



SUSTAINABLE & SMART **MOBILITY STRATEGY**

ReFuelEU Aviation

Sustainable Aviation Fuels



Overview of ReFuelEU Aviation

Objective: ramp up production and use of SAF in European air transport, while ensuring a well-functioning and level playing field aviation market

- **Blending mandate:** obligation on fuel suppliers to distribute SAF in increasing shares (%) over time;
 - Eligible SAF: biofuels produced from waste lipids, advanced biofuels and synthetic aviation fuels (e-fuels). Feedstock competing with food & feed sectors are excluded.
 - Flexibility of supply: Until 2030, fuel suppliers can distribute SAF where most cost effective. From 2030, fuel suppliers must supply all EU airports (small airports exempted) with the minimum SAF shares.

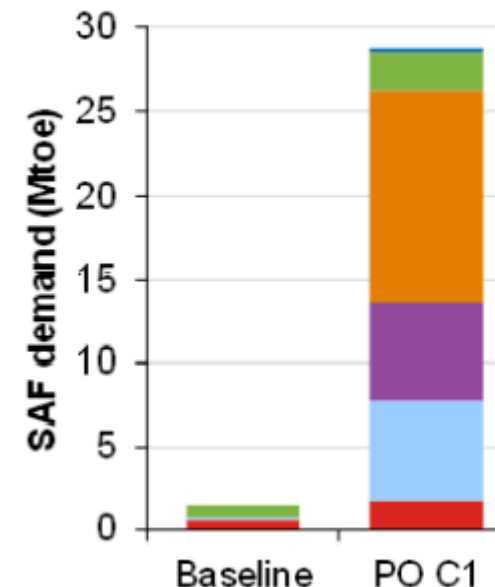
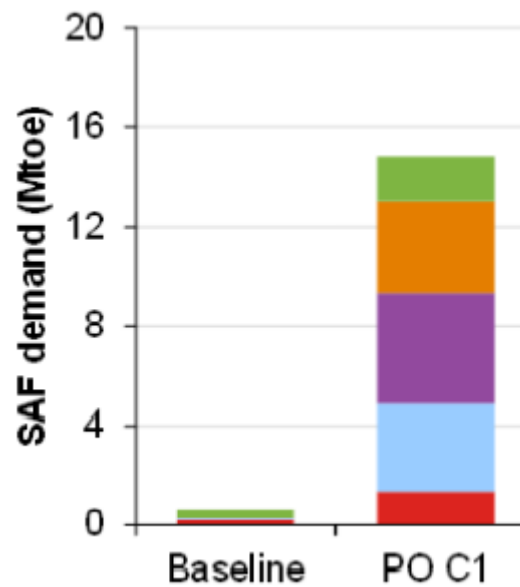
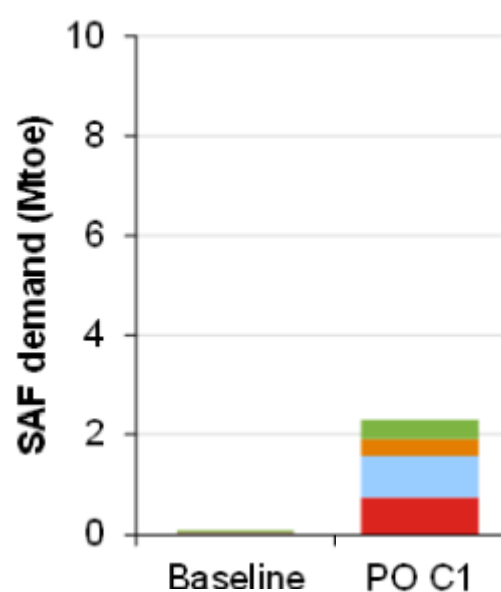
Total shares in the fuel mix (in %)	2025	2030	2035	2040	2045	2050
SAF ramp up:	2	5	20	32	38	63
Of which: sub-mandate on e-fuels	-	0.7	5	8	11	28

- **Airlines uplift aviation fuel at EU airports;**
 - An airline operating flights from an EU airport must uplift at least 90% of the fuel needed for flights from that airport
 - The quantified SAF obligation is imposed on fuel suppliers, **not on airlines.**

Information the feedstock analysis

- Study conducted by Ricardo, E3Modelling and Öko-Institut e.V.
 - [Study supporting the impact assessment of the ReFuelEU Aviation initiative - Publications Office of the EU \(europa.eu\)](https://publications.europa.eu/en/publication-detail/-/publication/11111111-1111-1111-1111-111111111111)
- Assessment of feedstock availability results from model-based analysis using *PRIMES-Biomass*.
- Baseline scenario builds upon the modelling work underpinning the 2030 Climate Target Plan Impact Assessment. It includes policies adopted at EU level by end 2019 + takes into account COVID-19 effects.
- Projections for bioenergy demand in aviation take into account the increased demand for bioenergy in other transport sectors by 2030 and 2050.

