Beyond 2030.
One global market. Different rules.

How regulation is reshaping renewable fuel markets and feedstock trade.

Global regulatory outlook

Europe

From 2030 target to a 2040 market



EU -90%
Net GHG emissions by 2040 (vs. 1990)

UK 22%
SAF mandate by 2040

Germany 65%
GHG emissions reduction obligation for transport fuels by 2040 (THG quota)

Americas

Established markets and growing demand.



Brazil 1% → 10%
Aviation emissions-reduction obligation 2027–2037

United States
RFS + LCFS
Drives demand for low-carbon feedstocks

Asia

Expanding demand and new opportunities



Japan up to 20%
Bioethanol in low-carbon petrol by 2040

Southeast Asia
Established biodiesel programmes and expanding SAF production initiatives

What does this mean for feedstock trading?

Growing demand

Different eligibility rules

Shifting trade flows

The Connex perspective

Connecting supply with opportunity.

Market knowledge, traceability and strong supply chains help connect sustainable feedstocks to the right markets.

Origin

Classification

Traceability

GHG performance