INNOVO Net Zero, Nil Capex for the Sustainable Aviation Fuel Industry

Commercial, Financial, and Strategic Impact Analysis
on the Industry, the First Mover and Followers

An Open Strategic Briefing for PR Agencies

1. EXECUTIVE SUMMARY

The Opportunity

The global sustainable aviation fuel (SAF) market is valued at approximately $2.5 billion in 2025 and is projected to grow at a CAGR of 35–66% to reach $40–$360 billion by the mid-2030s. Yet today, global SAF production stands at just 1.9 million metric tons—representing only 0.6% of total jet fuel consumption. The world can produce less than 2% of global SAF demand. Aviation accounts for 2–3% of global CO_2 emissions, and SAF is recognized as the single largest lever for decarbonization, expected to deliver 65% of the emissions reductions required for net-zero aviation by 2050. Regulatory mandates are accelerating from every direction: the EU ReFuelEU mandate (2% by 2025, scaling to 70% by 2050), the US SAF Grand Challenge (3 billion gallons/year by 2030), ICAO CORSIA (mandatory from 2027), and mandates in the UK, Japan, Singapore, India, and South Korea.

An oil and gas major that secures first-mover access to INNOVO's entire crude algal oil output gains a transformational position in this supply-constrained market. INNOVO is deploying 24 large-scale Smoke2Value bio-farms in Texas and Australia. At full capacity, these bio-farms will produce crude algal oil sufficient to yield 1.5 million tons of SAF—effectively doubling the current global SAF supply. The technology has been validated through $16 billion in offtake contracts held by INNOVO's technology partner, following two years of due diligence by five of the world's top 10 oil and gas majors including BP, Chevron, and Shell. Each bio-farm produces $63M of SAF feedstock in its first year, rising to $151M annually by year 5.

Commercial Impacts

INNOVO's nil capex model eliminates the SAF industry's most pressing commercial risks in a single deployment:

Regulatory compliance at zero cost: The first-mover oil and gas major secures exclusive or priority access to the world's largest new source of SAF feedstock—1.5 million tons of crude algal oil annually from 24 bio-farms. In a market where SAF trades at 2–5x the price of conventional jet fuel due to extreme supply scarcity, controlling this volume confers extraordinary pricing power. Airlines face a $3.6 billion SAF-related cost burden in 2025 alone due to these premiums, and demand is projected to reach 15 million tons by 2030 and 40 million tons by 2035. The first mover captures the lion's share of this explosive demand curve.

Carbon cost elimination: Beyond SAF production revenue, the first-mover oil and gas major claims US Section 45Z Clean Fuel Production Tax Credits of up to $1.00/gallon for refining crude algal oil into SAF. INNOVO separately claims 45Q credits for carbon capture at the bio-farm; the oil and gas major claims 45Z for SAF production at its refinery—no anti-stacking conflict. With algae-based SAF achieving exceptionally low lifecycle emissions, the 45Z credit could reach $0.80–$0.90 per gallon. Simultaneously, INNOVO sells 45Q Production Tax Credits ($612M per bio-farm over 12 years) to the oil and gas major at a first-mover discount, generating $100M immediate profit per $200M purchased.

Premium pricing and market share: SAF already commands 2–5x the price of conventional jet fuel. Airlines are locked into mandatory purchasing by ReFuelEU, CORSIA, the UK SAF Mandate, and Asia-Pacific mandates. With INNOVO doubling the global SAF supply, the first mover becomes

the dominant global SAF supplier, securing multi-year offtake agreements with the world's major airlines at premium margins. Net-zero oil and gas bundled with INNOVO's nil-capex bio-farms can also command a $30–$50/barrel premium over conventional commodity oil and gas, driven by avoided carbon costs and ESG value.

Customer and supply chain retention: The first-mover oil and gas major transforms its relationship with airlines, heavy industry clients, and data center operators. Airlines require SAF to comply with mandates; the first mover supplies it. Heavy industries require net-zero energy; the first mover offers nil-emissions oil and gas. Data centers require net-zero power; the first mover can provide gas-powered net-zero electricity (22% cheaper than solar, 39% cheaper than nuclear). This is a complete repositioning of the oil and gas major from a declining fossil fuel supplier to the dominant clean energy partner across multiple sectors.

