EASA
European Union Aviation Safety Agency

2026 Report

ReFuelEU Aviation Annual Technical Report

2025 in review



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Executive Summary

2025 Context

The ReFuelEU Aviation Regulation (Regulation (EU) 2023/2405, hereafter "RFEUA" or "the Regulation") stipulates in Article 13 that EASA is required to annually prepare and publish an Annual Technical Report, starting in 2025.

The primary RFEUA obligations[1] came into effect on January 1, 2025. The parties subject to the Regulation were required to report data for the 2025 reporting period, marking the first full year of compliance under the Regulation. This report is therefore based on 2025 data, collected during the mandatory 2026 reporting exercise.

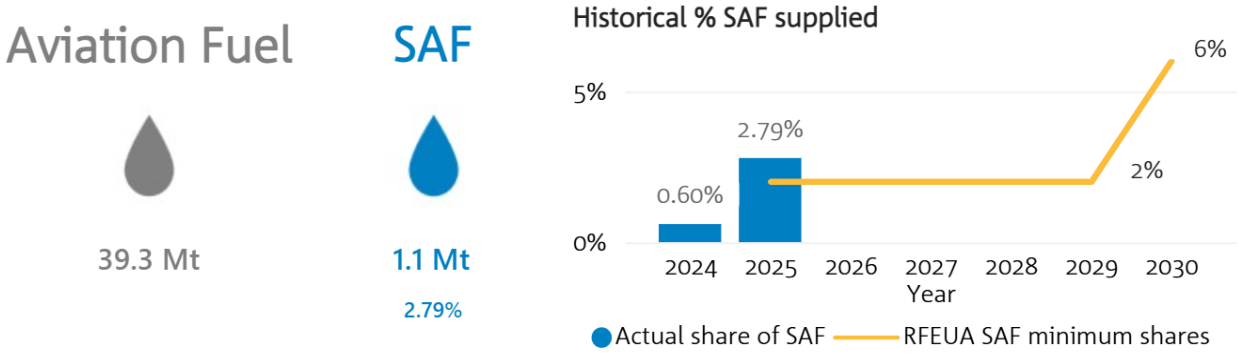
The 2025 datasets serve a critical purpose. This first full reporting period provides a real-world understanding of stakeholder preparedness and compliance, offering actionable insights into areas where further clarification, coordination, or support may be needed. Additionally, the 2025 data establishes a robust baseline for ongoing monitoring and compliance activities, enabling stakeholders and regulators to track progress effectively and ensure the Regulation's objectives are met.

This Executive Summary presents only a high-level overview of the key findings; readers are invited to refer to the main text for further detail.

Aviation Fuel Suppliers

2025, the second year of RFEUA implementation, saw a close to **90% compliance rate with the aviation fuel supplier reporting obligation**, with 102 out of 115 obligated aviation fuel suppliers submitting the data required under Article 10 of the Regulation. This represents a significant increase compared with 2024, when 67% of obligated aviation fuel suppliers submitted the required data.

In total, aviation fuel suppliers reported **39.3 million metric tonnes (Mt) of aviation fuel supplied** to aircraft operators (AOs) in scope of the Regulation at Union airports during 2025, of which **1.1 Mt – or 2.79% – was SAF**, an almost sixfold increase from 2024[2]. At Union level, aviation fuel suppliers therefore not only met but exceeded the requirement to supply a minimum of 2% of SAF as part of their aviation fuel supply.



[1] Referring here to the (1) refuelling obligation of aircraft operators and (2) obligation of aviation fuel suppliers to supply minimum shares of SAF.

[2] Note that this figure may not fully capture all aviation fuel and SAF supplied in the EU in 2025, given that (1) about 10% of aviation fuel suppliers did not submit reports on the amounts of aviation fuel and SAF they supplied, and (2) supply of aviation fuel and SAF to non-Union airports is not captured by reporting under the Regulation.

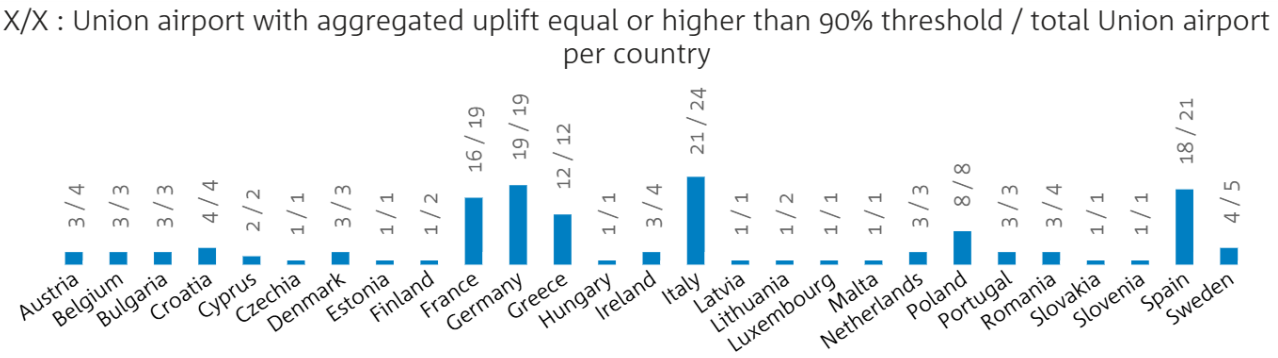
Similarly to 2024, aviation fuel suppliers reported that the **2025 SAF supply to Union airports consisted primarily of aviation biofuels**[3] (approximately 80%), derived from used cooking oil (UCO) as feedstock.

In 2025, SAF supplied to Union airports resulted in total greenhouse gas (GHG) emission savings of 3.77 Mt CO_2e, corresponding to an average reduction of 89% compared with the conventional jet fuel it replaced. This represents an increase of more than fivefold compared with the 714 kt of GHG emission savings reported for 2024.

Aircraft Operators

2025 saw a **93% compliance rate with the aircraft operator reporting obligation**, with 367 out of 393 aircraft operators submitting reports that were accepted by the Competent Authorities (CAs). This represents an increase compared with 2024, when 74% of obligated aircraft operators submitted the required data. Non-compliance with the aircraft operator reporting obligation (Article 8 RFEUA) was mostly linked to small business jets operators and non-scheduled operators or third country operators that did not respond to the CAs' requests.

At Union level, aircraft operators uplifted 43.1 Mt of aviation fuel at Union airports in 2025, exceeding the 90% refuelling threshold. In most Union airports (138 out of 153), **the aggregated actual fuel uplift from flights performed was above 90% of the fuel required threshold.** Compared with 2024, this indicates that aircraft operators have further adapted their operations to comply with their obligations under ReFuelEU Aviation.



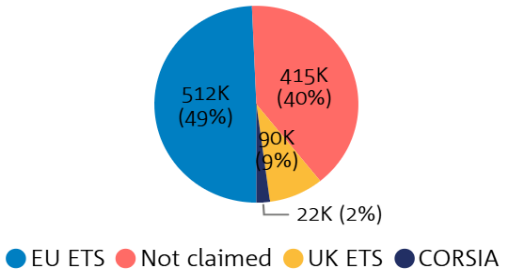
Finally, **aircraft operators reported having purchased approximately 1.0 Mt of SAF in 2025** at Union airports. Of the SAF purchased, aircraft operators reported that they intended to claim 49% (512 kt) under the EU ETS, 9% (90 kt) under the UK ETS, and 2% (22 kt) under the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA), while the remaining 40% (415 kt) was not intended to be claimed under any market-based measure (MBM) scheme. Notably, no SAF amounts were reported as intended to be claimed under the CH ETS nor in "other market-based measures"[4].

[3] Aviation biofuels are defined as biofuels produced from feedstock listed in Part B of Annex IX of the EU Renewable Energy Directive (EU RED).

[4] The "other market-measures" category encompasses other national schemes where the SAF may be claimed.

Aircraft operators reported that 69.6% (711 kt) **of the SAF purchased was categorised under "aviation biofuels"**[5], while 6% (64 kt) was "other aviation biofuels"[6] and 7% (72 kt) was "advanced aviation biofuels"[7]. 17% (175 kt) of the SAF purchased was not allocated to a category in the reports submitted by the aircraft operators.

SAF intended to be claim by MBM schemes



RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	72 kt
Aviation biofuels	711 kt
Not Categorised	174 kt
Other aviation biofuels	64 kt
Synthetic aviation fuels	0 kt
Total	**1021 kt**

State and Development of the EU SAF Market

SAF production capacities in the EU

EASA's assessment of SAF production capacity in the EU found that, **by the end of 2025, eight EU Member States – Austria, Finland, France, Germany, Italy, the Netherlands, Spain and Sweden – hosted at least one production facility capable of producing SAF**. In a further seven Member States – Belgium, Croatia, Denmark, Latvia, Poland, Portugal and Romania – at least one SAF production facility had been announced, with key attributes such as feedstock, production capacity and expected commissioning year disclosed. Three additional Member States – Estonia, Ireland and Slovakia – had at least one announced SAF production facility, but only limited information was available for these projects. The remaining nine Member States – Bulgaria, Cyprus, Czechia, Greece, Hungary, Lithuania, Luxembourg, Malta and Slovenia – had no operational or announced SAF production facilities at the time of the assessment.

EASA also assessed what the EU's **SAF production capacity could look like in 2030** and whether domestic production could be sufficient to meet the 2030 minimum SAF shares required under RFEUA. To this end, EASA developed three scenarios. While a first scenario considers only the production capacity of those SAF production facilities that were already operational by the end of 2025, the other two scenarios additionally consider the production capacity of SAF facilities at different stages of project development.

Scenario 1 reflects the **SAF production capacity currently available in the EU** – as of the end of 2025 – and assumes that, by 2030, only facilities already capable of producing SAF will be operational. Under this scenario, the EU would

[5] "Aviation biofuels" are defined as biofuels produced from feedstock listed in Part B of Annex IX of the EU RED.

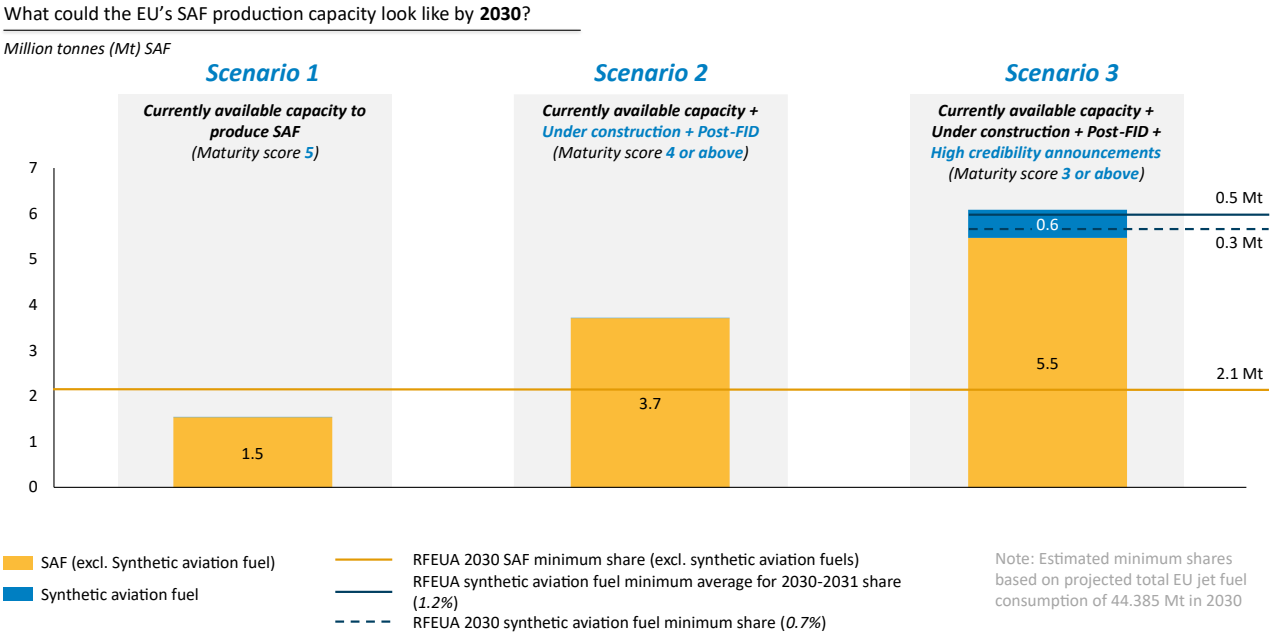
[6] "Other aviation biofuels" are biofuels produced from feedstock not listed in Annex IX of the EU RED and except for those produced from food and feed crops, intermediate crops, palm fatty acid distillate and palm and soy-derived materials, and soap stock and its derivatives.

[7] "Advanced aviation biofuels" are defined as biofuels produced from feedstock listed in Part A of Annex IX of the EU RED.

have 1.5 Mt of SAF production capacity by 2030[8], well below the 2.1 Mt required to meet the RFEUA SAF minimum share by 2030 (excluding synthetic aviation fuels).

Scenario 2 additionally considers **facilities under construction and those that have reached final investment decision (FID)**. Under this scenario, 3.7 Mt of SAF production capacity would be available by 2030, well above the 2.1 Mt required to meet the RFEUA SAF minimum share by 2030 (excluding synthetic aviation fuels).

Scenario 3 additionally encompasses so-called **"high credibility" projects** based on the disclosure of key data, providing reasonable confidence that these projects will proceed to completion. Under this scenario, total SAF production capacity is projected to reach 5.5 Mt in 2030, excluding synthetic aviation fuel, with an additional 0.6 Mt of synthetic aviation fuel capacity. Under this scenario, the synthetic aviation fuel production capacities in the EU would be sufficient to meet the 2030 minimum shares of synthetic aviation fuel required under RFEUA.



EU SAF Market – Key Themes and Developments

EU SAF production capacity is projected to remain sufficient to meet the minimum SAF shares established under the ReFuelEU Aviation Regulation for 2030, excluding synthetic aviation fuels. Compared with the 2024 assessment, additional SAF production capacity has come online and further capacity is expected to become available by 2030.

While the synthetic aviation fuel market remains at an early stage of development, several EU Member States are taking important steps to support its scale-up. As of June 2026, several facilities had reached demonstration or pilot scale, complemented by a significant project pipeline that included a number of larger-scale facilities. These developments demonstrate the progress made in the sector and could contribute to a substantial increase in synthetic aviation fuel production capacity towards 2030 and beyond. Nevertheless, no large-scale synthetic aviation fuel facility

[8] The figures for SAF production capacity in this report are based on the maximum potential SAF output for the year in which each facility is expected to commence operations. These figures assume that each project achieves its stated production targets. As such, the figures should be interpreted as indicative of potential capacity rather than actual projected output.

had yet reached FID. In response to this, EU Member States are also strengthening support for the sector. For example, under the EU's Sustainable Investment Plan, eight Member States launched the "eSAF Early Movers Coalition" to boost investments in eSAF. As part of this initiative, Germany, Luxembourg and Austria will launch a pilot double-sided auction, with more than EUR 2.1 billion in funding available.

SAF supply at Union airports in 2025 was met through a combination of EU-produced SAF and imports. The majority of the 1.1 Mt of SAF supplied at Union airports was produced domestically. According to Eurostat data, 173 kt of SAF was imported into the EU in 2025[9], primarily through ports in the Netherlands. Compared with the 1.1 Mt of SAF supply reported by aviation fuel suppliers, these imports represent approximately 16% of the total SAF supplied in the EU.

In 2025, **UCO remained the predominant feedstock**, accounting for 80% of SAF supplied at Union airports. However, compared to 2024, **more significant amounts of additional feedstocks** such as category 3 animal fats, palm oil mill effluent (POME), food waste and crude tall oil (CTO) entered the mix. As a result, the share of advanced and other aviation biofuels increased significantly compared with 2024, reaching 8% and 11% in 2025, respectively.

In 2025, **reliance on feedstock originating outside the EU further increased**, accounting for 85% of SAF supplied at Union airports, with China representing 61%, followed by Malaysia (8%), Indonesia (5%) and the United Kingdom (3%). Only 15% of SAF was produced from feedstock originating within the EU, with Germany, Spain and France as the largest contributors, each contributing around 2%.

In 2025, **the Netherlands received the largest amount of SAF among the EU Member States** (320 kt; or 29% of all SAF reported), followed by Spain (152 kt; 14%), Germany (116 kt; 11%), Italy (111 kt; 10%) and France (107 kt; 10%).

In 2025, **SAF was supplied at 121 Union airports across all 27 EU Member States**, meaning that 79% of Union airports received SAF during the year. Amsterdam Airport Schiphol received the largest amount of SAF, accounting for 29% of the total, followed by Frankfurt Airport (8%) and Paris Charles de Gaulle (7%).

In 2025, **20 aviation fuel suppliers accounted for 70% of the total 1.1 Mt of SAF supplied**. This suggests that market concentration, while still at a significant level, has decreased compared with 2024, when fewer than ten suppliers accounted for 80% of the SAF supply reported for Union airports[10].

[9] Eurostat- Supply and transformation of oil and petroleum products – monthly data, as of 15 September 2026.

[10] Nevertheless, it is important to note the significant difference in the amount of SAF supplied at Union airports in this context (2024: 192 kt; 2025: 1.1 Mt).

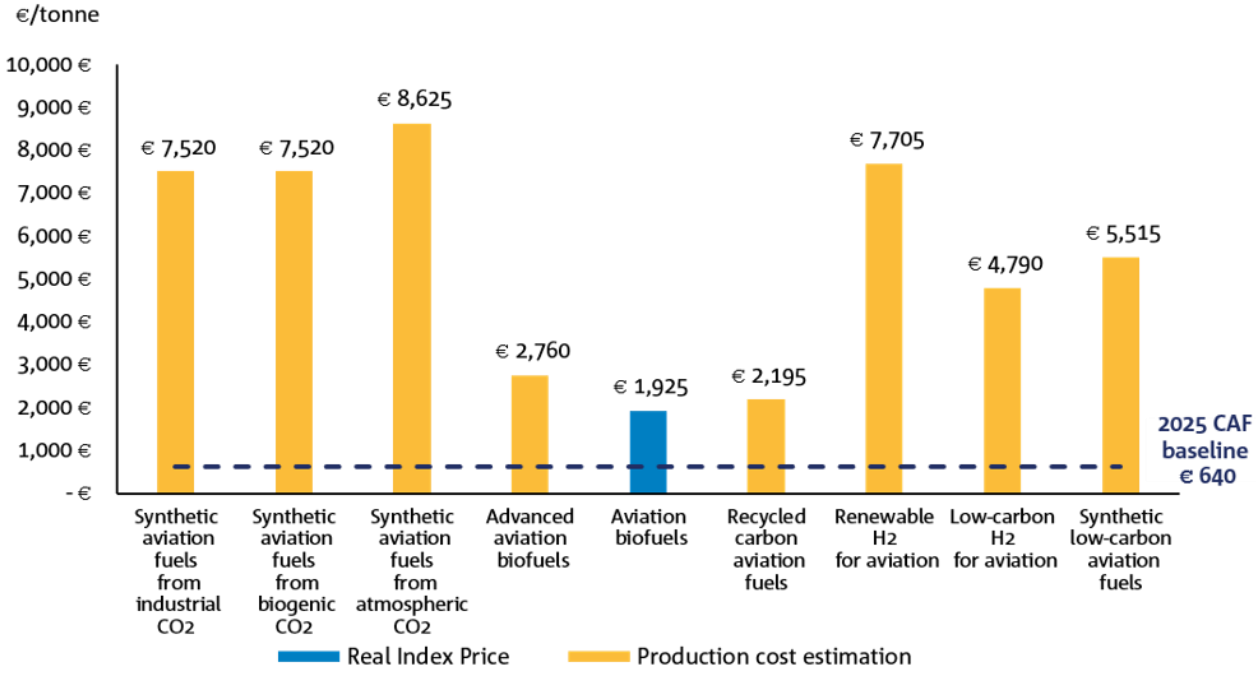
2025 Aviation Fuels Reference Prices

EASA also determined 2025 reference prices for all aviation fuels eligible under the ReFuelEU Aviation Regulation[11]. Their primary purpose is to serve as reference values for EU Member States in determining penalties under RFEUA, as well as for the support mechanism for the use of eligible aviation fuels under the EU ETS Directive.

The reference prices reflect SAF prices for the 2025 reference year, based on a defined methodology. Where possible, reference prices were determined using price indices ("real index prices") maintained by price reporting agencies[12]. For those aviation fuels for which no real index price was available in 2025, reference prices were calculated using bottom-up production cost estimations, factoring in feedstock, energy, and technology deployment costs, as well as hypothetical production capacity estimations for 2025.

For 2025, a real index price could again only be determined for the category of aviation biofuels – set at EUR 1925 per tonne – and conventional aviation fuel (CAF) – set at EUR 640 per tonne.

The figure below provides an overview of the 2025 reference prices for the different RFEUA eligible aviation fuels sub-categories.



[11] Note that the reference prices presented in this Annual Technical Report are identical to the ones included in the EASA 2026 Briefing Note 2025 Aviation Fuels Reference Prices for ReFuelEU Aviation published in February.

[12] For 2025 prices, indices from three different PRAs are used, each of which provided CAF and SAF price data covering European activity: Argus Media (Argus), S&P Global Commodity Insights (Platts) and General Index (GX). For more information see EASA reference prices for aviation fuels - eligible under ReFuelEU Aviation | EASA.

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Introduction

Background

The Annual Technical Report (ATR) is an annual requirement under Article 13 of the ReFuelEU Aviation Regulation (hereafter "RFEUA" or "the Regulation"), with the European Union Aviation Safety Agency (EASA) being the designated authority to prepare and publish it. Its purpose is to provide factual insights based on the data collected through the reporting exercise of the parties subject to the Regulation – aviation fuel suppliers, aircraft operators and Union airport managing bodies – in the respective reporting year.

The data gathered through this process holds significant value for policymakers, stakeholders, and citizens alike. For policymakers, it provides a transparent and evidence-based foundation to assess the effectiveness of RFEUA and make informed decisions about future adjustments or additional measures. For industry stakeholders, it offers clarity on market trends, and areas for improvement, fostering a more predictable and stable environment for investment and innovation. For citizens, it ensures accountability and transparency, allowing them to track the progress of SAF adoption and its contribution to the EU's climate goals. This shared access to reliable data is one of the main objectives behind the work performed by the Agency.

Data sources

This report presents an analysis of key data related to the implementation and enforcement of the Regulation. The datasets underpinning this report were collected through formal submissions from three key obligated stakeholder groups. Aviation fuel suppliers reported their data via the European Commissions' CIRCABC and Union Database (UDB) platforms, whereas aircraft operators and Union airport managing bodies provide information that is managed through EASA's Sustainability Portal.

The data gathered during this reporting exercise was then used to generate Key Performance Indicators (KPIs), which serve as essential metrics for assessing the effectiveness and impact of the Regulation. By analysing these indicators, stakeholders can gain insights into SAF adoption rates, compliance levels among aviation fuel suppliers, aircraft operators, and Union airport managing bodies, as well as overall progress towards the goal of a more sustainable aviation sector in the European Union. The KPIs not only highlight current achievements but also identify areas requiring further attention and improvement, helping to inform future policy and operational decisions. These indicators are based on reported data and should not be interpreted as a definitive assessment of compliance, as the review and validation processes carried out by the Competent Authorities (CAs) may still be ongoing.

In addition, this report will be accompanied by downloadable datasets made available via the EASA website[13], comprising of:

- Member State dataset reported by aircraft operators;
- Member State dataset reported by aviation fuel suppliers;
- SAF purchased, as reported by aircraft operators;
- SAF supplied, as reported by aviation fuel suppliers; and
- Union airport dataset reported by aircraft operators and aviation fuel suppliers.

This aims to improve transparency and provide stakeholders with direct access to the underlying data, enabling more detailed analysis beyond the KPIs presented in this report. These datasets do not include the compliance data used for enforcement purposes, as this remains the responsibility of individual CAs.

[13] https://www.easa.europa.eu/en/domains/environment/refueleu-aviation/annual-technical-report/dashboard-refueleu-aviation-2026

Report structure

This document is structured into three sections to ensure clarity and coherence in data presentation.

Section I outlines the key provisions of the Regulation, including the definitions, obligations and reporting requirements applicable to the regulated stakeholders.

Section II provides a comprehensive "Union level" overview, aggregating data across all European Union Member States to illustrate overarching trends, progress, and challenges, and the state of the EU SAF market.

Section III offers detailed summaries at EU Member State level, breaking down the aggregated data to showcase reported results for each type of stakeholder obligated under the Regulation. This section supports a nuanced understanding of how each Member State is performing within the regulatory framework established by the Regulation.

1. Regulatory Framework

The ReFuelEU Aviation Regulation (2023/2405) on ensuring a level playing field for sustainable air transport was adopted by the European Parliament and Council on October 18th, 2023.

This first section offers a regulatory overview of the different requirements outlined in the Regulation for the three main stakeholder groups. It also provides an update on the supporting documents published to aid in fulfilling the reporting obligations. As it focuses only on key changes and decisions adopted by the Agency and the European Commission, this section may evolve from year to year.

Note: Summary of main requirements versus legal basis of RFEUA

This section does not constitute the legal basis of RFEUA, it merely summarises the main requirements. Please consult the Regulation itself as well as any supporting official documentation published by the European Commission.

1.1 Aviation fuel suppliers

	Description
Definition	As per **Article 3.19**, *'aviation fuel supplier' means a 'fuel supplier' as defined in Article 2, second paragraph, point (38), of Directive (EU) 2018/2001, supplying aviation fuel or hydrogen for aviation at a Union airport.*
Scope list	List of aviation fuel suppliers in scope of the Regulation[14].
Obligations	**Article 4** mandates that aviation fuel suppliers ensure that all aviation fuel made available to aircraft operators at each Union airport contains gradually increasing minimum shares of SAF, starting in 2025. As an exception, an aviation fuel supplier may, from 01 January 2025 until 31 December 2034, supply the minimum shares of SAF as a weighted average over all the aviation fuel it supplies across Union airports for a given reporting period. This is referred to as the "flexibility mechanism".
Reporting process	As per **Article 10**, aviation fuel suppliers are required to submit to the Union Database, by 14 February each year, information on SAF and aviation fuel supplied during the reporting period, including the amounts and characteristics of that SAF and aviation fuel.
Supporting documents	• Guidance document – Reporting of aviation fuel suppliers under Article 10 of ReFuelEU Aviation • Template for aviation fuel supplier reporting on SAF and aviation fuel (Template A) • Worked example – Template for aviation fuel supplier reporting on SAF and aviation fuel

[14] Note that this list is generated each year based on data made available by the Member States to the Commission Services and published for information purposes. Aviation fuel suppliers not listed are not necessarily exempt from their respective obligations under ReFuelEU Aviation. It is the responsibility of each aviation fuel supplier to independently assess whether it is in-scope of the Regulation and to take appropriate action accordingly.

	• Template for aviation fuel supplier reporting on aviation fuel properties (Template B) • Worked example – Template for aviation fuel supplier reporting on aviation fuel properties

Table 1 – Summary of aviation fuel suppliers' RFEUA obligations.

1.2 Aircraft operators

	Description
Definition	As per **Article 3.3**, *'aircraft operator' means a person who operated at least 500 commercial passenger air transport flights, or 52 commercial all-cargo air transport flights departing from Union airports in the previous reporting period or, where it is not possible for that person to be identified, the owner of the aircraft.*
Scope list	List of aircraft operators in-scope of the Regulation[15].
Obligations	**Article 5** sets out the refuelling obligations and mandates aircraft operators to uplift at least 90% of the aviation fuel[16] required at Union airports on a yearly basis. In the cases this threshold is not met, aircraft operators shall justify as per Article 5.2 to the CA. Alternatively, the aircraft operators may also request refuelling exemptions on certain routes meeting the criteria set out in Article 5.3[17]. **Article 14** establishes a voluntary environmental labelling scheme, the Flight Emissions Label (FEL), under which aircraft operators shall apply to the Agency should they want to display emissions per passenger or emissions per passenger-kilometre to the public[18].
Reporting process	As per **Article 8**, the aircraft operators are required to submit by 31 March of each reporting year the completed official reporting template with the data of the respective reporting period to the CAs and to the Agency via either EASA's Sustainability Portal or email. Pursuant to the FEL, aircraft operators are required to submit by 1 May of each year starting in 2025 the required information under Article 3 FEL to the Agency to estimate flight emissions.

[15] Note that this list is generated each year based on data made available by the Member States to the Commission Services and published for information purposes. Aircraft operators not listed are not necessarily exempt from their respective obligations under ReFuelEU Aviation. It is the responsibility of each aircraft operator to independently assess whether it is in-scope of the Regulation and to take appropriate action accordingly.

[16] Note that this is valid for both conventional jet fuel and sustainable aviation fuel. There is no obligation on aircraft operators to uplift defined amounts of SAF.

[17] The European Commission publishes every year information related to Art. 5(3), hence, not present in this report.

[18] Only those aircraft operators that have opted-in the FEL may display emissions to their passengers in the European Union, in accordance with Article 6(5) of the FEL Implementing Regulation.

Supporting documents	• Commission interpretative guidelines on the application of exemptions • EASA's manual for aircraft operators and verification bodies • Official reporting RFEUA template • EASA's fuel monitoring tool (optional) • EASA's RFEUA Monitoring plan template (optional) • EASA's RFEUA Verification report template (optional) • EASA's RFEUA Competent authority audit Guidance (optional) • EASA's RFEUA Competent authority checklist (optional) • Flight Emissions Label Implementing Regulation • Flight Emissions Label website

Table 2 – Summary of aircraft operators' RFEUA obligations.

1.3 Union airports

	Description
Definition	As per **Article 3.1**, *'Union airport' means an 'airport' as defined in Article 2, point (1), of Directive 2009/12/EC of the European Parliament and of the Council (12) where passenger traffic was higher than 800 000 passengers or where the freight traffic was higher than 100 000 tonnes in the previous reporting period, and which is not situated in an outermost region, as listed in Article 349 TFEU.*
Scope list	List of Union airports in-scope of the Regulation[19].
Obligations	**Article 6** mandates Union airport managing bodies to facilitate the access to SAF. **Article 7** mandates Union airport managing bodies to report actions taken to facilitate the access of aircraft operators to hydrogen or electricity used primarily for the propulsion of an aircraft and to provide the infrastructure and services necessary for the delivery, storage and uplifting of such hydrogen or electricity to refuel or recharge aircraft.
Reporting process	Union airport managing bodies are required to submit their reports to the National Competent Authorities via the EASA Sustainability Portal every two years.
Supporting documents	-

Table 3 – Summary of Union airport managing bodies' RFEUA obligations.

[19] Note that this list is generated each year based on data made available by the Member States to the Commission Services and published for information purposes. Union airports not listed are not necessarily exempt from their respective obligations under ReFuelEU Aviation. It is the responsibility of each Union airport to independently assess whether it is in-scope of the Regulation and to take appropriate action accordingly.

1.4 Subcategories of aviation fuels eligible under ReFuelEU Aviation

Article 3 of RFEUA defines various aviation fuel subcategories for the purposes of the Regulation. These include different subcategories of SAF – such as aviation biofuels and synthetic aviation fuels – as well other subcategories of aviation fuels, including low-carbon aviation fuels, that are eligible to count towards the minimum shares of SAF established in the Regulation.

Table 4 presents all aviation fuel subcategories eligible under the Regulation, along with their respective definitions.

RFEUA AVIATION FUELS SUBCATEGORY	DEFINITION AS PER ARTICLE 3 RFEUA
Sustainable aviation fuels (SAF)	
Synthetic aviation fuels	**Art 3(12).** Renewable fuels of non-biological origin (RFNBOs) as defined in the RED.
Advanced aviation biofuels	**Art 3(8)(a).** Biofuels produced from feedstock listed in Part A of Annex IX of RED.
Aviation biofuels	**Art 3(8)(b).** Biofuels produced from feedstock listed in Part B of Annex IX of RED.
Other aviation biofuels	**Art 3(8)(c).** Biofuels produced from feedstock not listed in Annex IX of RED and except for those produced from food and feed crops, intermediate crops, palm fatty acid distillate and palm and soy-derived materials, and soap stock and its derivatives.
Recycled carbon aviation fuels	**Art 3(9).** Recycled carbon fuels as defined in RED.
Other eligible renewable and low-carbon aviation fuels	
Renewable hydrogen for aviation	**Art 3(16).** Hydrogen for use in aircraft that qualifies as renewable fuel of non-biological origin (RFNBO) as defined in RED.
Low-carbon hydrogen for aviation	**Art 3(15).** Hydrogen for use in aircraft the energy content of which is derived from non-fossil, non-renewable sources.
Synthetic low-carbon aviation fuels	**Art 3(13).** Aviation fuels of non-biological origin, the energy content of which is derived from non-fossil, low-carbon hydrogen.

Table 4 — Aviation fuel subcategories eligible under ReFuelEU Aviation.

2. Overview of Reported Data – European Union Level

This chapter presents a comprehensive overview of the Key Performance Indicators (KPIs) for the primary obligated parties under the Regulation – aviation fuel suppliers and aircraft operators, as well as Union airport managing bodies – at the aggregated European Union level ("Union level").

These KPIs play a critical role in monitoring collective progress toward the Regulation's ambitious objectives – evaluating indicative compliance among obligated parties, assessing the advancement of EU-wide SAF adoption, and tracking reductions in GHG emissions across the Union. By analysing these metrics at Union level, policymakers and stakeholders can identify regional strengths, highlight areas requiring targeted intervention, and support a coordinated approach to sustainability in aviation. This Union level overview is intended to enhance transparency and accountability.

Data Review Process

The data provided by aviation fuel suppliers and aircraft operators undergoes a rigorous, multi-step validation process to ensure its accuracy and reliability. In the case of aircraft operators, the data is first independently verified by accredited third-party verifiers, who assess whether it complies with the Regulation's requirements. For aviation fuel suppliers, the data is generally submitted directly to the relevant CAs; however, in some cases, CAs also require the data to be independently verified by accredited third-party verifiers prior to submission. Once the data from both aviation fuel suppliers and aircraft operators is submitted to the relevant CAs, they perform additional checks to confirm its correctness, completeness, and consistency. Finally, after validation at the national level, EASA compiles all the information from across the EU Member States for inclusion in the EASA Annual Technical Report. This layered approach provides for a high level of data integrity and supports the transparency and accountability of the Union-level KPIs.

As 2025 marked the first full year of compliance under the Regulation, some minor data gaps and refinements were expected during this initial reporting cycle. Nevertheless, the results demonstrate a clear improvement in data quality compared with 2024. As the RFEUA monitoring and reporting framework matures, there is an expectation for Member States to increase the number of reviewed reports with the support of EASA, further strengthening the robustness of the data verification process.

Note: Data review

For the purposes of capturing the reported data in the EASA Annual Technical Report, it was agreed that CAs would have until 1 May to review the reports submitted by the aviation fuel suppliers and aircraft operators assigned to them, respectively. The criteria applied for this review varied across Member States but generally covered the timely submission, completeness and accuracy of the reports submitted by aviation fuel suppliers and aircraft operators.

The KPIs, including the reporting status, therefore reflect the situation as of 1 May 2026. It should be noted that the 1 May cut-off date did not prevent CAs from continuing their review of the reports submitted by the aviation fuel suppliers and aircraft operators assigned to them after that date. However, any subsequent changes resulting from continued reviews are not expected to have a significant impact on the KPIs presented in this report or on the overall trends observed.

For the purposes of presenting the data in in this Annual Technical Report, the reports of aviation fuel suppliers and aircraft operators are classified as follows:

- **Not submitted:** Any report that was not submitted by the aviation fuel supplier or aircraft operator.
- **Submitted:** Any report submitted by the aviation fuel supplier or aircraft operator that:
  - had not been checked by the competent authority by 1 May; and/or
  - was not considered satisfactory by the competent authority (e.g. in terms of accuracy or completeness).

- **Submitted and reviewed:** Any report submitted by the aviation fuel supplier or aircraft operator that:
  - had been checked by the competent authority by 1 May; and
  - was considered satisfactory by the competent authority (e.g. in terms of accuracy or completeness).

It should also be noted that the review of reported data by CAs for the purposes of capturing data in the Annual Technical Report is separate from any enforcement procedures that an individual Member State may initiate against an aviation fuel supplier or aircraft operator assigned to it, based on the Member State's assessment of the relevant report.

KPI CATEGORIES	LIST OF KPIS FOR AVIATION FUEL SUPPLIERS[20]	DESCRIPTION
Reporting Status	**FS1:** Reporting status of aviation fuel suppliers at Union level	Percentage at Union level of aviation fuel suppliers that submitted reports.
Aviation Fuel and SAF Supply	**FS2.1:** Aviation fuel supplied at Union level **FS2.2:** SAF supplied at Union level **FS2.3:** Historical % SAF supplied at Union level	Amount of aviation fuel and SAF reported as supplied by aviation fuel suppliers at Union level. % SAF compared to aviation fuel.
SAF Characteristics	**FS3.1:** SAF supplied per category of RFEUA eligible aviation fuel at Union level **FS3.2:** Feedstock composition of SAF supplied at Union level **FS3.3:** Feedstock origin of SAF supplied at Union level	Key characteristics of SAF supplied at Union level – Category of RFEUA eligible aviation fuel, feedstock origin and feedstock composition.
Emission Savings	**FS4:** SAF CO_2e savings at Union level	CO_2e savings of SAF supplied at Union level.
Aviation Fuel Properties	**FS5:** Aviation fuel properties at Union level	Content of aromatics, naphthalenes and sulphur in aviation fuel supplied at Union level.