Projected SAF supply in EU27 by 2030 and 2050

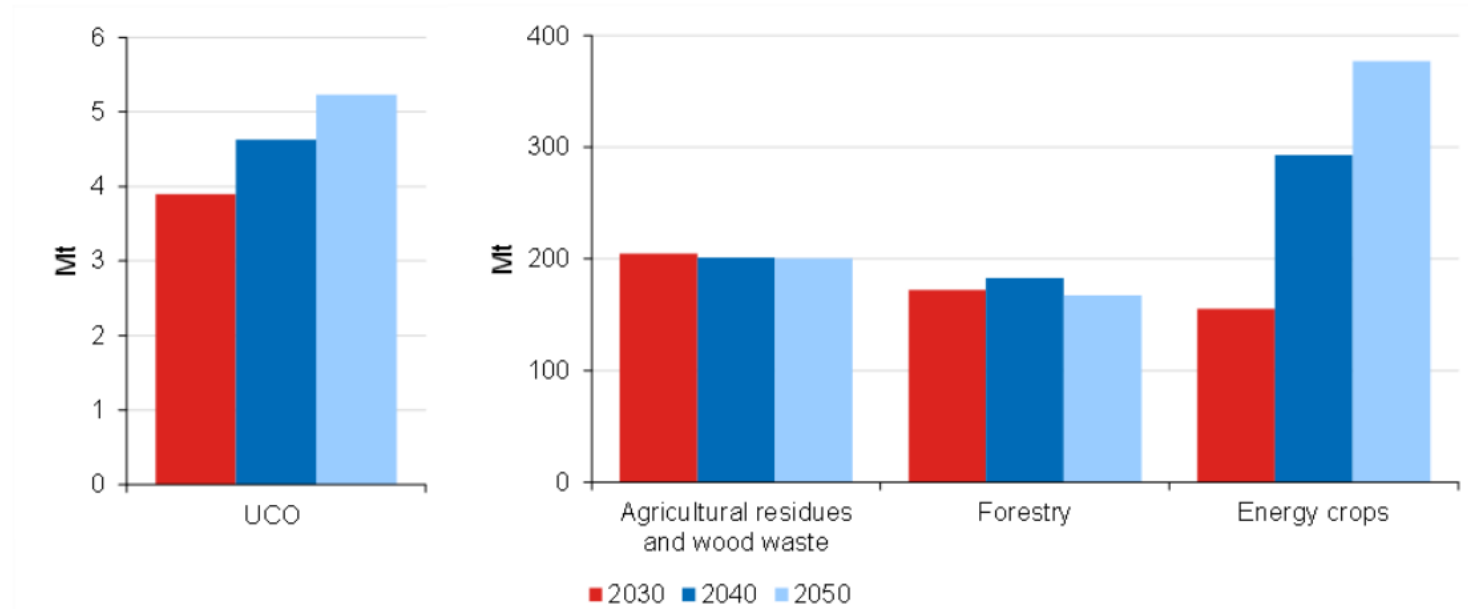


■ HEFA ■ ATJ ■ Gas.+FT ■ PTL ■ Biokerosene imports ■ Electricity

Source: PRIMES-TREMOVE and PRIMES Biomass

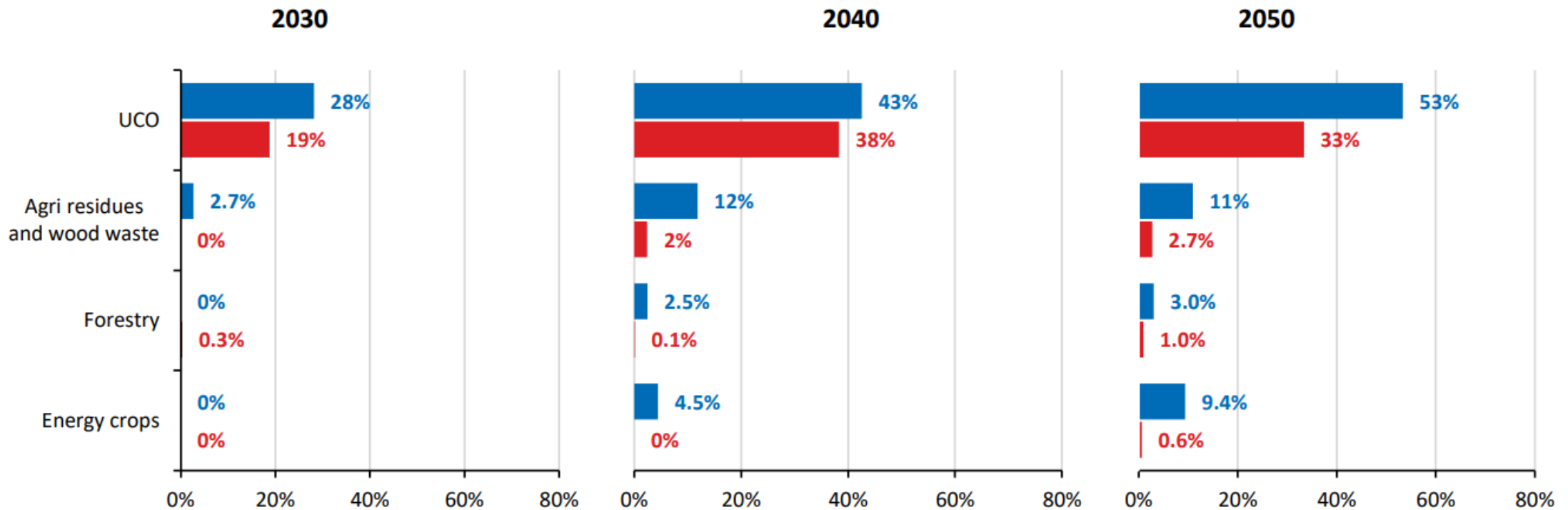


Feedstock availability for bioenergy production in the EU by 2030 and 2050



Source: PRIMES-TREMOVE and PRIMES Biomass

Use of feedstock for SAF production by 2030 and 2050



Source: PRIMES-TREMOVE and PRIMES Biomass



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