Financial Impacts

The financial case is compelling at every level:

KEY METRIC	VALUE
Global SAF market (2025)	**$2.5 billion; growing at 35–66% CAGR**
Global SAF supply (2025)	**1.9 million metric tons (0.6% of jet fuel)**
INNOVO total SAF feedstock output (24 bio-farms)	**1.5 million tons/year (doubles global supply)**
SAF feedstock revenue per bio-farm (Year 1 → Year 5)	**$63M → $151M annually**
SAF price premium vs. conventional jet fuel	**2–5x (mandated markets)**
US 45Q Tax Credits per bio-farm (12 years)	**$612M ($51M/year)**
US 45Z Clean Fuel Credit (oil & gas major claims)	**Up to $0.80–$0.90 per gallon of SAF**
Net-zero oil & gas price premium	**$30–$50 per barrel**
Bio-farm profitability	**58% IRR / 2.6-year payback**

First-mover deal: INNOVO grants first-mover status to the oil and gas major in return for either (a) the sale of $300M of US 45Q Tax Credits for $200M cash, generating $100M immediate profit, or (b) generation of $200M cash from $300M in Australian CO_2 tax mitigation obligations. The first mover secures priority access to INNOVO's entire crude algal oil output, creating a structural supply advantage that competitors cannot replicate for years.

Total first-mover annual benefit per facility: The first-mover oil and gas major captures: SAF production revenue from 24 bio-farms ($1.5B–$3.6B annually at maturity), 45Z tax credits (hundreds of millions per year), 45Q tax credit profits ($100M per $200M purchased), net-zero oil and gas premium pricing ($30–$50/barrel across production), halting the $700–$900 billion revenue decline from market share erosion, and dominant positioning in the fastest-growing segment of the energy market. Total 10-year value creation: $20B–$50B+.

Follower penalty: Once the first mover secures INNOVO's crude algal oil output, competitors face a structural feedstock scarcity. They cannot replicate the volume for years. They lose the SAF

market's supply-constrained premium window, receive less favorable 45Q terms, and cannot match the first mover's net-zero narrative. The oil and gas industry's market share decline ($700–$900B lost since 2020) continues for followers while the first mover reverses it.

Strategic Communications Opportunities for PR Agencies

A PR agency that successfully introduces a major SAF producer to INNOVO and wins the resulting global communications mandate secures a transformational opportunity:

Category-defining global campaign: The announcement that an oil and gas major has partnered with INNOVO to double global SAF supply and achieve net-zero operations at nil capex is the single most significant energy transition story in the sector. It redefines the oil and gas narrative from decline to growth, intersecting aviation, climate policy, ESG investing, geopolitics, and industrial strategy. The agency leads a sustained, multi-year global campaign across every major media category.

Revenue potential: INNOVO proposes a 3-way partnership model (Oil & Gas Major × INNOVO × PR Agency) with a 50/50 cost-sharing structure. INNOVO's contribution is funded from 45Q tax credit revenues ($612M per bio-farm). Total campaign budgets of $80M–$160M over 3 years. Agency fees: $12M–$40M per year.

Agency positioning: This campaign establishes the agency as the definitive global leader in energy transition and industrial decarbonization communications—a positioning that generates business development leverage across every heavy-emitting sector. Work of this magnitude (genuine environmental impact combined with commercial transformation) wins major industry awards and defines agency reputations.

Dual-Track engagement model:

INNOVO operates a Dual-Track PR engagement model.

Track 1 (Paid Mandate): For agencies with no existing client conflicts, the agency wins a mandate from both the SAF industry leader and INNOVO, covering the full global communications campaign.

Track 2 (Strategic Briefing): For agencies with existing retained relationships in the SAF sector, the agency wins the mandate from its existing client only, avoiding any conflict of interest with INNOVO.

All information is in the public domain, and there is no requirement to notify INNOVO before approaching any client or media contact.

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2. THE SUSTAINABLE AVIATION FUEL INDUSTRY'S DECARBONIZATION CRISIS

2.1 Scale of the Problem

Aviation accounts for 2–3% of global CO_2 emissions and 12% of transport-sector emissions. Unlike road transport, aviation cannot be electrified for long-haul flights in the foreseeable future. SAF is universally recognized as the primary decarbonization pathway, expected to deliver 65% of the emissions reductions needed for net-zero aviation by 2050. Global passenger numbers are forecast to reach 5.2 billion by 2026 and 10 billion by 2050, meaning emissions will rise sharply without massive SAF adoption.

