



Cleared for Takeoff

The EU Regulatory Framework for SAF

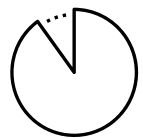
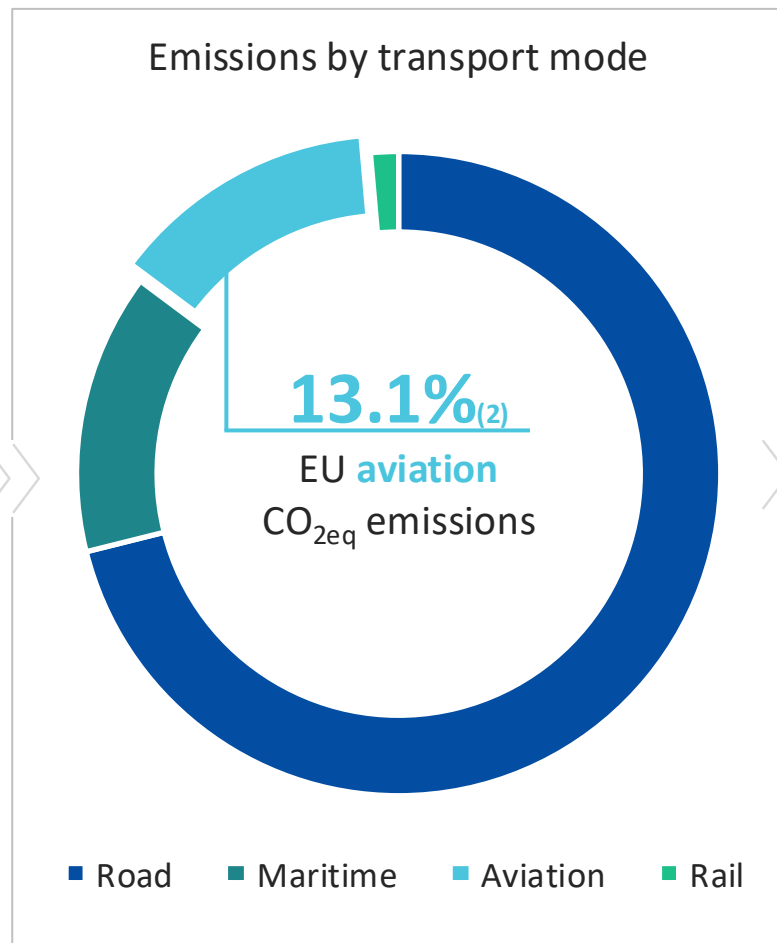
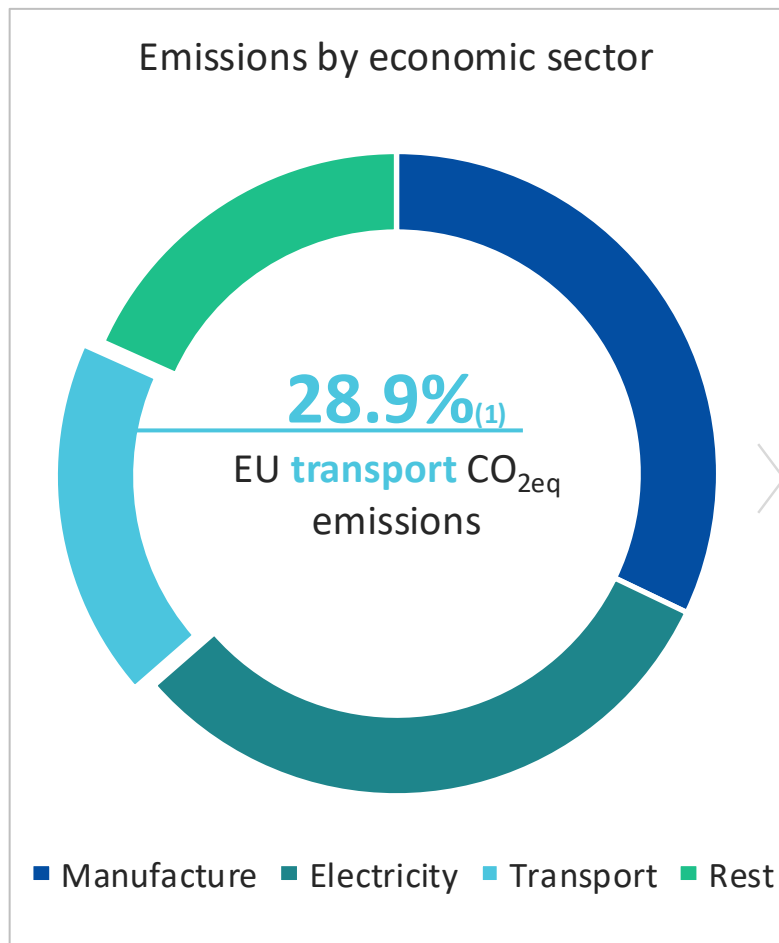
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European Commission

