

Seizing the strategic opportunity of e-SAF for the European Union's competitiveness, autonomy and clean tech industry

To:

President of the European Commission, Ursula von der Leyen
Executive Vice President of the European Commission, Teresa Ribera
Executive Vice President of the European Commission, Stéphane Séjourné
European Commissioner, Apostolos Tzitzikostas
European Commissioner, Dan Jørgensen
European Commissioner, Wopke Hoekstra

The ReFuelEU Regulation has laid a strong foundation for the adoption of Sustainable Aviation Fuels (SAFs), providing long-term predictability and demand certainty that have already yielded tangible results. Thanks to this leadership, the European Union has secured a crucial head start and unique industrial opportunity to turn early action into lasting global advantage. It is no coincidence that, with [41 large-scale projects](#), more than half of the global e-SAF production capacity – the most sustainable and scalable aviation fuel – is located within the EU. This is a direct outcome of the Union's vision, commitment to innovation and sustainability, and the clear regulatory path set by ReFuelEU.

With continued momentum and the right enabling conditions, the EU can now consolidate its position as the global leader in e-SAF. Ensuring the affordability and availability of e-SAF – and building an EU champion industry – is achievable provided that a stable framework is ensured, the right policies are enacted, and industrial and investment action is accelerated. Without these, the EU risks seeing a repeat of failures in other industries, where early opportunities were lost to other global players.

We – representing a unified voice of airlines, e-SAF developers and producers, and civil society organisations – call on the European Union to consolidate and strengthen this leadership by putting in place all the enabling conditions to realise the full potential of e-SAF in the EU. We also urge the entire EU aviation and e-SAF value-chain to unite together around a common goal: building a resilient, competitive, and world-leading e-SAF industry that anchors innovation, investment, and sustainable growth in Europe.

This starts by reaffirming support for the ReFuelEU targets and ensuring a swift and robust implementation of its compliance mechanisms. A stable and predictable framework is crucial to encourage further investment, boost first movers' confidence, and accelerate the creation of a European clean industrial value chain that drives forward Europe's leadership in sustainable aviation, strengthens energy security, and creates high-quality jobs.

The immediate priority must now be to rapidly scale-up e-SAF production, in order to turn the EU's early lead into lasting industrial leadership. The Sustainable Transport Investment Plan (STIP) represents a timely and unique opportunity to achieve this. Therefore, we call on the European Commission to ensure the STIP:

- Prioritises e-SAF, delivering a comprehensive EU e-SAF strategy that accelerates industrial deployment and investment through targeted support and financing mechanisms.
- Reinforces the long-term market predictability of the ReFuelEU framework, by reaffirming the e-SAF sub-target, ensuring the implementation of the ReFuelEU penalties, and clarifying that in its ReFuelEU review, any proposal (if any, as review does not equate revision) will focus on setting enabling conditions for e-SAF uptake.
- Creates a level playing field for all e-SAF market participants/players, guaranteeing fair access to jet fuel infrastructure, whilst ensuring incumbent jet fuel suppliers actively engage in the e-SAF market development.
- Establishes a dedicated market-intermediary, financed by recycled aviation ETS revenues, operating double-sided auctions to support e-SAF production and long-term offtakes.
- Mobilises existing EU instruments – such as the Innovation Fund, SAF allowances, and Hydrogen Bank – to provide targeted and accessible support for e-SAF producers and offtakers.

The development of a thriving e-SAF sector is a once-in-a-generation opportunity to align climate ambition with industrial renewal and strategic autonomy. The EU has the first-mover advantage, but leadership must now be consolidated through decisive action.

We stand ready to work with the European Commission to make this vision a reality, and to contribute actively to the development and implementation of the STIP and of a comprehensive SAF strategy.

Sincerely,

Signatories



