ABLC 2026

Policy Assessment

October 22, 2026

CASCADIA

SUSTAINABLE AVIATION ACCELERATOR

Accelerating the commercial viability of sustainable aviation fuel across the Cascadia region by catalyzing public-private action to de-risk production and remove barriers to adoption.



Policy Assessment

Objective: Develop **region-wide SAF policy assessment** to identify policy gaps, areas of opportunity, and **develop a a package of policy options for long-term SAF market growth**.

Completed:

- ☐ Identified policy landscape within each state and province in the region and desk research to understand how each work
- ☐ Developed scoring methodology and rubric to identify gaps in existing landscape, identified areas of opportunity
- ☐ Identified critical stakeholders in each jurisdiction and conducted interviews and working groups to gain additional insights
- ☐ Built package of policy options to address gaps and areas of opportunity & draft report
- ☐ Finalize package of policy options and report write up

Next Steps:

- ☐ Report Review and Finalization

Impact:

The policy roadmap identifies immediate and long-term policy considerations to develop a strong SAF ecosystem and supply chain in the region.

(DRAFT) Excerpt of Table of Contents, Policy Assessment Report

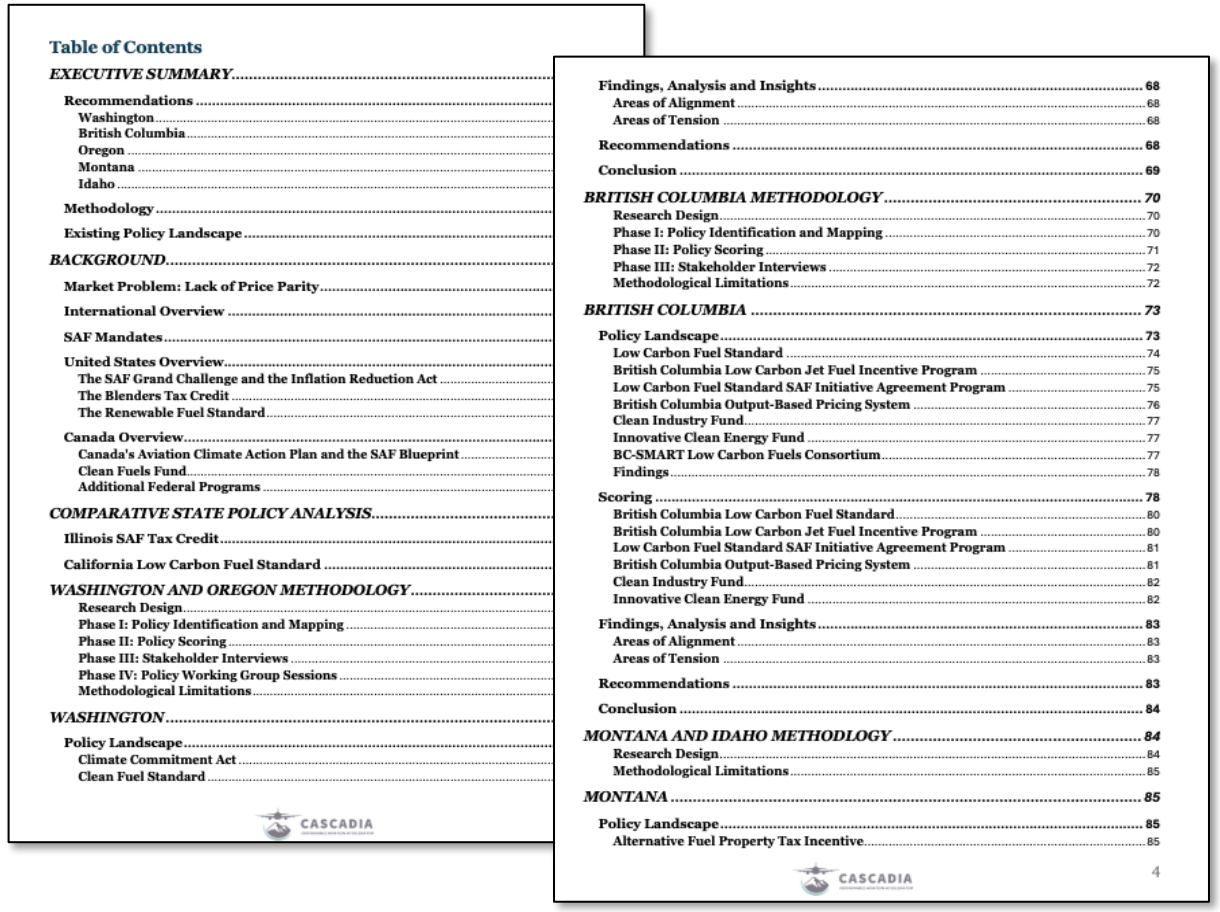


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Policy Assessment | Creating Market Certainty, Durability, and Closing the Financing Gap are the Critical Tools the Industry is Looking Towards the Policy Landscape to Address

Washington

Policy / Program	Market Certainty	Feasibility	Sustainability Prioritization	Closing Financing Gap	Infrastructure & Supply Chain	Tech Neutrality
CSAI & WSU R&D	Medium	Low	Medium	Medium	N/A	High
SAF Infrastructure Account	Medium	High	N/A	Medium	High	High
Permitting/Clean Energy Siting	Medium	Medium	N/A	Medium	High	High
SAF Tax Credit	Medium	Medium	High	Medium	Medium	High
Climate Commitment Act	Medium	Medium	High	Low	Medium	High
Clean Fuel Standard	Medium	Medium	High	High	Medium	High
Port of Seattle Goal	Low	High	N/A	Low	Low	High
CSAA	Low	High	N/A	N/A	N/A	N/A
Wood Biomass Fuel reduced B&O rate	High	High	Low	Low	Medium	Low
Hog Fuel Sales/Use Tax Exemption	Medium	High	Low	Medium	Medium	Low
