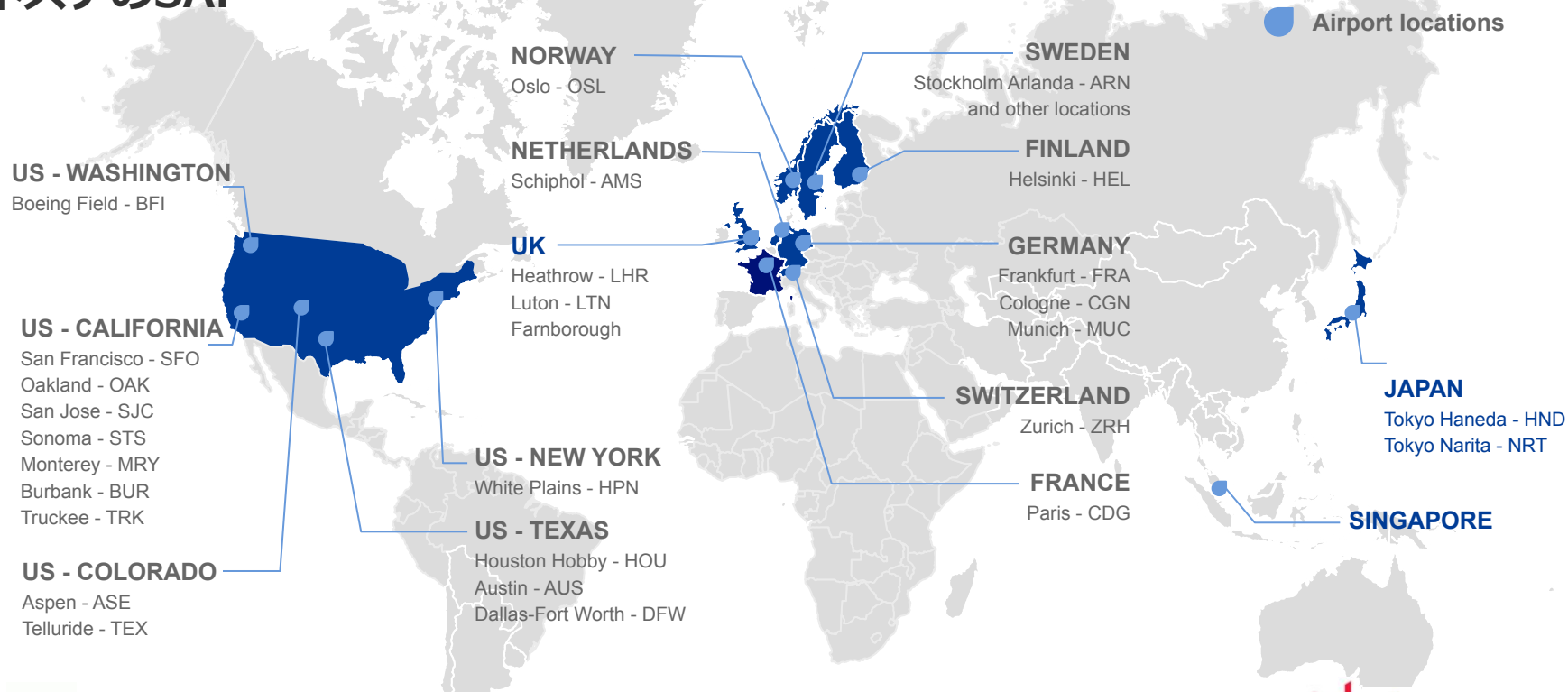


Neste's SAF is available globally, both through Neste's own network of airports and through distributors 各種ネットワークを通じ世界中で利用可能なネステのSAF





Neste's Sustainable Aviation Fuel capacity will grow 15-fold to 1.5 million tons by 2023 SAF生産能力を2023年までに150万トンへと増強予定



¹ 300 million tons of fossil fuels are burned every year to fuel airplanes (in 2019)

The growth path of sustainable aviation fuels is based on continuously expanding raw material base

新たな原料の利用によるSAFのさらなる発展



Current 現在



Used cooking oil

Waste oil from food cooking

使用済み食用油（廃油）



Animal fat

Food industry waste

獣脂（食品産業廃棄物）



Residues from vegetable oil processing

植物油加工残滓



Technical corn oil

Residue from ethanol production

工業用コーン油
（エタノール製造残滓）



Fish fat

Fish processing waste

魚脂（食品産業廃棄物）

Near future 近い将来

5 - 10 years



Lignocellulosic

リグノセルロース



Municipal solid waste

家庭ごみ

Future 将来

>10 years



Algae 藻類



Power-to-X

Regulations are needed to create demand certainty for the required investments in SAF capacity 規制による需要の創出とSAFへの投資の促進

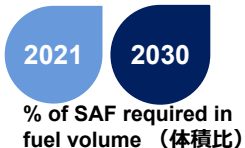
AMERICAS

Opt-ins continue to drive market growth and additional long-term policy frameworks for SAF expected
 オプトイン方式が市場拡大を促進してきたが、
 更なる長期的枠組みも検討



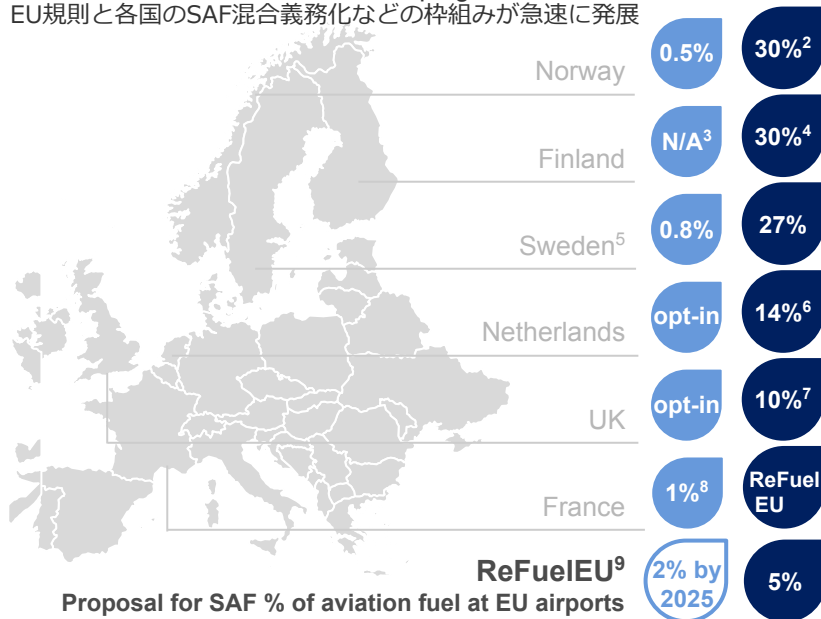
ASIA

Regulation in early phase, but frontrunner countries setting comparable targets to Europe & Americas
 規制は萌芽的段階だが、一部の国では米国・欧州同等の目標が掲げられる



EUROPE

Regulation, national level mandates and commitments are developing fast
 EU規則と各国のSAF混合義務化などの枠組みが急速に発展



Opt-in refers to scheme where a renewable fuel mandate can be fulfilled with using renewable fuels either in road transportation or aviation.

1) Start of program in 2023 2) Proposal 3) Mandate expected in the near future 4) Proposal 5) GHG reduction mandate 6) Up to 14% 7) Up to 10% 8) 1% from 2022 implemented 9) The EU-level regulation proposal to ensure SAF account at least 2% by 2025 and 5% by 2030 of aviation fuels at EU airports