Table 5 – KPI summary table for aviation fuel suppliers – Union level.

[20] Additional or alternative KPIs may be defined by EASA for subsequent reporting periods.

KPI CATEGORIES	LIST OF KPIS FOR AIRCRAFT OPERATORS[21]	DESCRIPTION
Reporting Status	**AO1:** Reporting status of aircraft operators reporting at Union level	Percentage at Union level of aircraft operators that submitted reports.
Anti-tankering Status	**AO2.1:** Total fuel uplifted versus 90% of fuel required at Union level **AO2.2:** Fuel uplifted versus the 90% of fuel required obligation in the Union airports	Level of uplifts of all RFEUA aircraft operators departing from Union airports.
SAF Purchased Summary	**AO3.1:** Amount of SAF purchased at Union level **AO3.2:** SAF intended to be claimed by MBM scheme **AO3.3:** RFEUA eligible fuel category	Information on SAF purchased as reported by the AOs at Union level.

Table 6 – KPI summary table for aircraft operators – Union level.

[21] Additional or alternative KPIs may be defined by EASA for subsequent reporting periods.

Union Level



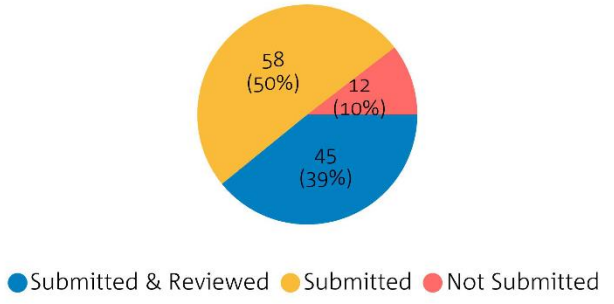
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/2

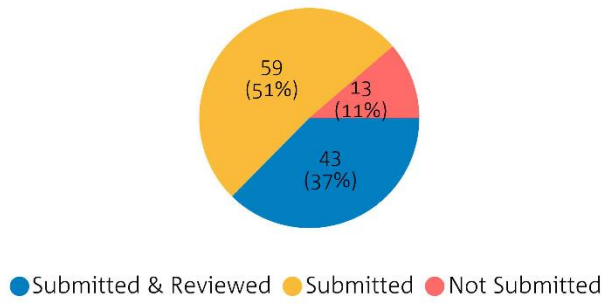
103 aviation fuel suppliers reported on SAF and aviation fuel quantities

Reporting status - SAF and aviation fuel quantities



102 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



1.1 Mt of SAF supplied by aviation fuel suppliers

Aviation Fuel

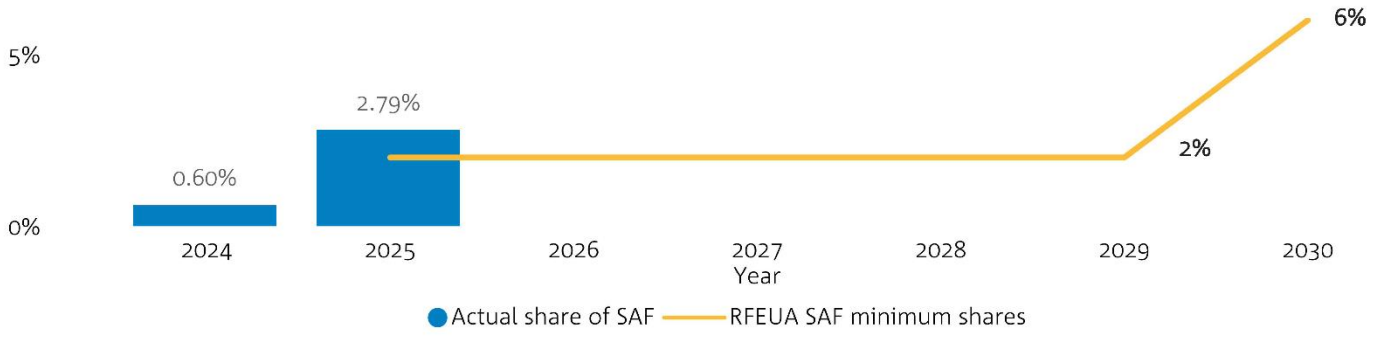
39.3 Mt

SAF

1.1 Mt

2.79% of supplied aviation fuel was SAF

Historical % SAF supplied



Union Level



At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

2/2

81% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

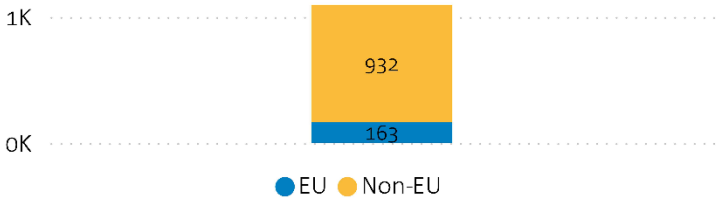
In kt (000s tonnes)



85% of SAF supplied came from feedstock originating outside the European Union

Feedstock origin of SAF supplied

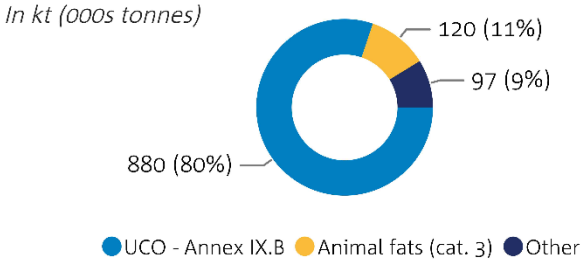
In kt (000s tonnes)



80% of SAF supplied was made from used cooking oil

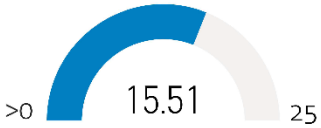
Feedstock composition of SAF supplied

In kt (000s tonnes)

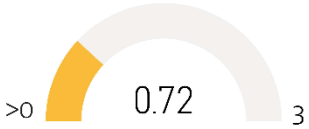


Aviation fuel properties at Union level (weighted averages)

Aromatics content (vol %)



Naphthalenes content (vol %)

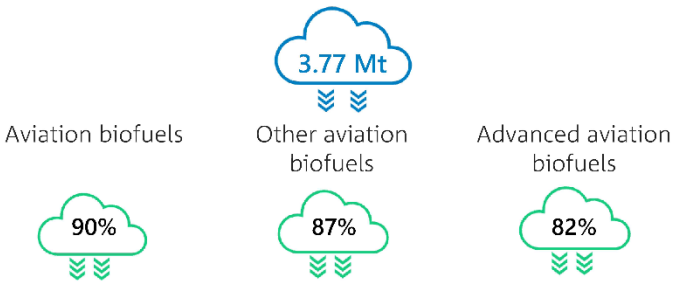


Sulphur content (mass %)



3.77 Mt of CO2e savings from SAF supplied at Union level

SAF CO_2e savings



Percentages show the weighted CO2e emission reduction average vs. fossil comparator



Union Level

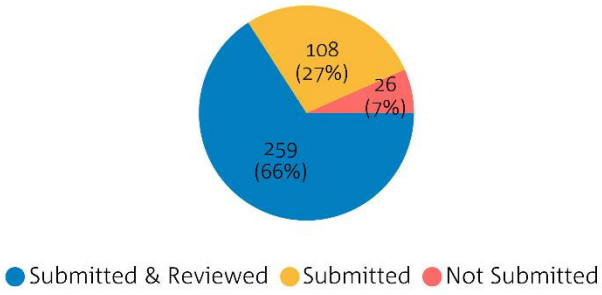
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

367 aircraft operators reported

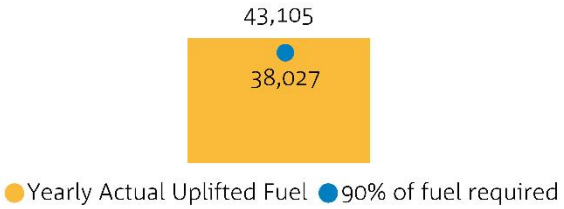
Reporting status of aircraft operators



43.1 Mt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 90% of Union airports the yearly uplift was above the 90% threshold

90%

138 out of 153

Union airports

1.0 Mt of SAF purchased by aircraft operators

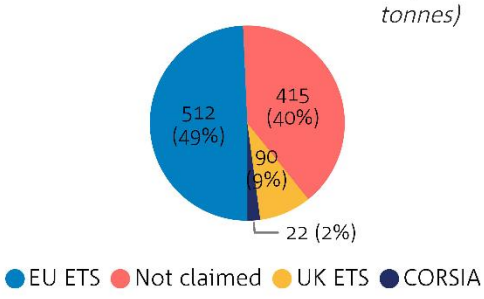
SAF

1.0 Mt

60% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



70% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	72 kt
Aviation biofuels	711 kt
Not Categorised	174 kt
Other aviation biofuels	64 kt
Synthetic aviation fuels	0 kt
Total	**1021 kt**

2.1 Aviation fuel suppliers

This section provides an overview, at European Union level, of the compliance status of aviation fuel suppliers with their reporting obligations under Article 10 RFEUA. Under Article 10, aviation fuel suppliers are required to report information on the SAF and aviation fuel supplied during the reporting period, including details on SAF characteristics and aviation fuel properties.

Aviation fuel suppliers were required to submit the relevant data for the 2025 reporting period by 14 February 2026, via the European Commission's CIRCABC[22] and UDB platforms[23]. This data was then subject to the review of EU Member States CAs, who had until 30 April 2026 to review the reports of the aviation fuel suppliers assigned to them. As this analysis draws on the full set of submitted reports, irrespective of their review status at the time of analysis[24], a further review was conducted to clean the dataset and remove remaining inconsistencies.

In accordance with Articles 4 and 13 RFEUA, the following indicators were identified for aviation fuel suppliers:

KPI CATEGORIES	LIST OF KPIS FOR AVIATION FUEL SUPPLIERS[25]	DESCRIPTION
Reporting Status	**FS1:** Reporting status of aviation fuel suppliers at Union level	Percentage at Union level of aviation fuel suppliers that submitted reports.
Aviation Fuel and SAF Supply	**FS2.1:** Aviation fuel supplied at Union level **FS2.2:** SAF supplied at Union level **FS2.3:** Historical % SAF supplied at Union level	Amount of aviation fuel and SAF reported as supplied by aviation fuel suppliers at Union level. % SAF compared to aviation fuel.
SAF Characteristics	**FS3.1:** SAF supplied per category of RFEUA eligible aviation fuel at Union level **FS3.2:** Feedstock composition of SAF supplied at Union level **FS3.3:** Feedstock origin of SAF supplied at Union level	Key characteristics of SAF supplied at Union level – Category of RFEUA eligible aviation fuel, feedstock origin and feedstock composition.
Emission Savings	**FS4.** SAF CO_2e savings at Union level	CO_2e savings of SAF supplied at Union level.
Aviation Fuel Properties	**FS5.** Aviation fuel properties at Union level	Content of aromatics, naphthalenes and sulphur in aviation fuel supplied at Union level.

Table 7 – KPI summary table for aviation fuel suppliers – Union level.

[22] Note that the CIRCABC database has been a temporary solution and is being discontinued following the 2026 reporting exercise.

[23] Aviation fuel suppliers submitted the data to these two databases via two Excel templates provided by the European Commission, referred to as "Template A" – to be submitted to CIRCABC – and "Template B" – to be uploaded in the UDB.

[24] For more details, see *Data review process* section (Overview of Reported Data – European Union Level).

[25] Additional or alternative KPIs may be defined by EASA for subsequent reporting periods.

2.1.1 Reporting status

FS1: Reporting status of aviation fuel suppliers at Union level

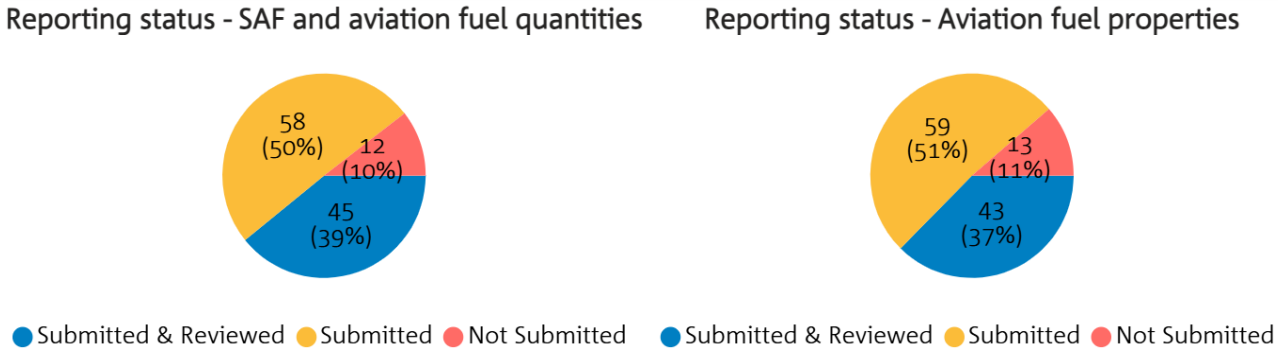


Figure 1 – FS1: Reporting status of aviation fuel suppliers at Union level.

A total of 115 aviation fuel suppliers were required to report their 2025 data by 14 February 2026.

Suppliers had to submit information on SAF and the quantities of aviation fuel supplied via the European Commission's CIRCABC database. Of the 115 suppliers, 103, or almost 90%, submitted this data. By 30 April, 45 reports, or around 39%, were reviewed by CAs.

Suppliers were also required to report data on the properties of aviation fuel supplied via the UDB. Here, 102 out of 115 suppliers, or almost 89%, submitted the required information. By 30 April, 43 reports, or around 37%, were reviewed by CAs.

The 2025 reporting rate represents a substantial increase compared with 2024, when only 67% of aviation fuel suppliers submitted data. This rise was expected, as 2025 marked the first year in which suppliers were required to comply with the obligation to include a minimum 2% share of SAF in their jet fuel supply.

The year 2025 also marked the first time that CAs reviewed a substantial number of reports submitted by the suppliers assigned to them. The review rates should nevertheless be considered in the context of RFEUA being only in its second year of implementation, as well as the complexity of the review process, particularly for extensive reports containing thousands of individual batches. Review rates are expected to further increase substantially in the coming years as validation processes become more established and mature across Member States.

2.1.2 Amount of aviation fuel and SAF supplied

FS2.1: Aviation fuel supplied at Union level & FS2.2: SAF supplied at Union level

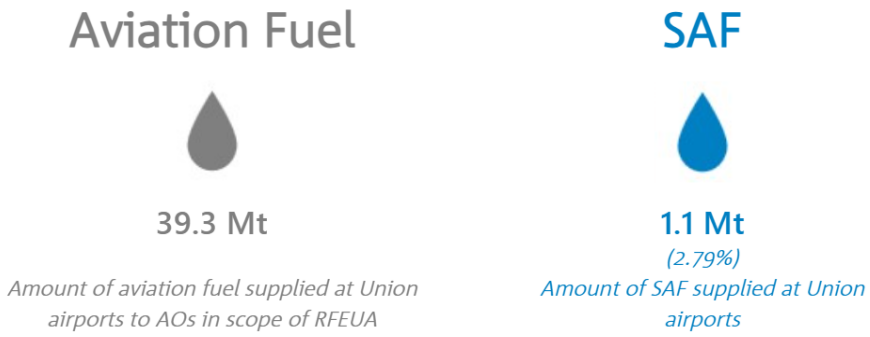


Figure 2 – FS2.1 and FS2.2: Aviation fuel and SAF supplied.

Aviation fuel suppliers were required to report both the total amount of SAF as well as aviation fuel (comprising conventional aviation fuel and SAF) supplied to aircraft operators in scope of the Regulation at Union airports in 2025.

Aviation fuel suppliers reported supplying 39.3 Mt of aviation fuel to aircraft operators in scope at Union airports in 2025. It is important to note that many suppliers also supplied limited amounts of aviation fuel to aircraft operators *not* in scope of the Regulation.

Aviation fuel suppliers also reported supplying 1.1 Mt of SAF at Union airports in 2025. It is important to note that the reported SAF volumes include both SAF that suppliers indicated as counting towards the minimum SAF shares required under RFEUA as well as SAF that they explicitly reported as not counting towards those shares. The latter category reflects SAF sold in so-called voluntary markets, where sustainability claims are frequently made outside regulatory frameworks on the condition that the same SAF is not simultaneously counted towards a regulatory obligation[26]. Of the total 1.1 Mt of SAF supplied at Union airports, around 250 kt were reported as voluntary SAF.

Finally, it should be noted that the SAF volumes reported by aviation fuel suppliers for 2025 may slightly underestimate the actual amount of SAF supplied in the EU during that year. Approximately 10% of aviation fuel suppliers did not submit data on SAF (see the section on reporting status above). Furthermore, the RFEUA reporting exercise did not capture any SAF supplied to non-Union airports (i.e. EU airports falling below the threshold for Union airports defined in the Regulation).

FS2.3: Historical % SAF supplied at Union level

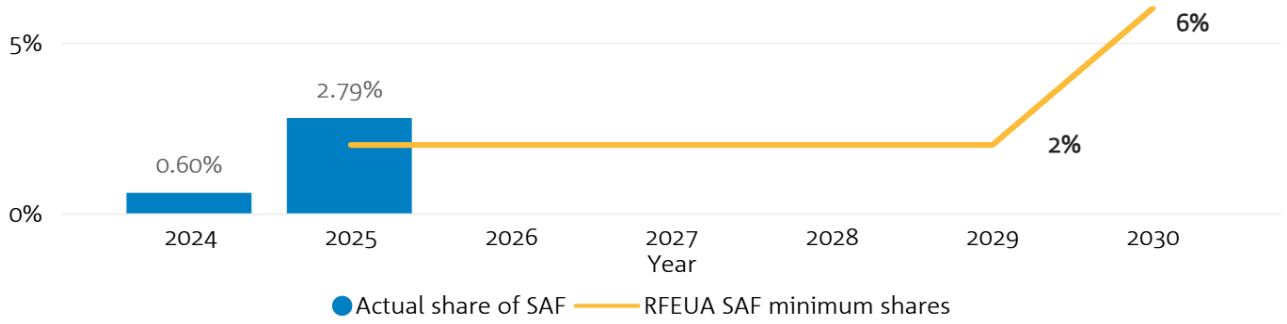


Figure 3 – FS2.3: Historical % SAF supplied

When compared with the total amount of aviation fuel supplied to aircraft operators within the scope of RFEUA, the amount of SAF supplied at Union airports corresponds to an overall SAF share of 2.79%. At Union level, this share therefore exceeds the minimum SAF share of 2% required for 2025.

The SAF share reported for 2025 also represents a significant increase compared with the 0.60% SAF share reported for 2024. This was expected given that 2025 marked the first year in which suppliers were required to comply with the obligation to include a minimum 2% share of SAF in their jet fuel supply.

As noted above, it is worth highlighting that the 250 kt of SAF reported as voluntary made a significant contribution, accounting for almost one fourth of the overall reported SAF share.

[26] Examples of systems or frameworks governing these sustainability claims in voluntary markets include the RSB Book & Claim system, the ISCC Credit Transfer System and the Voluntary Market Based Measures Framework for Logistics Emissions Accounting and Reporting by Smart Freight Centre, among others. These systems and frameworks also establish the requirements for how emission reductions resulting from SAF use may be accounted for by actors in voluntary markets, depending, for example, on whether the SAF was supplied to meet a mandate obligation (often referred to as "additionality" rules).

2.1.3 Characteristics of SAF supplied

FS3.1: SAF supplied per category of RFEUA eligible aviation fuel at Union level

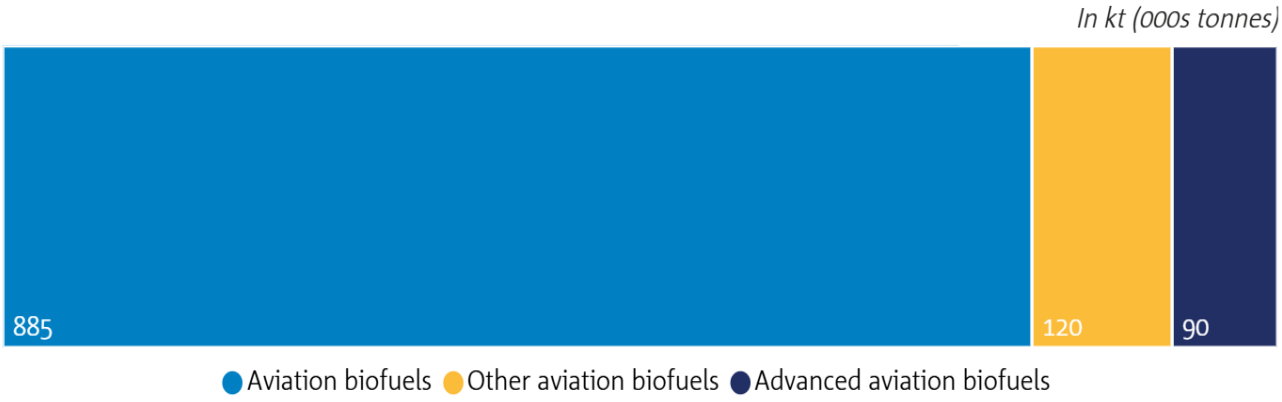


Figure 4 – FS3.1: SAF supplied per RFEUA eligible aviation fuel category

RFEUA legally defines several categories of SAF and other aviation fuels that are eligible to count towards the minimum SAF shares required under the Regulation (see Section 1.4).

Of the 1.1 Mt of SAF reported for 2025, the vast majority - 885 kilotonnes (kt), representing approximately 80% - consisted of aviation biofuels [Art 3(8)(b)] produced from feedstocks listed in Annex IX, Part B, of the EU Renewable Energy Directive (EU RED). A further 120 kt (around 11%) consisted of other aviation biofuels [Art 3(8)(c)] produced from feedstocks not listed in Annex IX but meeting the sustainability and GHG emission savings criteria set out in the EU RED. The remaining 90 kt (around 8%) consisted of advanced aviation biofuels [Art 3(8)(a)] derived from feedstocks listed in Annex IX, Part A, of the EU RED.

FS3.2: Feedstock composition of SAF supplied

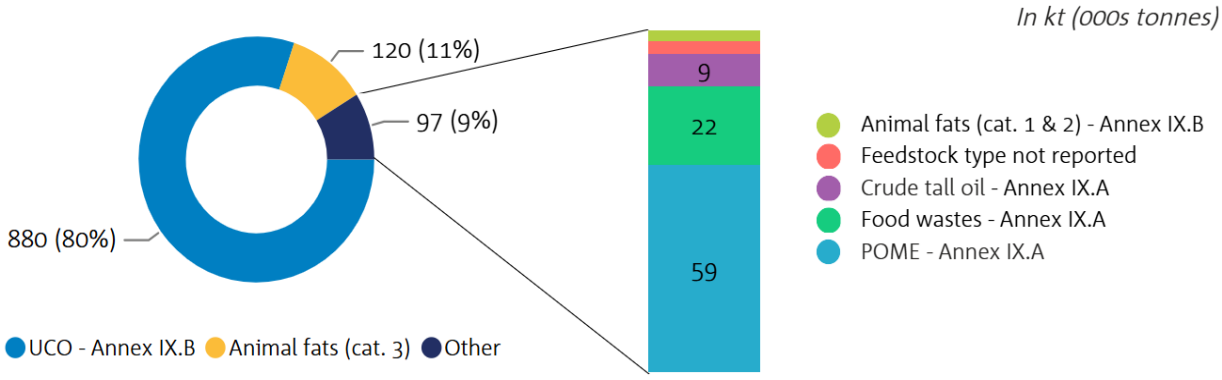


Figure 5 – FS3.2: SAF supplied by feedstock composition

The SAF supplied at Union airports in 2025 was produced from a range of feedstocks, as reported by aviation fuel suppliers. As in 2024, UCO remained by far the predominant feedstock, accounting for 80% of the total (2024: 81%). Of the remaining 20%, animal fats (category 3) accounted for 11%, while POME represented a further 5%. Food waste, CTO, and animal fats (categories 1 and 2) accounted for the remainder of the feedstock mix. Overall, just over 80% of the feedstocks used to produce SAF in 2025 were listed in Annex IX, Part B, of the EU RED.

FS3.3: Feedstock origin of SAF supplied

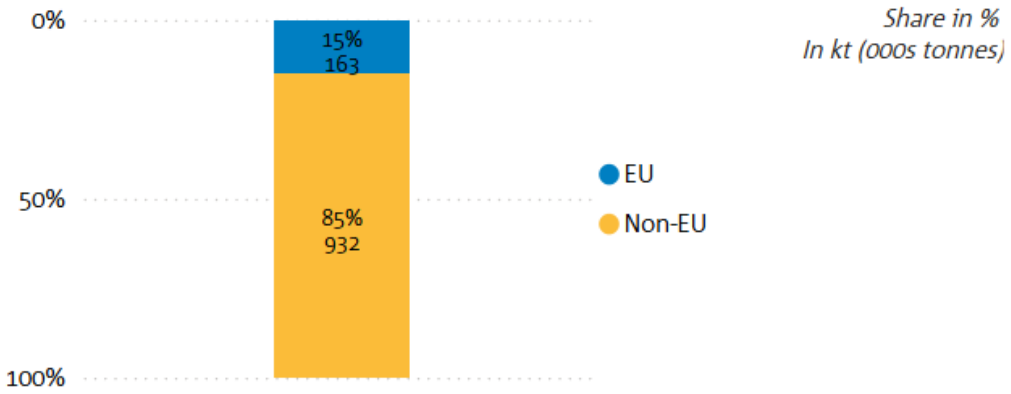


Figure 6 – FS3.3: SAF supplied by origin of feedstock.

Of the SAF reported by aviation fuel suppliers for 2025, around 15%, or 163 kt, was produced from feedstock originating within the EU, while around 85%, or 932 kt, was derived from feedstock sourced from countries outside the EU. It is important to note that feedstock originating outside the EU does not necessarily imply that the SAF itself was produced outside the EU. Feedstock may have been imported and subsequently refined into SAF at facilities located within the EU.

2.1.4 CO_2e emission savings of SAF supplied

FS4: SAF CO_2e emission savings

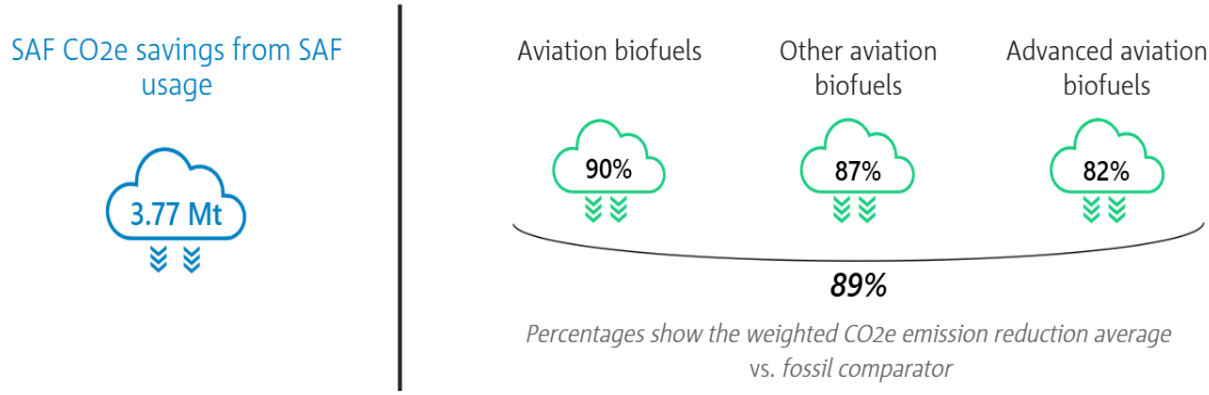


Figure 7 – FS4: CO_2e savings from SAF supplied at Union level.

By assessing the CO_2e[27] emission savings associated with the SAF amounts reported by aviation fuel suppliers, it is possible to calculate the total CO_2e savings enabled through the supply and use of SAF in 2025.

[27] CO_2e (carbon dioxide equivalent) is a standard unit used to express the climate impact of different greenhouse gases in terms of the equivalent amount of CO_2. It allows emissions from different gases to be combined and compared using a single measure.

In total, the CO_2e emission savings from SAF supplied and reported in 2025 amount to 3.77 Mt of CO_2e, if determined against a baseline scenario in which 100% of aviation fuel supplied is conventional fossil jet fuel with a CO_2e emissions intensity of 89 g CO_2e/MJ – i.e. the GHG emissions intensity assigned to fossil fuel under the EU RED[28]. The emissions savings of 3.77 Mt represent an increase of more than fourfold compared with 2024, when emissions savings amounted to 714 kt.

It is also worth noting that SAF across all three categories achieved high CO_2e emissions savings—ranging from 82% for advanced aviation biofuels to 90% for aviation biofuels, with a weighted average reduction of 89% compared to the baseline of conventional fossil-based jet fuel.

2.1.5 Properties of aviation fuel supplied

FS5: Aviation fuel properties – average content of aromatics, naphthalenes and sulphur

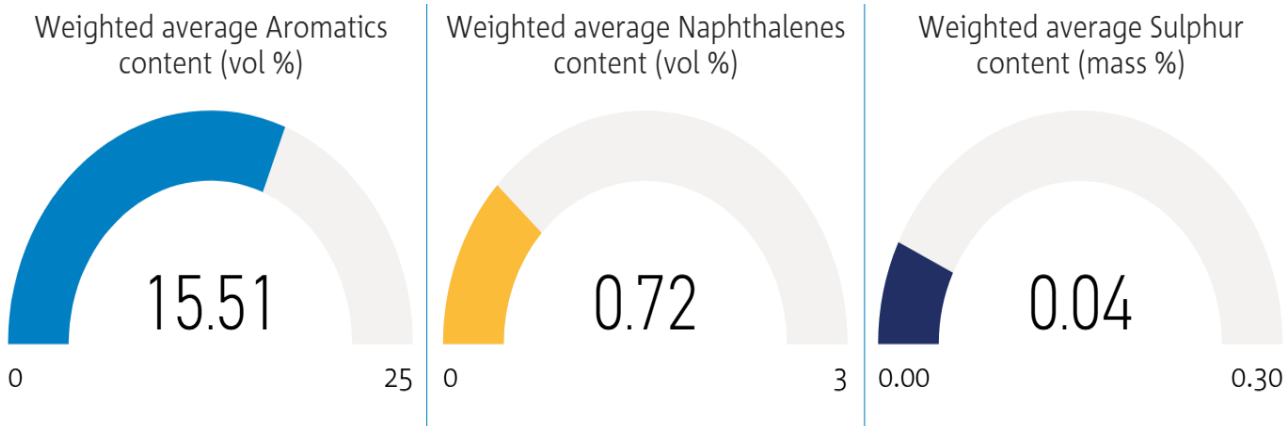


Figure 8 – Properties at aviation fuel supplied at Union level.

Under Article 10d RFEUA, aviation fuel suppliers are required to report specific properties of the aviation fuel (comprising conventional aviation fuel and SAF) supplied during the reporting period, including the content of aromatics, naphthalenes, and sulphur, as well as the test methods used to determine these values.

In 2025, the reported weighted average for aromatics was 15.51 vol % at Union level, which is significantly below the maximum limit set by DefStan 91-091 standard for Jet A1. The average content of naphthalenes was 0.72 vol %, and sulphur averaged 0.04 mass % – both also below the respective maximum thresholds defined in the standard.

[28] GHG emissions for SAF are calculated on a lifecycle basis (well to wake, or WTW) as per the methodology laid down in the EU RED. Emissions are determined as CO_2-equivalents (CO_2e) per megajoule (MJ) of SAF and subsequently compared against a fossil comparator for liquid fuels for transport (which includes jet fuel) set in the EU RED to 94 gCO_2eq/MJ.

2.2 Aircraft operators

This section presents an overview, at European Union level, of the compliance status of aircraft operators with their reporting obligations under Article 8 RFEUA. Article 8 requires aircraft operators to provide information on fuel uplifted and SAF purchased during the reporting period, including under which market-based measure (MBM) scheme the SAF was claimed.

Aircraft operators were required to submit 2025 data by 31 March 2026 to their respective CAs and EASA, in accordance with Article 8 RFEUA. The deadline for CAs to complete their review of the reports was 30 April 2026.

As this analysis draws on the full set of submitted reports, irrespective of their review status at the time of analysis[29], a further detailed review was conducted to clean the dataset and identify further inconsistencies. Errors identified through this process were excluded from the analysis, also helping to highlight recurring issues. These included inconsistencies in SAF data, errors in reported units, and potential data gaps affecting reported required fuel and uplifted fuel. Such issues reflect the maturing state of the RFEUA reporting process. As part of EASA's continuous improvement process, these findings will inform future clarifications in guidance material, including the EASA manual and supporting audit guidance and templates.

Aligned with the requirements of Articles 5 and 8 RFEUA, the following indicators were identified for the 2025 reporting period:

KPI CATEGORIES	LIST OF KPIS FOR AIRCRAFT OPERATORS[30]	DESCRIPTION
Reporting Status	**AO1:** Reporting status of aircraft operators reporting at Union level	Percentage at Union level of aircraft operators that submitted reports.
Anti-tankering Status	**AO2.1:** Total fuel uplifted versus 90% of fuel required at Union level **AO2.2:** Fuel uplifted versus the 90% of fuel required obligation in the Union airports	Level of uplifts of all RFEUA aircraft operators departing from Union airports.
SAF Purchased Summary	**AO3.1:** Amount of SAF purchased at Union level **AO3.2:** SAF intended to be claimed by MBM scheme **AO3.3:** RFEUA eligible fuel category	Information on SAF purchased as reported by the AOs at Union level.

Table 8 – KPI summary table for Aircraft operators – Union level.

[29] For more details, see *Data review process* section (Overview of Reported Data – European Union Level).

[30] Additional or alternative KPIs may be defined for subsequent reporting periods.

2.2.1 Reporting status

AO1: Reporting status of aircraft operators

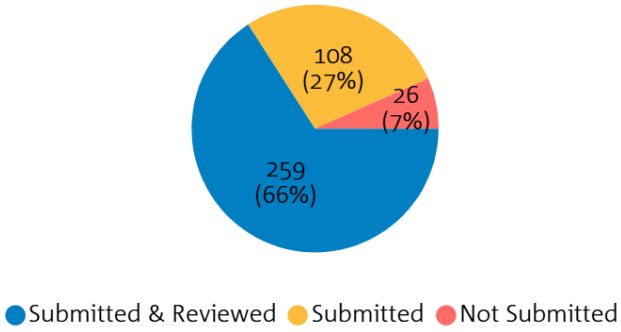


Figure 9 – AO.1: Reporting status of aircraft operators.

In 2026, a total of 393 aircraft operators were required to report their 2025 data in accordance with Article 8 RFEUA and the published Commission list[31]. Of these, 367 (93%) aircraft operators submitted a report, while 26 (7%) did not. The latter are mostly small business jets operators and non-scheduled operators or third country operators that did not respond to the CAs' requests.

Among the submitted reports, 259 have been reviewed[32] by the respective CA, representing 66% of all aircraft operators subject to reporting obligations. The remaining 108 of the submitted reports (27%) were not reviewed by the CAs.

While 2024 served as a test reporting period to prepare future obligations, 2025 is the first official reporting period under the RFEUA framework. Figure 9 highlights an improved level of compliance with the reporting obligation and engagement from aircraft operators (only 7% failed to submit reports in 2026 versus 27% in 2025). Throughout the year, EASA and the 27 CAs have been engaging with the aircraft operators to ensure a smooth onboarding onto the EASA Sustainability Portal and reporting process, providing ad hoc training and info sessions. The high reporting rate suggests that the majority of obligated aircraft operators are aware of the obligations and are engaged with their CAs. However, the non-reviewed report rate highlights the challenges associated with implementing a new monitoring and reporting framework across all Member States. Continued cooperation between EASA and the CAs will be important to further support the review process and strengthen the overall robustness of the system.

[31] List of aircraft operators in-scope of ReFuelEU Aviation for the 2025 reporting period.

2.2.2 Anti-tankering status

AO2.1: Fuel uplifted versus 90% of fuel required at Union level

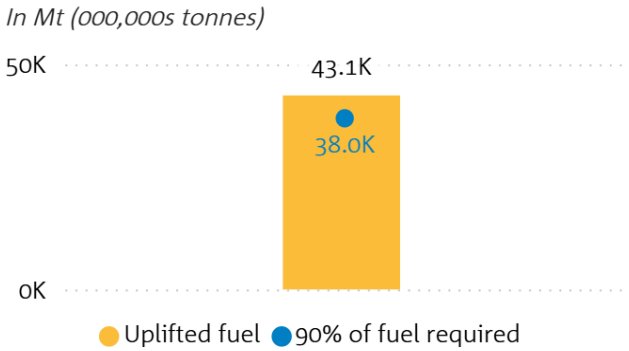


Figure 10 – AO2.1: Fuel uplifted versus 90% of fuel required at Union level.

