



SAF Implementation in the EU

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Icarus Webinar on Sustainable Aviation Fuel Policies
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Agenda

1. *Recap on ReFuelEU Aviation*
2. *Status on the implementation*
3. *Accompanying measures for SAF investments*
4. *Way forward for the ReFuelEU Aviation review*

1. Background on ReFuelEU Aviation

1. Recap on ReFuelEU Aviation – Main objectives

The ReFuelEU Aviation Regulation entered into force in 2024 (entry into force of the mandates in 2025) and has two-fold objectives:



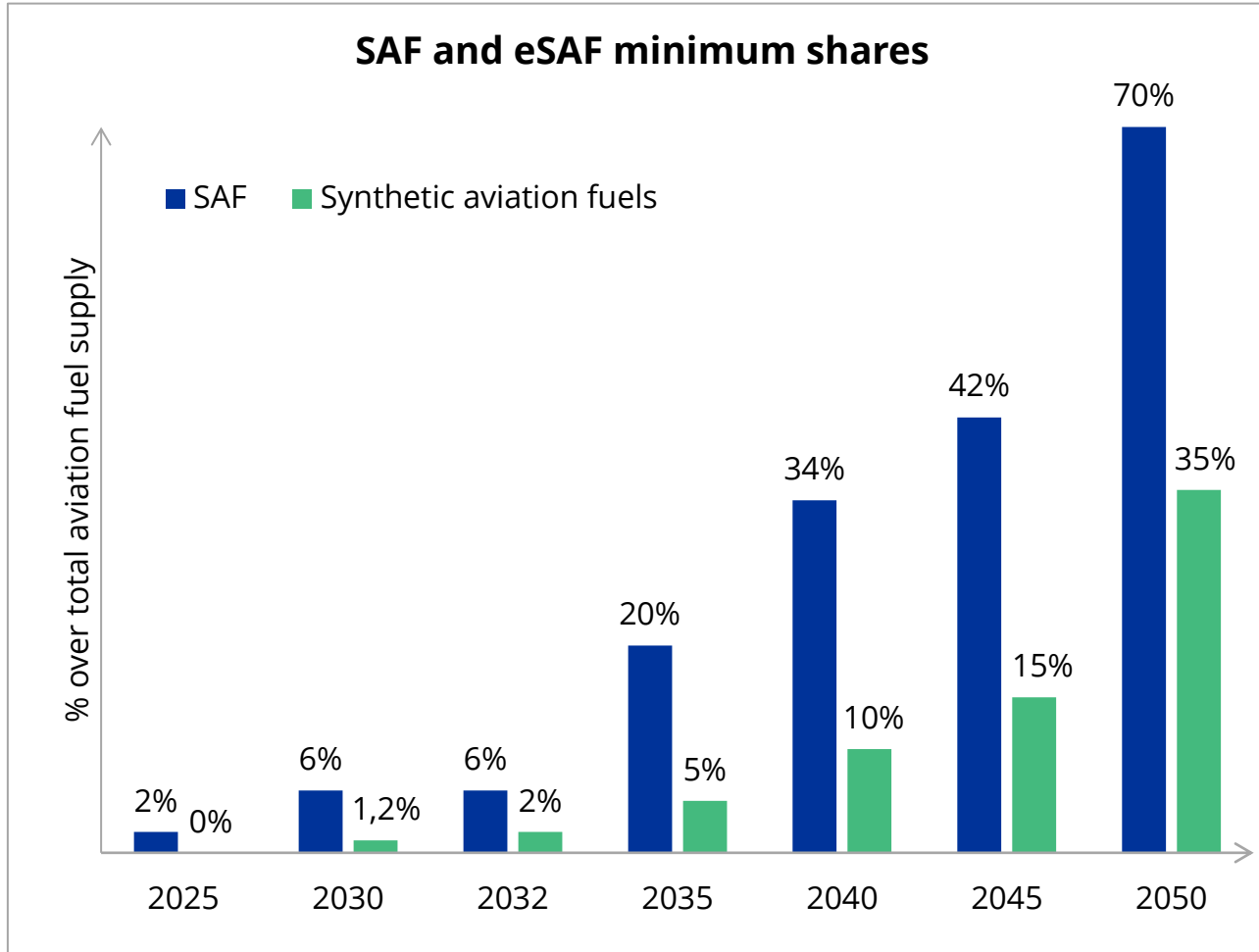
Provide long-term regulatory certainty for scaling up **SAF production and uptake** across the EU to decarbonise air transport and meet the EU climate targets.