Despite this urgency, global SAF production reached just 1.9 million metric tons in 2025—representing only 0.6% of total jet fuel consumption. Supply doubled from 2024 (1 million tons), but growth is projected to slow sharply to 2.4 million tons in 2026 due to high costs and policy design issues. The world can produce less than 2% of the SAF that aviation regulations will require. IATA has warned that poorly designed mandates have stalled investment momentum, and that airlines paying 2–5x the price of conventional jet fuel for SAF face a $3.6 billion cost burden in 2025 alone.

2.2 The Decarbonization Challenge

Regulatory mandates are accelerating from every major aviation jurisdiction, creating enormous demand that current production capacity cannot meet: EU ReFuelEU Aviation: 2% SAF blend by 2025, scaling to 70% by 2050 (estimated demand: 1.2M tons in 2025 rising to 43.4M tons by 2050). US SAF Grand Challenge: 3 billion gallons/year by 2030 (~10% of US jet fuel demand); 35 billion gallons/year by 2050 (100%). ICAO CORSIA: Net-zero aviation by 2050; mandatory phase starts 2027, covering nearly all international flights. UK SAF Mandate: 2% in 2025, rapidly increasing to 10% by 2030. Asia-Pacific: Japan (10% by 2030), Singapore (1% by 2026, 3–5% by 2030), India (1% by 2027, 5% by 2030), South Korea (1% by 2027).

The supply-demand gap is staggering. SAF demand is projected to reach 15 million tons by 2030, yet current planned capacity reaches only around 6 million tons. By 2035, demand is expected to nearly triple again to 40 million tons, creating a 26 million-ton gap. An estimated 500–800 new SAF facilities will be needed globally by 2050, requiring approximately €36 billion in capital expenditure annually. 82% of current SAF capacity relies on HEFA technology, which is constrained by limited feedstock availability. The industry urgently needs new, scalable feedstock pathways—exactly what INNOVO's algae-based crude algal oil provides.

2.3 Escalating Carbon Costs

The financial pressure on SAF producers is intensifying rapidly through multiple regulatory mechanisms:

EU Emissions Trading System (EU ETS): Aviation is included in the EU ETS, and 20 million carbon allowances are reserved to offset the SAF price gap. Airlines face escalating ETS costs as

free allowances are phased out. An oil and gas major that supplies net-zero jet fuel enables airlines to eliminate their ETS liability on INNOVO-powered routes, creating an irresistible commercial proposition.

EU Carbon Border Adjustment Mechanism (CBAM): While CBAM does not directly cover aviation fuel, the broader carbon pricing framework (EU ETS, CORSIA) creates equivalent cost pressures. Airlines must purchase SAF or pay penalties and offsetting costs. The CORSIA mandatory phase from 2027 covers nearly all international flights, creating a global compliance market for SAF that dwarfs current supply.

Emerging global carbon pricing: SAF mandates are proliferating globally: the EU, US, UK, Japan, Singapore, India, South Korea, and China have all implemented or announced SAF requirements. This creates a multi-jurisdictional compliance framework where airlines must source SAF regardless of geography, driving global demand well beyond any single region's production capacity.

2.4 Total Industry Exposure

The global SAF market is projected to reach $40–$360 billion by the mid-2030s, depending on the pace of mandate enforcement and technology development. For oil and gas majors, SAF represents one of the fastest-growing energy markets globally. Securing dominant supply in this market transforms an oil and gas major's revenue trajectory from decline to growth—reversing the estimated $700–$900 billion revenue loss from the sector's declining market share since 2020.

2.5 Failure of Existing Solutions

Current SAF producers (Neste, World Energy, LanzaJet) are constrained by feedstock limitations (waste oils, used cooking oil, agricultural residues) that cannot scale to meet projected demand. HEFA technology, which dominates current production, faces a "tipping point" after 2030 where demand will outpace HEFA's production potential. Alternative pathways (Fischer-Tropsch, alcohol-to-jet, power-to-liquid) are at earlier stages of commercialization and face high costs. The industry is in desperate need of new, scalable feedstock sources at industrial volume—which is precisely what INNOVO's crude algal oil delivers.