Based on the data reported, in 2025, aircraft operators departing from Union airports uplifted a total of 43.1 Mt of aviation fuel, exceeding the 90% of fuel uplift obligation (38 Mt). This figure slightly differs from the aviation fuel supplier reports of supplied fuel (39.3 Mt). These differences are potentially due to aviation fuel suppliers not always having visibility on whether the fuel supplied is ultimately uplifted by the aircraft operator (AO).

The anti-tankering clause appears to be functioning: only 147 kt of yearly non-tanked quantity, the fuel missing to reach the 90% fuel uplift threshold, was reported (prior to the CA review of the yearly tanked quantity for safety fuel). This is a steep drop from 2025 reporting of 2024 data (2.4 Mt), highlighting the efforts AOs have made to comply with RFEUA.

Based on reported data, 657 kt of yearly tanked quantity for safety fuel was reported[33], corresponding to the application of the formula for standard EASA/ICAO fuel categories (contingency, alternate, final reserve, and additional fuel) reported on the operational flight plan. If accepted by the CAs as justified for safety reasons, this quantity may be considered when assessing compliance with the anti-tankering provision. Aircraft operators that fall below the 90% threshold could still be considered compliant, provided that the accepted quantity of safety fuel is sufficient to meet the required threshold at each Union airport. This data is pending final review by individual CAs, which will assess the acceptability of the reported yearly quantity for safety fuel in accordance with national laws.

[33] Yearly tanked quantity for safety fuel can be higher than the yearly non-tanked quantity given that the latter is calculated based on the 90% minimum threshold that airlines normally exceed.

AO2.2: Fuel uplifted versus the 90% of fuel required obligation in the Union airports

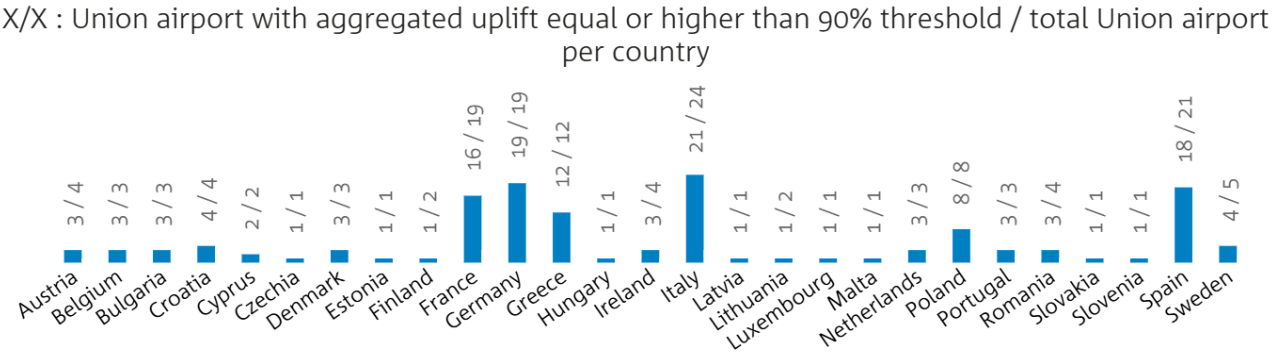


Figure 11 – AO2.2: Fuel uplifted versus the 90% of fuel required obligation in the Union airports.

In 138 out of 153 (90%) of the Union airports the actual fuel uplift from flights performed (aggregated for all departing aircraft operators) was above the 90% of the fuel required threshold. This marks an improvement compared to 2024, when 87 out of 143 Union airports (61%) reached the 90% threshold, meaning the number of Union airports where the aggregated threshold was not reached fell from 56 in 2024 to 15 in 2025.

When the aggregated values of uplifts are compared across Member States[34], Figure 11 shows slight disparities. However, these discrepancies do not necessarily mean that each individual AOs meet or not their obligations at those airports, nor reflect differences in the enforcement of RFEUA across individual Member States. Rather, they are more likely to show Union airport-specific operational and infrastructural factors, such as limited jet fuel supply capacity, air traffic patterns, capacity for an AO to uplift fuel and, in some cases, the application of exemptions under Article 5(3) RFEUA (e.g. for outermost or geographically isolated airports).

Union airports in which the aggregated actual fuel uplift did not reach 90% include:

- Innsbruck Airport (LOWI),
- Rovaniemi Airport (EFRO),
- Bastia-Poretta Airport (LFKB),
- Brest Bretagne Airport (LFRB),
- Figari–Sud Corse Airport (LFKF),
- Ireland West Airport Knock (EIKN),
- Elmas Airport (LIEE),
- Olbia (LIEO),
- Trapani-Birgi Airport (LICT),
- Kaunas Airport (EYKA),
- Iaşi Airport (LRIA),
- Asturias Airport (LEAS),
- Girona-Costa Brava Airport (LEGE),
- Seve Ballesteros–Santander Airport (LEXJ), and
- Luleå/Kallax Airport (ESPA).

Anti-tankering: 2024 vs 2025 comparison

The graph below (Figure 12) compares compliance with the anti-tankering clause between 2024 and 2025. Each dot represents one aircraft operator/Union airport pair with its position determined by:

- X-axis: number of departing flights operated by the aircraft operator at the Union airport;
- Y-axis: fuel uplift as percentage.

[34] For ease of reference the report refers to Member State level, however, the obligations are at Union airport level.

The horizontal yellow line represents the 90% compliance threshold as per RFEUA. The shaded yellow zone below the line identifies the AO/UA pairs where fuel uplifts fall below the threshold.

Consistent with the adaptation already observed in the Union airport level, the distribution of AO/UA pairs shows a clear shift towards higher fuel uplift ratios in 2025. In particular, the number of pairs below the 90% threshold have decreased, while the distribution becomes more concentrated around and above the compliance threshold. This suggests a progressive adjustment of refuelling practices in response to the Regulation.

The remaining pairs within the shaded area may still be considered non-compliant, subject to each Member State's assessment. This interpretation assumes that the reported yearly non-tanked quantities and yearly tanked quantities for safety fuel are fully accepted by the relevant CAs.

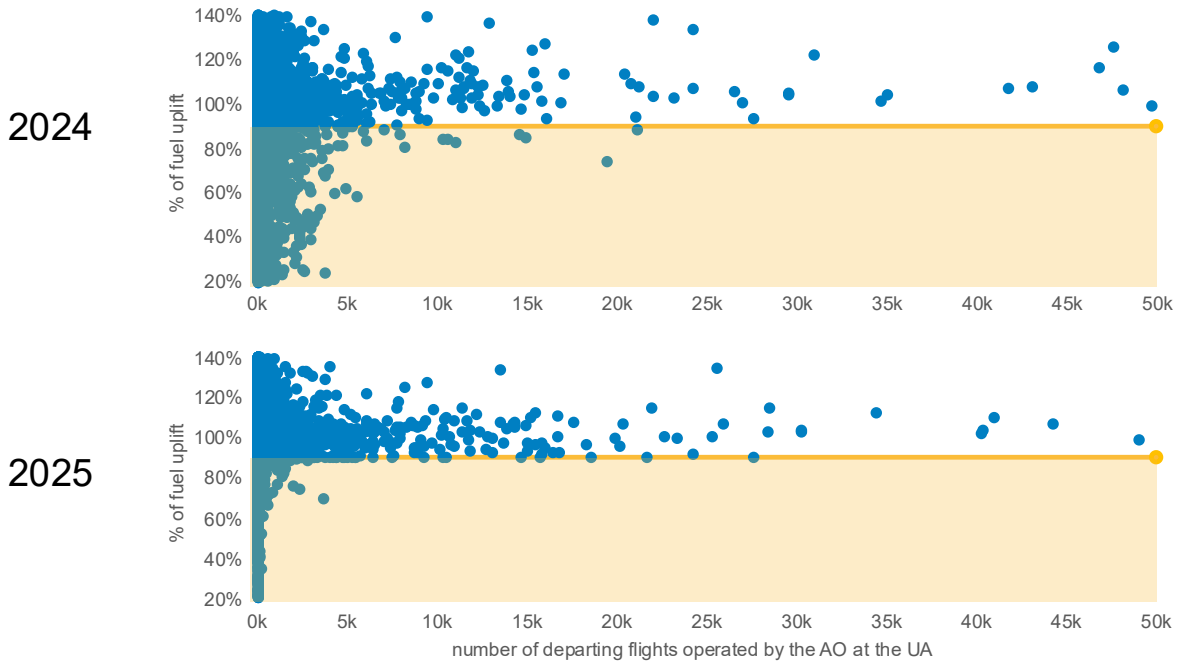


Figure 12 - Aircraft operator per Union airport - % Uplift against required (Y-axis) versus number of departing flights (X-axis)

2.2.3 Summary of SAF purchased

AO3.1: Amount of SAF purchased at Union level



Figure 13 - AO3.1: Amount of SAF purchased at Union level.

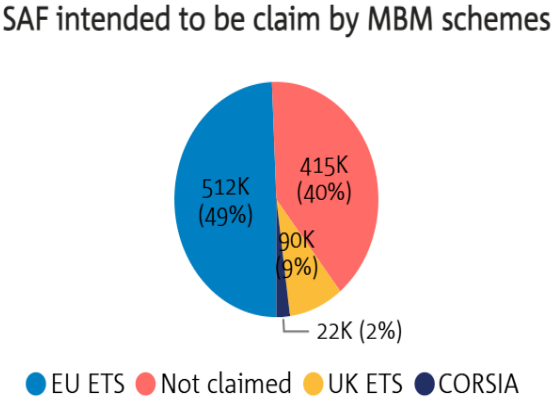
Based on the data reported, a total of 245 aircraft operators purchased 1 Mt of SAF in 2025 in a total of 149 Union airports.

Following the 2025 reporting process, the aircraft operator reporting template was revised to enable the reporting of SAF purchases at Union airport level. In the previous reporting cycle, SAF purchases were not systematically linked to individual Union airports, as the reporting template did not include a dedicated Union airport field for each SAF batch. As a result, the country-level indicators presented later in this report are based on SAF supplied at the corresponding Union airports in each country rather than on SAF quantities reported to a specific Member State. Consequently, the country-level results presented in this report are not directly comparable with those from the previous reporting cycle, as they now reflect the location where SAF was supplied rather than the Member State responsible for receiving the report.

Challenges in obtaining sustainability documentation

In 2025, aircraft operators faced challenges in obtaining Proof of Sustainability (PoS) and/or Proof of Compliance (PoC) documentation. The implications of these challenges on reported SAF purchases and associated claims cannot be fully assessed on the basis of the reported data alone.

AO3.2 and AO3.3: SAF intended to be claimed in MBM Schemes and by RFEUA eligible fuel category



RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	72 kt
Aviation biofuels	711 kt
Not Categorised	174 kt
Other aviation biofuels	64 kt
Synthetic aviation fuels	0 kt
Total	**1021 kt**

Figure 14 – AO3.3: SAF intended to be claimed by MBM scheme; and AO3.2: RFEUA eligible fuel category.

In addition to reporting SAF purchases, aircraft operators are required through the reporting template to indicate, where applicable, the market-based measure (MBM) scheme under which the reported SAF purchased batches may be claimed. The reporting template provides aircraft operators the following options: EU ETS; CH ETS; UK ETS; CORSIA; other market-based measures[35]; or not claimed, with the possibility to split batches among different schemes.

Based on the submitted reports, aircraft operators indicated their intention to claim a total of 624 kt of SAF under MBMs. The EU ETS accounted for 49% (512 kt) of SAF claims, representing the majority of SAF purchased[36]. 40% (415 kt) of the eligible fuel was not claimed. 9% (90 kt) has been reported as claimed under the UK ETS, while 2% under CORSIA[37].

Furthermore, aircraft operators also reported on the eligible fuel categories purchased: "aviation biofuels"; "other aviation biofuels"; "advanced aviation biofuels"; and not categorised. Of the SAF purchased, 69.6% (711 kt) falls under the "aviation biofuels" category, which is aligned with the SAF market availability of 2025, where the majority of SAF supplied was HEFA (see section 2.1.3). 17.1% (174 kt) purchased was not categorised, 7% (72 kt) was categorised under "advanced aviation biofuels", and 6.3% (64 kt) under "other aviation biofuels". No synthetic aviation fuels were purchased by aircraft operators in 2025.

The share of non-categorised SAF (175 kt) may reflect instances where AOs were not always able to receive the necessary information to claim the specific SAF sub-category purchased, even though the fuel is RED-compliant as evidenced by the PoS/PoC, in line with RFEUA requirements. This is likely to improve as AOs gain more experience with reporting; it may also reflect difficulties faced by third-country operators (TCOs) in interpreting the relevant definitions and PoS documentation

Finally, several factors may explain the divergence between the demand-side (aircraft operators' reports) and supply-side (aviation fuel suppliers' reports) figures. First, not all aircraft operators nor aviation fuel suppliers submitted a report, meaning the demand-side data does not capture the full SAF purchases and supply. Second, 17.1% of the SAF purchased by aircraft operators was not categorised by fuel type, which limits the extent to which the two datasets can be directly compared.

[35] The "other market-based measures" refers to any other market-based mechanism through which the use of SAF is considered for compliance with emission reduction targets or provides an economic incentive for SAF usage or purchase.

[36] Please note that this report reflects data reported under RFEUA obligations only. Differences between SAF quantities reported under RFEUA and other regulatory frameworks (e.g. the EU ETS) may result from differences in regulatory scope, flight coverage, reporting methodologies, competent authority review processes, reporting timelines, and the treatment of SAF quantities declared as intended to be claimed but subsequently rejected, adjusted or not accepted. Therefore, any potential differences between the schemes should not automatically be interpreted as data discrepancies.

[37] Under RFEUA, aircraft operators report only their intention to claim SAF under a given greenhouse-gas scheme. Reported volumes should therefore not be interpreted as accepted or validated claims. While some aircraft operators indicated an intention to claim SAF under CORSIA, the framework enabling SAF batches to be recognised simultaneously as compliant with both the EU Renewable Energy Directive (RED) and CORSIA sustainability requirements ("dual conformance") remains under development and has not yet been fully finalised or operationalised. Consequently, some reported CORSIA intentions may reflect reporting uncertainties rather than actual eligible claims.

2.3 Union airport managing bodies

This section presents the compliance status of the reporting obligations of Union airport managing bodies (hereafter "Union airports" in this section) with their obligations under RFEUA.

As of 1 January 2025, Union airports are required to facilitate the access to SAF, as per Article 6 RFEUA. Union airports are additionally required to report, every two years, actions taken to facilitate the access of aircraft operators to hydrogen or electricity used primarily for the propulsion of an aircraft and to provide the infrastructure and services necessary for the delivery, storage and uplifting of such hydrogen or electricity to refuel or recharge aircraft (Article 7(3) RFEUA).

Article 6 RFEUA – SAF access difficulties

To monitor potential barriers to SAF access at Union airports, aircraft operators are required to submit SAF access difficulty notices via the EASA Sustainability Portal to the CA of the respective Union airport. The CA is then required to investigate the claim with the relevant Union airport and determine its validity.

In 2025, four SAF access difficulties at Union airports were submitted by the aircraft operators to the CAs. All the requests were due to a misunderstanding of aircraft operator obligations in relation to SAF, and therefore have been discarded.

Article 7(3) RFEUA – Reports and deployment plans

In terms of reporting under Article 7(3) RFEUA, no Union airport submitted information on deployment plans to their CA in 202638. These can include airport strategies for supporting hydrogen and electric infrastructure for aircraft propulsion.

[38] Please note that the obligations on Union airport managing bodies follow a reporting cycle of two years. See Section 1.3 for more details.

3. State of the EU SAF Market

Article 13d of the Regulation requires the Annual Technical Report to contain information about the state of the EU SAF market.

This chapter therefore includes:

- An assessment of SAF production capacities in the EU; and
- An overview of key themes and trends shaping the EU SAF market.

3.1 Assessment of SAF production capacities in the EU

Assessing the status and evolution of SAF production capacities in the EU is essential to understanding the development of the EU SAF market and gaining insight into the extent to which the EU may be able to meet the minimum SAF shares under RFEUA, including through domestic production.

The following section presents the results of EASA's assessment of EU SAF production capacities. A detailed description of the methodology used to derive these results is provided in the separate document *Methodology document – Assessment of EU SAF production capacities*[39].

3.1.1 Methodology

The analysis of SAF production capacities in the EU was undertaken in three steps, as follows:

1. **Desk research of operating and announced SAF production facilities in each EU Member State**

Drawing on comprehensive desk research, EASA first compiled available information on both operational facilities and project announcements related to SAF production across EU Member States.

EASA had already established a database of SAF production facilities and project announcements for previous reports, which served as the foundation for the current analysis. This database was subsequently updated to incorporate new project announcements as well as revisions to existing facilities and planned projects – such as changes in production capacity, commissioning timelines, location, or project status. All data compiled during this step was obtained from publicly accessible sources.

2. **Consultation with EU Member State authorities**

Once the initial desk research was completed and new project announcements made since last year's *ReFuelEU Aviation Annual Technical Report* were incorporated, EASA reached out to the CAs of each EU Member State to verify the updated data. The data was shared with national authorities for review in January 2026, with a deadline for confirmation in February 2026. Following the consultation period, all feedback was collected and the data revised accordingly where necessary. Where discrepancies existed, information provided by EU Member States (e.g. on project status) was given precedence over publicly available sources.

Note: SAF production capacity assessment – Status and timelines

In line with the focus of this report, EASA's assessment of SAF production capacity covers the preceding calendar year. Accordingly, the SAF production capacity reflects the status of SAF production capacities in the EU as of December 2025.

[39] https://www.easa.europa.eu/en/downloads/142605/en

3. Development of scenarios

The year 2030 is used as the benchmark year for the SAF production capacity assessment as it serves as a key reference point under the ReFuelEU Aviation Regulation. Additionally, only a limited number of SAF project announcements extend beyond 2030, and those are subject to greater uncertainty. Future editions of the *ReFuelEU Aviation Annual Technical Report* will incorporate additional reference points beyond 2030 as the EU SAF market continues to evolve.

To account for the uncertainties inherent in the still-nascent SAF market – where not all announcements are expected to result in operational facilities – EASA developed three scenarios based on the maturity scores assigned to individual SAF production projects:

- *Scenario 1* includes SAF projects with a maturity score of 5;
- *Scenario 2* includes SAF projects with a maturity score of 4 or 5; and
- *Scenario 3* includes SAF projects with a maturity score of 3, 4 or 5.

Refer to Table 9 below for a description of the different project maturity scores.

PROJECT MATURITY SCORE	DESCRIPTION
5	Operational SAF facility or with demonstrated capability to continuously produce SAF
4	Facility under construction or post-FID
3	Main facility attributes announced: technology, feedstock, SAF capacity, commissioning year, location, upstream/downstream partners
2	Only limited information announced (ex. commissioning year and technology disclosed but feedstock, capacity and location are unknown)
1	Very limited information OR Non-ASTM approved pathway
0	Test/Trial of SAF production or demonstration facility

Table 9 – SAF Production capacity project maturity assessment.

Note: Estimating the production capacity of co-processed SAF

Production amounts of co-processed SAF are rarely disclosed publicly. To address this data gap, EASA estimated the co-processing capacity per facility in cases where public information was unavailable.

In *Scenario 1*, an annual output of 10 kt of SAF per co-processing facility was assumed. This figure was increased to 15 kt in *Scenario 2* and 20 kt in the *Scenario 3*.

Where specific co-processing amounts had been reported, these values were used as the facility's maximum production capacity.

3.1.2 Results

Throughout 2025, the EU's SAF production landscape remained dynamic; several new facilities were announced across multiple Member States, while others were cancelled. Further details on individual facilities, broken down by Member State, are available in Chapter 5.

As detailed in Table 10 below, by 2025, 15 Member States had at least one facility with a maturity score of 3 or above, meaning that at least the main attributes of the facility – such as feedstock, SAF capacity and commissioning year –

had been announced. Of these, eight Member States had at least one facility with a maturity score of 5, corresponding to a facility that was operational or had demonstrated the capability to continuously produce SAF.

A further three Member States had at least one facility with a maturity score of 2 or below, meaning that only very limited information on the announced facility was available. Compared with the assessment conducted for last year's report, Ireland has been included in this category, bringing the total number of Member States with SAF activity from 17 to 18. The remaining nine Member States had no operating or announced SAF facilities at the time of the assessment.

EU MEMBER STATES WITH AT LEAST ONE OPERATING OR ANNOUNCED SAF FACILITY WITH *MATURITY SCORE OF 3 OR ABOVE*[40]	EU MEMBER STATES WITH AT LEAST ONE ANNOUNCED SAF FACILITY WITH *MATURITY SCORE OF 2 OR BELOW*	EU MEMBER STATES WITH NO OPERATING OR ANNOUNCED SAF FACILITY
Austria*, Belgium, Croatia, Denmark, Finland*, France*, Germany*, Italy*, Latvia, Netherlands*, Poland, Portugal, Romania, Spain*, Sweden*	Estonia, Ireland**, Slovakia	Bulgaria, Cyprus, Czech Republic, Greece, Hungary, Lithuania, Luxemburg, Malta, Slovenia

**** Member State with at least one facility with a maturity score of 5***

***** Member State with first-time SAF activity***

Table 10 – Status of EU Member States with regard to operating and announced SAF production facilities.

Figure 15 below illustrates the three scenarios for the EU's SAF production capacities by 2030. Each scenario presents the projected SAF production capacities based on which SAF projects' capacities it considers:

- *Scenario 1* includes SAF projects with a maturity score of 5;
- *Scenario 2* includes SAF projects with a maturity score of 4 or 5; and
- *Scenario 3* includes SAF projects with a maturity score of 3, 4 or 5.

The bars coloured in yellow and blue represent the most recent SAF production capacity projections for the EU based on 2025 data. To allow for comparison over time, the bars coloured in grey represent EASA's assessments from previous years based on 2023 and 2024 data, respectively. To compare the projected production capacities with the minimum shares required by RFEUA, a yellow line represents the projected SAF amounts needed to fulfil the RFEUA 2030 SAF minimum share (excluding synthetic aviation fuels). Blue lines represent the projected amounts of synthetic aviation fuels needed to reach the RFEUA 2030 synthetic aviation fuel 0.7% minimum share and 1.2% minimum average for 2030-2031, respectively. The projected SAF amounts needed to fulfil the RFEUA minimum shares are calculated based on a projected total EU jet fuel demand in 2030 of 44.385 Mt, following the "base scenario" outlined by Eurocontrol in its Aviation Long-Term Outlook[41].

[40] See Table 9 above for an explanation of the different project maturity scores.

[41] This publication is available under EUROCONTROL Aviation Long-Term Outlook | EUROCONTROL.

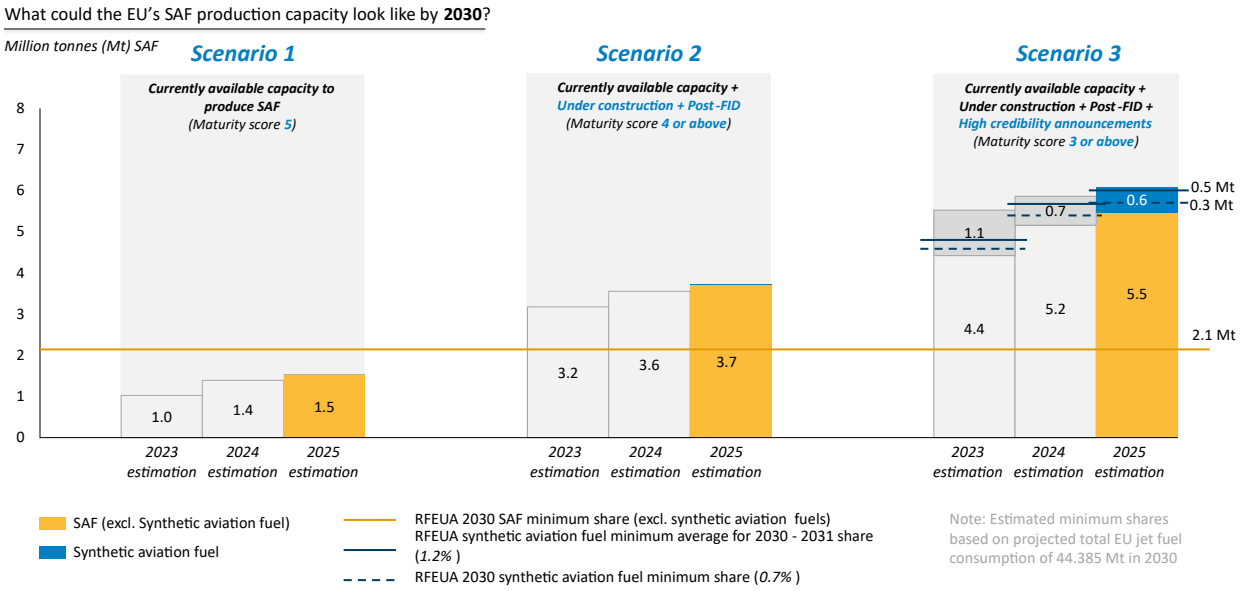


Figure 15 – Scenarios for the EU SAF capacity estimation by 2030.

Scenario 1 reflects the **SAF production capacity currently available in the EU** – as of the end of 2025 – and assumes that, by 2030, only facilities already capable of producing SAF will be operational. Under this scenario, the EU would have 1.5 Mt of SAF production capacity by 2030, well below the 2.1 Mt required to meet the RFEUA SAF minimum share by 2030 (excluding synthetic aviation fuels).

Available production capacity has increased steadily since EASA's first assessment, which was based on 2023 data. The 100 kt increase, from 1.4 Mt in 2024 to 1.5 Mt in 2025, is mainly attributable to the following changes:

- TotalEnergies' Normandy refinery in France has been reassessed from 40 kt to 160 kt of SAF production capacity, while an additional 50 kt of capacity has been identified at its Antwerp refinery in Belgium[42, 43].
- SARPOM's refinery in Trecate, Italy, has been included, with 12 kt/y of co-processed SAF capacity[44].
- Conversely, three co-processing facilities previously included in this scenario – Enilive's Livorno and Taranto facilities in Italy and ExxonMobil's Gravenchon facility in France – have been removed, as they are no longer active in SAF production[45].
- Finally, the estimated output of Enilive's Gela facility in Italy has been revised downwards from 400 kt/y to 350 kt/y of SAF[46].

Five Member States account for 90% of the SAF capacity included in this scenario. The Netherlands has the largest share, at 33%, with all of its capacity under this scenario coming from Neste's Rotterdam facility. Italy follows with 24%, Spain with 15%, France with 12%, and Finland with 7%. The other Member States with facilities included in this scenario are Sweden, Belgium, Germany and Austria.

[42] https://totalenergies.com/system/files/documents/2023-06/PR_TotalEnergies_Committed_to_the_Production_of_Sustainable_Aviation_Fuel.pdf

[43] https://aviation.totalenergies.com/en/blog/boarding/totalenergies-steps-up-saf-production-in-europe

[44] Member State feedback

[45] Member States feedback

[46] Member State feedback

Scenario 2 includes all facilities with **currently available production capacity, as well as facilities under construction and those that have reached FID**. Under this scenario, 3.7 Mt of SAF production capacity would be available by 2030, well above the 2.1 Mt required to meet the RFEUA SAF minimum share by 2030 (excluding synthetic aviation fuels).

Projected SAF production capacity under this scenario has also increased steadily since EASA's first assessment. The 100 kt increase, from 3.6 Mt in 2024 to 3.7 Mt in 2025, is mainly attributable to the changes described under Scenario 1 and the following changes:

- The HOLBORN refinery in Hamburg has been added to the scenario; it is currently under construction and is estimated to produce around 75 kt of SAF per year, based on a total nameplate capacity of 220 kt/y [47].
- The Amber Flow Fuels facility in Riga has also been added, with an annual SAF output of 87 kt, following public disclosure that construction began in 2025[48].
- In addition, projects that entered the construction phase in 2025, as well as other new additions to the scenario, include OMV's facility in Ploiești, Romania, with a planned SAF output of 90 kt/y, and the Galp-Mitsui project in Sines, Portugal, expected to produce around 92 kt/y, based on an estimated nameplate capacity of 270 kt/y[49,50].
- Conversely, Orlen's plant in Płock, Poland, has been removed from this scenario compared with last year's assessment, as the timeline for commencing SAF production has not been determined[51]. This results in a reduction of 300 kt/y in the capacity previously included in this scenario.

Five Member States account for 86% of the SAF capacity included in this scenario. The Netherlands has the largest share, at 32%, with all of its capacity coming from Neste's Rotterdam facility. Spain follows with 17%, Sweden with 15%, France with 13%, and Italy with 10%. The other Member States with facilities included in this scenario are Finland, Portugal, Romania, Germany, Latvia, Belgium and Austria.

Scenario 3 encompasses **currently available capacity, facilities under construction, projects that have reached FID, as well as high-credibility projects** based on the disclosure of key data, which provides reasonable confidence that these projects will proceed. Under this scenario, total SAF production capacity is projected to reach 5.5 Mt in 2030, excluding synthetic aviation fuel, with an additional 0.6 Mt of synthetic aviation fuel capacity. Under this scenario, the synthetic aviation fuel production capacities in the EU would be sufficient to meet the minimum shares of synthetic aviation fuel required under RFEUA.

Projected SAF production capacity (excluding synthetic aviation fuels) under this scenario has also increased steadily since EASA's first assessment. In contrast, announced synthetic aviation fuel capacity has declined year-on-year, partly due to projects postponing their expected commissioning dates beyond 2030 and to project cancellations. In addition, methanol-to-jet (MtJ) based capacities are not considered, as the pathway has been assigned a maturity score of 1 due to the absence of ASTM approval in 2025. As this scenario only includes technologies with maturity scores of 3 or higher, more than 1 Mt of announced MtJ-based synthetic aviation fuel capacity is therefore excluded from the projected capacity. Following the recent 2026 ASTM approval of the MtJ pathway, however, synthetic aviation fuel capacity based on this pathway is expected to contribute to an increase in projected synthetic aviation fuel production capacity by 2030. This increase is expected to be reflected in future editions of this report.

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[47] Refers to total processing capacity of the refinery. SAF capacity would be a function of the yield and selectivity

[48] https://www.ofimagazine.com/news/latvia-builds-first-hvo-saf-facility-in-riga

[49] https://www.omv.com/en/media/press-releases/2025/250219-omv-petrom-starts-construction-of-sustainable-fuels-unit-at-petrobrazi-refinery

[50] https://www.eib.org/en/press/all/2025-107-eib-finances-galp-s-renewable-hydrogen-and-biofuels-projects-in-sines-with-eur430-million

[51] Member State feedback

Changes in the 2025 SAF production capacity assessment for 2030 compared with the 2024 assessment are mainly attributable to the following:

- The projected SAF production capacity (excluding synthetic aviation fuels) increased by 300 kt, from 5.2 Mt in 2024 to 5.5 Mt in 2025. 100 kt is due to the updates captured under Scenario 2. The other 200 kt increase is primarily attributable to NorSAF's project in Latvia and OMV's project in Antwerp, each with an annual capacity of 100 kt.
- Projected synthetic aviation fuel production capacity for 2030 decreased by approximately 100 kt, mainly due to several projects postponing their expected commissioning dates beyond 2030 and the cancellation of other projects[52].

Five Member States account for 83% of the SAF production capacity under this scenario. The Netherlands has the largest share at 26%, followed by Italy (19%), Sweden (14%), France (13%) and Spain (12%). The remaining SAF production capacity is distributed across Germany, Latvia, Denmark, Belgium, Finland, Portugal, Romania, Croatia and Austria.

Synthetic aviation fuel production capacity under this scenario is distributed across seven Member States: Denmark (26%), France (23%), Sweden (16%), Germany (14%), Spain (12%), Latvia (6%) and the Netherlands (3%).

Note: Reflection of SAF project announcements in 2026

The 2025 assessment of EU SAF production capacity reflects the status of facilities as of 31 December 2025.

Several significant project announcements were made in 2026, which are consequently not captured in the 2025 assessment. Their inclusion would increase SAF production capacity under the *Scenario 2* (current capacity + under construction + post-FID) from 3.7 Mt to 4.6 Mt. At the same time, synthetic aviation fuel production capacity under *Scenario 3* (current capacity + under construction + post-FID + high-credibility announcements) would decrease by 32 kt. Details of individual project updates from 2026 are provided in the respective Member State sections in Chapter 5.

3.2 Key themes and developments in the EU SAF market

2025 marked the first year in which aviation fuel suppliers were required to include a minimum 2% share of SAF in their jet fuel supply at Union airports. At Union level, the reported data indicates that **this minimum requirement was not only met but exceeded**, with SAF accounting for 1.1 Mt, or 2.79%, of the total aviation fuel supplied to aircraft operators at Union airports.

SAF supply at Union airports in 2025 was met through a combination of EU-produced SAF and imports. Data indicates that the majority of the 1.1 Mt of SAF supplied at Union airports in the year was produced domestically. According to Eurostat data, 173 kt of SAF[53] was imported into the EU in 2025[54], primarily through ports in the Netherlands. Compared with the 1.1 Mt of SAF supply reported by aviation fuel suppliers, these imports represent approximately 16% of the total SAF supplied in the EU.

While the synthetic aviation fuel market remains at an early stage of development, several EU Member States are taking important steps to support its scale-up. As shown in Figure 15 above, the estimated synthetic aviation fuel production capacity available by 2030 has declined over the past three EASA assessments, mainly due to project delays resulting in expected commissioning dates being pushed beyond 2030, as well as project cancellations. As of

[52] Specific project information available under each Member State section

[53] https://ec.europa.eu/eurostat/documents/38154/16135593/energy-consumption-industry-reporting-instructions.pdf

[54] Eurostat- Supply and transformation of oil and petroleum products – monthly data, as of 15 September 2026.

June 2026, no commercial-scale synthetic aviation fuel facility in the EU had yet reached FID. Yet, several facilities had reached demonstration or pilot scale, complemented by a significant project pipeline that included a number of larger-scale facilities, which could contribute to a substantial increase in synthetic aviation fuel production capacity towards 2030 and beyond. EU Member States are also stepping up their efforts to support the development of the synthetic aviation fuel market. For example, under the EU's Sustainable Investment Plan, eight Member States launched the "eSAF Early Movers Coalition" to boost investments in eSAF. As part of this initiative, Germany, Luxembourg and Austria will launch a pilot double-sided auction, with more than EUR 2.1 billion in funding available.

3.2.1 Deep dive into 2025 SAF data

The following sections present the key findings from the 2025 data reported by aviation fuel suppliers and aircraft operators.

Focus: Feedstocks

In 2025, UCO remained the dominant feedstock for SAF supplied in the EU, accounting for 80% of total reported SAF amounts. Other feedstocks included category 3 animal fats (11%) and POME, with smaller contributions from food waste, CTO, and category 1 and 2 animal fats.

As a result, around 80% of the SAF supplied was classified as aviation biofuels under the RFEUA definition, a share broadly consistent with that reported for 2024. Advanced aviation biofuels and other aviation biofuels, as defined under RFEUA, accounted for 8% and 11% of total SAF volumes, respectively. Both shares were significantly higher than in 2024.

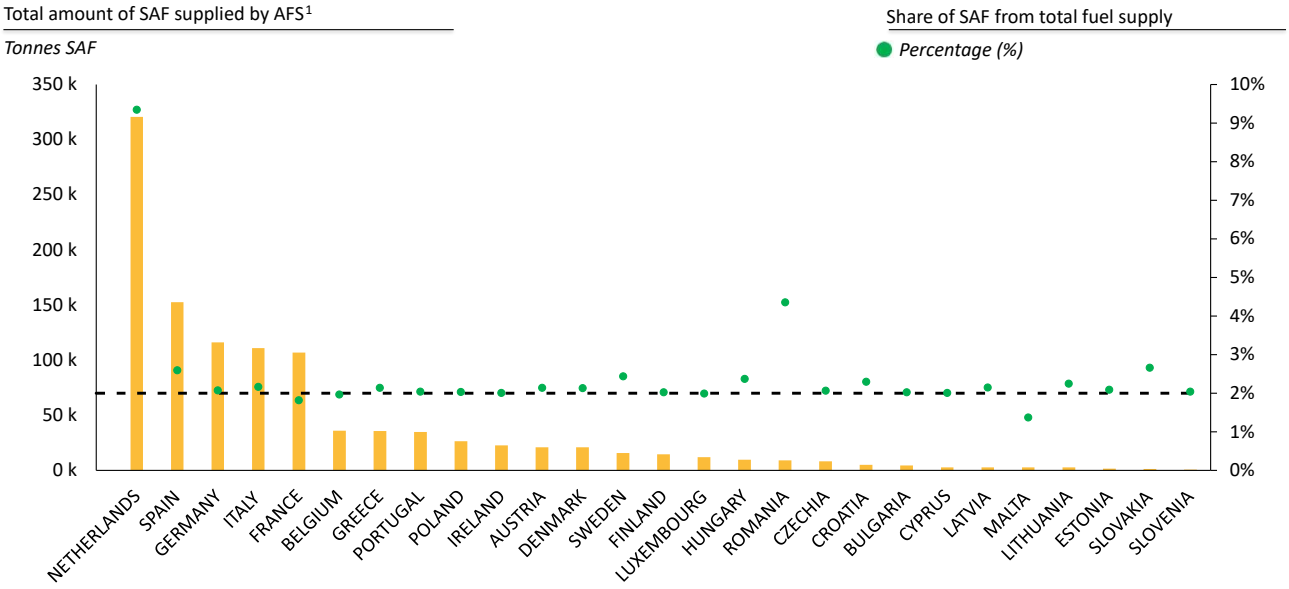
Feedstocks originating in the EU accounted for approximately 15% of the SAF supplied, with the biggest contributors being Germany, Spain, and France, each contributing around 2%. The remaining 85% of SAF was produced from feedstocks originating outside the EU. China was the largest country of origin, accounting for 61% of the total SAF supplied through feedstocks sourced there, followed by Malaysia (8%) and Indonesia (5%). Together, these three countries accounted for 74% of the 77% of SAF supplied that was produced from feedstocks sourced in Asia. Smaller quantities of SAF were produced from feedstocks originating in Latin America and the Caribbean (LACAB), the Middle East, and North America, with Saudi Arabia accounting for the largest share at almost 2%.