ISCC Global Sustainability Conference

25 February 2026

Transport emissions: contribution to climate neutrality by 2050



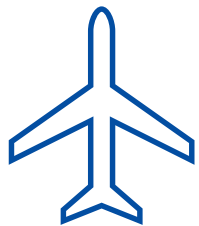
90% emission reduction in transport by 2050

- ▶ **All modes sustainable**
- ▶ **Sustainable alternatives widely available** across all the EU
- ▶ **Incentives** to accompany **the transition**

(1) Source: European Environment Agency (EEA) Sustainability of Europe's mobility systems - 2022 data

(2) European Commission: Directorate-General for Mobility and Transport, *EU transport in figures – Statistical pocketbook 2025*, Publications Office of the European Union, 2025 – 2023 data

Aviation's contribution to climate neutrality: a joint effort & a hard-to-decarbonise sector



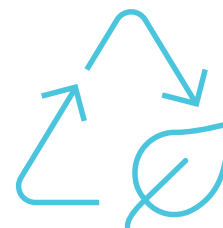
Aircraft and engine technology

More efficient and new aircraft



Air traffic management

More efficient air traffic



Sustainable aviation fuels (SAF)

Reducing carbon intensity using existing technologies



Economic and market-based measures

Setting incentives to drive the transition



ReFuelEU Aviation SAF mandates

EU SAF policy beyond ReFuelEU Aviation

a multi-faceted approach to ramp up SAF



Collaboration

Cross-sectoral collaboration

Renewable and Low Carbon Fuels Industrial Alliance (RLCF)

Global collaboration at ICAO

Long-Term Aspirational Goal, CAAF/3 Global Framework



Production

Financing to de-risk SAF production

Sustainable Transport Investment Plan (STIP), Horizon Europe, Innovation Fund, InvestEU, Global Gateway

New SAF pathways and new plants

EU SAF Clearing House, Net Zero Industry Act, ACT-SAF



Uptake

Financing to narrow the price gap

EU Emission Trading System (ETS) 20 million SAF Allowances and zero rating ETS, energy taxation

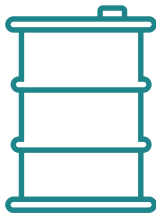
Enhancing transparency

Flight Emissions Label, EU taxonomy

ReFuelEU Aviation

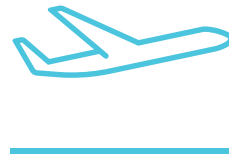
Implementation & market impact

Scope and obligations



Aviation fuel suppliers

supply **increasing amounts of SAF** at every Union airport
(flexibility 2025-34)