3. INNOVO'S SOLUTION: NET ZERO, NIL CAPEX

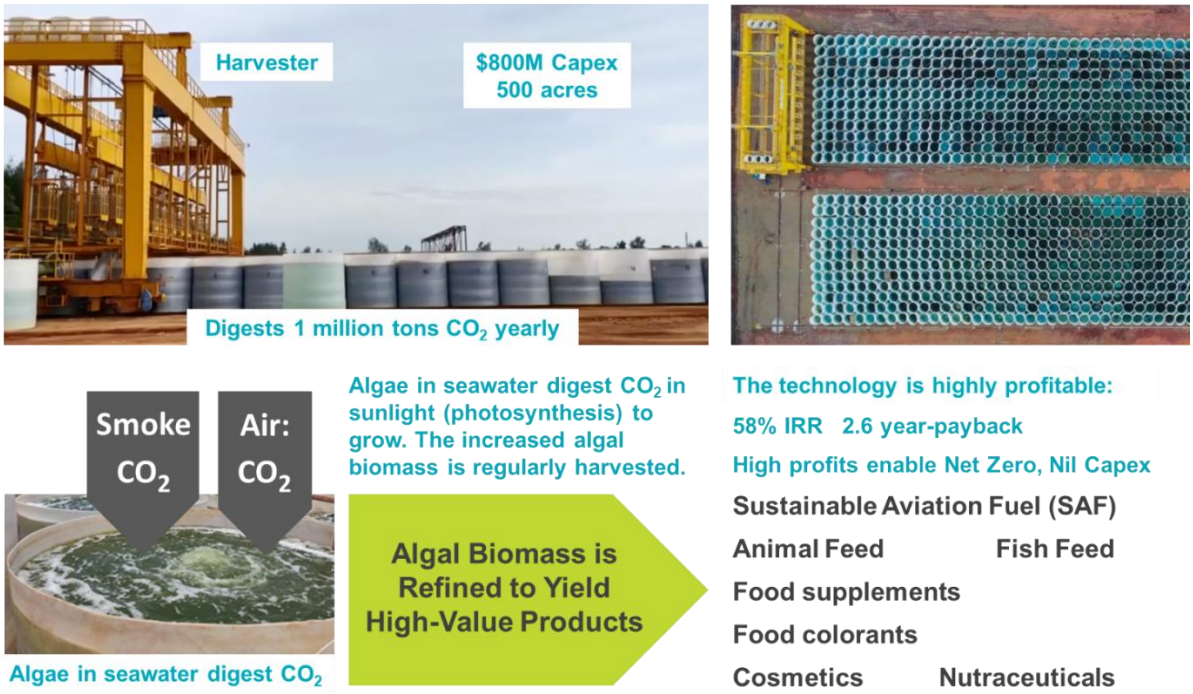
3.1 Smoke2Value Technology Overview

1.1 How It Works: Smoke2Value Technology Proven at Industrial Scale

Webpage and short video: Smoke2Value
Algae in the oceans grow by digesting half of the planet's CO_2 using sunlight and photosynthesis. Microalgae have been profitably grown in shallow ponds for decades by hundreds of small companies to produce a range of natural products, including animal feed, fish feed, food supplements, cosmetics and nutraceuticals.

A revolutionary version of this clean technology has now been proven at an industrial scale. Using thousands of 2.4-meter high tanks and a harvester, it produces 127 times more algal biomass than shallow ponds.

Smoke2Value Technology Proven at Industrial Scale



There are 250,000 tanks on a 500-acre bio-farm. The algae grow in bright sunlight through photosynthesis, just like they do in the sea. The algal biomass is harvested by the yellow overhead harvester and then sent for fractionation and refining to yield numerous products for different markets. Half of the crude algal oil output is destined for sustainable aviation fuel feedstock.

1.2 $16B Offtake Contracts from 5 Oil & Gas Majors Including Shell, Chevron & BP

Five of the world's top 10 oil & gas companies, including BP, Chevron, and Shell each performed 2 years' due diligence on the technology. Between them, they then placed $16 billion in three offtake contracts for the crude algal oil feedstock for sustainable aviation fuel. An INNOVO Smoke2Value bio-farm is to be collocated on a net zero, nil capex basis adjacent to the oil refinery of an oil & gas major to profitably digest all its emissions.

Crucially, removing the CO_2 from the generator's smoke enables that generator to produce electricity with zero net emissions. The generator itself is unchanged: it is the adjacent bio-farm that transforms its output from a climate liability into a source of clean energy.

For the SAF market specifically, INNOVO's 24 planned bio-farms produce crude algal oil—a premium SAF feedstock—as their primary commercial product. Each bio-farm produces 316,700 tons of crude algal oil per annum at $1,100 per ton. At full capacity across 24 bio-farms, INNOVO's output is sufficient to yield 1.5 million tons of SAF, effectively doubling the current global supply. The crude algal oil is sold to the oil and gas major, which refines it into finished SAF using existing hydroprocessing or Fischer-Tropsch infrastructure. This is a drop-in feedstock compatible with existing refinery operations, requiring no new capital investment by the oil and gas major for feedstock processing.