Set out **EU harmonised rules** to preserve a **level playing field** on the internal market.



1. ReFuelEU Aviation – SAF and eSAF targets



Geographical application of ReFuelEU Aviation,
including Switzerland since 2026



2. Status of ReFuelEU Aviation implementation

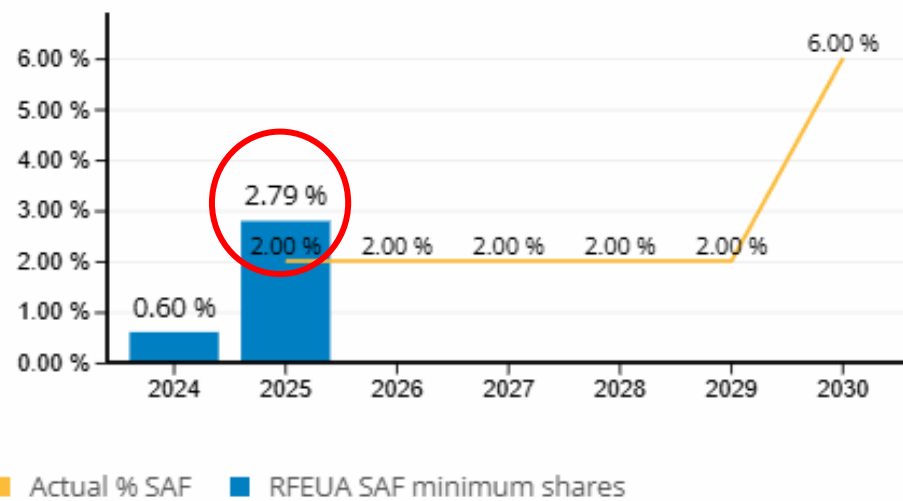
2. Status of ReFuelEU Aviation implementation

- **EASA:** supports the implementation of the SAF mandates & publishes Annual Technical Reports
- ✓ October 2025: [Annual Technical Report for 2024](#)
- ✓ Sept 2026 (new): [Annual Technical Report for 2025](#)

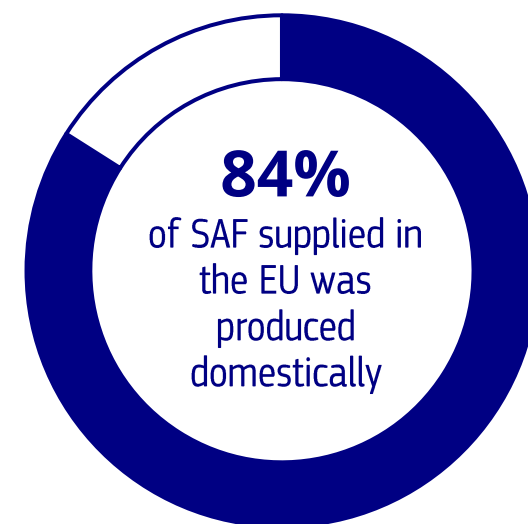
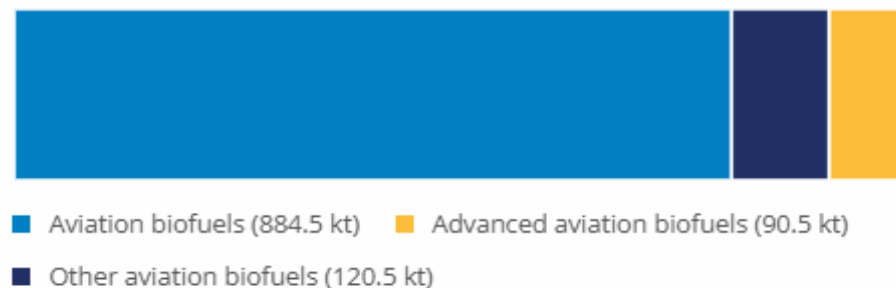