Union airports

facilitate the access to SAF

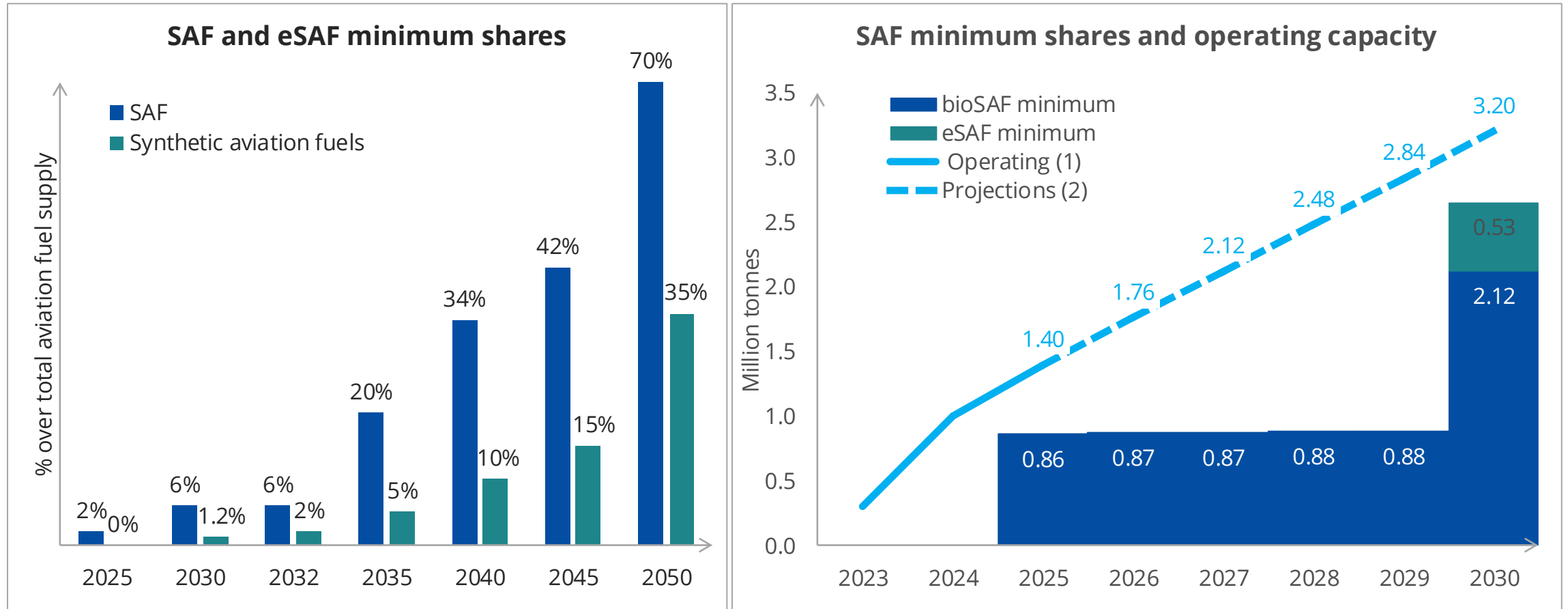


Aircraft operators

uplift aviation fuels **at each Union airport without 'tankering'** practices

ReFuelEU Aviation SAF and eSAF mandates

2030 SAF market outlook



Source: EASA (2024). Notes: (1) biofuels operating capacity in 2024 and 2025 and (2) biofuels capacity projections 2025 onwards based on EASA's "realistic scenario"

Estimated targets based on projected total EU jet fuel consumption of 44.25 Mt in 2030

EASA ReFuelEU Aviation Annual Report

Main outcomes

Promising levels of SAF uptake

- **2024 SAF Share:** 0.6% of the total aviation fuel supplied at Union airports was SAF.
- **2030 Target is Achievable:** EASA's assessment indicates that the EU is on track to meet the overall mandatory SAF blending target of 6% by 2030 based on current and planned production capacity

Market is highly concentrated and dependent on specific feedstocks

- The market remains highly concentrated: **99%** of the SAF supply was delivered to airports in just five Member States: **France, Germany, The Netherlands, Spain, and Sweden**
- SAF was supplied by only **25 fuel suppliers** to **33 EU airports** across 12 Member States
- Almost all SAF (98%) was **biofuel**, overwhelmingly produced from UCO & waste Animal Fats (HEFA)