3.2 Zero Capex Business Model

The INNOVO value proposition to SAF producers is straightforward:

WHAT INNOVO INVESTS	WHAT THE SUSTAINABLE AVIATION FUEL PRODUCER PROVIDES
$400M–$800M per bio-farm (100% financed by INNOVO)	Access to CO_2 emissions from the refinery and associated operations
Engineering, construction, and commissioning	Site access for bio-farm co-location (approx. 205 acres per $400M farm)
Ongoing operations and maintenance	Basic utilities (seawater access, grid connection)
Technology risk (INNOVO bears 100%)	**$0 capital expenditure**

3.3 Revenue Model

INNOVO's bio-farms generate approximately $200 profit per ton of CO_2 digested through the sale of high-value commercial products: crude algal oil (SAF feedstock at $1,100/ton), crude algal cake (animal feed at $250/ton), omega-3 oils ($80,000/ton), and US 45Q Production Tax Credits ($612M per bio-farm over 12 years). The technology has been validated through $16 billion in offtake contracts held by INNOVO's technology partner, following due diligence by five of the world's top 10 oil and gas majors. With a project IRR of 58% and a payback period of 2.6 years, INNOVO's bio-farms are seven times more profitable than solar energy.

4. COMMERCIAL IMPACT ON THE SUSTAINABLE AVIATION FUEL INDUSTRY

4.1 Immediate Regulatory Compliance

CBAM Elimination: The first-mover oil and gas major becomes the world's dominant SAF supplier, controlling access to the single largest new feedstock source. As CORSIA's mandatory phase begins in 2027, airlines worldwide will need SAF to meet their offsetting obligations. The first mover's position as the primary supplier creates a structural competitive advantage that is virtually impossible for competitors to replicate in the near term.

EU ETS Cost Elimination: Airlines purchasing SAF from the first-mover oil and gas major reduce their EU ETS liability proportionally to the SAF blend. With SAF providing up to 80%+ lifecycle GHG reductions, this creates a direct financial incentive for airlines to source SAF from the first mover. The first mover also eliminates its own upstream emissions through INNOVO's co-located bio-farms, offering a genuinely net-zero supply chain from wellhead to wing.

IFRS S2 and CSRD Compliance: Zero-emission SAF production dramatically simplifies climate-related financial disclosures under IFRS S2 and the EU Corporate Sustainability Reporting Directive, reducing transition risk exposure and improving ESG ratings.

4.2 Premium Pricing

SAF currently trades at 2–5x the price of conventional jet fuel due to extreme supply scarcity. Even as production scales, mandates ensure that demand will continue to outpace supply through at least the early 2030s, maintaining premium pricing. The first-mover oil and gas major locks in multi-year offtake agreements with major airlines at premium margins. With INNOVO's feedstock cost structure (algal oil at $1,100/ton), the margin on finished SAF is exceptionally attractive compared to HEFA pathways constrained by volatile waste oil pricing. A single bio-farm generates $63M in SAF feedstock revenue in year one, rising to $151M by year five. Across 24 bio-farms at maturity, this represents $1.5B–$3.6B in annual SAF feedstock revenue.

4.3 Customer Retention and Market Share

The first-mover oil and gas major transforms its customer relationships across multiple sectors. Airlines require SAF for regulatory compliance—the first mover supplies it. Heavy industrial clients require net-zero energy—the first mover offers nil-emissions oil and gas with INNOVO bio-farms co-located at their facilities. Data centers require zero-emission power—the first mover provides gas-powered net-zero electricity at 22% below solar cost. This is a comprehensive repositioning from commodity energy supplier to indispensable clean energy partner.

4.4 Stranded Asset Mitigation

Oil and gas majors face up to $30.6 trillion in stranded assets by 2050 under net-zero scenarios. The first mover's partnership with INNOVO neutralizes emissions from existing infrastructure

through co-located bio-farms, extending the economic life of wells, pipelines, refineries, and downstream assets. This protects shareholder value and avoids massive write-downs. Net-zero oil and gas with INNOVO's nil-capex model flips the narrative from decline to growth, attracting ESG funds and mainstream capital.

5. FINANCIAL IMPACT: FIRST MOVER VS. FOLLOWERS

5.1 First-Mover Advantages

The first SAF producer to partner with INNOVO secures a cascade of compounding financial advantages:

Priority Access to 45Q Tax Credits

In the US, each $400M Smoke2Value bio-farm generates $612M in Section 45Q Production Tax Credits over 12 years. INNOVO grants first-mover status in return for either (a) the sale of $300M of US 45Q Tax Credits for $200M cash, generating $100M immediate profit, or (b) generation of $200M cash from $300M in Australian CO_2 tax mitigation obligations. The first mover gets the best deal; subsequent buyers receive less favorable terms.

