



Industry Readiness Under RED III & Emerging EU Frameworks

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Sebastian Hirsz

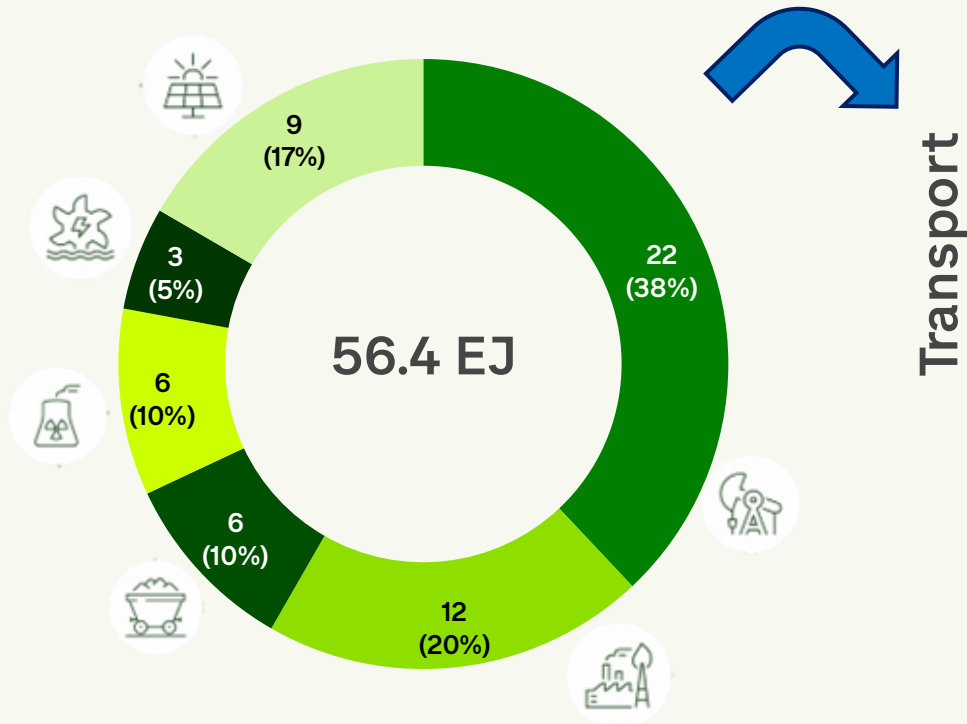
Strategy Advisor – Fuels & EV Charging

Finance

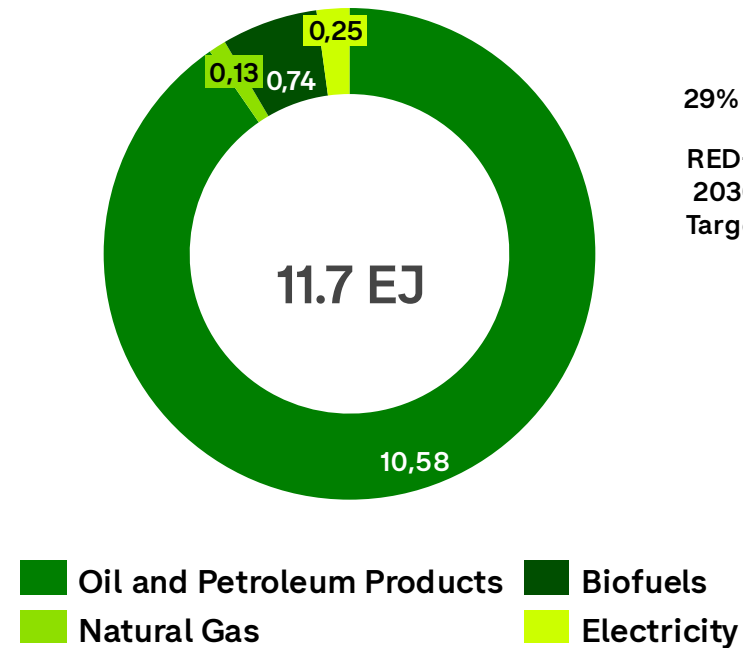
EU Transport Energy State of Play

Renewable energy use in transport is growing – primarily driven by the RED – with further displacement of fossil fuels to come