Clean Energy Investment Tax Deferral / Forgiveness	Low	Medium	High	Medium	High	High

Oregon

Policy / Program	Market Certainty, Durability, Stackability	Feasibility	Sustainability Prioritization	Closing Financing Gap	Infrastructure & Supply Chain	Tech Neutrality
Climate Protection Program	Low	Medium	Medium	Low	Low	High
Clean Fuel Program (Including OR-GREET)	Medium	Medium	High	High	Medium	High
Strategic Investment Program	Medium	Medium	Low	Medium	Medium	High
Rural Renewable Energy Development Zone	Medium	High	Low	Medium	Medium	Medium
Industrial Development Bond	Low	High	Low	Low	Medium	Medium
Oregon Business Development Fund	Medium	Medium	Low	Low	Medium	High
Long-Term Rural Enterprise Zone	Medium	Medium	Low	Medium	Medium	High
Oregon Investment Advantage	Medium	Medium	Low	Low	Low	High
CSAI R&D	Medium	Low	Medium	Medium	N/A	High
CSAA	Low	High	N/A	N/A	N/A	N/A

British Columbia

Policy / Program	Market Certainty, Durability, Stackability	Feasibility	Sustainability Prioritization	Closing Financing Gap	Infrastructure & Supply Chain	Tech Neutrality
BC LCFS	Medium	Medium	High	Medium	Medium	High
BC Low Carbon Jet Fuel Incentive Program	Medium	High	High	Medium	Low	High
LCFS SAF Initiative Agreement Program	Medium	Medium	High	High	High	High
Output-Based Pricing System	High	High	Medium	Low	Low	High
Clean Industry Fund	Medium	High	Medium	Low	Low	High
Innovative Clean Energy Fund	Medium	High	Medium	Medium	Medium	High
CSAI R&D	Medium	Low	Medium	Medium	N/A	High
CSAA and BC-SMART LCF Consortium	Low	High	N/A	N/A	N/A	N/A

1. Identify gaps in existing policy
2. Identify areas of opportunity
3. Confirm and learn from stakeholders
4. Build policy options for amendments within the existing landscape
5. Build package of options for new policy to strengthen the landscape
6. Provide next steps to encourage policy emerging states to grow the network of support
7. Integrate outcomes of additional research in feedstock and infrastructure

Policy Options

Summary of policy options for each jurisdiction

WASHINGTON

Restructure the Existing SAF Tax Credit

Amend the 10-year sweeping sunset clause — Replace with a per-producer 10-year credit window, phasing out based on carbon intensity after the guarantee period, so both existing refiners and startups can benefit.