Key challenges and price gap

- **Lack e-SAF:** **Synthetic fuels production facilities at industrial level** (PtL) are inexistent, confirming that this highly scalable pathway is underdeveloped, with mandate starting in 2030.
- **Imported Feedstock:** A significant portion of the feedstock for SAF production - **69%** - was **imported** from outside the EU, primarily from China (38%) and Malaysia (12%)
- **Price Disparity:** The average price of SAF in 2024 was about **€2,085 per tonne**, compared to approximately **€734 per tonne** for conventional jet fuel, highlighting the substantial cost gap that the regulation is designed to address

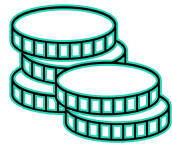
STIP

Sustainable Transport and Investment Plan

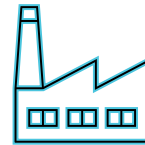
Communication European Commission – 5th November 2025

STIP - Three main pillars of action

Derisk, invest, deploy



Short term actions to boost investments through EU and national funding support



Developing new instruments to tackle market failures through double sided-auction mechanisms



Strategic partnerships to boost sustainable fuel supply & ensure level-playing field

Actions to boost investments

Innovation fund

- **2024:** four e-SAF projects (total amount of grant: € 153 million) + 11 aviation projects awarded STEP Seal
- **December 2025:** call for proposal under the European Hydrogen Bank €300 Million for maritime and aviation projects

Current Multi-Annual Financial Framework

- **Invest-EU:** Objective to mobilise up to €2 billion for sustainable aviation fuels
- **EIB:** Mobilise the EIB Group's Tech EU programme

SAF allowances

- **EU ETS:** Assess the possibility of extending the ETS SAF support in terms of volume and duration for aviation

National support

- **National recovery & resilience plans:** when funding available
- **Use of EU ETS national revenues** for renewable, low carbon fuels
- **CISAF:** State aid flexibility to support production

Developing new de-risking instruments

- **e-SAF Early Movers Coalition** launched on 4th December 2025 with **8 Members States**: Austria, Finland, France, Germany, Luxembourg, the Netherlands, Portugal and Spain.
- First double sided auction to be launched in 2026 **+EUR 500 million**
- **Contribute to funding an EU wide double sided auction mechanism 2027-2028**
- **Ongoing study** to assess appropriate governance frameworks and identify legal requirements



Statement on the 'eSAF Early Movers Coalition' of Member States

Today, Austria, Finland, France, Germany, Luxembourg, the Netherlands, Spain and Portugal announce the official launch of the **eSAF Early Movers Coalition**. This Coalition is a key initiative of the [Sustainable Transport Investment Plan](#), presented by the European Commission on 5 November 2025. It reflects the urgent need to accelerate the decarbonisation of aviation and highlights the crucial role of synthetic Sustainable Aviation Fuels.

The **eSAF Early Movers Coalition** brings together Member States committed to scaling up eSAF production. Coalition members will work jointly to share best practices and insights and pull together knowledge, and endeavour to financially contribute to the organisation of double-sided auctions for eSAF. A first double-sided auction should take place in 2026. The conceptual framework, including terms and conditions for a joint double-sided auction, will build on successful past experience and on the sharing of best practices among members. The Coalition remains open to all interested Member States.

The double-sided auctions will support the rapid deployment of eSAF in the EU and accelerate efforts of the aviation sector to reduce its emissions. It will support the objectives of ReFuelEU Aviation, and more broadly to advance a hydrogen-based economy across the Union.