Of the SAF that was produced from UCO, 73% was produced using UCO originating in China, followed by Malaysia (8%), Indonesia (2%), Saudi Arabia (2%) and the United Kingdom (2%). For SAF produced from category 3 animal fats, Germany was the leading country of feedstock origin, accounting for 17% of the SAF supplied, followed by France (13%) and Poland (11%). The POME used to produce SAF supplied in the EU originated from three Asian countries. Indonesia accounted for 48% of the SAF supplied in the EU that was produced from POME, followed by Malaysia (47%) and China (5%). Small quantities of SAF, totalling 9 kt, were produced from CTO, with the feedstock originating in Finland, Sweden and the United States.

Focus: SAF supply in Member States

Figure 16 below presents the amount of SAF supplied in each Member State in 2025, together with the corresponding share of SAF compared with total aviation fuel supplied.

In 23 of the 27 Member States, SAF accounted for at least 2% of the aviation fuel supplied. Malta (1.37%), Luxembourg (1.99%), Belgium (1.96%) and France (1.81%) remained below this threshold. A Member State may receive less than 2% SAF where aviation fuel suppliers operating in multiple Member States make use of the flexibility mechanism, compensating for a shortfall in SAF supply in one Member State through oversupply in another. The Netherlands received the largest amount of SAF in 2025, with SAF accounting for more than 9% of the total aviation fuel supplied to aircraft operators in scope of RFEUA at Union airports in the country.



Notes: (1) AFS = Aviation fuel suppliers, (2) SAF share estimated based on total amount of aviation fuel supplied to in scope aircraft operators at Union Airports

Figure 16 - Member State SAF supply overview.

Focus: SAF supply at Union airports

In 2025, SAF was supplied at 121 Union airports across all 27 EU Member States, meaning that 79% of Union airports received SAF during the year. Amsterdam Airport Schiphol received the largest amount of SAF, accounting for 29% of the total, followed by Frankfurt Airport (8%) and Paris Charles de Gaulle Airport (7%). Overall, the ten Union airports receiving the largest amounts accounted for 65% of all SAF reported in the EU.

This distribution reflects the current stage of SAF deployment: while SAF supply is extending to a broader range of airports, major hubs continue to account for a substantial share of total amounts. The distribution of SAF across Union airports is influenced by multiple factors, including the number of aviation fuel suppliers, suppliers' decisions on where to make SAF available under the flexibility mechanism, and other economic and operational considerations. Although the ten largest airports accounted for approximately 65% of reported SAF volumes, they also accounted for around 49% of total aviation fuel supplied, indicating that their higher SAF amounts are partly linked to the greater overall fuel demand at larger hubs. At the same time, relatively high SAF shares at smaller airports, such as Palma de Mallorca, suggest that additional commercial and operational factors may influence where SAF is supplied.

Figure 17 illustrates the SAF supply distribution at Union airports in 2025.

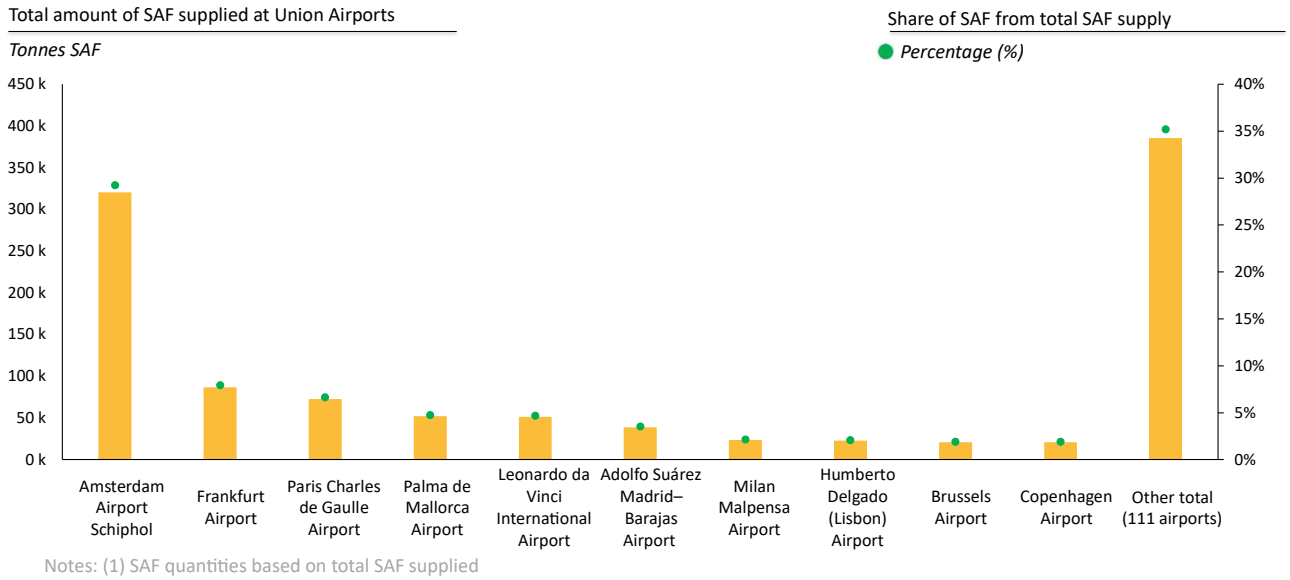


Figure 17 – SAF supply at Union Airports.

Furthermore, 79% of Union airports had fewer than five aviation fuel suppliers, while 11% had only one supplier, irrespective of SAF availability. Conversely, 35% of the aviation fuel suppliers that submitted reports supplied aviation fuel to only one Union airport and were therefore unable to make use of the flexibility mechanism. Of the remaining 65% of suppliers eligible to use the mechanism, 86% did so, supplying less than 2% SAF at one or more of the Union airports to which they supplied aviation fuel. These figures indicate that the flexibility mechanism was widely used in 2025 and help explain some of the Member State-level results presented above.

Focus: Aviation fuel suppliers

Twenty aviation fuel suppliers accounted for 70% of the total 1.1 Mt of SAF supplied in 2025. The table below presents the 10 largest suppliers in 2025 by amount of SAF supplied.

TOP 10 AVIATION FUEL SUPPLIERS, BY AMOUNT OF SAF SUPPLIED
(Based on data reported under ReFuelEU Aviation)

Aviation Fuel Supplier	Amount of SAF supplied (in tonnes)
Koninklijke Luchtvaart Maatschappij N.V. (KLM)	162,872
Repsol Comercializadora De Productos Petrolíferos, S.A.	73,909
Bp Europa Se	61,522
Neste Components B.V.	57,114
Moeve, S.A.	40,104
Shell Nederland Verkoopmaatschappij N.V.	38,452
Shell Deutschland GmbH	36,245

TOP 10 AVIATION FUEL SUPPLIERS, BY AMOUNT OF SAF SUPPLIED (Based on data reported under ReFuelEU Aviation)	
Bp Energía España, S.A.	34,466
Shell France	31,807
World Fuel Services Italy S.R.L.	29,496

Table 11 – Top 10 aviation fuel suppliers in 2025 by amount of SAF supplied.

Focus: Aircraft operators

In 2025, a total of 245 aircraft operators reported purchasing SAF, representing 62% of all aircraft operators active in the EU. The total amount of SAF purchased by aircraft operators reached 1 Mt, with approximately half of this amount purchased by just ten aircraft operators, as shown in Table 12 below.

TOP 10 AIRCRAFT OPERATORS, BY AMOUNT OF SAF PURCHASED (Based on data reported under ReFuelEU Aviation)	
Aircraft Operator	**Amount of SAF purchased (in tonnes)**
KLM	91,786
Ryanair DAC	78,951
Transavia Airlines	68,003
Air France	67,772
Deutsche Lufthansa AG	58,505
United Airlines, Inc.	41,978
Vueling Airlines	29,078
Eurowings GmbH	26,722
Compañía Operadora de Corto y Medio Radio Iberia Express S.A.	20,510
Emirates Intl	20,506

Table 12 – Top 10 aircraft operators in 2025 by amount of SAF purchased.

3.2.2 Non-EU SAF activity

North America

Canada: British Columbia will introduce minimum SAF blending requirements of 1% in 2028, 2% in 2029 and 3% in 2030. Canada's federal plan retains an aspirational 10% SAF target by 2030, but no binding national mandate has yet been established[55].

United States: The 45Z Clean Fuel Production Credit was extended through 2029, but the previous US$0.75/gal SAF bonus was removed, support was capped at US$1.00/gal, eligibility was restricted to North American feedstocks and induced land-use change was removed from carbon-intensity calculations[56]. These changes favour domestically sourced crop and waste feedstocks but reduce SAF's relative attractiveness compared with renewable diesel, which also benefits from stronger road-fuel demand under the Renewable Fuel Standard. Recent RIN data indicate that approximately 0.9 Mt of SAF was supplied in 2025[57].

Asia-Pacific

Australia: Policy measures aiming to develop a SAF industry include the A$1.1 billion Cleaner Fuels Program, A$250 million for low-carbon liquid fuels through the Future Made in Australia Innovation Fund and confirmation that a demand-side mechanism will be developed [58, 59, 60]. No project in the country has yet reached FID[61]. Potential feedstocks include canola, tallow, UCO, sugarcane residues, bagasse, municipal waste and forestry residues; abundant renewable power also creates longer-term synthetic SAF potential[62].

China: An annual 50 kt SAF use target is in place and a mandate is expected under the 2026–2030 Five-Year Plan, potentially creating a 3–5% blend requirement[63]. China is scaling HEFA and other SAF production pathways rapidly, and export controls and the removal of tax incentives for UCO exports indicate a shift from exporting feedstocks towards domestic refining[64].

India: Proposed international-flight SAF blending requirements rise from 1% in 2027 to 2% in 2028 and 5% in 2030[65].**Indonesia:** A ministerial decree introduces a 1% blend in 2027 at Jakarta and Bali's principal airports, increasing to 5% in 2029–2030[66]. Export restrictions on UCO and palm oil mill effluent support domestic HEFA production, alongside existing palm-based biofuel supply chains[67].

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[55] https://www.argusmedia.com/en/news-and-insights/latest-market-news/2856989-canada-saf-growth-plan-highlights-competitiveness-gaps

[56] https://www.congress.gov/bill/119th-congress/house-bill/1/text

[57] https://skynrg.com/2026-saf-market-outlook/

[58] https://arena.gov.au/funding/cleaner-fuels-program/

[59] https://arena.gov.au/funding/future-made-in-australia-innovation-fund/

[60] https://www.qcintel.com/biofuels/article/australia-to-consult-on-biofuel-mandate-soon-reports-65340.html

[61] https://skynrg.com/2026-saf-market-outlook/

[62] https://www.csiro.au/safroadmap

[63] https://www.nexanteca.com/blog/flying-different-directions-mixed-saf-signals-china-and-us

[64] https://biomassmagazine.com/articles/report-chinese-uco-exports-fall-sharply-in-december

[65] https://www.pib.gov.in/PressReleaseDetail.aspx?PRID=2255021&reg=3&lang=1

[66] https://www.indonesia-investments.com/news/todays-headlines/indonesia-prepares-for-2027-saf-mandate-as-pertamina-ramps-up-production/item9998

[67] https://gapki.id/en/news/2025/01/17/govt-restricts-exports-of-palm-wastes-and-uco/

Japan: In August 2026, a Japanese government subcommittee proposed to soften plans for a sustainable aviation fuel mandate. The new proposal would require at least a 1% SAF blend in jet fuel supplied to international flights from seven major Japanese airports in FY 2030-2031, rising to 3% in FY 2031-2032 and 5% from FY 2032-2034, compared to a previous target of 10% of 2019's jet fuel supply over 2030-2034[68].

Malaysia: Planning a 1% SAF blending mandate for international flights departing from Kuala Lumpur International Airport starting in January 2027[69]. Retains a strong lipid-feedstock potential and is considering UCO and POME export restrictions[70].

Singapore: The 1% SAF target begins in 2026, rising to 3–5% by 2030. Because of higher jet-fuel costs, the SAF levy has been deferred: it will apply to tickets and services sold from October 2026 for departures from January 2027[71].

South Korea: A binding requirement for international flights starts at 1% in 2027, rising to 3–5% in 2030 and 7–10% by 2035[72].

Thailand: 1% blending SAF target from 2026, increasing to 5–8% during 2033–2037[73]. The country retains a strong lipid-feedstock potential.

Latin America, Middle East and other emerging markets

Brazil: The Fuel of the Future framework requires aviation emissions reductions from domestic aircraft operators beginning at 1% in 2027, increasing to 10% by 2037[74]. Existing ethanol, agricultural and biofuel infrastructure supports HEFA, AtJ and export-oriented production.

Chile: The national roadmap targets a 50% SAF blend by 2050 and aims for a large-scale domestic production facility by 2030[75]. The roadmap places specific focus on synthetic aviation fuel production.

United Arab Emirates: A voluntary target requires 1% locally produced SAF by 2031, supplied to national airlines at UAE airports[76].

Türkiye: SAF regulation targeting a 5% emissions reduction ambition by 2030 has been published[77].

[68] https://www.qcintel.com/biofuels/article/japanese-ministry-committee-proposes-watering-down-2030-saf-targets-71195.html

[69] https://www.trade.gov/market-intelligence/malaysia-energy-sustainable-aviation-fuel

[70] https://www.qcintel.com/biofuels/article/senior-malaysia-government-official-eyes-pome-export-restrictions-for-saf-54933.html

[71] https://www.caas.gov.sg/resources/media-and-publication/newsroom/sustainable-aviation-fuel--saf--levy-to-be-deferred/

[72] https://www.greenairnews.com/?p=8125

[73] https://www.argusmedia.com/en/news-and-insights/latest-market-news/2755278-thai-aviation-authority-airlines-to-collaborate-on-saf

[74] https://biomassmagazine.com/articles/brazil-publishes-regulations-for-probioqav-the-countrys-saf-mandate-program

[75] https://www.reuters.com/sustainability/climate-energy/chile-aims-have-first-large-scale-sustainable-aviation-fuel-factory-by-2030-2024-04-10/

[76] https://www.sustainableaviationfutures.com/saf-spotlight/uae-saf

[77] https://www.reuters.com/sustainability/climate-energy/turkey-set-sustainable-aviation-fuel-mandates-airlines-suppliers-2025-06-30/

4. 2025 Aviation Fuels Reference Prices for ReFuelEU Aviation

Article 13d RFEUA requires the Annual Technical Report to contain information on SAF prices, including information on the evolution of the price gap between SAF and CAF.

EASA calculated 2025 reference prices for the different aviation fuels eligible under ReFuelEU Aviation as well as for CAF, which are intended to serve as reference for EU Member States in their determination of penalties under RFEUA as well as for the support mechanism for the use of eligible aviation fuels under the EU ETS Directive (FEETS)[78, 79].

Note: Identical reference prices in Annual Technical Report and in February briefing note

In February 2026, EASA published the *2025 Aviation Fuels Reference Prices for ReFuelEU Aviation* briefing note[80], which provided the 2025 reference prices for the aviation fuel categories eligible under RFEUA as well as CAF.

The briefing note published in February served as a preliminary release of the price information later included in this Annual Technical Report. Accordingly, the aviation fuels reference prices presented in this chapter are identical to those published in the February briefing note.

4.1 Methodology

Note: Methodology document for RFEUA eligible aviation fuels reference prices

Alongside this Annual Technical Report, EASA has published a methodology document explaining in detail how the reference prices for RFEUA eligible aviation fuels are determined.

The methodology document can be accessed on EASA's website[81].

Where possible, reference prices were determined using price indexes maintained by price reporting agencies (also referred to as "real index pricing"). For those RFEUA eligible aviation fuels for which no real index price was available in 2025, reference prices were calculated using a bottom-up production cost estimation methodology (also referred to as "back up pricing" or "production cost estimation").

[78] Delegated Regulation supplementing Directive 2003/87/EC of the European Parliament and of the Council by laying down detailed rules for the yearly calculation of price differences between eligible aviation fuels and fossil kerosene and for the EU ETS allocation of allowances for the use of eligible aviation fuels.

[79] Note that the European Commission publishes a dedicated Commission notice regarding the applicable price difference between kerosene and relevant eligible aviation fuels under the FEETS mechanism.

[80] EASA 2026 Briefing Note *2025 Aviation Fuels Reference Prices for ReFuelEU Aviation*. 2025 Aviation Fuels Reference Prices for ReFuelEU Aviation | EASA

[81] The methodology document can be accessed here: EASA reference prices for aviation fuels - eligible under ReFuelEU Aviation | EASA.

Real index pricing

Only CAF and aviation biofuels reference prices could be established via real index pricing.

The real index pricing result for aviation biofuels, set at EUR 1,925 per tonne, is calculated by price reporting agencies[82] for the Northwest European (NWE) hub. As illustrated in Figure 18, this price reflects the costs associated with feedstock production, upstream logistics, and production at the refinery. However, it does not capture downstream components, such as costs associated with blending, distribution, and downstream actors' (such as aviation fuel suppliers') profit margins.

Liquidity is currently strongest at the NWE hub, meaning that SAF is traded there more frequently and there are more market transactions from which reliable price information can be derived. This makes it a suitable benchmark for establishing a transparent reference price, providing a common basis for market participants and supporting a level playing field. Beyond this NWE hub, SAF prices vary considerably due to the factors outlined above. Ongoing evaluation will be required to determine whether the NWE hub should continue to serve as the most appropriate benchmark as the SAF market and the associated pricing dynamics evolve.

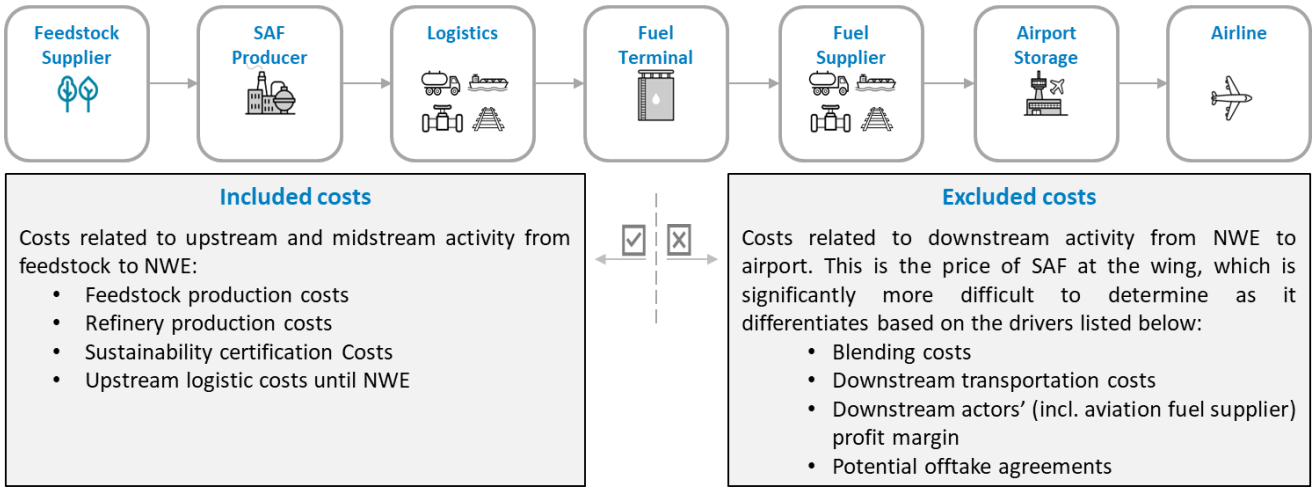


Figure 18 – Overview of included and excluded costs of PRA assessments.

Back up pricing

The reference prices for the other RFEUA eligible aviation fuels were determined using production cost estimations, factoring in feedstock, energy, and technology deployment costs, as well as hypothetical production capacity estimations for 2025. For these production cost estimations, facilities were assumed to be "first-of-a-kind" (FOAK) facilities, with smaller capacities, to better represent a hypothetical 2025 production scenario.

[82] For 2025 prices, indices from three different PRAs are used, each of which provided CAF and SAF price data covering European activity: Argus Media (Argus) S&P Global Commodity Insights (Platts) General Index (GX). The specific price indices used are detailed in the dedicated methodology document.

4.2 2025 aviation fuels reference prices per RFEUA aviation fuels subcategory

Note: EASA 2025 SAF reference prices vs SAF prices paid by aircraft operators in 2025

The reference prices for RFEUA eligible aviation fuels, as determined by EASA, reflect average SAF prices for a given reference year, based on a defined methodology[83].

Their primary purpose is to serve as reference values for EU Member States in determining penalties under RFEUA, as well as for the support mechanism for the use of eligible aviation fuels under the EU ETS Directive (FEETS).

At this stage, the reference prices cannot provide a fully accurate reflection of the prices paid for SAF by all aircraft operators throughout the reference year – particularly given the geographically localised and temporally variable nature of pricing in the still nascent SAF market. As outlined in section 4.1, the EASA reference prices, including those based on real index pricing, currently primarily reflect upstream cost components only.

The 2025 reference prices for each RFEUA eligible aviation fuels subcategory are presented in the table below.

RFEUA AVIATION FUELS SUBCATEGORY[84]	REAL INDEX PRICE (€/tonne)[85]	PRODUCTION COST ESTIMATION (€/tonne)[86]
Sustainable aviation fuels (SAF)		
Synthetic aviation fuels[87] (weighted average)	N/A	Average 7,520 [6,710 – 9,525]
Synthetic aviation fuels from industrial CO_2	N/A	Average 7,520 [6,710 – 8,420]
Synthetic aviation fuels from biogenic CO_2	N/A	Average 7,520 [6,710 – 8,420]
Synthetic aviation fuels from atmospheric CO_2	N/A	Average 8,625 [7,815 – 9,525]

[83] Refer to the dedicated methodology document on EASA's website: EASA reference prices for aviation fuels - eligible under ReFuelEU Aviation | EASA.

[84] See Methodology document – EASA reference prices for RFEUA eligible aviation fuels (section 2.2) for definitions of each RFEUA aviation fuels subcategory. Note that 'aviation biofuels' in this briefing note includes the categories 'aviation biofuels' (Annex IX Part B) and 'other aviation biofuels' (non Annex IX).

Also note that the aviation fuels subcategories under RFEUA generally align with the eligible aviation fuel subcategories outlined in the Annex of the Delegated Regulation on FEETS, with the following differences:

(1) recycled carbon aviation fuels are not eligible for support as FEETS, and

(2) FEETS additionally includes several co-processing-based aviation fuels subcategories. In this briefing note, co-processed fuels are included in their respective aviation fuels category.

[85] Note that the average prices are provided in €/tonne of product, without adjusting for energy content.

[86] Note that the average prices are provided in €/tonne of product, without adjusting for energy content.

[87] The weighted average is calculated factoring in the currently announced production capacity per subcategory in the EU.

RFEUA AVIATION FUELS SUBCATEGORY[84]	REAL INDEX PRICE (€/tonne)[85]	PRODUCTION COST ESTIMATION (€/tonne)[86]
Advanced aviation biofuels	N/A	Average 2,760 [1,790- 3,130]
Aviation biofuels	1,925	1,630[88]
Recycled carbon aviation fuels	N/A	Average 2,195 [1,805 – 2,540]
Other eligible renewable and low-carbon aviation fuels		
Renewable hydrogen for aviation	N/A	Average 7,705 [6,810 – 8,700]
Low-carbon hydrogen for aviation	N/A	4,790
Synthetic low-carbon aviation fuels	N/A	Average 5,515 [4,890 – 5,940]
Other aviation fuels		
Conventional aviation fuels	640	N/A

Table 13 – 2025 reference prices per RFEUA aviation fuels subcategory.

[88] Note that the production cost estimation for 'aviation biofuels' is included only for informational purposes and to allow for comparison with the production cost estimations for other RFEUA aviation fuels subcategories.

Figure 19 provides a visual overview of the 2025 reference prices for the different RFEUA eligible aviation fuels subcategories.

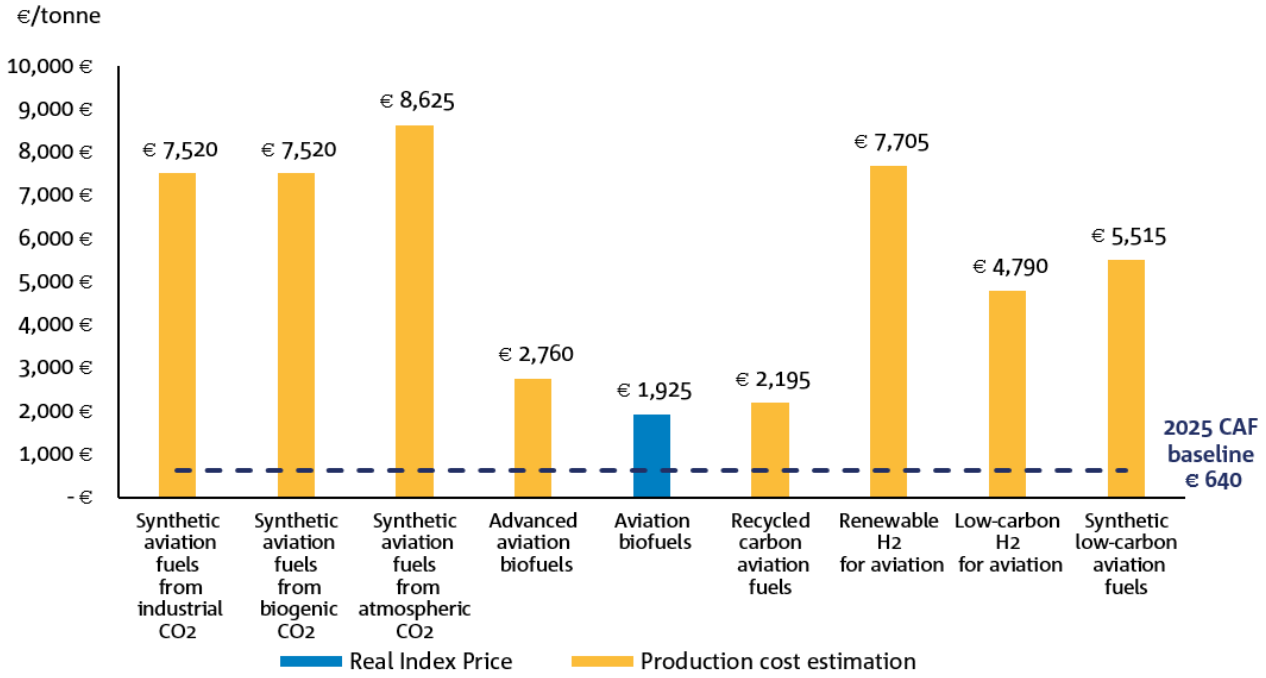


Figure 19 – 2025 reference prices per RFEUA aviation fuels subcategory.

Using the reference prices from the different RFEUA eligible aviation fuels *subcategories* as outlined above, EASA also determines reference prices for RFEUA eligible aviation fuels *categories*. These are provided to support EU Member States in the determination of penalties under RFEUA, in line with Article 12 in the Regulation.

The table below provides the 2025 reference prices per RFEUA aviation fuels category[89].

RFEUA AVIATION FUELS CATEGORY		2025 REFERENCE PRICE (€/tonne)
(i)	CAF	640
(ii)	SAF	1,925
(iii)	Synthetic aviation fuels	7,520
(iv)	Aviation fuels	666

Table 14 – 2025 reference prices per RFEUA aviation fuels category.

[89] Refer to the dedicated methodology document on EASA's website for an explanation of how the reference price for each RFEUA aviation fuels *category* is determined based on the reference prices of the respective RFEUA aviation fuels *subcategories*.

4.3 Evolution of the price gap between SAF and CAF

SAF and CAF prices, as well as the price differential between them, are dynamic. Since 2023, EASA's reference price publications have tracked this differential. As illustrated in Figure 20, the differential between SAF (aviation biofuel, real index pricing, NWE) and CAF amounted to EUR 1,940 per tonne in 2023. It decreased by 30% to EUR 1,350 per tonne in 2024 and by a further 5% to EUR 1,284 per tonne in 2025.

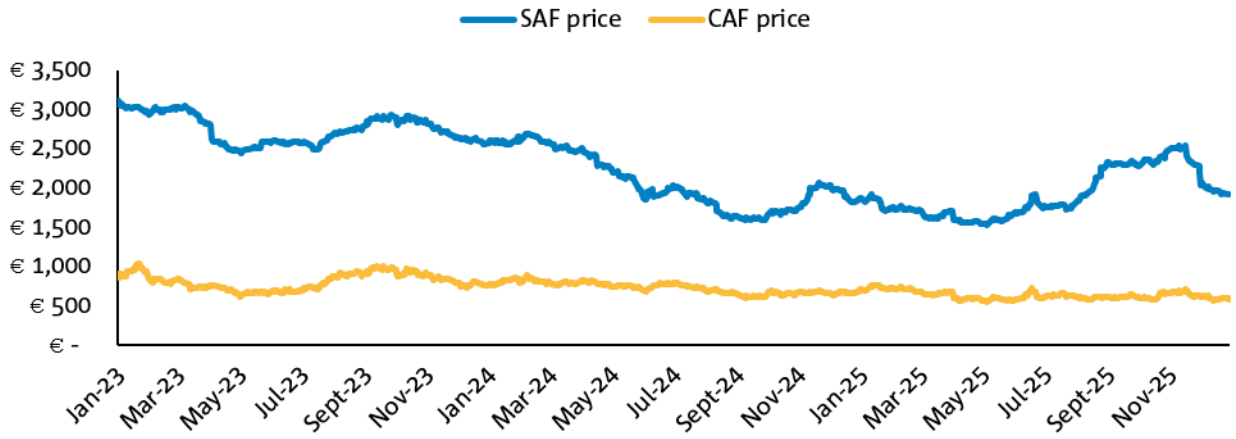


Figure 20 - Evolution of the price gap between SAF and CAF

While SAF prices have generally declined as commercial-scale production has expanded and the underlying technologies have matured, SAF remains a volatile commodity, exposed, like conventional jet fuel, to geopolitical instability and regulatory deadlines. The figure shows that SAF prices followed an uneven downward trajectory, with several temporary increases, while CAF prices fluctuated within a comparatively narrower range. Consequently, the SAF-CAF price differential did not narrow consistently over the period: the most substantial reduction occurred between 2023 and 2024, while the smaller decrease in 2025 indicates a slower pace of convergence. A noticeable increase in SAF prices during 2025 also temporarily widened the differential before prices declined again towards the end of the period.

5. Overview of Reported Data and SAF Market Status – EU Member States

This chapter provides an overview of the KPIs for each EU Member State. The KPIs are informed by data from the 2025 reporting period, submitted by aviation fuel suppliers and aircraft operators during the 2026 reporting exercise under RFEUA. Each sub-section also includes a SAF activity fiche, featuring a map of both operational and announced SAF production facilities.

These indicators are essential for evaluating compliance with, and progress toward, the objectives of RFEUA. By comparing these metrics across EU Member States, it is possible to identify areas of success as well as those requiring further improvement.

Note: Analysis of SAF activity in EU Member States

This analysis was conducted to the best of EASA's knowledge, drawing on publicly available data and input from the EU Member States' authorities. It is acknowledged that some projects may have been overlooked and, as a result, are not included in this analysis. Stakeholders are encouraged to contact EASA and share information to ensure that any omissions are addressed in future reports.

KPI CATEGORIES	LIST OF KPIS FOR AVIATION FUEL SUPPLIERS[90]	DESCRIPTION
Reporting Status	**FS1:** Reporting status of aviation fuel suppliers	Percentage of aviation fuel suppliers that submitted reports.
Aviation Fuel and SAF Supply	**FS2.1:** Aviation fuel supplied **FS2.2:** SAF supplied	Amount of aviation fuel and SAF reported as supplied by aviation fuel suppliers for that Member State.
SAF Characteristics	**FS3.1:** SAF supplied per category of RFEUA eligible aviation fuel	Key characteristics of SAF supplied in EU Member State – Category of RFEUA eligible aviation fuel.
Emission savings	**FS4.** SAF CO_2e savings	CO_2e savings of SAF supplied per EU Member State.

Table 15 – KPI summary table for aviation fuel suppliers – Member State level.

[90] Additional or alternative KPIs may be defined by EASA for subsequent reporting periods.

KPI CATEGORIES	LIST OF KPIS FOR AIRCRAFT OPERATORS[91]	DESCRIPTION
Reporting Status	**AO1:** Reporting status of aircraft operators	Level of reporting of AOs to the respective Member State.
Anti-tankering Status	**AO2.1:** Total fuel uplifted versus 90% of fuel required **AO2.2:** Fuel uplifted versus the 90% of fuel required obligation	Level of uplifts of all RFEUA aircraft operators departing from Union airports in the Member State.
SAF Purchased Summary	**AO3.1:** Amount of SAF purchased **AO3.2:** SAF claim by MBM scheme **AO3.3:** RFEUA eligible fuel category	These KPIs present the SAF information reported by the AOs for the respective MS.

Table 16 – KPI summary table for aircraft operators – Member State level.

[91] Additional or alternative KPIs may be defined by EASA for subsequent reporting periods.

Austria



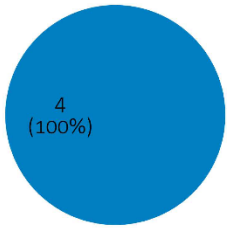
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

4 aviation fuel suppliers reported on SAF and aviation fuel quantities

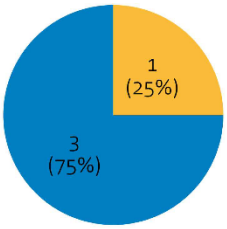
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

4 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

20.9 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
976.5 kt	20.9 kt	2.14%

87% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Other aviation biofuels

0.07 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Austria

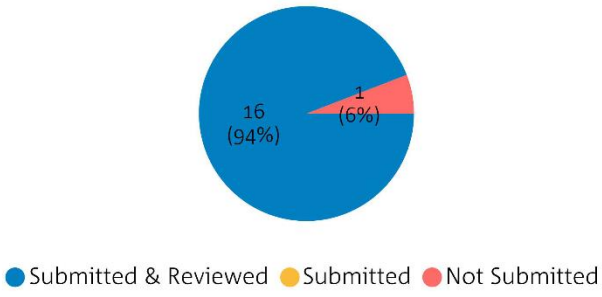
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

16 aircraft operators reported

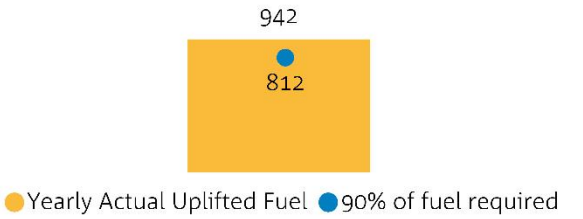
Reporting status of aircraft operators



942 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 75% of Union airports the yearly uplift was above the 90% threshold

75%

3 out of 4

Union airports

18.0 Kt of SAF purchased by aircraft operators

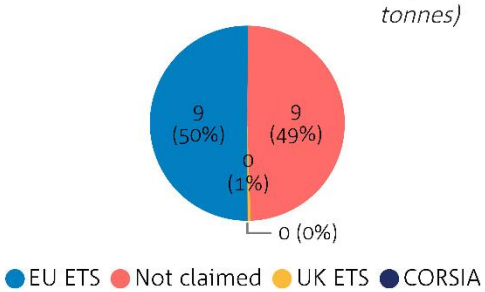
SAF

18.0 Kt

51% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



92% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	17 kt
Not Categorised	0 kt
Other aviation biofuels	1 kt
Synthetic aviation fuels	0 kt
Total	18 kt



SAF Activity in Austria

2025 in a nutshell

In 2025, 977 kt of aviation fuel was supplied at Union Airports in Austria to aircraft operators in scope of RFEUA. 956 kt of this was conventional aviation fuel, while SAF accounted for 2.14% or 20.88 kt for the Member State. These figures represent 2.48% and 1.91% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

87% of the SAF supplied was categorised as *aviation biofuel*, while 13% were *other aviation biofuels*. The largest share of the feedstock used in the supplied SAF originated from China (48%), followed by Malaysia (22%), with Uruguay (6%), Vietnam (6%) and Saudi Arabia (5%) completing the top 5 contributors of feedstock to supplied SAF in Austria.