Premium Pricing Window

The first mover controls the world's largest new SAF feedstock source during the most supply-constrained period in aviation history. Airlines have no alternative: mandates require SAF purchasing, and INNOVO's output represents the only source at this scale. The first mover sets the pricing benchmark for the global SAF market, locking in premium multi-year contracts with the world's largest airlines before competitors can secure alternative feedstock at comparable volume.

Category-Defining Narrative

The first oil and gas major to partner with INNOVO defines the narrative for the entire energy transition. "The oil major that doubled global SAF supply and achieved net-zero operations at nil capex" is a story that rewrites the sector's image from climate villain to climate leader. This is not incremental greenwashing; it is a fundamental transformation backed by $16 billion in validated contracts, regulatory compliance across every jurisdiction, and measurable emissions reduction. Every competitor's subsequent announcement is measured against this benchmark.

Investor and ESG Rating Uplift

Oil and gas companies face the most intense ESG scrutiny of any sector. The first mover to demonstrate a credible pathway to net-zero operations—backed by industrial-scale SAF production and validated technology—will see transformational benefits: reversal of ESG-driven divestment, lower cost of capital, inclusion in sustainability indices previously closed to fossil fuel companies, improved access to sustainability-linked financing, and renewed institutional investor confidence. The share price implications of shifting from "stranded asset risk" to "energy transition leader" are estimated at 20–30% uplift.

5.2 Financial Case Study

FINANCIAL METRIC (FIRST-MOVER OIL & GAS MAJOR)	VALUE
SAF feedstock revenue (24 bio-farms at maturity)	**$1.5B–$3.6B per year**
45Z Clean Fuel Tax Credits (oil & gas major claims)	**Hundreds of millions per year**
45Q Tax Credit profit (first-mover deal)	**$100M per $200M purchased (per bio-farm)**
Net-zero oil & gas premium ($30–$50/barrel)	**$22B/year for 2M bbl/day producer**
Market share reversal (halt $700–$900B decline)	**Tens of billions recaptured**
Stranded asset mitigation ($30.6T sector-wide risk)	**Billions in protected shareholder value**
TOTAL 10-YEAR VALUE CREATION	**$20B–$50B+**

5.3 Follower Disadvantages

Once the first mover is announced, all competitors become followers:

- Followers face structural feedstock scarcity: the first mover controls INNOVO's 24 bio-farms' output, which doubles global SAF supply. Competitors cannot replicate this volume for years.
- Followers lose the SAF pricing window: by the time alternative feedstock sources scale, the first mover has locked in multi-year airline contracts at peak premium margins.
- Followers cannot claim 45Z credits on INNOVO feedstock: the first mover's exclusive access means competitors must find alternative (more expensive, less scalable) feedstock pathways.
- Followers' market share decline continues: the $700–$900 billion revenue erosion since 2020 accelerates for companies that cannot offer net-zero products, while the first mover reverses the trend.
- Followers face intensifying stranded asset risk: without INNOVO's nil-capex solution, competitors must invest billions in their own decarbonization with uncertain returns and longer timelines.

The gap between first mover and followers widens over time. A 2–3 year head start in a rapidly tightening regulatory environment creates compounding advantages that followers may never fully close.

6. STRATEGIC IMPACT ON TARGET SUSTAINABLE AVIATION FUEL COMPANIES

INNOVO's value proposition is relevant to the major global SAF producers:

COMPANY	REVENUE	KEY METRIC	STRATEGIC DRIVER
Chevron	$196B (2024)	2nd largest US major	First-mover probability ranking: highest. Strong US refining; 45Q/45Z eligibility; expanding SAF capacity
Shell	$280B (2024)	Largest European major	Shell Aviation: major global jet fuel supplier; SAF investments; Brevik CCS; US operations
BP	$199B (2024)	Post-reset strategy	Pivoted back to oil & gas (Feb 2025 "fundamental reset"); CEO Meg O'Neill; nil capex aligns with new strategy
ExxonMobil	$340B (2024)	Largest US major	Massive refining capacity; Baytown SAF facility; strong 45Z eligibility; limited current SAF presence
TotalEnergies	$200B (2024)	Diversified major	Grandpuits SAF refinery; European SAF mandate exposure; renewable energy investments

7. STRATEGIC COMMUNICATIONS OPPORTUNITIES FOR PR AGENCIES

A PR agency that successfully introduces a major SAF producer to INNOVO and wins the resulting global communications mandate would secure one of the most significant retainer opportunities in the SAF sector.