- **Provide clarity to apply credit to full B&O tax obligation** — Allow producers to claim against their entire B&O liability, not just SAF production taxes, delivering closer the credit's intended value.
- **Remove the 650,000-population county restriction** — Open eligibility to SAF producers statewide, including larger-county refiners considering retrofits.

Direct ECY to study and consider Recognizing SAF Under the Climate Commitment Act

- Allow refiners to offset a portion of their CCA compliance obligation with verified lifecycle emissions reductions from SAF production.
- Transforms the CCA from a blanket carbon penalty into an active incentive for refinery retrofits to renewable fuel production, to be designed in coordination with WA Department of Ecology to protect cap integrity and WA–CA–Quebec market linkage.

Direct ECY to study and consider Utilizing the Clean Fuel Standard to further support SAF, including a Temporary Multiplier and Project-Based Crediting

- Increase the credit value of SAF-generated CFS credits to equalize the incentive versus renewable diesel, which currently has a structural advantage.
- Allow credit generation for capital infrastructure, in line with California's LCFS program

OREGON

- Reject the Critical Energy Infrastructure Hub Proposal to Limit Fuel Storage
- Execute an Education Campaign
- Establish a SAF Working Group
- Implement a SAF goal

BRITISH COLUMBIA

- Execute a Regional Working Group
- Direct the British Columbia Ministry of Energy and Climate Solutions to collaborate with Washington to investigate incentives to incentivize BC production of SAF