Facility overview

Austria's SAF activity continues to be primarily driven by OMV which has been producing SAF at its Schwechat refinery since 2022 through co-processing. The company aims to supply a cumulative total of 1.5 Mt of SAF by 2030, however not specifically produced in Austria alone[92]. In 2025, OMV commissioned a 10 MW green hydrogen plant at Schwechat to support SAF and renewable fuels production[93]. In 2024, the oil major announced a partnership with Airbus aimed at accelerating the testing, evaluation, and approval of new feedstocks and production pathways[94].

AVL List conducted a synthetic aviation fuel production trial, however, this was limited to demonstration activities and no plans for continued production have been announced[95]. AGRANA had announced plans to produce SAF in Pischelsdorf capturing biogenic CO_2 from its bioethanol fermentation process. Recent updates indicate that there are no concrete in-house SAF production plans, but the company aims to instead supply the CO_2 for the production of synthetic fuels[96].

Other updates

Austria's ambition to expand its SAF industry was underscored by the publication of a SAF roadmap in 2024 by the Federal Ministry of Innovation, Mobility, and Infrastructure (BMIMI)[97]. This document outlines key areas for the industry's development in Austria, including the regulatory landscape, SAF demand, economic potential, and future

[92] https://www.omv.com/en/media/press-releases/2025/250116-omv-and-airbus-collaborate-to-drive-aviation-decarbonization

[93] https://www.omv.com/en/media/press-releases/2025/250430-omv-unveils-austria-s-largest-green-hydrogen-production-plant

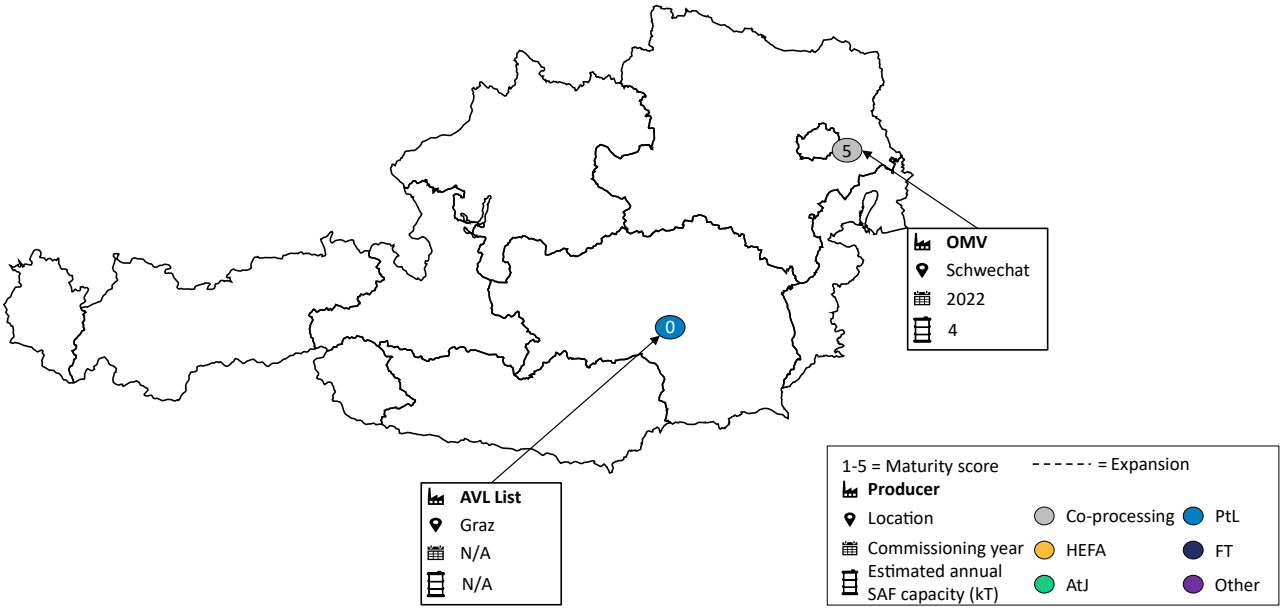
[94] https://www.omv.com/en/media/press-releases/2025/250116-omv-and-airbus-collaborate-to-drive-aviation-decarbonization

[95] https://www.bmimi.gv.at/themen/verkehr/luftfahrt/publikationen/saf-roadmap.html; Member State feedback

[96] https://www.bmimi.gv.at/themen/verkehr/luftfahrt/publikationen/saf-roadmap.html

[97] https://www.bmimi.gv.at/themen/verkehr/luftfahrt/publikationen/saf-roadmap.html

measures to support achieving national targets. Austria also announced participation in the eSAF Early Movers Coalition, launched by the European Commission in December 2025 to accelerate the deployment of synthetic aviation fuels through coordinated financial support and auction mechanisms[98].



Note: 0 = Production has only been tested

Figure 21 - Map of SAF production facilities in Austria.

[98] https://transport.ec.europa.eu/news-events/news/eu-launches-early-movers-coalition-accelerate-sustainable-aviation-fuel-uptake-2025-12-04_en

Belgium



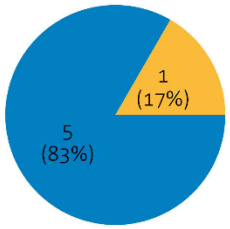
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

6 aviation fuel suppliers reported on SAF and aviation fuel quantities

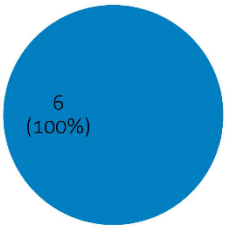
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

6 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

35.8 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
1.8 Mt	35.8 kt	1.96%

83% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Other aviation biofuels

0.12 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Belgium

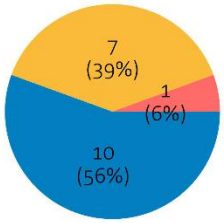
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

17 aircraft operators reported

Reporting status of aircraft operators

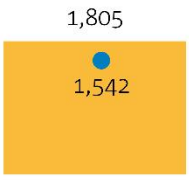


Submitted & Reviewed · Submitted · Not Submitted

1,805 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel · 90% of fuel required

In 100% of Union airports the yearly uplift was above the 90% threshold

100%

3 out of 3

Union airports

22.8 Kt of SAF purchased by aircraft operators

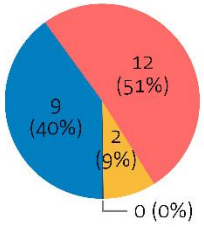
SAF

22.8 Kt

49% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS · Not claimed · UK ETS · CORSIA

71% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	1 kt
Aviation biofuels	16 kt
Not Categorised	1 kt
Other aviation biofuels	5 kt
Synthetic aviation fuels	0 kt
Total	**23 kt**



SAF Activity in Belgium

2025 in a nutshell

In 2025, 1.8 Mt of aviation fuel was supplied at Union Airports in Belgium to aircraft operators in scope of RFEUA. 1.79 Mt of this was conventional aviation fuel, while SAF accounted for 1.96% or 35.81 kt for the Member State. These figures represent 4.65% and 3.27% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

83% of the SAF supplied was categorised as *aviation biofuel*, while 17% were *other aviation biofuels*. The largest share of the feedstock used in the supplied SAF originated from China (53%), followed by Germany (8%), with the Netherlands (7%), France (5%) and United Kingdom (5%) completing the top 5 contributors of feedstock to supplied SAF in Belgium.

Facility overview

Belgium hosts domestic SAF production following the start of operations at TotalEnergies' Antwerp refinery. SAF production began in 2025 through co-processing with an initial output of 50 kt per year with plans to increase output to 80 kt per year[99]. At present, the SAF produced is primarily intended for export markets, including Germany, with the possibility of extending distribution to the domestic market later in 2026[100].

Besides TotalEnergies, OMV has announced plans for a facility in the Port of Antwerp which is estimated to produce 99 kt of SAF annually (290 kt renewable fuels output announced) with commissioning expected in 2028[101]. A land lease has been approved, while the final investment decision and permitting remain pending[102].

In the Ghent region, Terra Mater is advancing a project based on the Alcohol-to-Jet (AtJ) pathway to produce advanced aviation biofuels, although further details on timeline and capacity have not yet been publicly disclosed[103]. In May 2026, LanzaTech also announced an AtJ-based plant aiming to produce 79 kt of SAF per year in the North Sea Port, Ghent[104]. Targeted commissioning year has not been disclosed.

Other updates

Alongside production initiatives, Belgium's downstream SAF supply chain is also further developing. Brussels Airport has SAF supply capability through the NATO pipeline system, which enables the distribution of SAF alongside conventional aviation fuel[105]. The airport also maintains incentives scheme to encourage SAF use by airlines[106].

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[99] https://aviation.totalenergies.com/en/blog/boarding/totalenergies-steps-up-saf-production-in-europe

[100] From Member State feedback

[101] https://www.industrylinqs.com/recarb-europe/2025/01/omv-considers-building-saf-plant-in-antwerp/

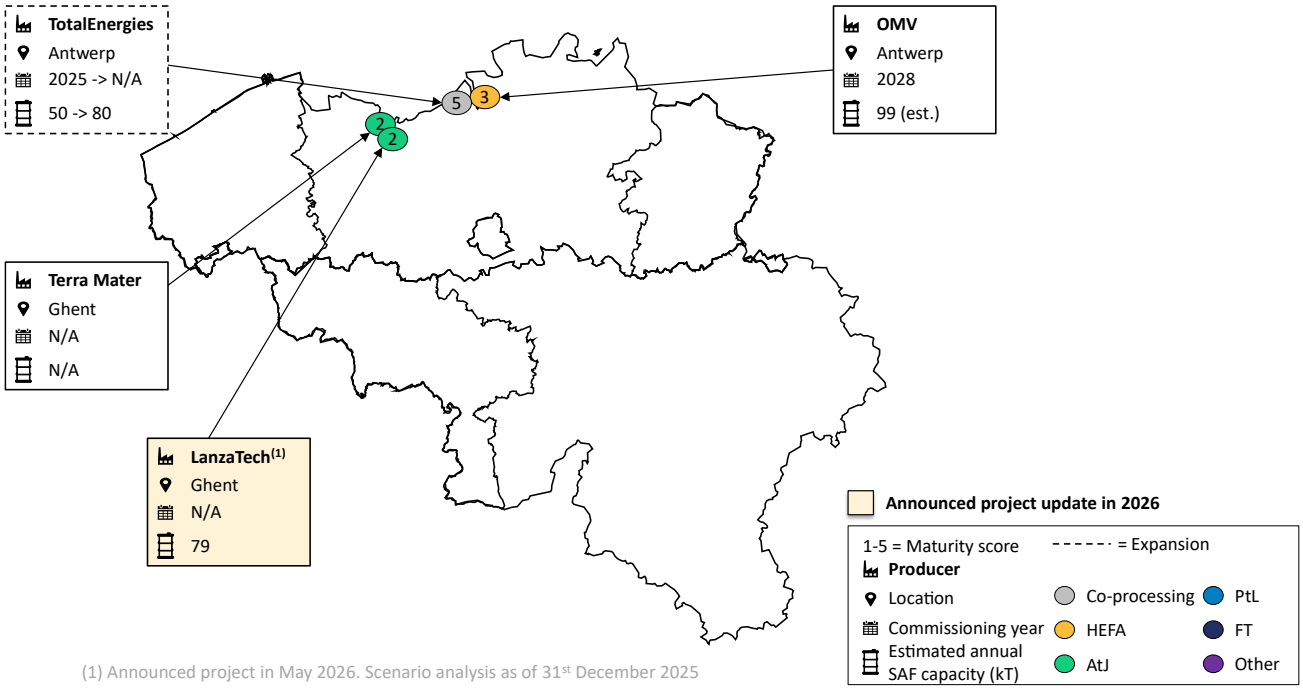
[102] https://www.belganewsagency.eu/austrian-energy-and-chemicals-giant-plans-multi-million-euro-facility-in-antwerp-port

[103] https://en.northseaport.com/north-sea-hub-sustainable-aviation-fuel-chemicals-production

[104] https://ir.lanzatech.com/news-releases/news-release-details/lanzatech-selects-north-sea-port-ghent-site-europes-first

[105] https://press.brusselsairlines.com/brussels-airlines-and-brussels-airport-kick-off-the-new-year-with-first-delivery-of-sustainable-aviation-fuel-via-nato-pipeline

[106] https://www.brusselsairport.be/en/aviation-development/charges-fees-and-incentives/saf-incentive



(1) Announced project in May 2026. Scenario analysis as of 31st December 2025

Figure 22 – Map of SAF production facilities in Belgium.

Bulgaria



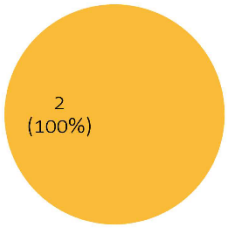
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

2 aviation fuel suppliers reported on SAF and aviation fuel quantities

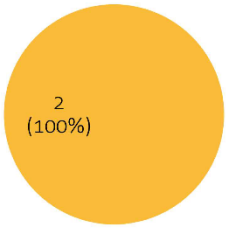
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

2 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

4.3 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
213.8 kt	4.3 kt	2.02%

87% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Other aviation biofuels

0.01 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings



Bulgaria



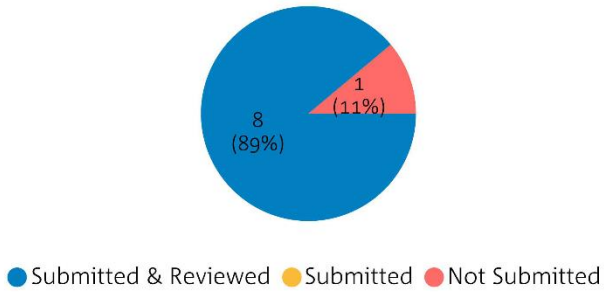
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

8 aircraft operators reported

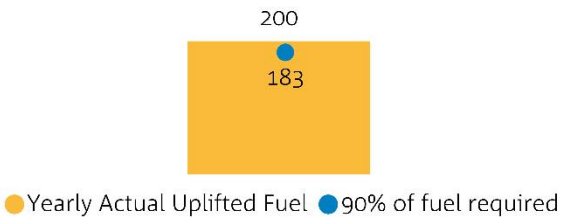
Reporting status of aircraft operators



200 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

3 out of 3

Union airports

3.7 Kt of SAF purchased by aircraft operators

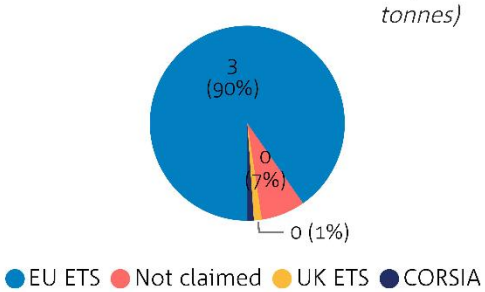
SAF

3.7 Kt

93% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



85% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	3 kt
Not Categorised	0 kt
Other aviation biofuels	1 kt
Synthetic aviation fuels	0 kt
Total	4 kt



SAF Activity in Bulgaria

2025 in a nutshell

In 2025, 214 kt of aviation fuel was supplied at Union Airports in Bulgaria to aircraft operators in the scope of RFEUA. 210 kt of this was conventional aviation fuel, while SAF accounted for 2.02% or 4.33 kt for the Member State. These figures represent 0.54% and 0.40% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

87% of the supplied SAF was categorised as *aviation biofuel*, while 13% were *other aviation biofuels*. Feedstock used in the supplied SAF originated from three countries: China (87%), followed by United Kingdom (11%) and Italy (2%).

Facility overview

Bulgaria currently has no domestic SAF production capacity. The only publicly known indication of potential future activity came from the oil and gas company Lukoil in 2024, which expressed an intent to explore SAF production at its Bulgarian refinery[107]. However, no further details on project scope, timeline, or technology have been publicly disclosed.

Other updates

Despite the absence of domestic production, SAF has been supplied to Vasil Levski Airport - Sofia since early 2025. The airport reported that a large share of departing flights operated using a blend of Jet A1 and SAF, indicating early uptake of SAF within the country[108].

[107] https://www.safinvestor.com/news/145557/lukoil/

[108] https://centreforaviation.com/news/sofia-airport-uses-2-saf-fuel-to-power-75-of-departing-flights-in-jan-2025-1303601



Croatia



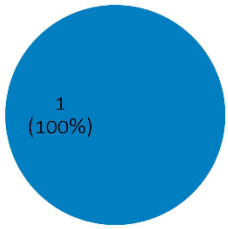
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

1 aviation fuel supplier reported on SAF and aviation fuel quantities

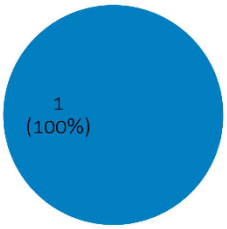
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

1 aviation fuel supplier reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

5.0 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
217.2 kt	5.0 kt	2.29%

98% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Advanced aviation biofuels

0.02 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Croatia

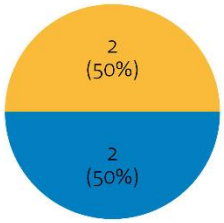
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

4 aircraft operators reported

Reporting status of aircraft operators

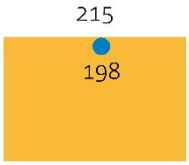


Submitted & Reviewed Submitted Not Submitted

215 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel 90% of fuel required

In 100% of Union airports the yearly uplift was above the 90% threshold

100%

4 out of 4

Union airports

3.8 Kt of SAF purchased by aircraft operators

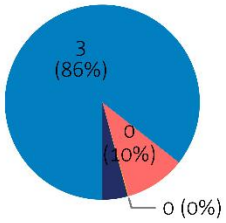
SAF

3.8 Kt

90% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS Not claimed UK ETS CORSIA

93% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	3 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	4 kt



Croatia



SAF Activity in Croatia

2025 in a nutshell

In 2025, 217 kt of aviation fuel was supplied at Union Airports in Croatia to aircraft operators in scope of RFEUA. 212 kt of this was conventional aviation fuel, while SAF accounted for 2.29% or 4.98 kt for the Member State. These figures represent 0.55% and 0.45% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

98% of the supplied SAF was categorised as *aviation biofuel*, while 2% was *advanced aviation biofuels*. Feedstock used in the supplied SAF originated from two countries: China (92%), followed by Indonesia (2%).

Facility overview

INA aims to establish continuous SAF production in Croatia, having conducted a co-processing test at its Rijeka refinery in May 2025 which received ISCC certification in the process[109]. The pilot involved the co-processing of approximately 1,000 tonnes of biogenic feedstock, including 5% POME, a residue-based feedstock aligned with advanced biofuel pathway under the Renewable Energy Directive[110]. Following the successful trial, INA has announced its intention to establish continuous SAF supply from the Rijeka refinery by 2029[111,112]. No other public announcements have been made regarding SAF production projects in Croatia.

Other updates

Croatia Airlines, in partnership with INA, successfully operated initial flights with SAF in 2024 from Zagreb Airport[113]. The initiative by INA was an important step towards establishing continuous supply of SAF in Croatia.

[109] https://www.ina.hr/en/announcement/ina-successfully-pilots-sustainable-aviation-fuel-production/

[110] https://www.ina.hr/en/announcement/ina-successfully-pilots-sustainable-aviation-fuel-production/

[111] https://www.ina.hr/en/announcement/ina-successfully-pilots-sustainable-aviation-fuel-production/

[112] Based on feedback from Member States

[113]https://www.croatiaairlines.com/resources/dokumenti/korporativno-upravljanje/godisnja-izvjesca/annual-report-2024.pdf

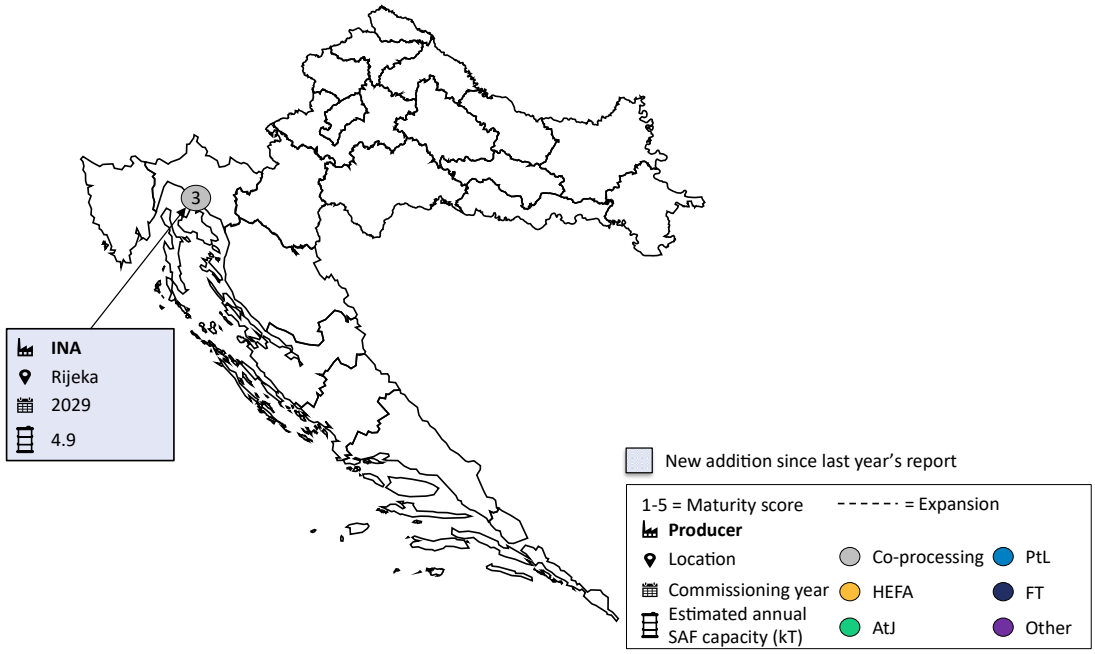


Figure 23 - Map of SAF production facilities in Croatia.

Cyprus



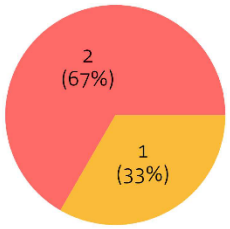
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

1 aviation fuel supplier reported on SAF and aviation fuel quantities

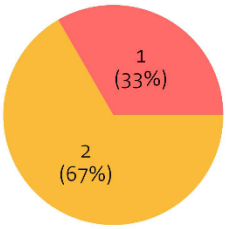
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

2 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

2.7 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
136.0 kt	2.7 kt	2.00%

100% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels

0.01 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings



Cyprus



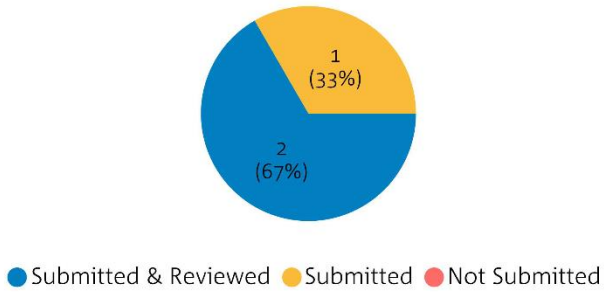
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

3 aircraft operators reported

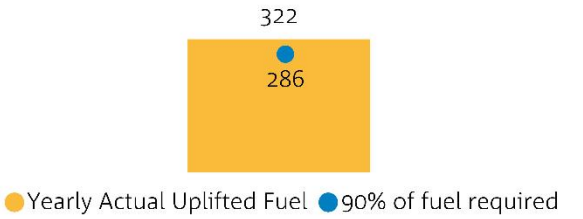
Reporting status of aircraft operators



322 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

2 out of 2

Union airports

5.7 Kt of SAF purchased by aircraft operators

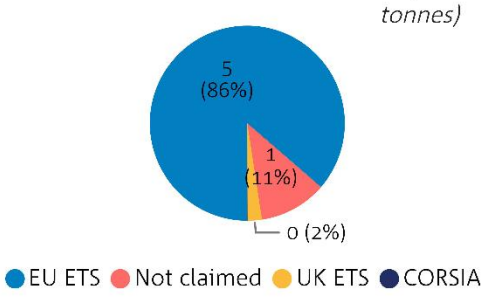
SAF

5.7 Kt

89% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



60% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	3 kt
Not Categorised	0 kt
Other aviation biofuels	2 kt
Synthetic aviation fuels	0 kt
Total	**6 kt**



SAF Activity in Cyprus

2025 in a nutshell

In 2025, 136 kt of aviation fuel was supplied at Union Airports in Cyprus to aircraft operators in scope of RFEUA. 133 kt of this was conventional aviation fuel, while SAF accounted for 2.00% or 2.72 kt for the Member State. These figures represent 0.35% and 0.25% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

100% of the supplied SAF was categorised as *aviation biofuel*. China was the only country of origin (100%) for the feedstock used in the supplied SAF in Cyprus.

Facility overview

Cyprus currently does not have any domestic SAF production capacity, and no public announcements have been made regarding future projects related to SAF production in the country.

Other updates

In 2025, both Larnaca International Airport and Paphos International Airport received 100% SAF price support, effectively removing the cost premium and enabling SAF uptake despite the absence of domestic production[114].

[114]https://climate.ec.europa.eu/document/download/13dd8dc2-9011-4fdb-acb8-f21c260dd080_en?filename=eea_airports_aviation_fuels_en.pdf

Czechia



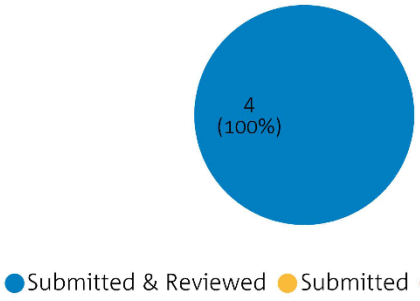
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

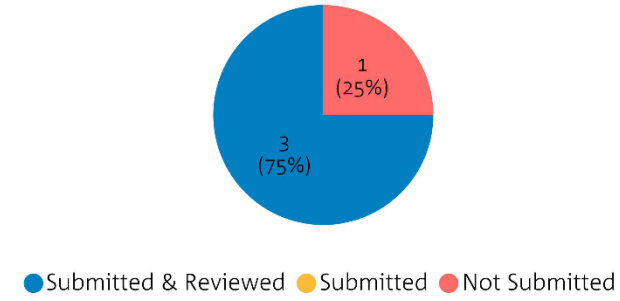
4 aviation fuel suppliers reported on SAF and aviation fuel quantities

Reporting status - SAF and aviation fuel quantities



3 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



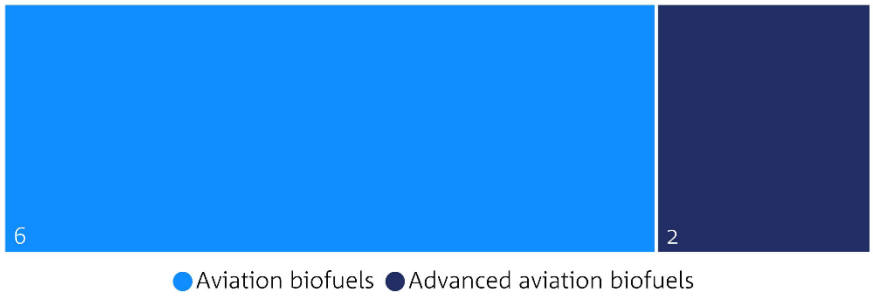
8.2 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
397.6 kt	8.2 kt	2.06%

75% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



0.03 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings



Czechia



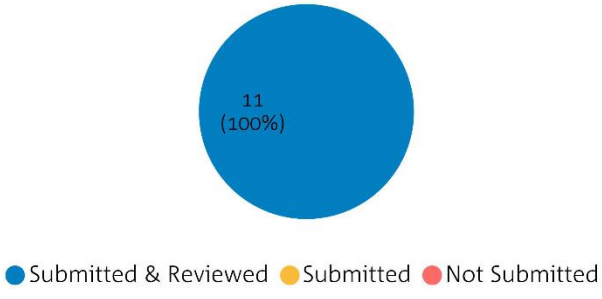
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

11 aircraft operators reported

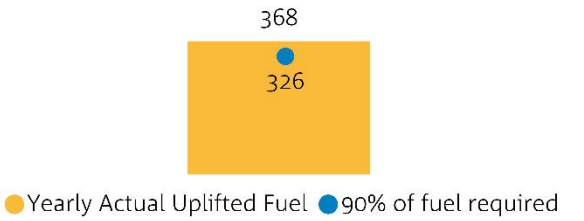
Reporting status of aircraft operators



368 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

1 out of 1

Union airports

6.5 Kt of SAF purchased by aircraft operators

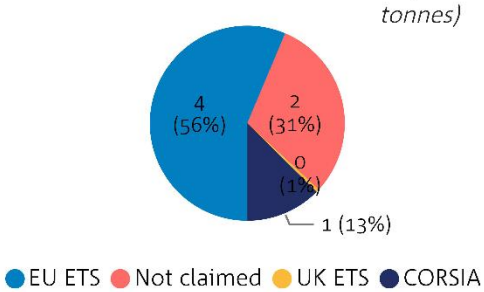
SAF

6.5 Kt

69% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



85% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	1 kt
Aviation biofuels	6 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	7 kt



SAF Activity in Czechia

2025 in a nutshell

In 2025, 398 kt of aviation fuel was supplied at Union Airports in Czech Republic to aircraft operators in the scope of RFEUA. 389 kt of this was conventional aviation fuel, while SAF accounted for 2.06% or 8.19 kt for the Member State. These figures represent 1.01% and 0.75% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

75% of the supplied SAF was categorised as *aviation biofuel*, while 25% were *advanced aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (51%), followed by Indonesia (25%), with United Kingdom (11%), Belgium (4%) and Malaysia (3%) completing the top 5 contributors of feedstock to supplied SAF in Czech Republic.

Facility overview

Czech Republic currently does not have any domestic SAF production capacity, and no public announcements have been made regarding future projects related to SAF production in the country.

Other updates

The Polish oil and gas major, ORLEN has introduced SAF at Václav Havel Airport Prague, indicating early fuel availability in the market[115].

[115]https://www.orlen.pl/en/about-the-company/media/press-releases/current/2025/september-2025/orlen-group-launches-saf-fuels-across-baltic-markets

Denmark



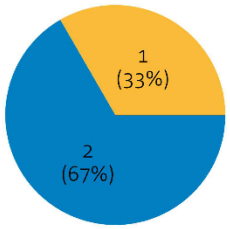
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

3 aviation fuel suppliers reported on SAF and aviation fuel quantities

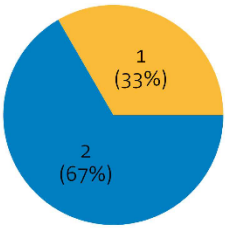
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

3 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

20.8 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
978.8 kt	20.8 kt	2.13%

99% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Other aviation biofuels

0.07 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings



Denmark



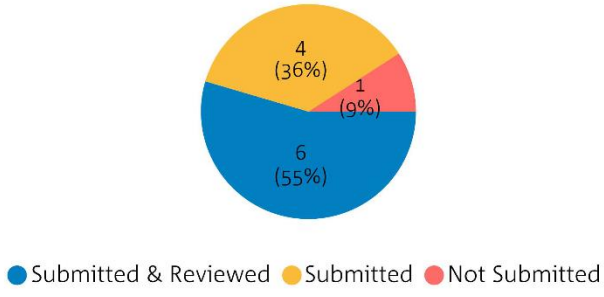
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

10 aircraft operators reported

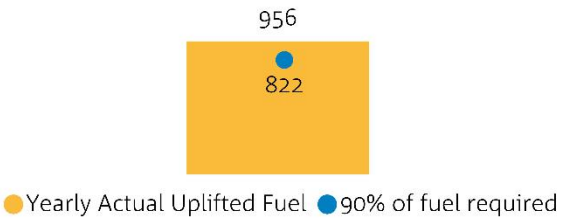
Reporting status of aircraft operators



956 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

3 out of 3

Union airports

18.5 Kt of SAF purchased by aircraft operators

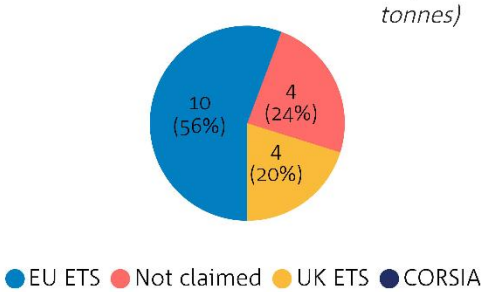
SAF

18.5 Kt

76% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



98% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	18 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	19 kt



SAF Activity in Denmark

2025 in a nutshell

In 2025, 979 kt of aviation fuel was supplied at Union Airports in Denmark to aircraft operators in the scope of RFEUA. 958 kt of this was conventional aviation fuel, while SAF accounted for 2.13% or 20.84 kt for the Member State. These figures represent 2.49% and 1.90% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

99% of the supplied SAF was categorised as *aviation biofuel*, while 1% was *other aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (92%), followed by Vietnam (5%), with Malaysia (2%), Belgium (0.5%) and Netherlands (0.4%) completing the top 5 contributors of feedstock to supplied SAF in Denmark.

Facility overview

Denmark has five commercial scale announced SAF facilities, all focused on synthetic aviation fuel production. Project Endor, led by Arcadia eFuels in Vordingborg, has completed front-end engineering design (FEED). It targets production of 68 kt of SAF annually with planned commissioning in 2028[116]. Project Fjord PtX, developed by Copenhagen Infrastructure Partners in Aalborg, targets commissioning in 2030 with an anticipated output of 90 kt per year[117].

Two additional initiatives rely on the methanol-to-jet pathway (MtJ), which is not ASTM certified yet (as of April 2026). The MeSAF consortium, comprising European Energy, Kosan Gas and Vertimass, indicated plans for a pilot facility in Aalborg. Following the pilot stage, annual SAF output target of 10 kt was announced, although no commissioning year has been confirmed[118]. No recent news or further disclosures regarding this project have been announced. The other MtJ project, is being developed by Metafuels, working together with European Energy for a facility in Padborg (project Pizol). The plant is planned to reach an annual output of 3.5 kt with commissioning expected in 2029[119]. However, limited information on project progress has been made publicly available and achieving planned commissioning year is uncertain.

Skovgaard Energy has also announced plans to establish the North Sky project in a joint venture with Sumitomo Corporation in Holstebro, which is intended to produce both aviation biofuel and synthetic aviation fuel from biogas. No information regarding planned production capacity or commissioning timeline has been disclosed[120].

A demonstration project, FrontFuel SynFuels, led by Topsoe has been testing production of synthetic fuels through combining hydrogen and CO_2 conversion with Fischer-Tropsch synthesis, with no confirmed plans for commercial expansion[121].

Other updates

In 2025, the European Commission approved EUR 36 million to the Danish State aid scheme to support the use of sustainable aviation fuel on domestic routes. The measure provides direct grants to cover the additional cost of using SAF and remains in effect until 2027[122]. In March 2026, Denmark launched its first domestic route using a 40% blend of

[116] https://arcadiaefuels.com/arcadia-efuels-completes-the-front-end-engineering-design/

[117] https://www.fjord-ptx.com/about-the-plant/

[118] https://mesaf.energy/project/

[119] https://metafuels.ch/metafuels-plans-esaf-facility-in-denmark-together-with-europeanenergy/

[120] https://www.skovgaardenergy.dk/en/projects/north-sky

[121] https://www.topsoe.com/blog/frontfuel-synfuels-demonstration

[122] https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1928

sustainable aviation fuel produced from used cooking oil on the Aalborg to Copenhagen service operated by Norwegian Air Shuttle, as part of its ongoing implementation of its national green aviation strategy[123].