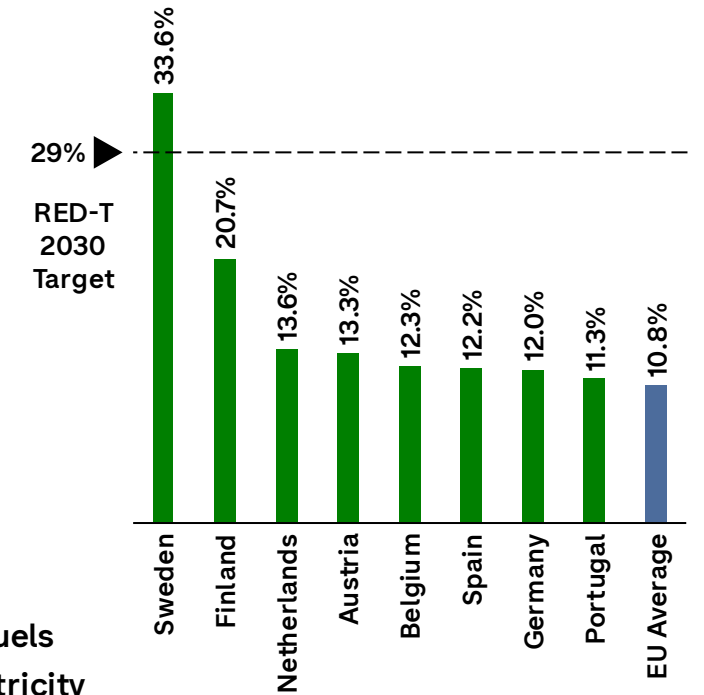
Energy Consumption by fuel type 2023¹



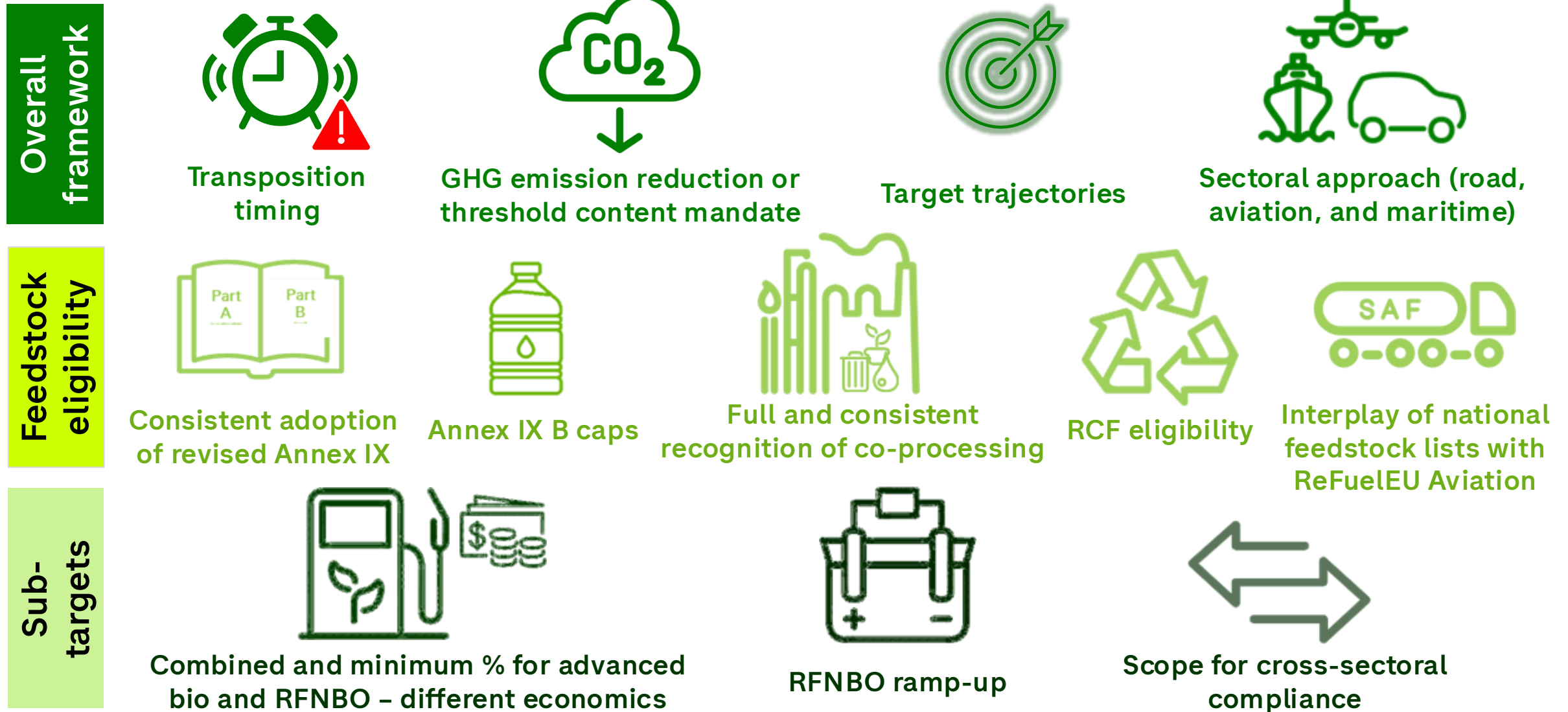
Energy Consumption by fuel type 2023²



Share of Renewable Energy Used in Transport 2023²



RED III is built on sound policy design, but Member State implementation has been fragmented



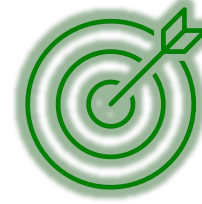
Overall framework



Transposition timing



GHG emission reduction or threshold content mandate

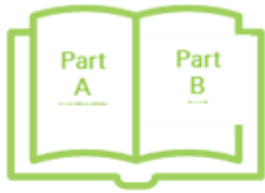


Target trajectories



Sectoral approach (road, aviation, and maritime)

