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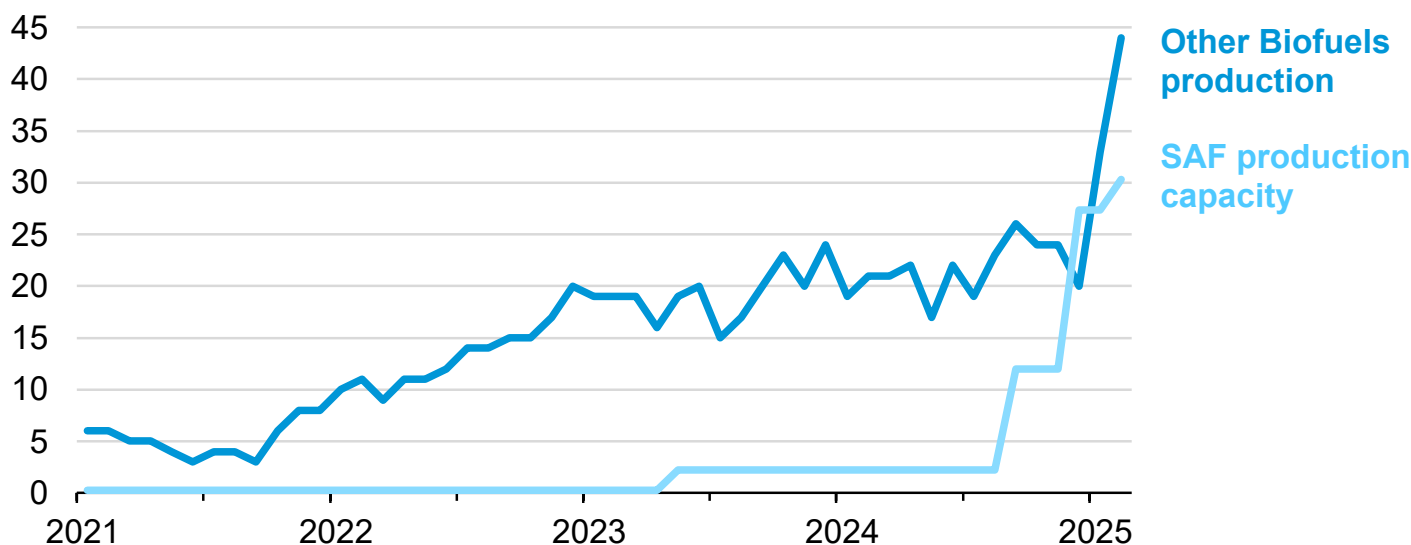
## Today in Energy

### IN-BRIEF ANALYSIS

May 6, 2025

## U.S. sustainable aviation fuel production takes off as new capacity comes online

### U.S. production of Other Biofuels and U.S. sustainable aviation fuel (SAF) production capacity (Jan 2021–Feb 2025) thousand barrels per day



**Data source:** U.S. Energy Information Administration, [Petroleum Supply Monthly](#); company announcements and trade press

**Note:** Other Biofuels includes sustainable aviation fuel (SAF), renewable heating oil, renewable naphtha, renewable propane, renewable gasoline, and other emerging biofuels that are in various stages of development and commercialization. SAF production capacity is an estimate based on company announcements and trade press and only includes hydroprocessed esters and fatty acids (HEFA) SAF. We do not publish SAF production capacity data.

Sustainable aviation fuel (SAF) production is growing in the United States [as new capacity comes online](#). U.S. production of Other Biofuels, the category we use to capture SAF in our [Petroleum Supply Monthly](#), approximately doubled from December 2024 to February 2025.

SAF is an alternative to petroleum jet fuel. It's produced from agricultural and waste feedstocks and is consumed in blends with petroleum jet fuel. Investments in SAF have increased because of the [U.S. Environmental Protection Agency's Renewable Fuel Standard](#) (RFS), federal tax credits, and state programs and tax credits incentivizing use of the fuel.

In addition to SAF, our Other Biofuels category includes renewable heating oil, renewable naphtha, renewable propane, renewable gasoline, and other [emerging biofuels](#) that are in various stages of development and commercialization.

Prior to 2025, renewable naphtha and renewable propane, which are byproducts of renewable diesel production, made up most of Other Biofuels production and was growing because of [growing renewable diesel production](#). SAF made up only a small portion of Other Biofuels production because of limited production capacity. At the beginning of 2024, U.S. SAF production capacity was only around 2,000 barrels per day (b/d), with just two plants capable of producing SAF: [World Energy's plant](#) in Paramount, California, and [Montana Renewables' plant](#) in Great Falls, Montana.

U.S. SAF production capacity increased by about 25,000 b/d in late 2024. Phillips 66 completed its 10,000-b/d SAF project in [Rodeo, California](#), in the third quarter of 2024 (3Q24), before temporarily halting production in 4Q24. Diamond Green Diesel [completed](#) its 15,000-b/d SAF project in [Port Arthur, Texas](#), in 4Q24.

A couple of smaller projects will bring additional SAF production capacity online in 2025. New Rise Renewables [announced it began SAF production](#) at its [plant in Reno, Nevada](#), in February 2025, adding up to 3,000 b/d of SAF production. Par Pacific [plans to begin SAF production](#) at its plant in Kapolei, Hawaii, in the second half of the year, adding about 2,000 b/d of SAF production capacity.

With SAF production capacity now around 30,000 b/d and growing in 2025, SAF will likely drive significant growth in Other Biofuels production and make up most of U.S. Other Biofuels production.

In January, U.S. production of Other Biofuels reached 33,000 b/d, nearly 30% more than the previous record high set in September 2024. Production increased another 30% in February to 44,000 b/d. In our latest [Short-Term Energy Outlook](#), we forecast that U.S. production of Other Biofuels will more than double between 2024 and 2025 and increase by about another 20% in 2026. Although we do not publish a forecast for each fuel that makes up the category, we expect increased SAF production to drive most of that growth. Despite strong growth in SAF on a percentage basis, the absolute volumes will remain relatively low, making up less than 2% of [about 1.7 million b/d of U.S. jet fuel consumption](#) in 2025 and about 2% in 2026.

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