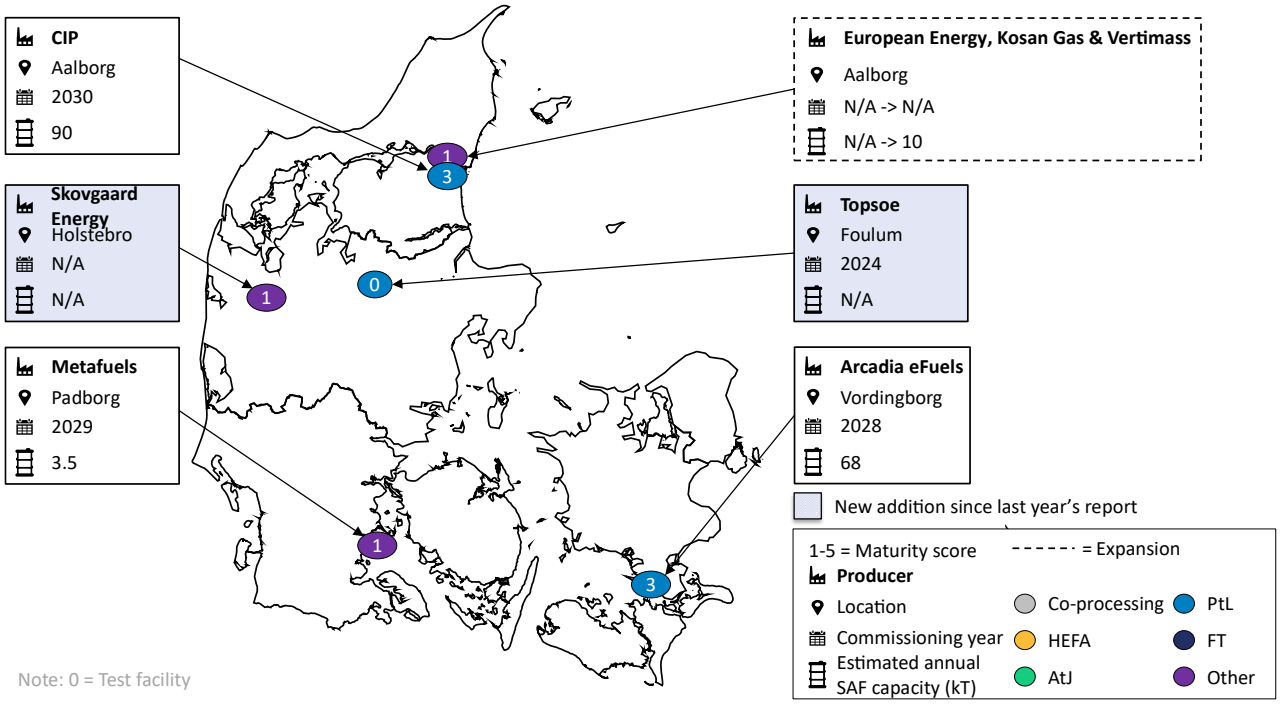


Figure 24 – Map of SAF production facilities in Denmark.

[123]https://biofuels-news.com/news/denmark-launches-first-domestic-flight-using-saf-made-from-uco/

Estonia



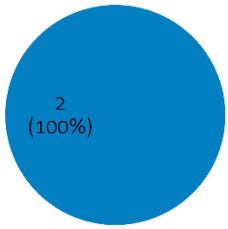
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

2 aviation fuel suppliers reported on SAF and aviation fuel quantities

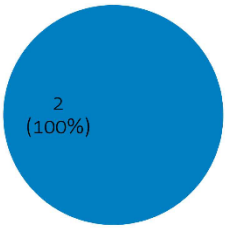
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

2 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

1.3 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
63.7 kt	1.3 kt	2.09%

100% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels

0.00 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





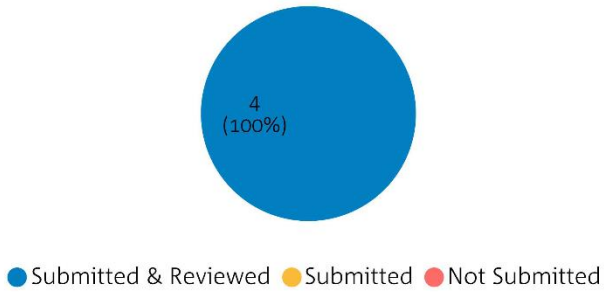
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

4 aircraft operators reported

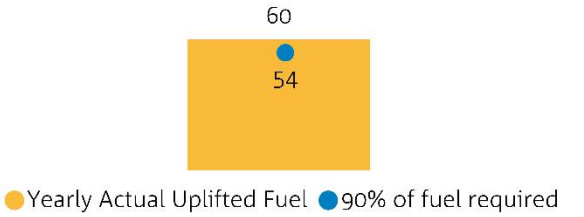
Reporting status of aircraft operators



60 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

1 out of 1

Union airports

1.1 Kt of SAF purchased by aircraft operators

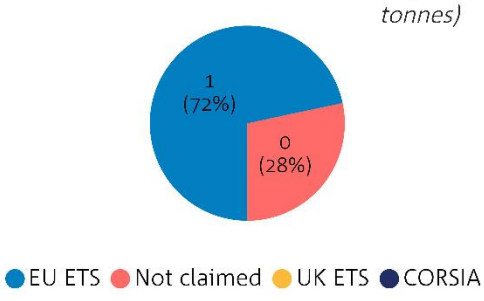
SAF

1.1 Kt

72% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



96% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	1 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	**1 kt**



SAF Activity in Estonia

2025 in a nutshell

In 2025, 63.7 kt of aviation fuel was supplied at Union Airports in Estonia to aircraft operators in the scope of RFEUA. 62.4 kt of this was conventional aviation fuel, while SAF accounted for 2.09% or 1.33 kt for the Member State. These figures represent 0.16% and 0.12% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

100% of the supplied SAF was categorised as *aviation biofuel*. Largest share of the feedstock used in the supplied SAF originated from Malaysia (40%), followed by Germany (16%), with Singapore (12%), Vietnam (11%) and Australia (8%) completing the top 5 contributors of feedstock to supplied SAF in Estonia.

Facility overview

In recent years, several developers have considered various projects that are not currently in the active phase. Protio signed a Memorandum of Understanding with the Port of Tallinn in 2024 to explore synthetic fuels production, including SAF, at Muuga Harbour. However, the project is currently on hold and no target production capacity or commissioning date has been disclosed[124,125].

Another project has been identified in Narva, led by Biojet. The facility targets SAF production from wood-based feedstocks, however there is limited information on its development[126].

Other updates

A joint study conducted by Estonia and Latvia, supported by the European Commission was completed in November 2025. The study concluded that no SAF production facilities are expected to be developed in Estonia in the near term due to factors including limited feedstock availability and high production costs, while also identifying measures to support SAF access in line with EU regulation[127,128].

[124] https://www.kosangas.se/press/sustainable-aviation-fuel-plant-to-start-production-in-2024-in-denmark

[125] From Member State feedback

[126] https://kliimaministeerium.ee/sites/default/files/documents/2025-12/Final%20Report%20%28Lõppraport%29.pdf

[127] https://kliimaministeerium.ee/sites/default/files/documents/2025-12/Final%20Report%20%28Lõppraport%29.pdf

[128] From Member State feedback

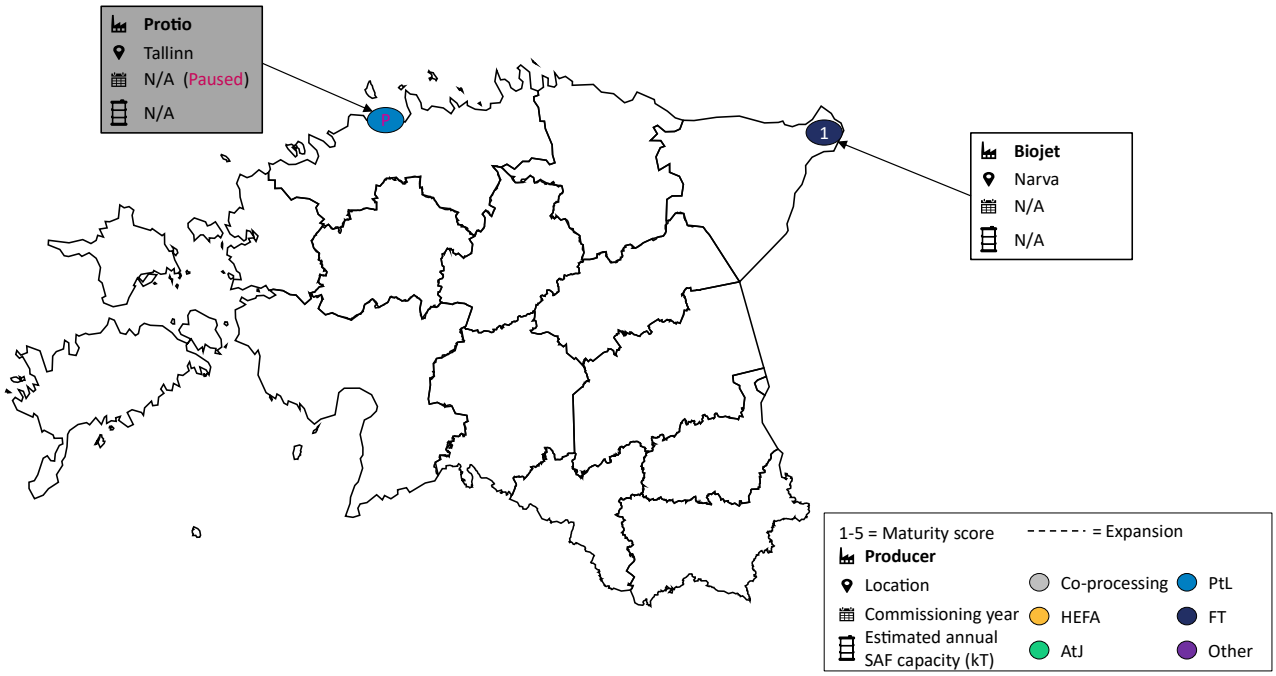


Figure 25 - Map of SAF production facilities in Estonia.

Finland



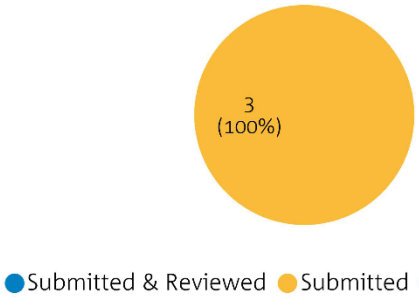
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

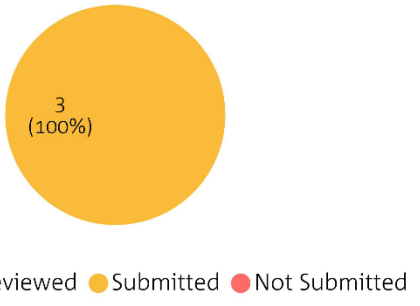
3 aviation fuel suppliers reported on SAF and aviation fuel quantities

Reporting status - SAF and aviation fuel quantities



3 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



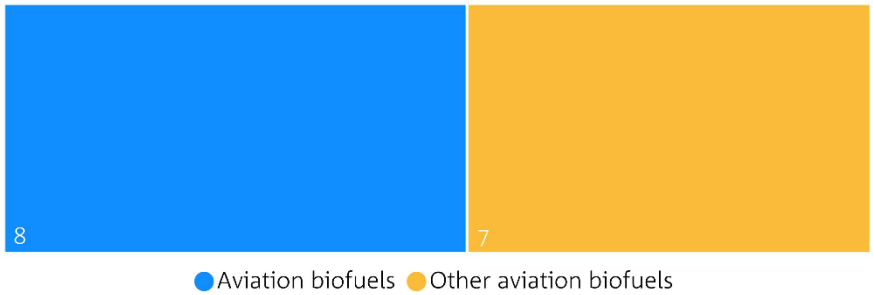
14.6 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
722.5 kt	14.6 kt	2.02%

53% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



0.05 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings



Finland



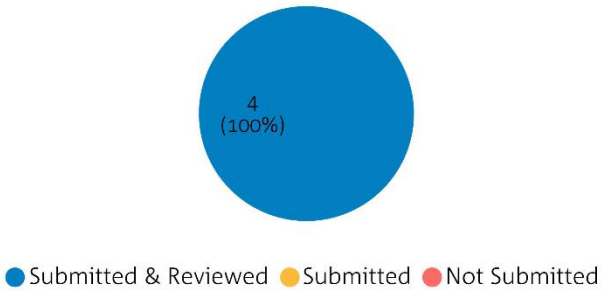
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

4 aircraft operators reported

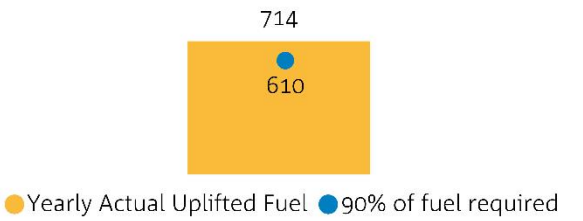
Reporting status of aircraft operators



714 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 50% of Union airports the yearly uplift was above the 90% threshold

50%

1 out of 2

Union airports

17.3 Kt of SAF purchased by aircraft operators

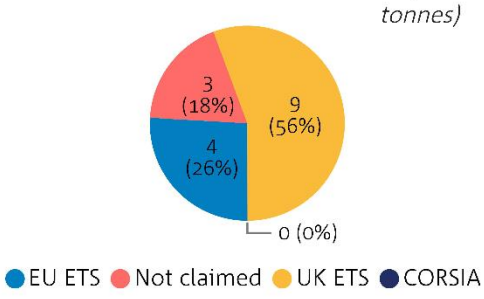
SAF

17.3 Kt

82% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



59% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	10 kt
Not Categorised	0 kt
Other aviation biofuels	7 kt
Synthetic aviation fuels	0 kt
Total	17 kt



SAF Activity in Finland

2025 in a nutshell

In 2025, 723 kt of aviation fuel was supplied at Union Airports in Finland to aircraft operators in the scope of RFEUA. 708 kt of this was conventional aviation fuel, while SAF accounted for 2.02% or 14.58 kt for the Member State. These figures represent 1.84% and 1.33% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

53% of the supplied SAF was categorised as *aviation biofuel,* while 47% was *other aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (19%), followed by United Kingdom (16%), with Poland (12%), Saudi Arabia (10%) and France (8%) completing the top 5 contributors of feedstock to supplied SAF in Finland.

Facility overview

SAF production in Finland continues to be led by Neste, which has the capacity to produce up to 100 kt of SAF annually at its Porvoo refinery[129]. Neste has also announced plans to transform the Porvoo refinery into a renewable and circular solutions site, with the objective of increasing renewable fuels production capacity, including SAF, by up to 1.5 Mt[130]. This expansion is targeted for the mid-2030s.

All other SAF projects announced in Finland are targeting production of synthetic aviation fuel. Liquid Sun has launched a pilot project in Espoo, which uses low-temperature electrolysis technology to convert biogenic CO_2 and renewable hydrogen into synthetic fuel. The project is being developed in partnership with Finnair, ABB, Fortum and Finavia, and commenced operations in late 2025[131,132].

Norwegian fuel producer, Norsk e-Fuel is leading three projects. Project Rauma, developed in collaboration with Fortum is aiming to produce 80 kt of renewable fuels annually, resulting in estimated 44 kt of SAF by 2031[133,134]. Project Imatra is also targeting the production of 80 kt of renewable fuels per year. Timeline for both projects has not been disclosed. The third project, project Tornio, was announced in early 2026 and is a collaboration with Outokumpu aiming to produce synthetic fuels using CO side stream from ferrochrome production. The project targets production of 80 kt of SAF annually and commissioning in 2032[135].

Verso Energy has announced the development of two projects in Finland. The first one is located in Oulu, while the second is in Tornio[136]. Both project are based on the methanol-to-jet pathway (MtJ) and have announced capacity of 81 kt of SAF annually. Commissioning year for both projects has not been disclosed.

[129] https://www.safinvestor.com/project/141894/neste-porvoo-finland

[130] https://www.reuters.com/sustainability/sustainable-finance-reporting/neste-invest-25-billion-euros-convert-porvoo-refinery-into-biofuels-plant-2023-12-20/

[131] https://www.liquidsun.co/post/esaf-production-pilot-with-abb-finnair-fortum-finavia

[132] https://hydrogeneurope.eu/liquid-sun-launches-esaf-production-pilot-with-abb-finnair-fortum-and-finavia/

[133] https://www.norsk-e-fuel.com/projects

[134] https://www.omexom.com/news/omexom-leads-400-kv-transmission-design-to-enable-finlands-e-fuels-ambitions-at-rauma-harbour/

[135] https://www.norsk-e-fuel.com/outokumpu

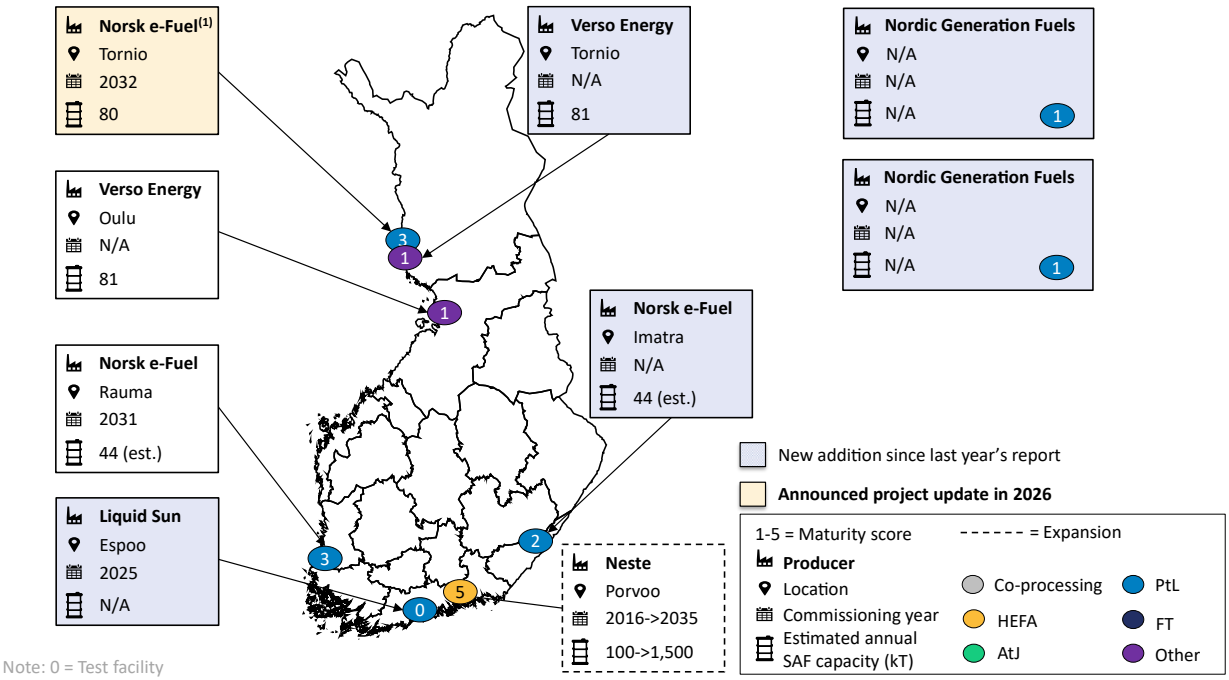
[136] https://oulu.com/wp-content/uploads/2025/05/antoine-huard_verso-energy-oulu-project.pdf

Nordic Generation Fuels, backed by Octopus Energy Generation and Business Finland, is developing two SAF production facilities in Finland using biogenic CO_2 and renewable hydrogen[137]. However, key project details such as planned capacity and commissioning year have not been disclosed[138].

In comparison to the *ReFuelEU Aviation Annual Technical Report 2025*, a project by AM Green Group has been removed, since there have been no updates and no specific information has been disclosed[139].

Other updates

SAF related activity in Finland is not limited to production. In late 2024, Finnair introduced a passenger SAF contribution scheme, and in September 2025 extended this to corporate and cargo clients through a dedicated SAF service[140]. Finnair also reported that SAF accounted for approximately 1.6% of its total fuel use in 2025[141]. Finland also announced participation in the eSAF Early Movers Coalition, launched by the European Commission in December 2025 to accelerate the deployment of synthetic aviation fuels through coordinated financial support and auction mechanisms[142]. Overall, SAF development in Finland reflects a combination of existing production capacity, ongoing project development, and increasing demand-side activity.



Note: 0 = Test facility
(1) Announced project in January 2026. Scenario analysis as of 31st December 2025

Figure 26 - Map of SAF production facilities in Finland.

[137] https://octopus.energy/press/octopus-energy-accelerates-take-off-of-clean-air-travel-with-new-investment/

[138] https://www.nordicgenerationfuels.com/

[139] From Member State feedback

[140] https://www.finnair.com/in-en/sustainability-in-travel/contribute-to-sustainable-aviation-fuel

[141] https://www.finnair.com/in-en/bluewings/sustainability/finnair-sustainability-report-2025--key-findings-from-the-author-4167784

[142] https://transport.ec.europa.eu/news-events/news/eu-launches-early-movers-coalition-accelerate-sustainable-aviation-fuel-uptake-2025-12-04_en



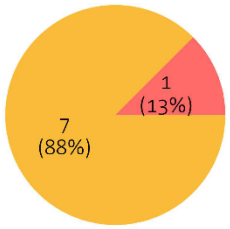
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

7 aviation fuel suppliers reported on SAF and aviation fuel quantities

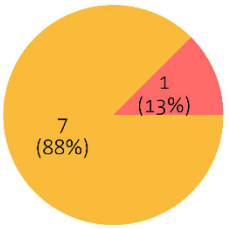
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed · Submitted · Not Submitted

7 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed · Submitted · Not Submitted

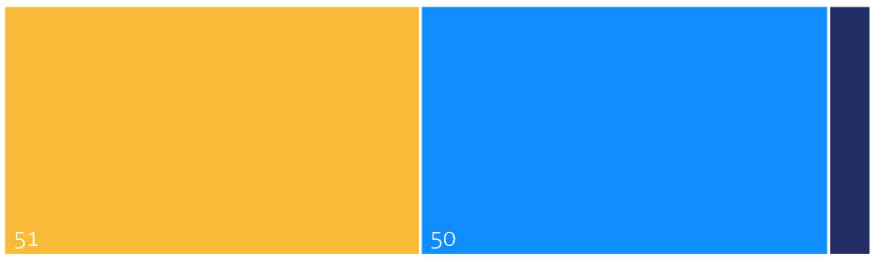
108.8 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
5.9 Mt	108.8 kt	1.85%

48% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Other aviation biofuels · Aviation biofuels · Advanced aviation biofuels

0.36 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





France

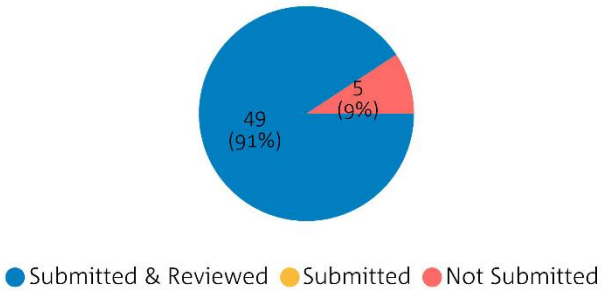
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

49 aircraft operators reported

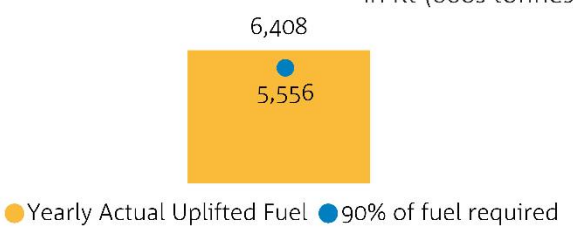
Reporting status of aircraft operators



6,408 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 84% of Union airports the yearly uplift was above the 90% threshold

84%

16 out of 19

Union airports

120.1 Kt of SAF purchased by aircraft operators

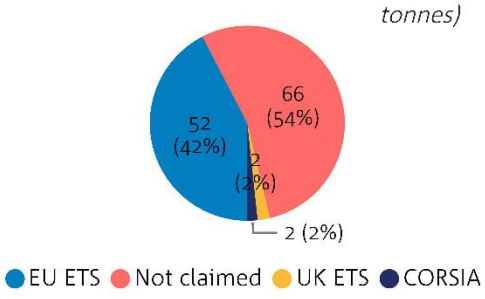
SAF

120.1 Kt

46% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



86% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	1 kt
Aviation biofuels	104 kt
Not Categorised	1 kt
Other aviation biofuels	14 kt
Synthetic aviation fuels	0 kt
Total	**120 kt**



SAF Activity in France

2025 in a nutshell

In 2025, 5.9 Mt of aviation fuel was supplied at Union Airports in France to aircraft operators in the scope of RFEUA. 5.8 Mt of this was conventional aviation fuel, while SAF accounted for 1.81% or 106.72 kt for the Member State. These figures represent 14.98% and 9.74% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

47% of the supplied SAF was categorised as *aviation biofuel,* while 48% was *other aviation biofuels and 5%* was *advanced aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (33%), followed by Germany (11%), with France (10%), United Kingdom (9%) and Netherlands (5%) completing the top 5 contributors of feedstock to supplied SAF in France.

Facility overview

SAF production in France continues to progress with multiple operational SAF facilities across the country. TotalEnergies began producing SAF at its HEFA facility in La Mède in 2021, where production capacity has been expanded to 15 kt per year in 2025[143,144]. At its Normandy facility, SAF production via co-processing was introduced in 2022 and has a capacity of 160 kt[145,146]. In addition, the company develops a dedicated HEFA facility at Grandpuits with a production capacity of 230 kt by 2026 with intention to increase to 285 kt in 2027[147,148]. Co-processing was also used in a test at Gravenchon refinery, which was previously owned by ExxonMobil[149]. The company conducted SAF production tests at the facility with targets to expand to commercial production. The refinery has been subsequently sold to North Atlantic Energies in 2025 and no information has been disclosed on potential future SAF production there[150].

Projects targeting the production of advanced aviation biofuels have also been announced in France. The largest by expected annual capacity is Elyse Energy's BioTJet project in Lacq which targets production of 87 kt of SAF, aiming for commissioning in 2030 using forestry and agricultural residues as feedstock[151]. Haffner Energy in collaboration with LanzaJet has announced a project targeting 30 kt of SAF per year with commissioning expected around 2030[152]. This

[143]https://totalenergies.com/media/news/press-releases/total-begins-producing-sustainable-aviation-fuel-in-france

[144]https://totalenergies.com/news/press-releases/paris-air-show-totalenergies-pioneer-sustainable-aviation-fuels-and-committed

[145]https://www.ogj.com/refining-processing/article/14275657/totalenergies-normandy-integrated-platform-now-producing-saf

[146]https://totalenergies.com/news/press-releases/paris-air-show-totalenergies-pioneer-sustainable-aviation-fuels-and-committed

[147]https://totalenergies.com/fr/actualites/communiques-presse/mise-au-point-chantier-transformation-grandpuits-plateforme-zero

[148]https://totalenergies.com/newsroom/totalenergies-steps-sustainable-aviation-fuel-production-grandpuits/?lang=eng

[149]https://corporate.exxonmobil.com/what-we-do/lower-emission-transportation/france-sustainable-aviation-fuel-emissions-reduction

[150] https://northatlantic.ca/media-releases/north-atlantic-france-sas-completes-acquisition

[151]https://elyse.energy/en/our-projects/e-cho

[152]https://iuk-business-connect.org.uk/wp-content/uploads/2025/08/Marcella-Franchi-SAF-Cafe_webinar-17-July-2025.pdf

will be based on the alcohol-to-jet (AtJ) pathway. Another project targeting advanced aviation biofuels production is a demonstration plant in Épinal, developed by EQTEC and CompactGTL[153]. No further details have been disclosed regarding this project.

In June 2026, Technip Energies, Airbus, Safran and Tereos entered into an agreement to develop a SAF production facility at the port of Dunkrik, under a joint venture called Rebound. The project will utilise the AtJ pathway and targets the production of 160 kt of SAF per year. Targeted commissioning year has not been disclosed[154].

Eleven projects focused on synthetic aviation fuel have been announced in France. Qair and Engie have both announced plans for facilities producing 70 kt of SAF per year[155]. Qair's HyLann project in Lannemezan is set to begin production in 2030, while Engie's France KerEAUzen project in Le Havre is expected to be commissioned in 2031[156]. Another project is Hynamic's Take Kair in Donges, which targets an annual output of 37.5 kt of SAF starting from 2030[157]. SAF+ in partnership with Lhyfe has announced a project in Le Havre, with commissioning expected in 2030, although further details remain limited[158]. The Avebio project in Tartas is led by Elyse Energy, however key project information has not been disclosed[159].

Six projects out of the eleven synthetic fuel ones are based on the methanol-to-jet (MtJ) pathway. Verso Energy has announced four projects across the country, including facilities in Rouen, Tartas and Épinal, each targeting 81 kt of SAF per year[160,161,162]. They are all targeting commissioning by 2030. The most advanced one, DEZiR, is in a Front-End Engineering Design (FEED) stage[163]. Another project was also announced in Saillat-sur-Vienne, targeting up to 153 kt annually by 2030[164]. Elyse Energy has announced project NeoCarb located in Fos-sur-Mer. Planned capacity is 75 kt annually, with targeted commissioning in 2030[165]. The sixth MtJ project in France was announced by Hy2Gen in collaboration with H2V. Project H4 Marseille Fos, located in Fos-sur-mer also targets 75 kt of SAF annually with planned commissioning in 2030[166].

[153] https://www.safinvestor.com/news/144152/144152/

[154] https://www.airbus.com/en/newsroom/press-releases/2026-06-technip-energies-airbus-safran-and-tereos-join-forces-to-develop-a-sustainable-aviation-fuel

[155] https://www.debatpublic.fr/usine-de-production-de-carburant-bas-carbone-pour-laviation-lannemezan-hylann-6702

[156] https://france-kereauzen.fr/

[157] https://www.takekair-concertation.fr/

[158] https://www.lhyfe.com/press/lhyfe-and-saf-international-group-sign-a-memorandum-of-understanding-to-decarbonise-the-aviation-industry-using-green-hydrogen/

[159] https://www.hydrocarbonprocessing.com/news/2023/03/khimod-and-elyse-energy-team-up-to-produce-saf-through-collaborative-project-avebio/

[160] https://www.debatpublic.fr/sites/default/files/2025-03/DossierConcertation_ProjetRESTART_versoEnergy.pdf

[161] https://concertation-dezir.eu/description-du-projet/

[162] https://www.sylvamo.com/us/en/esg-stories/verso-energy-to-study-turning-biogenic-carbon-dioxide-from-saillat-mill-into-sustainable-aviation-fuel

[163] https://investors.technipenergies.com/news-releases/news-release-details/technip-energies-invests-verso-energys-dezir-esaf-project-rouen

[164] https://www.debatpublic.fr/usine-de-production-de-carburant-de-synthese-pour-laviation-saillat-sur-vienne-etou-etagnac-lichen

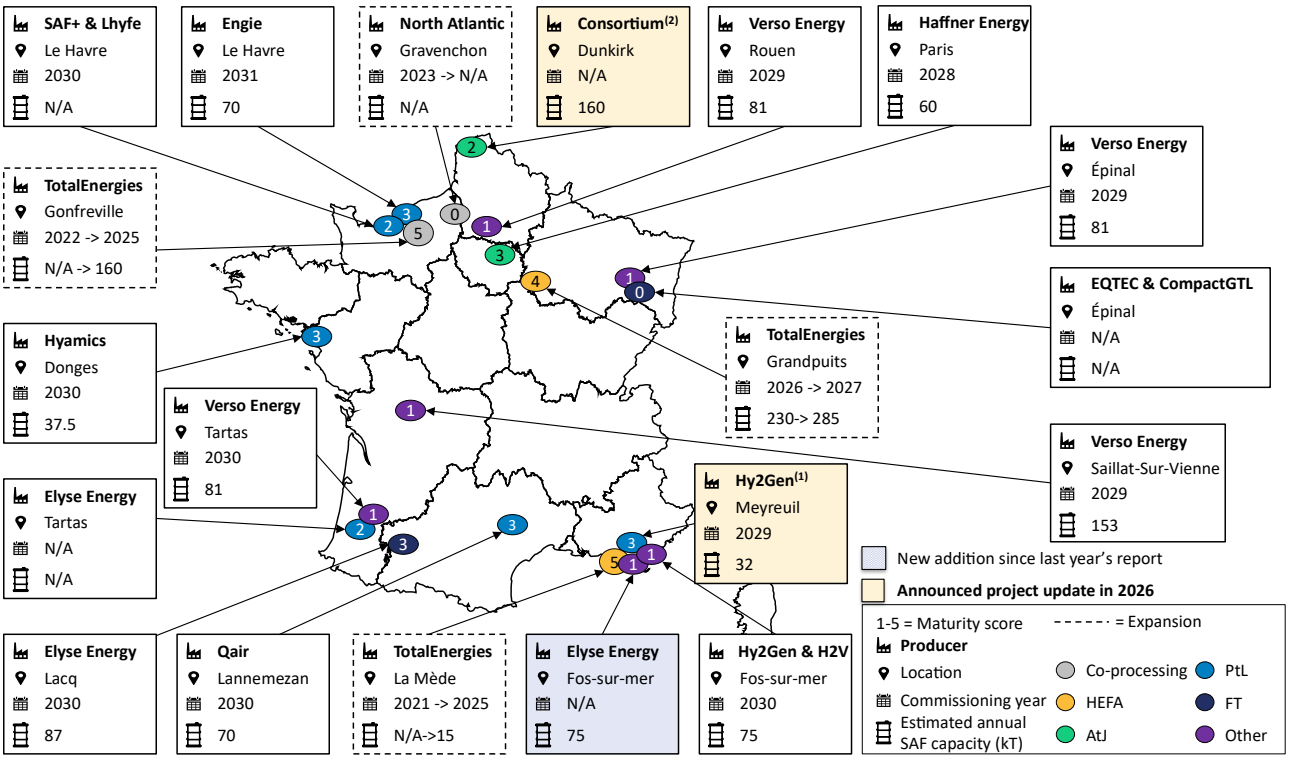
[165] https://elyse.energy/en/our-projects/neocarb

[166] https://www.hy2gen.com/h4-marseille-fos

Another project led by Hy2Gen, called Hynovera was cancelled in March 2026[167]. The project was aiming for 32 kt of SAF per year using renewable hydrogen and captured carbon dioxide[168].

Other updates

France announced participation in the eSAF Early Movers Coalition, launched by the European Commission in December 2025 to accelerate the deployment of synthetic aviation fuels through coordinated financial support and auction mechanisms[169].



Note: 0 = Production has only been tested
(1) Project has been cancelled in March 2026; (2) Project has been announced in June 2026.
Scenario analysis as of 31st December 2025

Figure 27 - Map of SAF production facilities in France.

[167] https://concertation.hynovera.fr/

[168] https://www.hy2gen.com/hynovera

[169] https://transport.ec.europa.eu/news-events/news/eu-launches-early-movers-coalition-accelerate-sustainable-aviation-fuel-uptake-2025-12-04_en

Germany



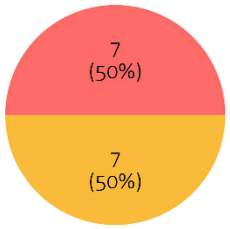
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

7 aviation fuel suppliers reported on SAF and aviation fuel quantities

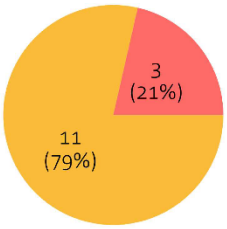
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

11 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

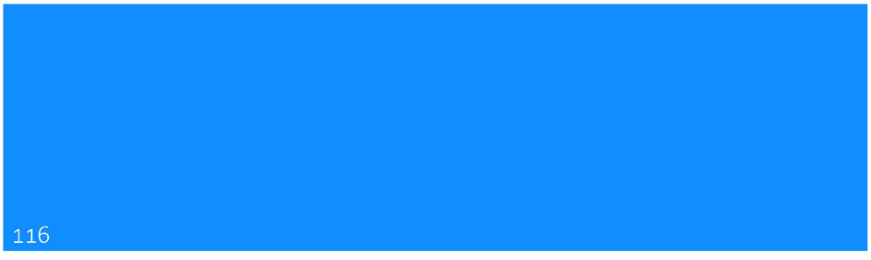
116.1 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
5.6 Mt	116.1 kt	2.07%

100% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels

0.40 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings



Germany



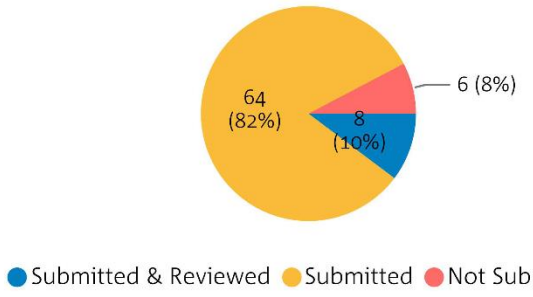
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

72 aircraft operators reported

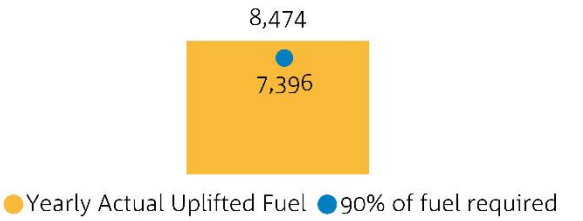
Reporting status of aircraft operators



8,474 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

19 out of 19

Union airports

148.3 Kt of SAF purchased by aircraft operators

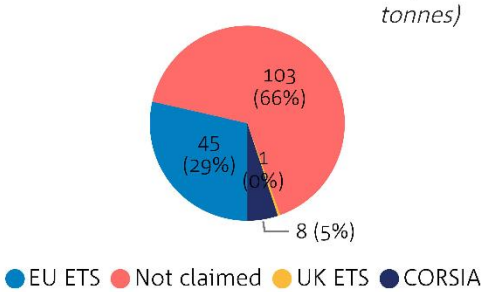
SAF

148.3 Kt

34% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



89% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	15 kt
Aviation biofuels	133 kt
Not Categorised	1 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	**148 kt**



SAF Activity in Germany

2025 in a nutshell

In 2025, 5.6 Mt of aviation fuel was supplied at Union Airports in Germany to aircraft operators in the scope of RFEUA. 5.5 Mt of this was conventional aviation fuel, while SAF accounted for 2.07% or 116.08 kt for the Member State. These figures represent 14.27% and 10.60% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

100% of the supplied SAF was categorised as *aviation biofuel*. Largest share of the feedstock used in the supplied SAF originated from China (79%), followed by Malaysia (9%), with Singapore (4%), Saudi Arabia (2%) and Indonesia (1%) completing the top 5 contributors of feedstock to supplied SAF in Germany.