Feedstock eligibility



Consistent adoption of revised Annex IX



Annex IX B caps



Full and consistent recognition of co-processing



RCF eligibility



Interplay of national feedstock lists with ReFuelEU Aviation

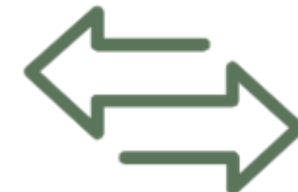
Sub-targets



Combined and minimum % for advanced bio and RFNBO - different economics



RFNBO ramp-up



Scope for cross-sectoral compliance

Associated compliance processes should be harmonised, bolstered, and underpinned by the UDB

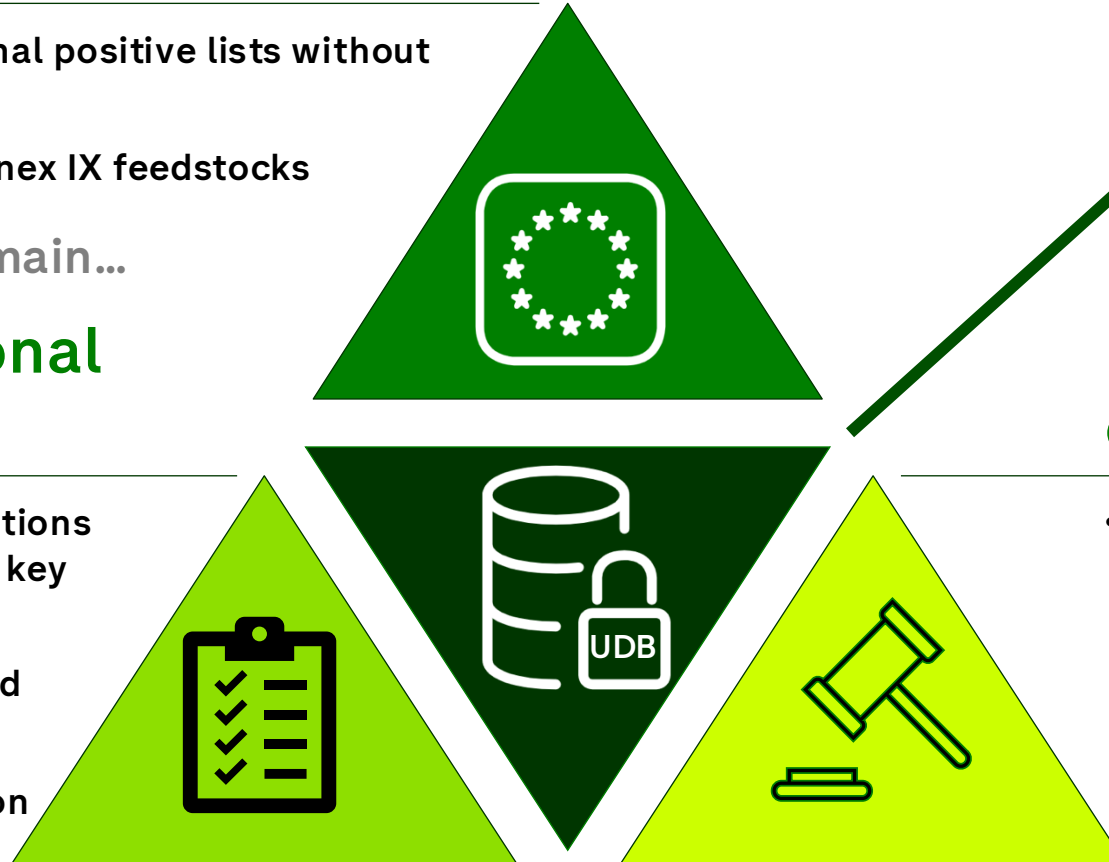
Harmonisation of feedstock codes at EU level