7.1 The Scale of the Communications Mandate

Category-Defining Global Campaign

The announcement that an oil and gas major has partnered with INNOVO to double global SAF supply, achieve net-zero operations, and transform the aviation fuel market is the single most significant energy transition story in a generation. It redefines the narrative for an entire industry, resonating across aviation, energy, climate policy, ESG investing, and geopolitics simultaneously.

- Global launch campaign: Coordinated announcement across financial, trade, and mainstream media in multiple markets.
- Ongoing narrative management: Multi-year program covering construction milestones, regulatory approvals, and expansion announcements.
- Executive positioning: CEO thought leadership at COP, World Economic Forum, IATA Annual General Meeting, World Aviation Festival, Air Transport Action Group events, and tier-one business media.
- Investor communications: ESG-focused messaging for capital markets, including sustainability-linked bond issuances.
- Government affairs: Positioning the partnership as a model for SAF industry decarbonization policy.

Revenue Potential

INNOVO proposes a 3-way partnership model (Sustainable Aviation Fuel Producer × INNOVO × PR Agency) where communications costs are funded from the financial value INNOVO creates. Indicative mandate value: $5M–$15M annual retainer for global communications, with $20M–$50M+ in campaign budgets over the first three years. The agency that proves the model in SAF gains a strong position to extend the partnership across INNOVO's other target industries.

7.2 Strategic Value Beyond Revenue

Industry Leadership Positioning

The agency that leads this campaign establishes itself as the definitive leader in energy transition and industrial decarbonization communications. This positioning generates business development leverage far beyond the SAF mandate, opening doors to sustainability-focused work across every heavy-emitting sector.

Award-Winning Work

A campaign combining genuine environmental impact with commercial transformation is precisely the type of work that wins major industry awards (Cannes Lions, PRWeek Awards, SABRE Awards) and defines agency reputations for a generation.

7.3 The Dual-Track Engagement Model

INNOVO operates a Dual-Track PR engagement model designed to align with professional standards and eliminate conflicts of interest:

Track 1 – Paid Mandate: For agencies with no existing client conflicts in the SAF sector, the agency wins a mandate from both the industry leader partner and INNOVO, covering the full global communications campaign including launch, ongoing narrative management, and executive positioning.

Track 2 – Strategic Briefing: For agencies with existing retained relationships in the SAF sector, the agency wins the communications mandate from its existing client only. This avoids any conflict of interest with INNOVO. The agency's commercial opportunity comes from the transformational campaign it delivers for its own client.

In both tracks, all information in this briefing is in the public domain. There is no requirement to notify INNOVO before approaching any client or media contact.

8. COMPETITIVE LANDSCAPE: ALTERNATIVE DECARBONIZATION PATHWAYS

Understanding the limitations of alternative approaches reinforces the uniqueness of INNOVO's value proposition:

SAF PATHWAY	CURRENT SCALE	KEY LIMITATION	INNOVO ADVANTAGE
HEFA (waste oils/fats)	82% of current SAF; ~1.6Mt/yr	Feedstock-constrained (waste oil, used cooking oil); "tipping point" after 2030 where demand exceeds potential	Algal oil is a new, scalable feedstock not limited by waste supply; 24 bio-farms = 1.5Mt SAF/year
Fischer-Tropsch (gasification)	Early commercial; <0.1Mt/yr	High capex ($1.5–$2B per facility); requires biomass or waste feedstock at scale; limited to date	Drop-in feedstock compatible with existing FT or hydroprocessing; nil capex to oil & gas major
Alcohol-to-Jet (AtJ)	Pilot/demo stage	Limited commercial production; ethanol feedstock competition with food/fuel markets	Proven at industrial scale; $16B in validated offtake contracts
Power-to-Liquid (e-SAF)	Pre-commercial	Requires massive renewable electricity and direct air capture of CO_2; extremely high cost; no commercial plant operating	Bio-farms capture CO_2 biologically at $200 profit/ton vs. $300–$600/ton cost for DAC
Co-processing in refineries	Growing; ~0.2Mt/yr	Limited to 5% co-processing ratio; requires certified sustainable feedstock	Algal oil is a certified sustainable feedstock (ISCC EU, US EPA); full refinery processing possible

INNOVO's crude algal oil is the only new SAF feedstock pathway that simultaneously provides industrial-scale volume (1.5 million tons/year across 24 bio-farms), proven technology validation ($16 billion in offtake contracts), a profitable carbon capture mechanism ($200/ton CO_2 profit), and nil capital expenditure to the oil and gas partner. No competing pathway combines all four attributes.

