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GrainCorp charts strategic roadmap for Australia's sustainable aviation fuel industry

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New white paper argues Australia possesses abundant feedstock resources to build a globally competitive SAF sector, with policy certainty and investment now emerging as the decisive enablers

GrainCorp has unveiled a comprehensive white paper outlining a strategic blueprint for establishing a domestic sustainable aviation fuel (SAF) industry, positioning Australia to capitalise on its abundant agricultural resources as policymakers prepare to introduce measures aimed at accelerating investment in refining capacity.

The report, *From Paddock to Plane: Feedstock White Paper*, presents a commercially focused roadmap for transforming Australia's extensive agricultural and waste-derived feedstocks into a globally competitive SAF value chain, reinforcing both energy security and the country's long-term decarbonisation ambitions.

Its release coincides with the Federal Government's impending consultation on a demand-side policy mechanism intended to stimulate private investment in domestic SAF production, signalling growing momentum behind Australia's low-carbon aviation strategy.

The report also arrives amid heightened geopolitical uncertainty, with recent disruptions in the Strait of Hormuz underscoring Australia's structural dependence on imported liquid fuels. Currently, nearly 90 per cent of the nation's transport fuel requirements are met through imports, leaving the aviation sector particularly exposed to supply chain disruptions and geopolitical volatility.

Prepared as part of GrainCorp's contribution to the Federal Government's Jet Zero Council, the white paper concludes that Australia's sustainable aviation fuel ambitions are constrained less by feedstock availability than by the absence of investment

certainty, supportive policy frameworks and durable market signals capable of catalysing commercial-scale production.

According to the analysis, currently available agricultural and waste-based feedstocks alone could generate sufficient sustainable aviation fuel to meet 117 per cent of Australia's projected jet fuel demand by 2030. The report further projects that this production potential will expand as next-generation feedstocks, conversion technologies and advanced biofuel pathways continue to mature.

GrainCorp Managing Director and Chief Executive Officer Robert Spurway said Australia's competitive advantage lies in its agricultural resource base, providing an immediate opportunity to establish a globally significant SAF industry while strengthening national energy resilience.

"Australia's competitive advantage begins in the paddock, and it's an advantage we can act on now," Spurway said. The white paper argues that with coherent policy settings, targeted investment incentives and coordinated industry collaboration, Australia is well positioned to emerge as a leading producer of sustainable aviation fuel in the Asia-Pacific region. Beyond supporting aviation decarbonisation, a domestic SAF industry could enhance energy sovereignty, create regional economic opportunities, diversify agricultural value chains and establish new export markets for renewable fuels as global aviation accelerates its transition towards net-zero emissions.