- Classified consistently in the national positive lists without further deviations
- Clarify rules/guidelines for new Annex IX feedstocks

Where national deviations remain...

Reinforce robust national verification processes

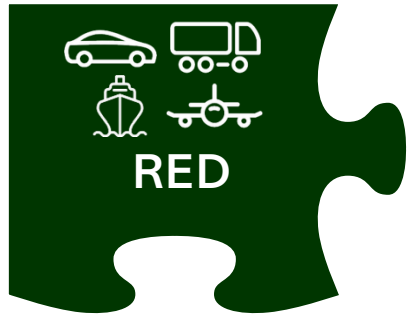
- Provide guidelines with clear definitions of new/added feedstock codes and key related compliance elements
- Country-specific verification related training
- Registration of feedstock generation facilities in the national database



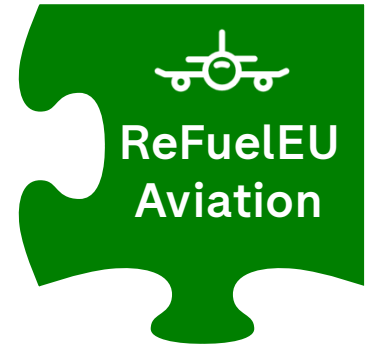
Reinforcement of cooperation

- Between certification bodies, regulatory compliance, and law enforcement authorities at national level as a dissuasive measure against fraudulent activities.

EU renewable and low carbon fuels policy is driving more demand in more sectors than ever before while the framework has become increasingly complex



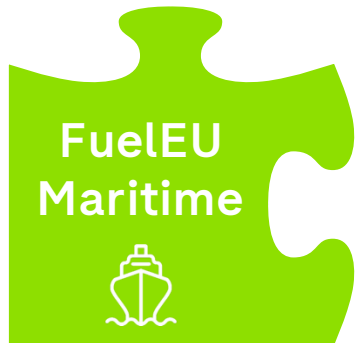
- National feedstock lists vs ReFuelEU Aviation eligibility
- Aviation in-scope in RED, but national measures prevented as per ReFuelEU Aviation FAQs
- Inconsistent eligibility of RFNBO



- National feedstock lists vs FuelEU Maritime eligibility
- Inconsistent eligibility of RFNBO



- Physical supply requirement
- Fragmented national documentation approaches



- Fragmented national documentation approaches
- (Fuel supplier not obligated under FuelEU Maritime)





**Coherent policy
framework**



**Broad, consistent,
and clear feedstock
eligibility**



**Robust and
pragmatic
compliance rules**



Boost demand



Enable supply



**With confidence in
the verification**

Thank you