2. Status of implementation – SAF market is progressing

Historical SAF supplied



Type of SAF supplied



eSAF: launch of the largest EU-based demonstration plant and **50** EU projects in the pipeline

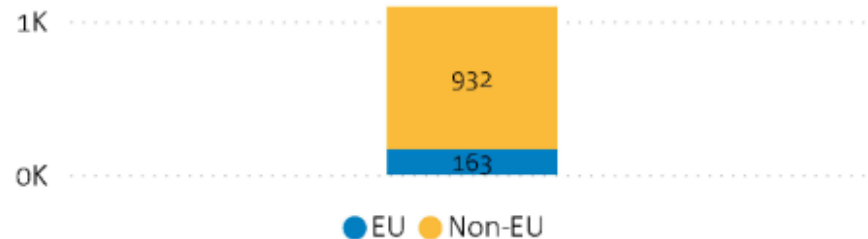


2. Status of implementation of the Regulation – 2026 EASA ReFuelEU Aviation Annual Report – SAF market in 2025

- **85%** of SAF supplied came from feedstock originating outside the EU.
- The two most prevalent feedstocks were **used cooking oil** (80%) and **animal fats** (11%).

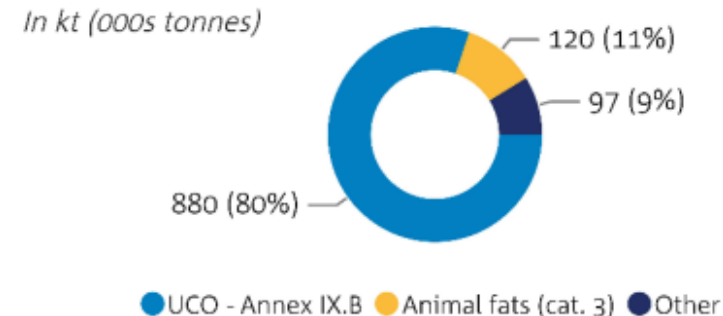
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Feedstock origin of SAF supplied *In kt (000s tonnes)*