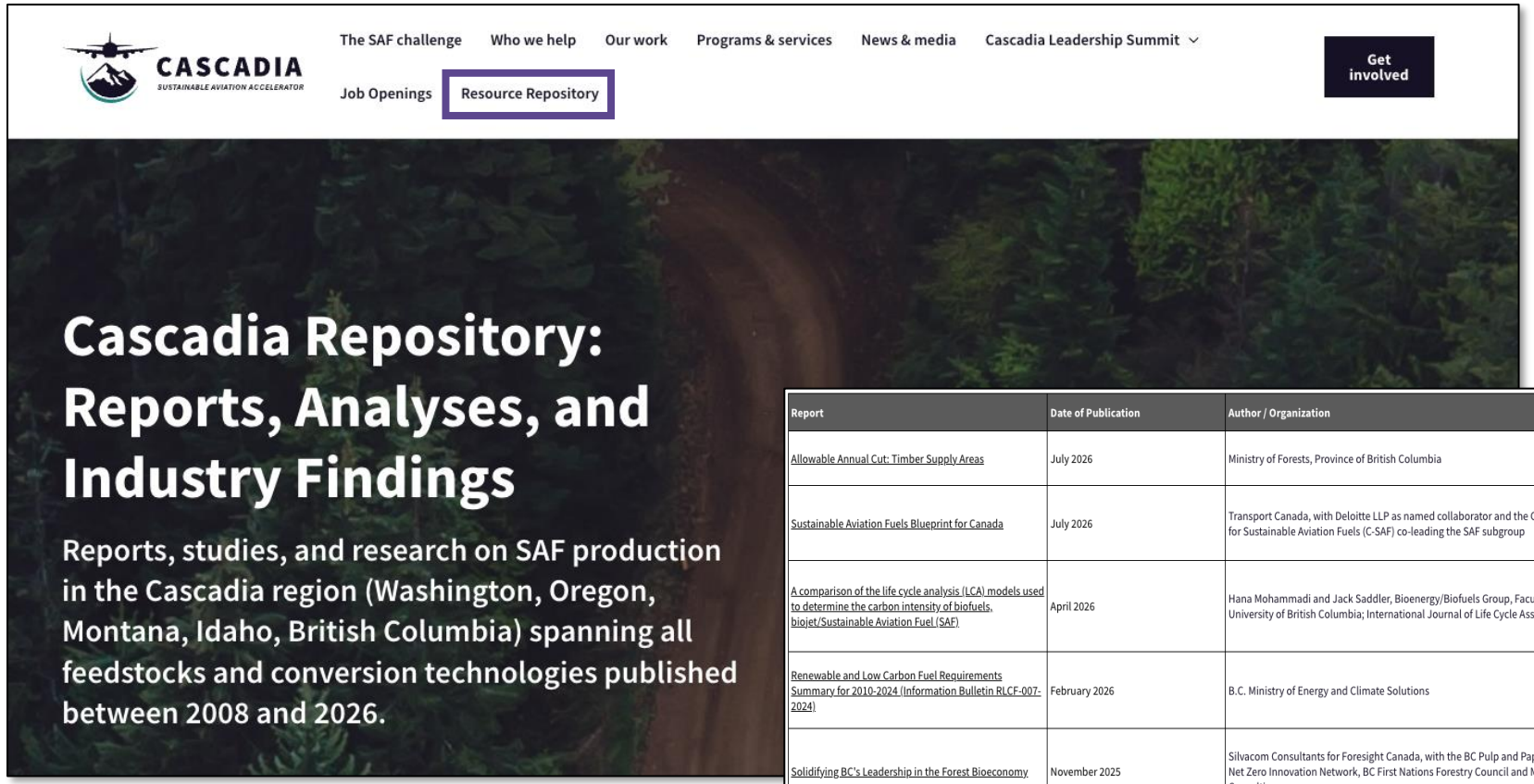
MONTANA

- Include SAF as an eligible fuel under the Biodiesel Tax Exemptions

IDAHO

- Build a statewide SAF statewide working group that investigates the best way to Idaho to participate and educate on feedstock opportunity

Policy Assessment | Resource Repository



Report	Date of Publication	Author / Organization	Description
Allowable Annual Cut: Timber Supply Areas	July 2026	Ministry of Forests, Province of British Columbia	The official BC listing of allowable annual cut by timber supply area with effective dates, giving the province-wide harvest ceiling that constrains all harvest-linked residue supply.
Sustainable Aviation Fuels Blueprint for Canada	July 2026	Transport Canada, with Deloitte LLP as named collaborator and the Canadian Council for Sustainable Aviation Fuels (C-SAF) co-leading the SAF subgroup	Canada's first federal SAF blueprint that sets the domestic production, import, book-and-claim and sustainability-accounting pathways to a Canadian SAF market. Analysis finds that British Columbia is the most likely near-term jurisdiction in Canada for SAF use and production.
A comparison of the life cycle analysis (LCA) models used to determine the carbon intensity of biofuels, biojet/Sustainable Aviation Fuel (SAF)	April 2026	Hana Mohammadi and Jack Saddler, Bioenergy/Biofuels Group, Faculty of Forestry, University of British Columbia; International Journal of Life Cycle Assessment 31(5)	Report comparing the four regional LCA models used to set SAF carbon intensity and showing that different models drive the largest CI differences.
Renewable and Low Carbon Fuel Requirements Summary for 2010-2024 (Information Bulletin RLCF-007-2024)	February 2026	B.C. Ministry of Energy and Climate Solutions	First BC-LCFS compliance summary that includes jet fuel.
Solidifying BC's Leadership in the Forest Bioeconomy	November 2025	Silvacom Consultants for Foresight Canada, with the BC Pulp and Paper Coalition, BC Net Zero Innovation Network, BC First Nations Forestry Council and MJ Rensing Consulting	Report detailing the opportunity and benefits of converting damaged and waste wood into bioeconomy products in BC.
Biofuels in Canada 2025 (10th annual edition)	October 2025	Navius Research for Advanced Biofuels Canada	Annual report that accounts Canadian biofuel volumes, carbon intensity and policyin 2024.
British Columbia (BC) Airports Decarbonization Study: Assessing emissions reductions opportunities at airports in BC - Executive Summary	October 2025	Deloitte LLP for the B.C. Ministry of Transportation and Transit	Emissions reduction study covering major Canadian airports. List opportunities to reduce Scope 1, 2, and 3 emissions, with SAF identified as a principal Scope 3 lever.
Aviation Climate Action Plan 2022 and 2023 Report	2025	Transport Canada	Biennial progress report against Canada's Aviation Climate Action Plan 2022-2030, covering fleet, operations, SAF and offsetting.