

**Innovative Market Approaches
to Decarbonize the
Hardest-to-Abate Sectors:
The Work of the
Center for Green Market Activation**




GMA's Theory of Change

The Center for Green Market Activation™ (GMA) is a US-based, globally focused nonprofit.

We **catalyze markets** for low-carbon fuels and materials in the world's hardest to decarbonize sectors by standing up systems that **activate and aggregate** currently untapped corporate demand.



Three key barriers prevent buyers from supporting climate technologies at scale today

-  New solutions are expensive and available in short supply, from few providers, in limited locations
-  Suppliers are reluctant to invest in increasing production without confirmed demand from buyers
-  Buyers lack expertise in hard-to-abate sectors and a coordinated way to communicate and execute demand

The GMA Approach Has Two Parts

System Design
& Build

Demand Aggregation
& Execution

GMA helps companies find and scale critical climate technologies through the use of **book and claim systems** and **demand-aggregating buyers alliances** in the following hard to abate sectors:



Aviation



Trucking



Maritime



Cement & Concrete



Chemicals

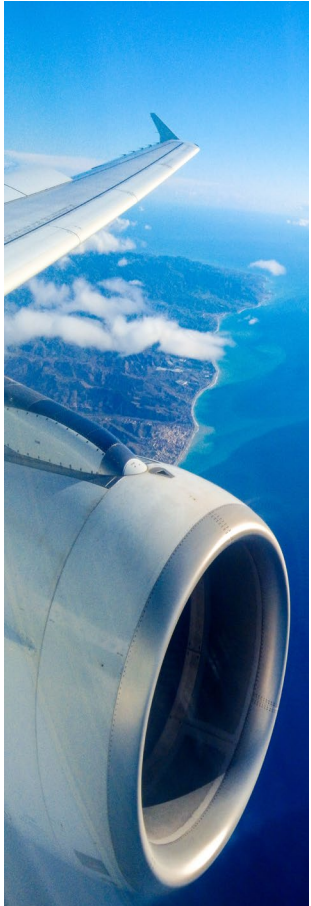


Steel

We go beyond target setting to help members execute on their demand through collective procurement.

Established GMA initiatives span 3 sectors – and have driven hundreds of millions toward critical climate technologies

AVIATION



SABA
SUSTAINABLE AVIATION BUYERS ALLIANCE

\$400M
demand for SAFc

40+
members

2 procurement
streams
underway in
2025

HEAVY DUTY TRUCKING



GMA | TRUCKING

Up to **450**
EV trucks
expected through
pilot procurement

10+
founding
members

Mid-2025 bid
review and
winner selection

MARITIME



ZEMBA
ZERO EMISSION MARITIME BUYERS ALLIANCE
2025-2026 EMISSIONS TARGET: 100%
REDUCTION IN CO₂ EMISSIONS

80,000+
tonnes of CO₂
avoided

40+
members

E-fuel
focused tender
accepting bids,
due spring 2025

**ZEMBA is an initiative of the Aspen Institute's Energy and Environment Program. GMA serves as the technical advisory team.*

***Figures shown for GMA Trucking are estimated totals based on current demand from members. First RFP currently underway.*

Examining the Work of the Sustainable Aviation Buyers Alliance (SABA) as Proof of Concept



THE SUSTAINABLE AVIATION BUYERS ALLIANCE (SABA)

is a joint non-profit initiative formed by the environmental NGOs EDF and RMI, with expert support from GMA. It operates as a membership-based organization.

SABA

SABA Members:

A community of leaders in climate action



Similar to RECs, SAF certificates are built off the book and claim model and are key to scaling the nascent SAF market



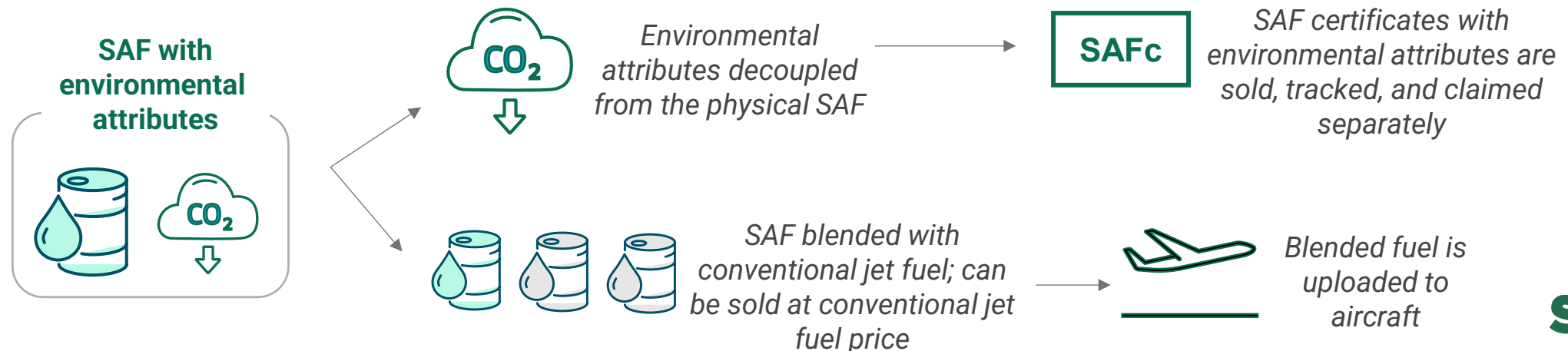
Electricity

- Renewable Energy Certificates (RECs) are the most widely-used book-and-claim instrument today
- RECs enable companies that can not access renewable energy directly to help drive its uptake -- *even when renewable electrons can not be delivered to them*



Aviation

- Just like RECs in the early renewable energy market, SAF certificates (SAFc) can scale the nascent SAF market
- Aviation customers who travel or ship air freight on flights using conventional jet fuel can still support aviation decarbonization with SAFc and claim the corresponding emission reductions



SABA's procurements help catalyze SAF supply and grow market maturity

FIRST PROCUREMENT

2021

Proof of Concept

Single year offtake

7 participants

~2,550K gallons SAF
requested

850K gallons supported
due to limited supply

All bio-based SAF

SECOND PROCUREMENT

2023

SAFc Registry Pilot

Up to *5-year* offtakes

25 participants

~100 mil gallons SAF
requested, equating to
~\$400M total demand

~50 mil gallons SAF
contracted

First e-fuels contracts

THIRD & FOURTH PROCUREMENTS

2025

Dual-track Effort

1) SAF Marketplace for
new and small buyers,
traditional SAF

2) Advanced SAF
procurement, ~5-10 year
advanced market
commitments

50+ expected
participants

SABA's 2025 Collective SAFc Procurements

**We are developing
two new
procurement
opportunities for
members coming
in May 2025**



Increase accessibility of SAFc and short-term purchasing flexibility through **SAFc Connect**

- Increase SAFc market liquidity through standardized, recurring process
- Shorten contracting timeline
- More homogenized pricing



Support uptake and secure supply of next-generation fuels

- Leverage corporate SAFc offtake to drive additional production capacity
- Send targeted demand signal
- Secure competitive pricing

SABA has consulted with SAFc providers, customers, and procurement experts to build out these purchasing streams.

Applying and Scaling this Approach for APAC

Putting Systems to Work

- GMA's book and claim systems and procurement approaches have global application to jumpstart new markets
- APAC is a high potential region for SAF opportunities using our model
 - Airlines and corporates who want to take action
 - Government support
 - Key producers
 - Key feedstocks

Questions?



Thank you!

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