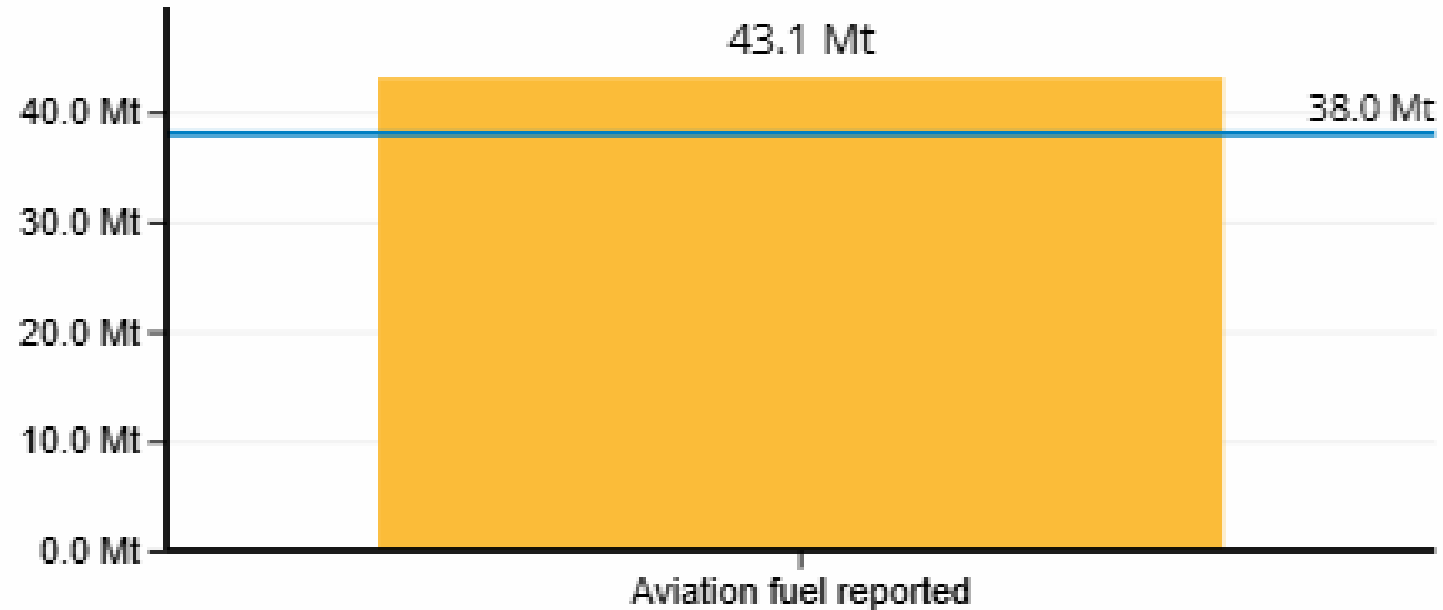
80% of SAF supplied was made from used cooking oil

Feedstock composition of SAF supplied *In kt (000s tonnes)*



2. Status of implementation – Anti-tankering rules compliance

Uplifted versus required fuel



■ 90% of required fuel ■ Fuel uplifted

2. Status of implementation of the Regulation – 2026 EASA ReFuelEU Aviation Annual Report – SAF market in 2025

- Number of pairs below 90% threshold **decreased**
- Distribution becomes more **concentrated around and above** the compliance threshold.
- Distribution of AO/UA pairs shows a clear shift towards **higher fuel uplift ratios** in 2025 compared to 2024