Facility overview

Three SAF production facilities are operational in Germany. BP has been producing SAF at its Lingen refinery since 2022 via co-processing of waste feedstock such as used cooking oil[170]. Ineratec has commissioned its ERA ONE synthetic fuel plant in Frankfurt in 2025, with a maximum announced production capacity of approximately 2 kt of SAF per year (total renewable fuel output of 2.5 kt per year)[171]. The third one is project DAWN by Synhelion in Jülich, which commissioned in 2024, but does not produce commercial scale volumes[172].

HOLBORN is building a SAF unit at its Hamburg refinery, with commissioning expected in 2027[173]. The project has an announced renewable fuels production capacity of 220 kt per year, with estimated SAF capacity of 75 kt, although the exact share allocated to SAF has not been disclosed[174]. TotalEnergies has announced its plans to produce 50 kt of SAF annually at its Leuna refinery through co-processing starting in 2026[175].

Currently there are three active projects under development targeting the production of advanced aviation biofuels in the country. Flugplatz Straubing-Wallmühle GmbH is developing the Bavaria Biofuels facility in Straubing, which is expected to produce approximately 10 kt of SAF per year, with commissioning targeted for 2028[176]. The other one, Caphenia's Germany I facility is a demonstration project currently under construction with an announced SAF production capacity of approximately 0.5 kt per year and targeted commissioning in 2026[177]. Caphenia's next planned project is the BAYSAF facility (Germany II), located at the Gendorf Chemical Park in Bavaria. The project is expected to produce approximately 15 kt of SAF annually, with commissioning targeted for 2029[178,179].

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[170] https://www.bp.com/en/global/air-bp/news-and-views/press-releases/bp-refinery-in-lingen-starts-production-of-saf.html

[171] https://www.ineratec.de/en/news/ineratec-opens-era-one-europes-largest-e-fuel-production-plant-goes-operation-frankfurt

[172] https://synhelion.com/our-plants

[173] https://www.holborn.de/en/press/construction-begins-on-germany-s-first-gdp-complex-in-a-refinery

[174] https://www.holborn.de/presse/bergfest-fuer-den-gdp-komplex

[175] https://totalenergies.com/news/press-releases/paris-air-show-totalenergies-pioneer-sustainable-aviation-fuels-and-committed

[176] From Member State feedback

[177] https://caphenia.tech/en/reactor-delivery/

[178] https://www.bayern.de/studien-zeigen-neue-perspektiven-fr-biogas-und-nachhaltigen-flugkraftstoff/

[179] https://www.linkedin.com/posts/baysaf-saf-plantengineering-ugcPost-7353691974756921347-ACf4/

There are eleven active synthetic aviation fuel projects announced in Germany. Most of these are demonstration facilities, while there are three active projects under development with targeted capacity of over 20 kt per year. Xfuels' Hykero facility in Böhlen has a planned capacity of 50 kt per year with previously announced targeted start of production at the end of 2027[180]. However, limited recent information on project progress is available and the project is considered likely to be on hold[181]. Brandenburg eSAF, a joint development by Zaffra and Enertrag in Schwedt, which secured EUR 350 million in public funding in January 2026, is targeting 30 kt SAF production per year with commissioning expected in 2030[182]. Hy2Gen's Jangada project in Brandenburg is targeting a capacity of 28 kt by 2030, using the methanol to jet (MtJ) pathway[183].

Atmosfair has been producing demonstration volumes of synthetic SAF using Direct Air Capture (DAC) and CO_2 from industrial exhaust gases at its Werlte facility since 2021[184]. Other demonstration projects include Greenlyte Carbon Technologies' project at Düsseldorf Airport which aims to use DAC to supply the required CO_2, with a targeted annual SAF output of 0.15 kt starting in 2028[185]. Spark e-Fuels has announced plans for a demonstration-scale synthetic fuel project in Germany[186]. However, no location, production capacity or commissioning timeline has been disclosed[187]. DLR is developing a synthetic fuel production facility as part of its Technology Platform PtL (TPP) project with an estimated annual capacity of approximately 1.3 kt (2.5 kt announced renewable fuel output), currently under construction[188]. Construction is expected to be completed in 2027, with operations commencing in 2028[189]. The facility is intended for research and demonstration purposes and is not expected to supply SAF to the commercial market[190]. The Federal Ministry for Economic Affairs and Energy (BMWE) launched a developer selection process in 2025 for a synthetic fuel demonstration project. Initially, this was planned to be the PtX Lab Lausitz, but a tender for new project developer was launched. While the initiative is supported by up to EUR 400 million in public funding, no production capacity or commissioning timeline has been disclosed[191,192]. Additionally, Karlsruhe Institute of Technology (KIT) has announced its involvement in SAF-related pilot production and technology development through its Energy Lab facilities. The project is intended for research and demonstration purposes, with planned production capacity of approximately one tonne of kerosene per day (approximately 0.4 kt per year)[193,194]. Fraunhofer ISE is working on a research and development project in Freiburg focusing on the methanol-to-jet (MtJ) technology, but no commercial production planned[195].

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[180]https://xfuels.de/hykero/

[181] From Member State feedback

[182]https://www.concrete-chemicals.eu/

[183]https://www.hy2gen.com/jangada

[184]https://www.atmosfair.de/en/air-travel-and-climate-german-plant-produces-first-quantities-of-carbon-neutral-synthetic-kerosene/

[185]https://www.greenlyte.tech/impact-logs/eurowings-and-greenlyte-sign-memorandum-of-understanding-for-strategic-partnership

[186]https://www.sparkefuels.com/

[187] From Member State feedback

[188]https://www.dlr.de/en/latest/news/2023/02/e-fuels-dlr-selects-leuna-as-location-for-ptl-technology-platform

[189]https://www.dlr.de/de/aktuelles/nachrichten/2025/dlr-erhaelt-157-millionen-euro-fuer-betrieb-der-technologieplattform-power-to-liquid-kraftstoffe

[190]From Member State feedback

[191]https://www.z-u-g.org/en/strategic-tasks/ptx-lab-lausitz/

[192]BAnz AT 17.02.2025 B2.pdf

[193] From Member State feedback

[194]https://www.refuels.de/img/layout/Datenblatt_refuels_ENG_NEU.pdf

[195]https://www.ise.fraunhofer.de/de/forschungsprojekte/safari.html

Some projects have faced pausing or cancellations since the publication of the *ReFuelEU Aviation Annual Technical Report 2025*. Two projects have been put on hold. The Net-ZeroLEJ project in Leuna, developed by Sasol, DHL Group, HH2E and Airbus, targeting 200 kt of SAF per year, as well as the Bayosine project in Vohburg by Bayernoil, which was aiming to use sewage sludge as a feedstock[196,197]. Three projects have been identified as cancelled with combined SAF capacity of 100 kt per year. These include: HCS Group's Speyer plant which aimed to produce 50 kt advanced aviation biofuels annually through the alcohol-to-jet (AtJ) pathway, as well as SkyNRG's project in Mergelstetten for 50 kt annually and a joint initiative by Sowitec and Rolls-Royce Power Systems[198,199,200,201]. Four further projects were omitted compared to the *ReFuelEU Aviation Annual Technical Report 2025* because they have been either cancelled or were research and demonstration projects, which have been completed. These include previously announced co-processing by BP at the Gelsenkirchen refinery[202], OMV's M2SAF project, project TAKE OFF and a technology demonstration project by Sunfire.

Other updates

Germany's largest airline group, Lufthansa, continued its Green Fares offering with over 5% of passengers opting for sustainable fares, reflecting growing demand for SAF[203]. In January 2025, MB Energy began supplying SAF at the Frankfurt Airport, while other airports such as Munich Airport are supporting SAF uptake through infrastructure and incentives[204,205]. Germany also announced participation in the eSAF Early Movers Coalition, launched by the European Commission in
December 2025 to accelerate the deployment of synthetic aviation fuels through coordinated financial support and auction mechanisms[206].

[196] https://www.mdf-ag.com/media/user_upload/Verantwortung/LEJ_Net_Zero/Proposition_Slides_ILA_2024.pdf

[197] From Member State feedback

[198] From Member State feedback

[199]https://www.haltermann-carless.com/news/haltermann-carless-suspends-plans-for-saf-investment-project

[200]https://skynrg.com/state-of-baden-wu%CC%88rttemberg-supports-study-on-the-production-and-use-of-synthetic-kerosene-based-on-renewable-energies/

[201]https://www.rolls-royce.com/media/press-releases/2022/04-10-2022-rr-and-sowitec-cooperate-on-power-to-x-projects.aspx

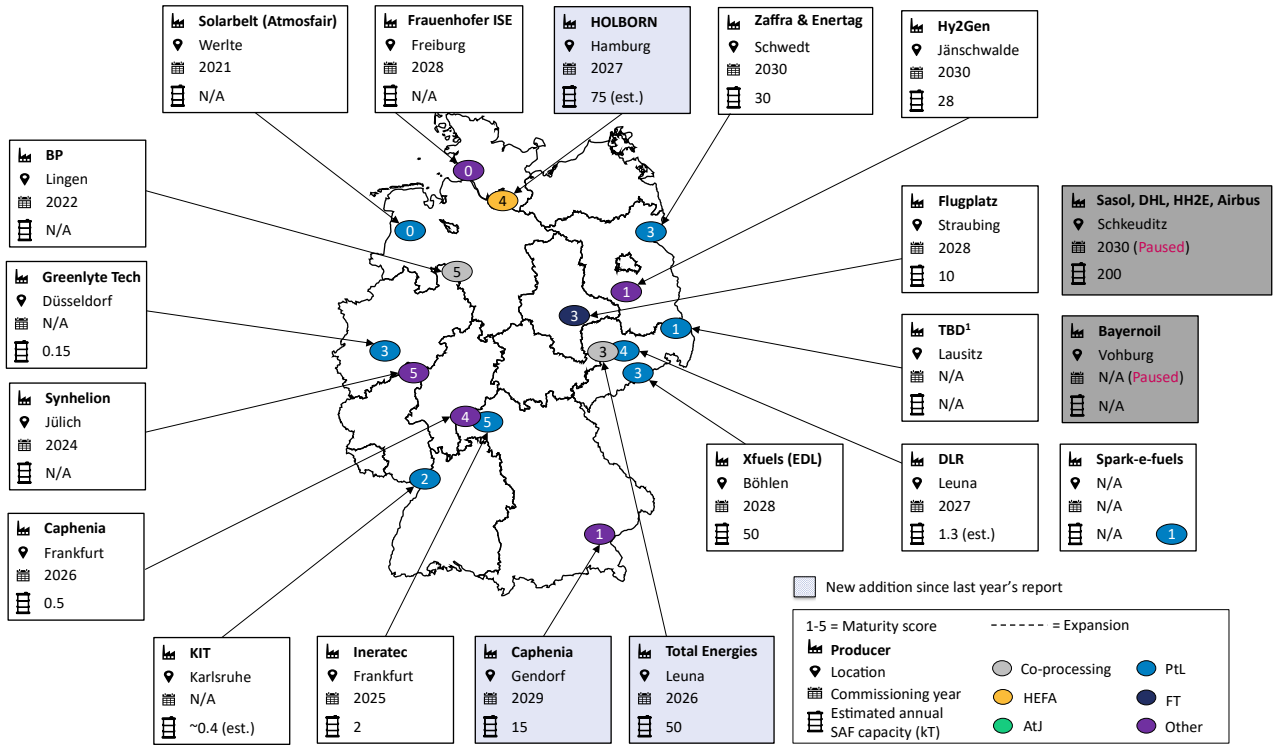
[202] Refinery has been sold by BP in 2025 - https://www.bp.com/press-and-publications/press-releases/bp-further-simplifies-portfolio-with-agreement-to-sell-gelsenkirchen-refinery-to-klesch-group

[203]https://newsroom.lufthansagroup.com/en/almost-7-million-lufthansa-group-passengers-opted-for-more-sustainable-flying-in-2025

[204]https://biomassmagazine.com/articles/mabanaft-expands-saf-supply-to-airlines-at-frankfurt-airport

[205]https://alternative-fuels-observatory.ec.europa.eu/system/files/documents/2024-11/Airport%20SAF%20Initiatives.pdf

[206]https://transport.ec.europa.eu/news-events/news/eu-launches-early-movers-coalition-accelerate-sustainable-aviation-fuel-uptake-2025-12-04_en



Notes: 0 = Production has only been tested
(1) Unknown project developer

Figure 28 - Map of SAF production facilities in Germany.



Greece

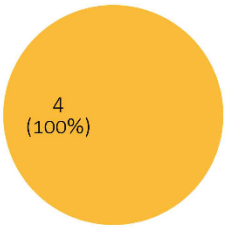
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

4 aviation fuel suppliers reported on SAF and aviation fuel quantities

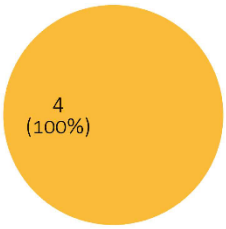
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

4 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

35.7 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
1.7 Mt	35.7 kt	2.14%

99% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Other aviation biofuels

0.13 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Greece

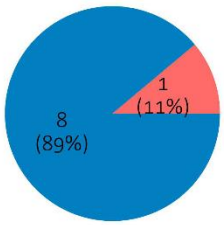
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

8 aircraft operators reported

Reporting status of aircraft operators

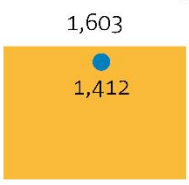


Submitted & Reviewed Submitted Not Submitted

1,603 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel 90% of fuel required

In 100% of Union airports the yearly uplift was above the 90% threshold

100%

12 out of 12

Union airports

33.8 Kt of SAF purchased by aircraft operators

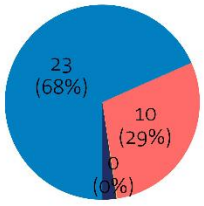
SAF

33.8 Kt

71% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS Not claimed UK ETS CORSIA

95% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	1 kt
Aviation biofuels	32 kt
Not Categorised	1 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	**34 kt**



Greece



SAF Activity in Greece

2025 in a nutshell

In 2025, 1.7 Mt of aviation fuel was supplied at Union Airports in Greece to aircraft operators in the scope of RFEUA. 1.6 Mt of this was conventional aviation fuel, while SAF accounted for 2.14% or 35.65 kt for the Member State. These figures represent 4.25% and 3.25% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

99% of the supplied SAF was categorised as *aviation biofuel,* while 1% was *other aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (95%), followed by United States (2%), with Malaysia (1%), Canada (1%) and Australia (0.4%) completing the top 5 contributors of feedstock to supplied SAF in Greece.

Facility overview

Greece currently does not have any domestic SAF production capacity, and no public announcements have been made regarding future projects related to SAF production in the country. Previously announced project by Dimensional Energy for a synthetic fuel plant with a capacity of 44 kt per year is assumed cancelled[207].

Other updates

HELLENiQ Energy has collaborated with Neste to supply SAF since 2022, with the agreement expanded in 2024 to include bulk deliveries to its Thessaloniki refinery. These volumes have been distributed to airlines including Aegean Airlines, supporting initial SAF use in the country[208]. Additionally, Greece's Ministry of Environment and Energy indicated its intention to develop a plan for domestic SAF production in 2024, however, no further developments were disclosed[209].

[207] From Member State feedback

[208] https://www.helleniqenergy.gr/en/media/press-releases/hellenic-petroleum-group-and-neste-supply-sustainable-aviation-fuel-greece-and

[209] https://www.safinvestor.com/news/146405/greece/

Hungary



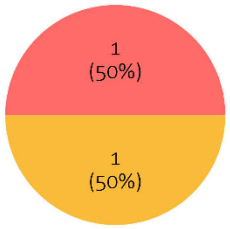
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

1 aviation fuel supplier reported on SAF and aviation fuel quantities

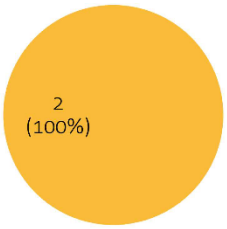
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

2 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

9.6 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
407.5 kt	9.6 kt	2.37%

94% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Advanced aviation biofuels

0.03 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





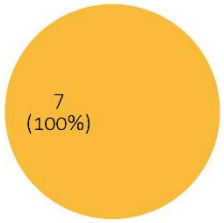
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

7 aircraft operators reported

Reporting status of aircraft operators

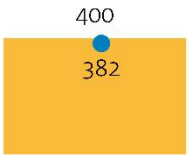


Submitted & Reviewed Submitted Not Submitted

400 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel 90% of fuel required

In 100% of Union airports the yearly uplift was above the 90% threshold

100%

1 out of 1

Union airports

7.3 Kt of SAF purchased by aircraft operators

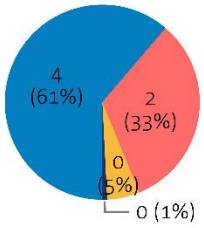
SAF

7.3 Kt

67% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS Not claimed UK ETS CORSIA

93% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	7 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	7 kt



SAF Activity in Hungary

2025 in a nutshell

In 2025, 408 kt of aviation fuel was supplied at Union Airports in Hungary to aircraft operators in the scope of RFEUA. 398 kt of this was conventional aviation fuel, while SAF accounted for 2.37% or 9.65 kt for the Member State. These figures represent 1.04% and 0.88% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

100% of the supplied SAF was categorised as *aviation biofuel.* Largest share of the feedstock used in the supplied SAF originated from China (63%), followed by Indonesia (10%), with Malaysia (7%), Saudi Arabia (5%) and France (4%) completing the top 5 contributors of feedstock to supplied SAF in Hungary.

Facility overview

Hungary currently has no domestic SAF production capacity, and no public announcements have been made regarding future SAF-related projects in the country.

Other updates

Despite the absence of production, other SAF related initiatives are unfolding in Hungary. Budapest Airport has been testing the commercial viability of SAF supply in collaboration with MOL Group, Wizz Air and Air France-KLM[210].

At airline level, the Hungarian air carrier Wizz Air has taken steps toward SAF adoption, including setting a target of 10% SAF usage by 2030 and investing in SAF production through equity participation in Firefly[211]. In early 2025, the airline also completed an operational trial using SAF blends across more than 50 flights, demonstrating the feasibility of SAF use in commercial operations[212].

[210] https://dailynewshungary.com/budapest-airport-new-aviation-fuel-available/

[211] https://www.greenairnews.com/?p=5586

[212]https://www.wizzair.com/en-gb/information-and-services/about-us/news/wizz-air-reveals-passengers-survey-results-after-successful-saf-trials-in-collaboration-with-airbus-1

Ireland



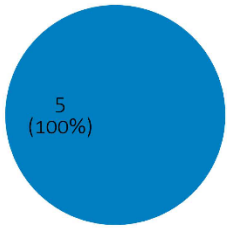
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

5 aviation fuel suppliers reported on SAF and aviation fuel quantities

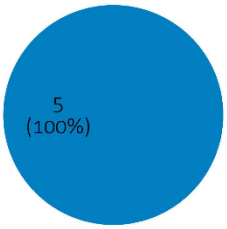
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

5 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

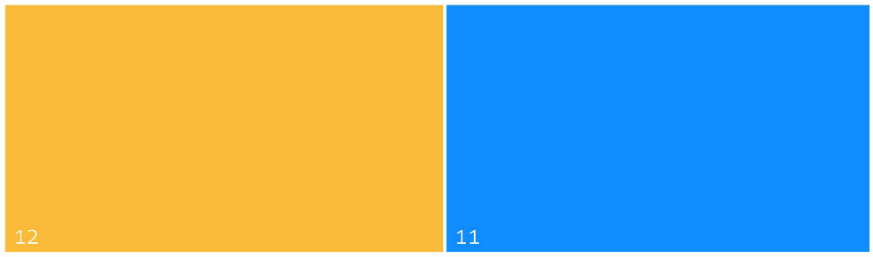
22.7 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
1.1 Mt	22.7 kt	2.00%

49% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Other aviation biofuels Aviation biofuels

0.07 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





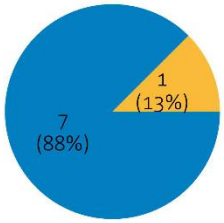
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

8 aircraft operators reported

Reporting status of aircraft operators



Submitted & Reviewed Submitted Not Submitted

1,075 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel 90% of fuel required

In 75% of Union airports the yearly uplift was above the 90% threshold

75%

3 out of 4

Union airports

19.1 Kt of SAF purchased by aircraft operators

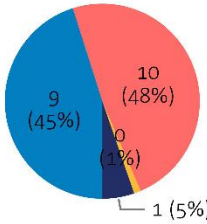
SAF

19.1 Kt

52% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS Not claimed UK ETS CORSIA

79% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	15 kt
Not Categorised	0 kt
Other aviation biofuels	4 kt
Synthetic aviation fuels	0 kt
Total	**19 kt**



SAF Activity in Ireland

2025 in a nutshell

In 2025, 1.13 Mt of aviation fuel was supplied at Union Airports in Ireland to aircraft operators in the scope of RFEUA. 1.11 Mt of this was conventional aviation fuel, while SAF accounted for 2.00% or 22.66 kt for the Member State. These figures represent 2.88% and 2.07% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

49% of the supplied SAF was categorised as *aviation biofuel,* while 51% was *other aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (26%), followed by United States (21%), with Germany (20%), Poland (11%) and Uruguay (6%) completing the top 5 contributors of feedstock to supplied SAF in Ireland.

Facility overview

Ireland does not currently produce SAF domestically. Efforts to establish a national SAF industry are progressing. Galetech Energy has announced a pilot production and research facility that will support technical validation, process optimisation, and commercial-readiness studies for synthetic aviation fuel production in Ireland and international markets. Construction of the facility is expected to commence in 2026, with commissioning planned for 2027[213,214]. Initial production volumes are expected to reach approximately 100 tonnes in the first operational year, with a maximum output capacity of 286 tonnes as systems scale[215].

Since the publication of the *ReFuelEU Aviation Annual Technical Report 2025*, the previously announced project by Simply Blue Group has been assumed cancelled and has been removed, as no further announcements or project developments have been identified since the initial announcement[216].

Other updates

At the policy level, Ireland published its first national Sustainable Aviation Fuel Policy Roadmap in August 2025, with the objective of supporting aviation connectivity in a sustainable manner. The Roadmap sets out a pathway to accelerate SAF production and uptake, aligning climate, energy, and industrial policy to support SAF deployment[217].

Key to Ireland's SAF policy development is the national SAF Advisory Body (formerly known as the SAF Task Force), which fosters collaboration between government departments and agencies, airlines, airports, air freight carriers, academia, representative bodies and other stakeholders with an interest in SAF[218].

[213] https://www.galetechgroup.com/post/galetech-group-to-develop-ireland-s-first-e-fuels-production-facility

[214] https://www.galetechgroup.com/e-fuels

[215] From Member State feedback

[216] From Member State feedback

[217]https://www.gov.ie/en/department-of-transport/publications/sustainable-aviation-fuel-task-force/

[218] https://www.gov.ie/en/department-of-transport/publications/sustainable-aviation-fuel-task-force/

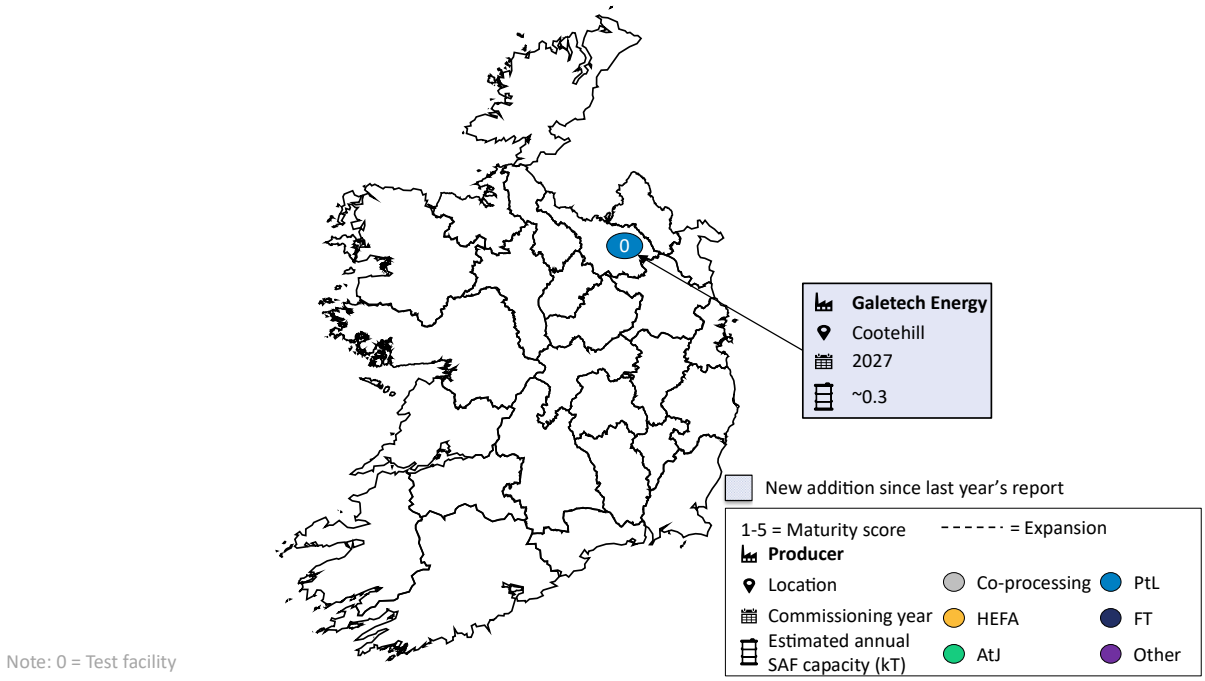


Figure 29 - Map of SAF production facilities in Ireland.

Italy



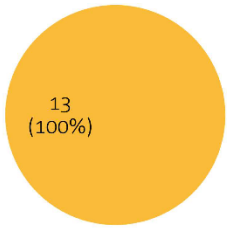
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

13 aviation fuel suppliers reported on SAF and aviation fuel quantities

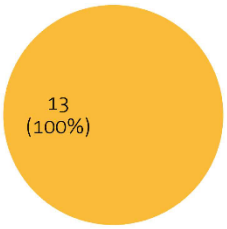
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

13 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

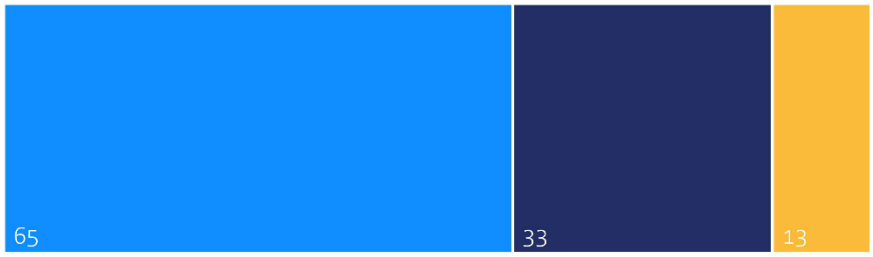
110.9 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
5.1 Mt	110.9 kt	2.17%

59% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Advanced aviation biofuels Other aviation biofuels

0.37 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Italy

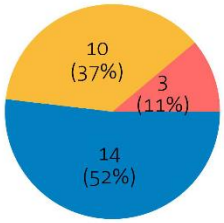
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

24 aircraft operators reported

Reporting status of aircraft operators

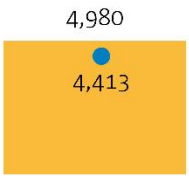


Submitted & Reviewed · Submitted · Not Submitted

4,980 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel · 90% of fuel required

In 88% of Union airports the yearly uplift was above the 90% threshold

88%

21 out of 24

Union airports

91.8 Kt of SAF purchased by aircraft operators

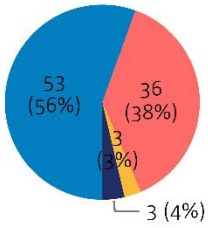
SAF

91.8 Kt

62% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS · Not claimed · UK ETS · CORSIA

58% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	19 kt
Aviation biofuels	53 kt
Not Categorised	11 kt
Other aviation biofuels	8 kt
Synthetic aviation fuels	0 kt
Total	**92 kt**



SAF Activity in Italy

2025 in a nutshell

In 2025, 5.1 Mt of aviation fuel was supplied at Union Airports in Italy to aircraft operators in the scope of RFEUA. 5.0 Mt of this was conventional aviation fuel, while SAF accounted for 2.17% or 110.93 kt for the Member State. These figures represent 13.03% and 10.13% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

59% of the supplied SAF was categorised as *aviation biofuel,* while 30% was *advanced aviation biofuels* and 11% was *other aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (42%), followed by Malaysia (16%), with Indonesia (13%), Netherlands (6%) and Saudi Arabia (5%) completing the top 5 contributors of feedstock to supplied SAF in Italy.

Facility overview

One of the largest operational SAF production facilities in Europe is based in Italy. Enilive's Gela biorefinery began SAF production in 2025 and has a production capacity of 350 kt of SAF per year[219]. The facility utilises HEFA technology with waste-based feedstocks such as used cooking oil and animal fats[220].

Enilive S.p.A. is also developing a dedicated HEFA-based SAF plant in Porto Marghera, Venice, targeting a capacity of 200 kt SAF per year by 2027[221]. More recent HEFA-based project announcements by Enilive S.p.A. include a facility in Pavia estimated to produce 400 kt SAF per year (460 kt of renewable fuels announced[222]) and another in Priolo with an estimated capacity of 180 kt SAF per year, both expected to be commissioned by 2028[223,224]. Announced in 2026, all three projects reached final investment decision (FID)[225].

Additional facility, which has been identified since the *ReFuelEU Aviation Annual Technical Report 2025* publication, is a refinery in Trecate operated by SARPOM, which began producing SAF via co-processing in 2023, with an estimated capacity of 12 kt per year[226,227].

Other updates

Beyond production, SAF uptake is supported by industry initiatives. Airport operator SEA Prime incentivises SAF use at Milano Linate and Milano Malpensa airports, while broader decarbonisation initiatives are underway at the Rome

[219] From Member State feedback

[220] https://www.eni.com/en-IT/actions/global-activities/Italy/gela.html

[221] https://www.eni.com/en-IT/actions/global-activities/Italy/venice-porto-marghera-bio-refinery.html

[222] From Member State feedback

[223] https://www.eni.com/en-IT/media/press-release/2025/09/eni-unveils-new-biorefinery-project-sannazzaro-burgondi.html

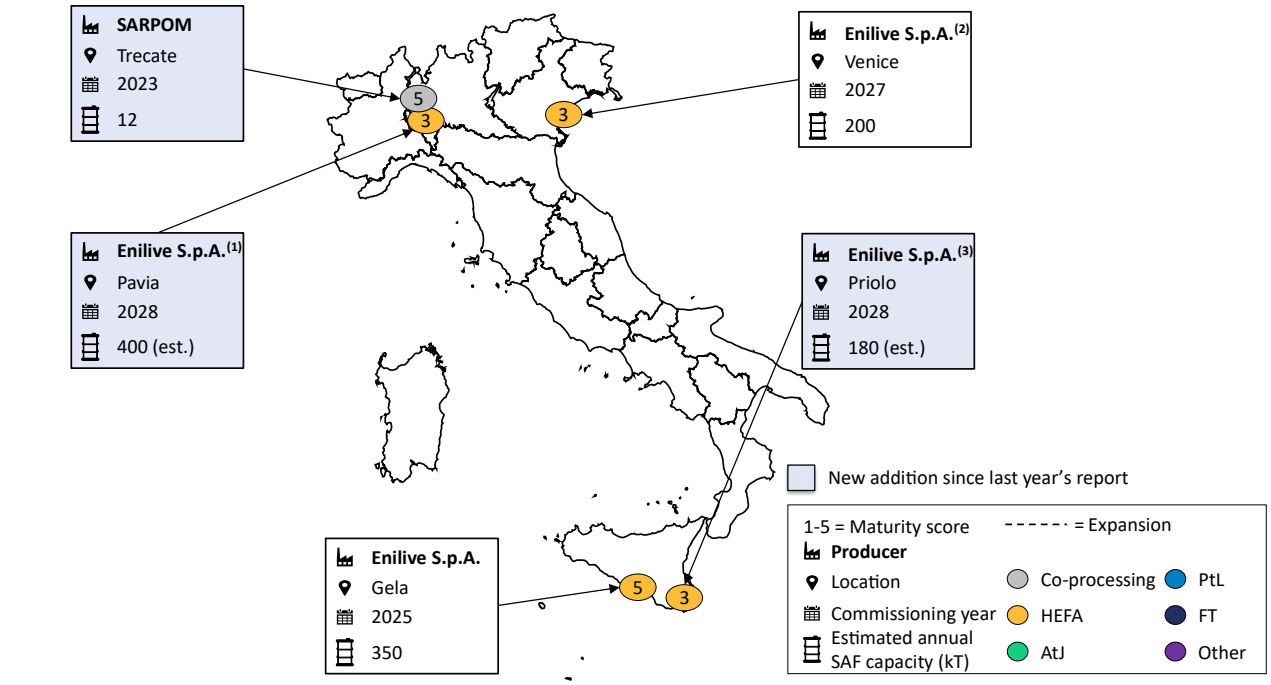
[224] https://www.eni.com/en-IT/media/press-release/2026/02/pr-eni-q8-partner-construction-priolo-biorefinery.html

[225] https://www.eni.com/en-IT/media/press-release/2026/02/eni-investment-development-biorefining-sannazzaro-de-burgondi-is-confirmed.html; From Member State feedback

[226] https://www.qcintel.com/biofuels/article/sarpom-refinery-starts-producing-advanced-biofuel-from-pome-15071.html

[227] From Member State feedback

Fiumicino Airport, including investments in renewable energy infrastructure to support low-carbon aviation[228,229]. ITA Airways promotes SAF adoption through its "Fly with SAF" programme, which enables corporate customers to contribute to SAF usage in operations[230].



(1), (2), (3) In February 2026, the projects reached FID. Maturity score would be 4 as of then, however map data and scenario analysis as of 31st December 2025

Figure 30 - Map of SAF production facilities in Italy.

[228]https://www.ainonline.com/aviation-news/business-aviation/2024-05-29/sea-prime-launches-saf-incentives-expand-linate

[229]https://www.adr.it/web/aeroporti-di-roma-en/net-zero-pathway

[230]https://www.ita-airways.com/gb/en/world-of-ita-airways/discover-ita-airways/sustainability/fly-with-saf



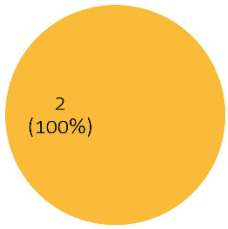
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

2 aviation fuel suppliers reported on SAF and aviation fuel quantities

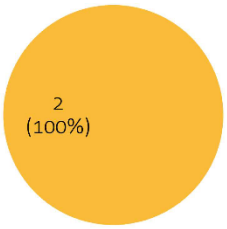
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

2 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

2.6 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
122.1 kt	2.6 kt	2.15%

100% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels

0.01 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





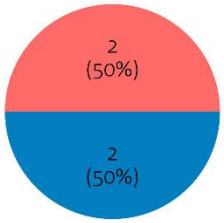
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

2 aircraft operators reported

Reporting status of aircraft operators

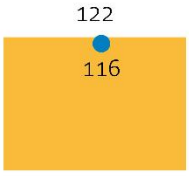


Submitted & Reviewed Submitted Not Submitted

122 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel 90% of fuel required

In 100% of Union airports the yearly uplift was above the 90% threshold

100%

1 out of 1

Union airports

2.3 Kt of SAF purchased by aircraft operators

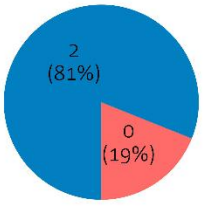
SAF

2.3 Kt

81% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS Not claimed UK ETS CORSIA

98% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	2 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	2 kt



SAF Activity in Latvia

2025 in a nutshell

In 2025, 122 kt of aviation fuel was supplied at Union Airports in Latvia to aircraft operators in the scope of RFEUA. 119 kt of this was conventional aviation fuel, while SAF accounted for 2.15% or 2.62 kt for the Member State. These figures represent 0.31% and 0.24% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

100% of the supplied SAF was categorised as *aviation biofuel.* Largest share of the feedstock used in the supplied SAF originated from China (68%), followed by Germany (9%), with Malaysia (8%), Australia (5%) and Singapore (4%) completing the top 5 contributors of feedstock to supplied SAF in Latvia.