9. GETTING STARTED

9.1 Engagement Process

INNOVO proposes a straightforward three-phase engagement:

Phase 1 – Executive Briefing (Weeks 1–2): Confidential briefing for the SAF producer's CEO and senior leadership on the INNOVO value proposition, financial model, and first-mover partnership structure.

Phase 2 – Site Assessment (Weeks 3–5): Technical assessment of the oil and gas major's refinery infrastructure for crude algal oil processing (hydroprocessing or FT compatibility), logistics planning for feedstock transport from bio-farm sites (Texas and Australia), 45Z tax credit qualification and ISCC/RSB certification pathway, and SAF offtake agreement structuring with airline customers.

Phase 3 – Commercial Structuring (Weeks 6–8): Negotiation of partnership terms including the 45Q Tax Credit sale structure, emissions elimination timeline, regulatory compliance pathway, and communications launch planning with the PR agency.

9.2 Contact

PR Agency Enquiries: public.relations@innovo-network.com

Website: innovo-net-zero.com/pr-briefing

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10. SOURCES

External Sources

[1] IATA, “SAF Production Growth Rate is Slowing Down,” December 2025 (1.9 Mt in 2025; 2.4 Mt in 2026; $3.6B cost burden; 0.6% of jet fuel; 2–5x price premium).

[2] SkyNRG & ICF, “SAF Market Outlook 2025,” June 2025 (2 Mt demand in 2025; 15 Mt by 2030; 40 Mt by 2035; 82% HEFA; HEFA tipping point post-2030).

[3] MarketsandMarkets, “SAF Market Size 2025–2030,” December 2024 ($2.06B in 2025; $25.62B by 2030; 65.5% CAGR).

[4] S&P Global, “Global SAF Supply to Slow in 2026,” December 2025 (SAF premium = $1,870/mt FOB; $4.5B airline cost burden in 2026).

[5] EASA, “SAF Market,” 2025 (0.53% of jet fuel in 2024; 500–800 facilities needed by 2050; €36B annual capex; EU capacity ~1 Mt).

[6] Fortune Business Insights, “SAF Market Size 2025–2034” ($2.72B in 2025; $40.09B by 2034; North America 46.43% share).

[7] McKinsey, “Securing a Sustainable Fuel Supply: Airline Strategies” (world produces <2% of SAF demand; feedstock constraints).

[8] EU ReFuelEU Aviation Regulation 2023/2036 (2% by 2025, 70% by 2050; synthetic fuel sub-targets).

[9] ICAO CORSIA framework (mandatory from 2027; net-zero aviation by 2050; ISCC/RSB certification).

INNOVO Project Knowledge

[10] INNOVO Net Zero Nil Capex for the Oil & Gas Industry v2025-12-19 MK (SAF market opportunity; 24 bio-farms; 1.5M tons SAF; regulatory mandates; $63M→$151M/year per bio-farm).

[11] INNOVO’s US Federal Tax Credits – S2V Bio-farm Eligibility & Monetization Strategy v2026-1-25 MK (45Q/45Z dual-credit structure; oil & gas major claims 45Z; $0.80–$0.90/gallon; no anti-stacking conflict).

[12] INNOVO Algae Tech Stack Venture Information Memorandum v2025-5-15 MK ($16B offtake contracts; $645M EBITDA; 90% crude algal oil for SAF; 31% p.a. SAF price inflation 2020–2022).

[13] About INNOVO & its Smoke2Value Technology v2026-1-2 MK RdM (crude algal oil: 316.7K tons/year at $1,100/ton; product streams).

[14] INNOVO’s Sale of US 45Q Production Tax Credits v2026-1-25 MK ($612M per bio-farm; first-mover deal: $300M for $200M cash).

[15] Summary of Webpage & Video – Profitable Net Zero Oil & Gas v2026-2-26 MK (first mover vs. follower; $700–$900B revenue decline; Dual-Track PR model).

[16] INNOVO Financial Processes incl Executive Summary v2025-10-23 MK ($150M first year SAF sales per bio-farm to oil & gas major).

[17] innovo-net-zero.com (company website; SAF page; PR briefing page).