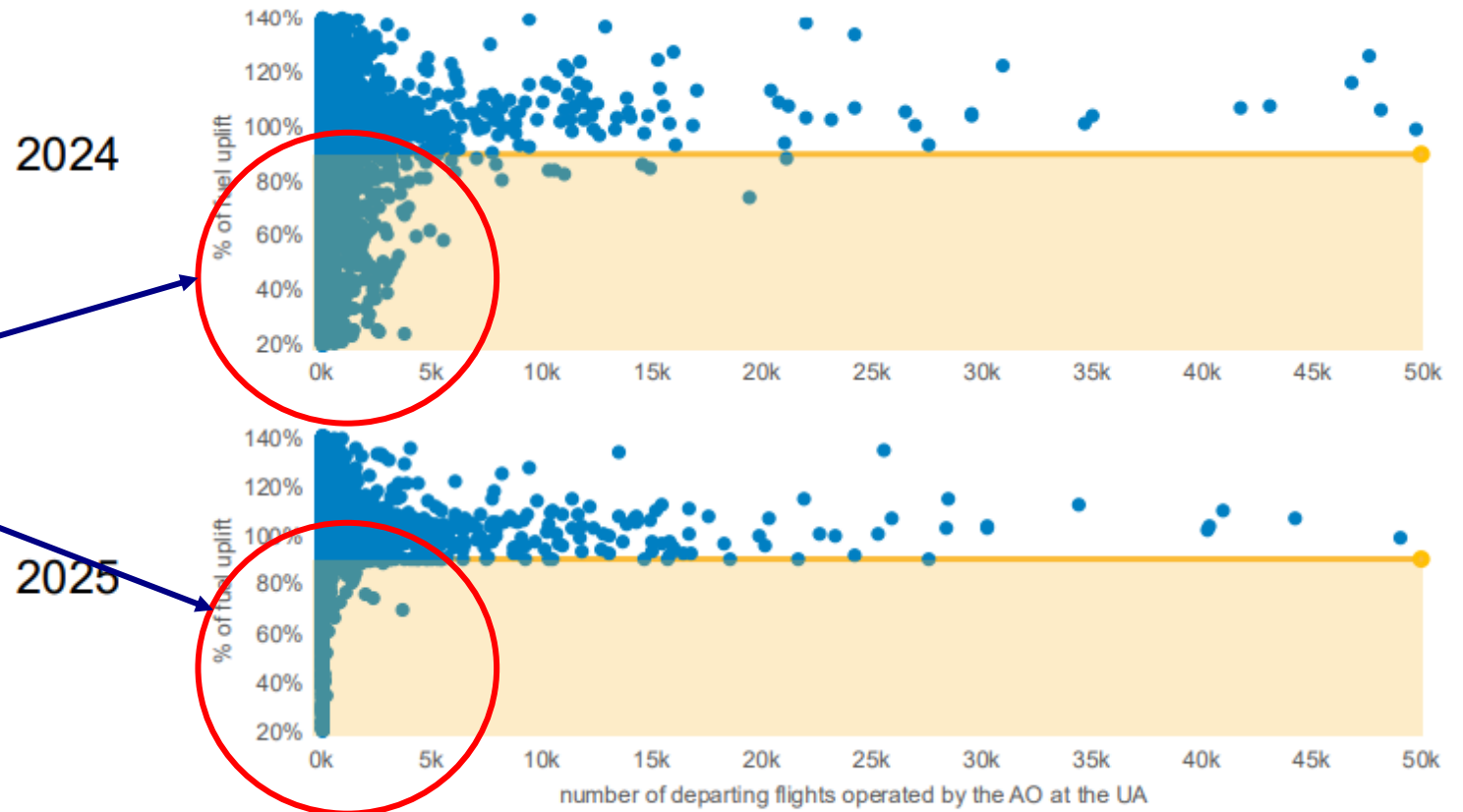


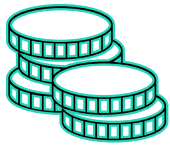
Figure 12 - Aircraft operator per Union airport - % Uplift against required (Y-axis) versus number of departing flights (X-axis)

3. Accompanying measures for SAF investments

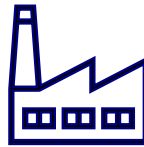
3. Accompanying measures for SAF investments

Sustainable Transport Investment Plan

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

3. Accompanying measures for SAF investments

eSAF Early Movers Coalition

8 Members States: Austria, Finland, France, Germany, Luxembourg, the Netherlands, Portugal and Spain.

- Germany, Luxembourg and Austria committed to launch a pilot double-sided auction with over **€2.1 billion in funding in 2027**.
 - Launch of the first phase of the double sided auction in 2027



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.



4. Way forward for ReFuelEU Aviation

4. Way forward for the ReFuelEU Aviation

1. Implementation report on ReFuelEU Aviation.
2. Targeted revision of ReFuelEU Aviation in 2027, as announced in:
 - **Action Plan for Regulatory Deep Cleaning:** *“enhance clarity and transparency to simplify the regulatory environment and promote a more efficient and competitive industry, while keeping the level of ambition.”*
 - **Sustainable Transport Investment Plan:** *“strengthen market transparency, reduce administrative burden, digitalisation.”*
 - Aim: **simplification** and **targeted technical adjustments**, while maintaining the **ambition** and **objectives** of ReFuelEU Aviation.

Next steps:

- Supported by an external study
- Stakeholder consultation as from end 2026 / early 2027
- Proposal expected in the **second half of 2027**





Thank you for your attention!

Henry Charléty

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