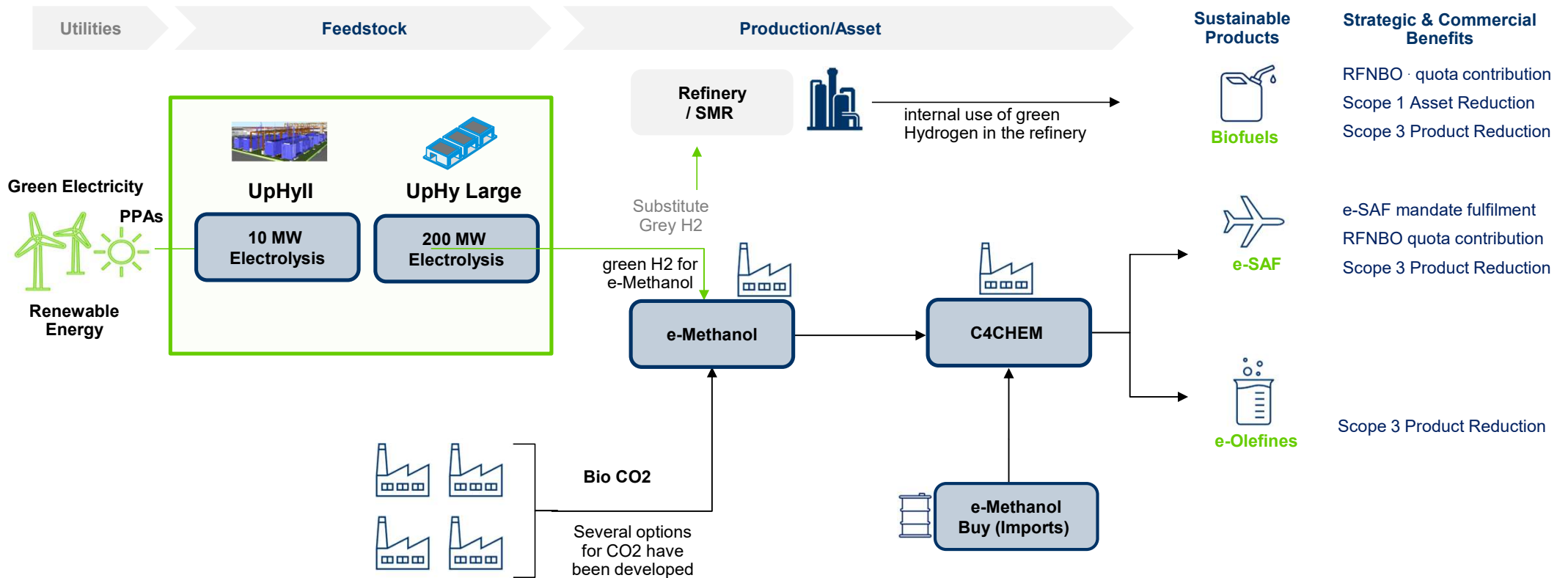
What is co-processing?

Co-processing is an innovative technology that facilitates the processing of biogenic feedstocks together with fossil based raw materials in an existing refinery hydrotreating plant, a technology that is used for sustainable fuels production.



Outlook on potential e-SAF and e-Olefines production

By 2030 OMV aims to have a lead in production of e-Olefines & e-SAF. Clear Targets: CO2 Reduction; Compliance Fulfillment & Future Scale-Up



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