STIP Strategic partnerships

- **Promote international partnership for diversification**, market access and global ambition
 - Support of flagship projects in partner countries through the Global Gateway Strategy
 - Capacity building : Cooperation ICAO- EU (e.g. ACT-SAF)
- **Work towards common standards** at global level
 - Dual conformance of SAF under RED and CORSIA
- **Market monitoring and trade defence**
 - Deter unfair practices and take remedial measures against injurious imports

EU ETS

Support mechanisms for SAF

Support mechanism for the use of Fuels Eligible under ETS (FEETS)

Directive (EU) 2023/958 of 10 May 2023 introduced Article 3c(6) into the ETS Directive: commercial aircraft operators are entitled to receive allowances for sustainable fuel to cover the remaining price difference with kerosene

- FEETS support is in place from 1 January 2024 – 31 December 2030
- 20 million EU ETS allowances have been reserved for that purpose, representing EUR 1.5 billion

Delegated act on the detailed rules ([here](#))

1. Application for dedicated allowances by aircraft operators;
2. Yearly calculation of the average price difference and its publication;
3. Determination of the amount of allowances per aircraft operator;
4. Laying down the procedural steps for the allocation;
5. Annex: Level of support per fuel category and airport location.

What is the level of support?

2024 annual prices (in EUR/tonne)

Fuel support categories per Art. 3c(6)	Share of price difference covered	FEETS price	Price difference	Direct ETS support
RFNBOs	95%	8,465	7,526	7,150
Advanced biofuels	70%	2,987	2,048	1,434
Renewable hydrogen for aviation	70%	8,272	7,333	5,133
Aviation biofuels	50%	2,085	1,146	573
Non-fossil low-carbon hydrogen for aviation	50%	5,121	4,182	2,091
Non-fossil synthetic low-carbon aviation fuels	50%	6,078	5,139	2,569

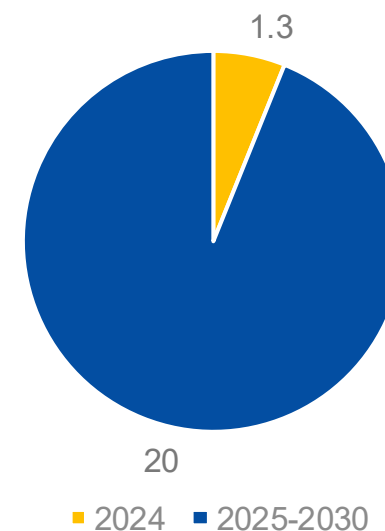
Publication of 2024 prices [here](#)

16 List of airports 2024 covered by 100% price difference coverage [here](#)

SAF allowances claimed in 2024

- **53 aircraft operators claimed SAF allowances for an equivalent amount of EUR 100 million**, and even EUR 125 million taking into account the allowances that airlines did not have to surrender, by using SAF (zero rating). ⁽¹⁾
- This mechanism allows airlines to bridge 50% of the price gap for bioSAF, 75% for advanced bioSAF, and 95% for eSAF.
- **100% of the price difference** can also be claimed for eligible fuel at airports on **small islands** with no mainland connection, in outermost regions and non-Union airports.

SAF Allowances available until 2030 under FEETS mechanism ⁽²⁾



Notes: (1) This support comes on top of the EU ETS incentive for using of SAF as operators are not required to surrender allowances for the use of these fuels – an advantage worth around €25 million in 2024.

(2) The latest EU ETS Directive amendment allocates 20 million free allowances (worth €1.5 billion - €75 per allowance) from 2024 to accelerate SAF use.

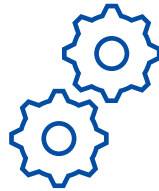
Implementation and next steps



EU ETS Revision

Looking into SAF support mechanism

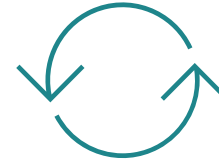
Due Q3 2026



Implementation ReFuelEU Aviation

EASA Technical Report for the 2025 compliance year

Ongoing monitoring & potential simplification



Evaluation ReFuelEU Aviation

Report due in 2027



Optimise aviation fuel content

Ongoing technical analysis due in 2027



Thank you for your attention!

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European Commission