Facility overview

Latvia currently has no domestic SAF production, however, two projects are under development. Amber Flow Fuels facility under construction targets the production of 87 kt of SAF per year at the Port of Riga using HEFA technology[231]. Announced in December 2024, the project is estimated to cost EUR 120 million and SAF production is expected to begin by 2027[232].

NorSAF has also announced a SAF production facility in Latvia at the Port of Liepaja[233]. The project is designed to produce both advanced aviation biofuel and synthetic aviation fuel, with planned output of 61.6 kt per year and 38.4 kt per year, respectively. Plant commissioning is expected in 2030[234]. The company signed a Memorandum of Understanding with renewable hydrogen developer CIS Liepaja to cooperate in developing renewable hydrogen and SAF production in the Liepaja Special Economic Zone[235]. Project cost is estimated at EUR 650 million.

Other updates

A joint study conducted by Estonia and Latvia, supported by the European Commission was completed in November 2025 and confirmed that Latvia has potential for SAF production, but remains at an early stage. While the sector currently faces challenges, the study recommends implementing an improved national policy framework that focuses on long-term regulatory clarity, infrastructure development at airports and ports, and strengthened cross-sectoral collaboration. By prioritising these strategic measures, Latvia can leverage its renewable energy capacity and biomass resources to foster domestic production, enhance energy security, and attract the investment necessary to achieve long-term commercial viability[236].

[231] https://www.ofimagazine.com/news/latvia-builds-first-hvo-saf-facility-in-riga

[232]https://rop.lv/en/news/kundzinsala-new-industrial-centre-riga

[233] https://norsaf.com/

[234]https://aviasg.com/en/businesses/saf-esaf-production

[235]https://www.baltictimes.com/cis_liepaja_and_lsez_norsaf_to_cooperate_in_developing_green_hydrogen_and_sustainable_aviation_fuel_projects/

[236]https://kliimaministeerium.ee/sites/default/files/documents/2025-12/Final%20Report%20%28Lõppraport%29.pdf

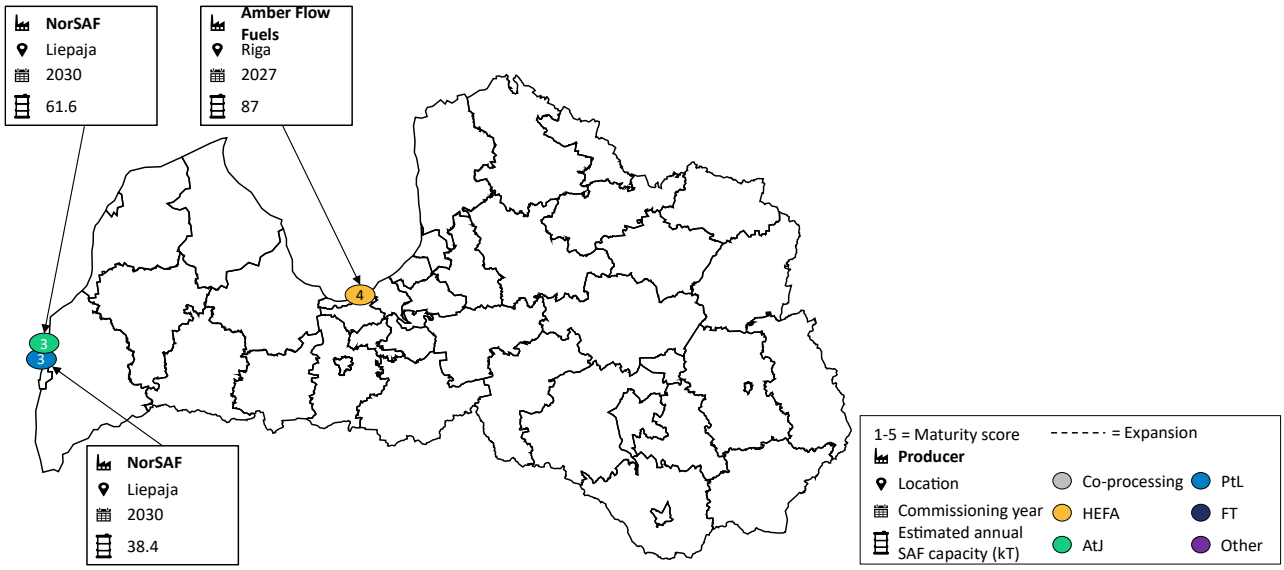


Figure 31 - Map of SAF production facilities in Latvia.

Lithuania



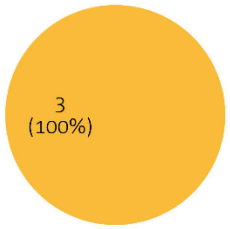
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

3 aviation fuel suppliers reported on SAF and aviation fuel quantities

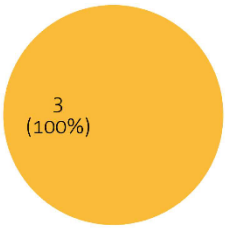
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

3 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

2.6 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
114.7 kt	2.6 kt	2.24%

100% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels

0.01 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Lithuania

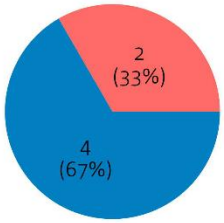
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

4 aircraft operators reported

Reporting status of aircraft operators

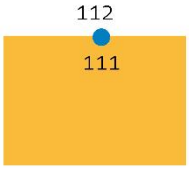


Submitted & Reviewed Submitted Not Submitted

112 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel 90% of fuel required

In 50% of Union airports the yearly uplift was above the 90% threshold

50%

1 out of 2

Union airports

2.2 Kt of SAF purchased by aircraft operators

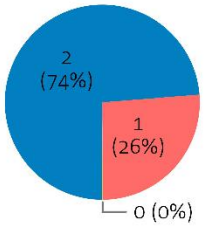
SAF

2.2 Kt

74% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS Not claimed UK ETS CORSIA

93% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	2 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	**2 kt**



SAF Activity in Lithuania

2025 in a nutshell

In 2025, 115 kt of aviation fuel was supplied at Union Airports in Lithuania to aircraft operators in the scope of RFEUA. 112 kt of this was conventional aviation fuel, while SAF accounted for 2.24% or 2.57 kt for the Member State. These figures represent 0.29% and 0.23% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

100% of the supplied SAF was categorised as *aviation biofuel.* Largest share of the feedstock used in the supplied SAF originated from China (23%), followed by Germany (22%), with Malaysia (22%), Italy (8%) and Singapore (8%) completing the top 5 contributors of feedstock to supplied SAF in Lithuania.

Facility overview

Lithuania currently has no domestic SAF production capacity, and no public announcements have been made regarding future SAF production projects in the country.

Other updates

In 2025, SAF supply became available at Lithuanian airports through the distribution network of ORLEN Group. SAF is now accessible to all departing aircraft at Vilnius, Kaunas and Palanga airports, marking a first step towards enabling SAF use in the country[237,238].

[237]https://www.orlen.pl/en/about-the-company/media/press-releases/current/2025/september-2025/orlen-group-launches-saf-fuels-across-baltic-markets

[238]https://www.ltou.lt/en/media-1/news/lithuanian-airports-lead-green-transition-sustainable-aviation-fuel-powers-all-departing-flights

Luxembourg



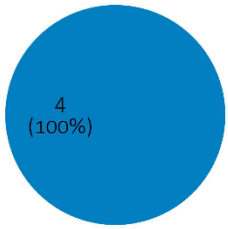
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

4 aviation fuel suppliers reported on SAF and aviation fuel quantities

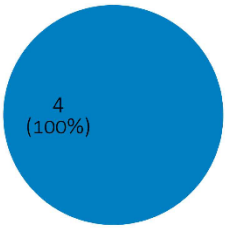
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

4 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

11.9 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
597.7 kt	11.9 kt	1.99%

58% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Other aviation biofuels

0.04 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings



Luxembourg



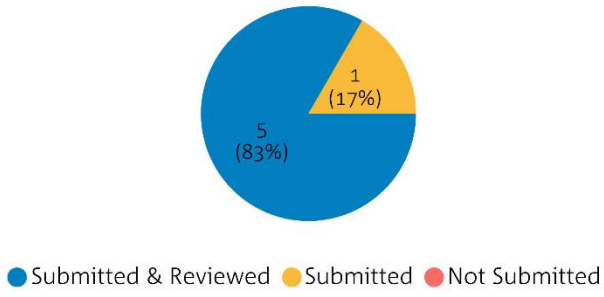
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

6 aircraft operators reported

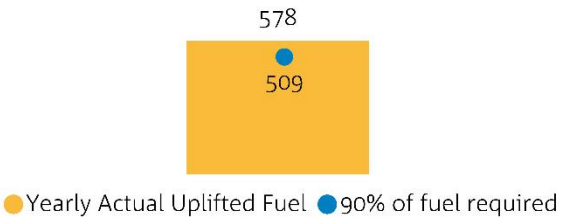
Reporting status of aircraft operators



578 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

1 out of 1

Union airports

11.2 Kt of SAF purchased by aircraft operators

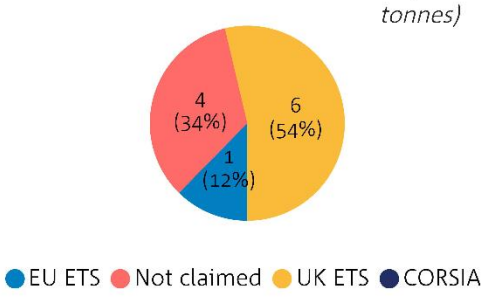
SAF

11.2 Kt

66% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



61% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	7 kt
Not Categorised	1 kt
Other aviation biofuels	3 kt
Synthetic aviation fuels	0 kt
Total	11 kt



SAF Activity in Luxembourg

2025 in a nutshell

In 2025, 598 kt of aviation fuel was supplied at Union Airports in Luxembourg to aircraft operators in the scope of RFEUA. 586 kt of this was conventional aviation fuel, while SAF accounted for 1.99% or 11.90 kt for the Member State. These figures represent 1.52% and 1.09% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

58% of the supplied SAF was categorised as *aviation biofuel*, while 42% was *other aviation biofuels.* Largest share of the feedstock used in the supplied SAF originated from China (47%), followed by France (12%), with Germany (8%), Indonesia (6%) and United Kingdom (5%) completing the top 5 contributors of feedstock to supplied SAF in Luxembourg.

Facility overview

Luxembourg currently has no domestic SAF production capacity, and no public announcements have been made regarding future SAF production projects in the country.

Other updates

Economic actors based in Luxembourg are engaged in the SAF market. Luxembourg Airport (lux-Airport) has invested in the Norwegian e-SAF developer Norsk e-Fuel and has also begun construction of a new fuel farm[239,240]. In addition, Cargolux will have access to synthetic SAF from Norsk e-Fuel in the future[241]. The airline was also the first to uplift SAF at Luxembourg Airport in 2023[242]. Luxembourg also announced participation in the eSAF Early Movers Coalition, launched by the European Commission in December 2025 to accelerate the deployment of synthetic aviation fuels through coordinated financial support and auction mechanisms[243].

[239]https://www.norsk-e-fuel.com/articles/lux-airport-invests-into-norsk-e-fuel

[240]https://www.lux-airport.lu/luxembourg-airport-begins-construction-of-state-of-the-art-fuel-farm-to-meet-21st-century-supply-demands/

[241]https://www.cargolux.com/media/media-releases/2024/securing-offtake-and-investment-norsk-e-fuel-closes-milestone-agreements/

[242]https://www.lux-airport.lu/cargolux-inaugurates-saf-at-luxembourg-airport-and-operates-carbon-neutral-flight-to-zhengzhou-in-china/

[243]https://transport.ec.europa.eu/news-events/news/eu-launches-early-movers-coalition-accelerate-sustainable-aviation-fuel-uptake-2025-12-04_en



Malta

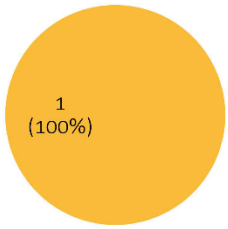
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

1 aviation fuel supplier reported on SAF and aviation fuel quantities

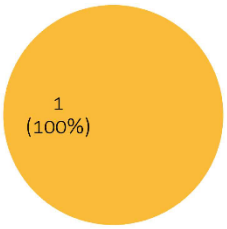
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

1 aviation fuel supplier reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

2.6 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
188.8 kt	2.6 kt	1.37%

84% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Other aviation biofuels

0.01 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Malta

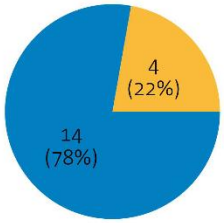
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

18 aircraft operators reported

Reporting status of aircraft operators

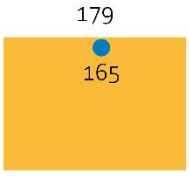


Submitted & Reviewed Submitted Not Submitted

179 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel 90% of fuel required

In 100% of Union airports the yearly uplift was above the 90% threshold

100%

1 out of 1

Union airports

2.4 Kt of SAF purchased by aircraft operators

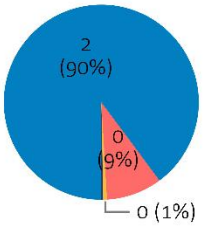
SAF

2.4 Kt

91% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS Not claimed UK ETS CORSIA

92% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	2 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	**2 kt**



SAF Activity in Malta

2025 in a nutshell

In 2025, 189 kt of aviation fuel was supplied at Union Airports in Malta to aircraft operators in the scope of RFEUA. 186 kt of this was conventional aviation fuel, while SAF accounted for 1.37% or 2.58 kt for the Member State. These figures represent 0.48% and 0.24% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

84% of the supplied SAF was categorised as *aviation biofuel*, while 16% was advanced aviation *biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (84%), followed by France (8%), Germany (4%), and Italy (4%).

Facility overview

Malta currently has no domestic SAF production capacity, and no public announcements have been made regarding future SAF production projects in the country.

Other updates

In 2025, Malta International Airport received 100% SAF price support, effectively removing the cost premium and enabling SAF uptake[244].

[244]https://climate.ec.europa.eu/document/download/13dd8dc2-9011-4fdb-acb8-f21c260dd080_en?filename=eea_airports_aviation_fuels_en.pdf

Netherlands



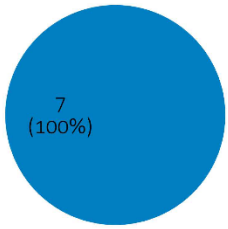
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

7 aviation fuel suppliers reported on SAF and aviation fuel quantities

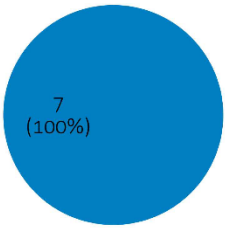
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

7 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

320.6 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
3.4 Mt	320.6 kt	9.35%

85% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Advanced aviation biofuels

1.12 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





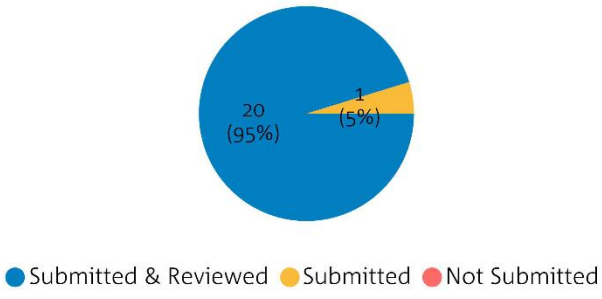
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

21 aircraft operators reported

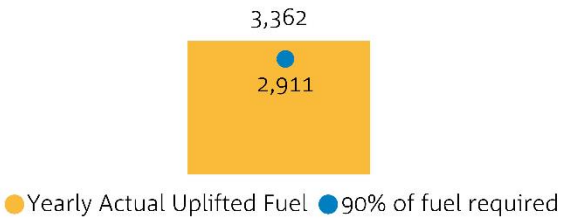
Reporting status of aircraft operators



3,362 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

3 out of 3

Union airports

260.2 Kt of SAF purchased by aircraft operators

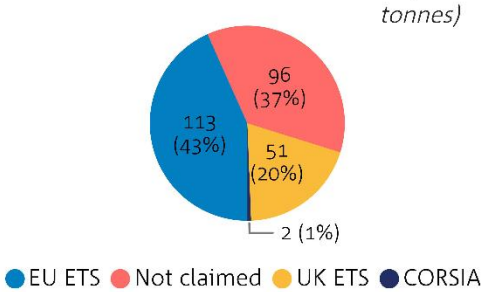
SAF

260.2 Kt

63% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



30% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	30 kt
Aviation biofuels	79 kt
Not Categorised	151 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	**260 kt**



SAF Activity in the Netherlands

2025 in a nutshell

In 2025, 3.4 Mt of aviation fuel was supplied at Union Airports in the Netherlands to aircraft operators in the scope of RFEUA. 3.1 Mt of this was conventional aviation fuel, while SAF accounted for 9.34% or 320.47 kt for the Member State. These figures represent 8.73% and 29.25% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

85% of the supplied SAF was categorised as *aviation biofuel,* while 15% was *advanced aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (65%), followed by Malaysia (12%), with Indonesia (6%), Saudi Arabia (2%) and Finland (2%) completing the top 5 contributors of feedstock to supplied SAF in Netherlands.

Facility overview

The Netherlands hosts two operational HEFA facilities in Rotterdam. Neste began SAF production at its Rotterdam refinery in 2025 with an initial capacity of 500 kt per year, which is anticipated to grow to 1.2 Mt per year following the planned expansion in 2027[245,246]. Chane Terminals has been distilling SAF since 2020 and is also expanding its facility. The additional capacity was expected to be online from 2025, however no public information confirms this has happened[247].

Further HEFA capacity is also under development. SkyNRG is advancing a project in Delfzijl targeting 100 kt SAF per year, expected to be operational by 2028[248]. The project reached final investment decision (FID) in February 2026 and is now under construction[249]. Varo Energy has also announced plans for a SAF facility in Rotterdam with an investment of USD 600 million and a planned capacity of 245 kt per year by late 2026[250].

The Netherlands also hosts a pipeline of synthetic aviation fuel projects under development. Power2X and Advario are partnering to develop a synthetic fuel plant at the Port of Rotterdam with a planned capacity of 250 kt per year[251]. Ineratec and Zenith Energy Terminals plan to produce approximately 20 kt of SAF annually from industrial CO_2 starting in 2027[252]. Metafuels is also advancing its Turbe project in Rotterdam which aims to convert methanol into SAF, beginning with limited production of 0.3 kt in 2028 and scaling up to 35 kt per year by 2031[253]. In April 2026, the project secured EUR 1.92 million in funding from the Dutch government to support development activities, including FEED, permitting and progress towards final investment decision[254].

[245]https://www.neste.com/about-neste/how-we-operate/production/rotterdam-refinery

[246]https://www.neste.com/news/neste-started-producing-sustainable-aviation-fuel-saf-at-its-renewables-refinery-in-rotterdam-the-netherlands

[247]https://chane.eu/case/seeing-and-creating-opportunities-with-sustainable-aviation-fuel/

[248]https://skynrg.com/producing-saf/skynrg-delfzijl-dsl-01/

[249] https://www.esgtoday.com/skynrg-secures-funding-to-build-netherlands-first-sustainable-aviation-fuel-plant/

[250]https://renewablesnow.com/news/varo-energy-to-build-usd-600m-saf-plant-in-rotterdam-833567/

[251]https://www.power2x.com/efuels-rotterdam/

[252]https://www.ineratec.de/en/news/ineratec-and-zenith-work-commercial-scale-e-fuel-plant-port-amsterdam

[253]https://metafuels.ch/making-it-happen/

[254]https://global-efuels.com/news/metafuels-e-saf-project-secures-e1-92-million-dutch-grant/

Previously included in the *ReFuelEU Aviation Annual Technical Report 2025*, Gidara's Advanced Methanol Amsterdam project has now been omitted as there is no concrete information related to the production of SAF from this project in the near term[255].

Several projects based in the Netherlands have also been paused or cancelled. SkyNRG's Synkero project in Amsterdam with a planned capacity of 50 kt per year continues to be on hold. Shell, BP and UPM Biofuels have all decided to halt their renewable fuels projects in Rotterdam[256,257,258].

Other updates

Airports such as Schiphol and Eindhoven actively support SAF uptake through incentive programmes, while Schiphol has also invested in SAF production initiatives[259]. Netherlands has also strengthened its SAF strategy with the publication of the Dutch SAF Roadmap 2025, outlining pathways to scale domestic production[260]. Netherlands announced participation in the eSAF Early Movers Coalition, launched by the European Commission in December 2025 to accelerate the deployment of synthetic aviation fuels through coordinated financial support and auction mechanisms[261].

[255] From Member State feedback

[256] https://www.shell.com/news-and-insights/newsroom/news-and-media-releases/2025/shell-not-restart-construction-rotterdam-biofuels-plant.html

[257] https://chemxplore.com/news/bp-halts-rotterdam-saf-project-amid-strategic-shift

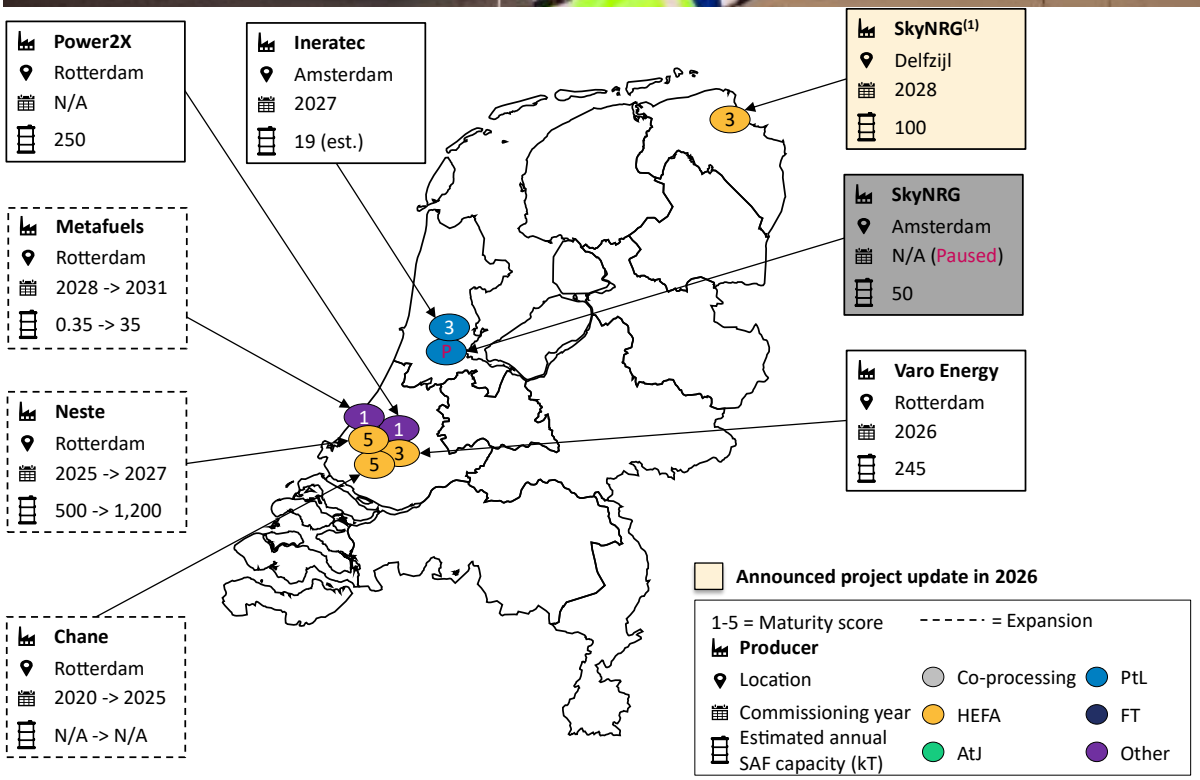
[258]https://biofuels-news.com/news/upm-halts-biofuels-refinery-project-in-rotterdam/

[259]https://alternative-fuels-observatory.ec.europa.eu/system/files/documents/2024-11/Airport%20SAF%20Initiatives.pdf

[260]https://www.deloitte.com/nl/en/Industries/energy/perspectives/sustainable-aviation-fuel-roadmap.html

[261]https://transport.ec.europa.eu/news-events/news/eu-launches-early-movers-coalition-accelerate-sustainable-aviation-fuel-uptake-2025-12-04_en





(1) In February 2026, the project reached FID and began construction. Maturity score would be 4 as of then, however map data and scenario analysis as of 31st December 2025

Figure 32 - Map of SAF production facilities in Netherlands.



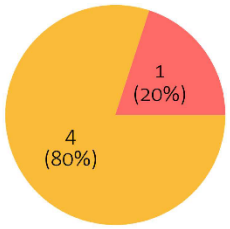
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

4 aviation fuel suppliers reported on SAF and aviation fuel quantities

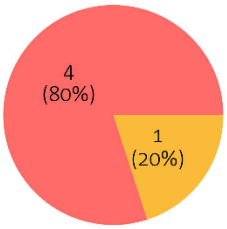
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

1 aviation fuel supplier reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

26.4 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
1.3 Mt	26.4 kt	2.03%

17% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Other aviation biofuels Aviation biofuels

0.09 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





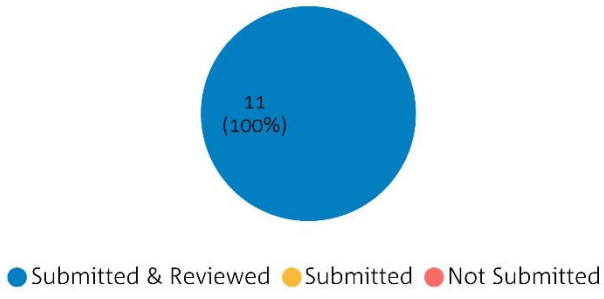
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

11 aircraft operators reported

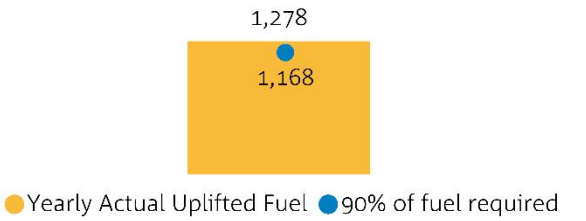
Reporting status of aircraft operators



1,278 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

8 out of 8

Union airports

26.1 Kt of SAF purchased by aircraft operators

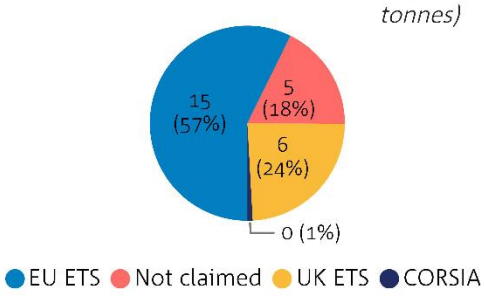
SAF

26.1 Kt

82% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



21% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	5 kt
Not Categorised	2 kt
Other aviation biofuels	18 kt
Synthetic aviation fuels	0 kt
Total	**26 kt**



SAF Activity in Poland

2025 in a nutshell

In 2025, 1.30 Mt of aviation fuel was supplied at Union Airports in Poland to aircraft operators in the scope of RFEUA. 1.27 Mt of this was conventional aviation fuel, while SAF accounted for 2.03% or 26.37 kt for the Member State. These figures represent 3.30% and 2.41% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

17% of the supplied SAF was categorised as *aviation biofuel,* while 83% was *other aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from New Zealand (13%), followed by China (12%), with United Kingdom (11%), France (7%) and Argentina (7%) completing the top 5 contributors of feedstock to supplied SAF in Poland.

Facility overview

Poland is progressing towards establishing domestic SAF production, led by the country's largest oil and gas producer, Orlen. The company is developing a SAF production facility in Płock, with a planned capacity of approximately 300 kt per year[262]. The current infrastructure at the plant is suitable for HVO production, however commissioning of SAF production is still undetermined[263].

Other updates

The national airline, LOT Polish Airlines has also taken steps to support SAF adoption, including purchasing SAF through a book-and-claim mechanism and signing an offtake agreement with ORLEN for future supply from the Płock facility[264].

Poland has also begun receiving physical SAF deliveries. In 2025, SAF was supplied to Katowice Airport by Unimot Aviation, marking the first physical SAF availability in the country[265].

[262]https://simpleflying.com/lot-polish-airlines-to-purchase-domestically-produced-saf/

[263] From Member State feedback

[264]https://pressoffice.lot.com/360487-lot-polish-airlines-and-skynrg-partner-for-saf-offtake

[265]https://advancedbiofuelsusa.info/unimot-with-first-delivery-of-sustainable-aviation-fuel-saf-to-poland#:~:text=Business%20News/Analysis-,UNIMOT%20with%20First%20Delivery%20of%20Sustainable%20Aviation%20Fuel%20(SAF)%20to,net%20zero%20emissions%20by%202050*.

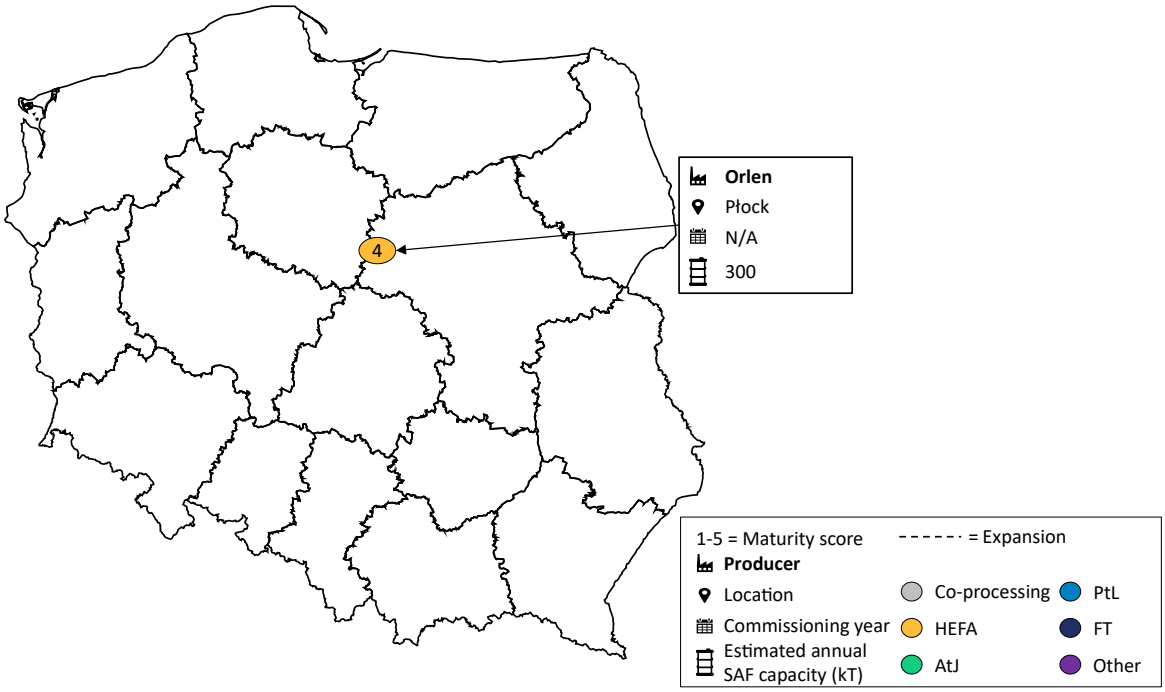


Figure 33 - Map of SAF production facilities in Poland.



Portugal

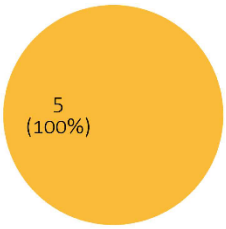
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

5 aviation fuel suppliers reported on SAF and aviation fuel quantities

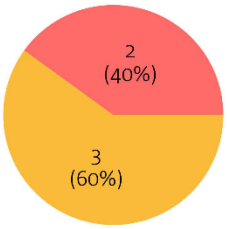
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

3 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

34.7 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
1.7 Mt	34.7 kt	2.04%

99% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Advanced aviation biofuels

0.12 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Portugal

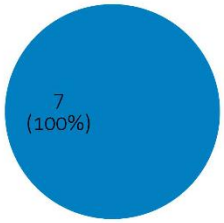
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

7 aircraft operators reported

Reporting status of aircraft operators

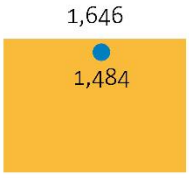


Submitted & Reviewed Submitted Not Submitted

1,646 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel 90% of fuel required

In 100% of Union airports the yearly uplift was above the 90% threshold

100%

3 out of 3

Union airports

27.8 Kt of SAF purchased by aircraft operators

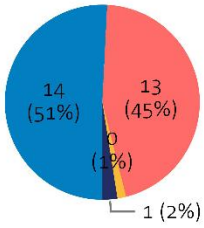
SAF

27.8 Kt

55% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS Not claimed UK ETS CORSIA

97% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	27 kt
Not Categorised	1 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	**28 kt**



Portugal



SAF Activity in Portugal

2025 in a nutshell

In 2025, 1.71 Mt of aviation fuel was supplied at Union Airports in Portugal to aircraft operators in the scope of RFEUA. 1.67 Mt of this was conventional aviation fuel, while SAF accounted for 2.04% or 34.71 kt for the Member State. These figures represent 4.34% and 3.17% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

99% of the supplied SAF was categorised as *aviation biofuel,* while 1% was *advanced aviation biofuels*. Largest share of feedstock used in the supplied SAF originated from China (95%), followed by Indonesia (4%), with Malaysia (1%), Australia (0.2%) and Vietnam (0.1%) completing the top 5 contributors of feedstock to supplied SAF in Portugal.

Facility overview

Although Portugal has no active SAF production facilities, seven projects are under development. The most advanced one - a collaboration between Galp and Mitsui at Sines, is under construction and is expected to begin production in 2026. The estimated SAF capacity from this plant is 92 kt per year (from announced total renewable fuel output of 270 kt) using HEFA technology and waste-based feedstocks such as used cooking oil and animal fats[266].

The other six projects are targeting production of synthetic aviation fuel. LIPOR, in collaboration with P2X Europe and Veolia, have announced a project in Porto, although capacity, timeline and other project information have not been disclosed[267]. The Leça H2 Green Valley project, led by Smartenergy, in collaboration with LIPOR is also located in Porto. The facility targets 77 kt of SAF per year by 2031[268]. Smartenergy has announced two other synthetic fuel projects. The Galileu Green H2 Valley project near Lisbon will utilise CO_2 from a cement plant and targets the production of 155 kt of SAF annually[269]. Commissioning year is not disclosed. The final project announced by Smartenergy (project Mondego) is for a facility in Aveiro with a planned capacity of 230 kt of SAF per year[270].

P2X Europe, a German synthetic fuel developer, is partnering with Navigator, a Portuguese pulp and paper company, on a project in Figueira da Foz called P2X-Portugal. This initiative targets production of 70 kt of SAF annually starting in 2031[271]. A new addition after the publication of the *ReFuel Aviation Annual Technical Report 2025* is project Lusitania developed by Elyse Energy. This project targets production of 80 kt of SAF per annum, with planned commissioning in 2032[272].

Other updates

Portugal developed a National Roadmap for Aviation Decarbonisation (RONDA), approved in 2024, which provides a framework for SAF deployment in the country. The government has launched the Alliance for Sustainability in Aviation

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[266]https://www.eib.org/en/press/all/2025-107-eib-finances-galp-s-renewable-hydrogen-and-biofuels-projects-in-sines-with-eur430-million

[267]https://www.veolia.com/en/our-media/press-releases/veolia-will-produce-local-energy-waste-greater-porto-portugal

[268] From Member State feedback

[269] https://euhydrogenweek.eu/wp-content/uploads/2024/12/B2B-Forum_S10_Raghu-Viswanathan_Smartenergy.pdf

[270] https://euhydrogenweek.eu/wp-content/uploads/2024/12/B2B-Forum_S10_Raghu-Viswanathan_Smartenergy.pdf

[271]https://www.spglobal.com/energy/en/news-research/latest-news/electric-power/072522-portugals-40000-mtyear-saf-project-set-for-2023-fid-eur600-million-investment

[272] From Member State feedback

(ASA) and has announced that EUR 40 million will be reinvested into the aviation sector to support its decarbonisation[273]. More specifically, this support will aim to stimulate the national production of SAF and will be allocated in 2026[274,275]. Portugal also announced participation in the eSAF Early Movers Coalition, launched by the European Commission in December 2025 to accelerate the deployment of synthetic aviation fuels through coordinated financial support and auction mechanisms[276].

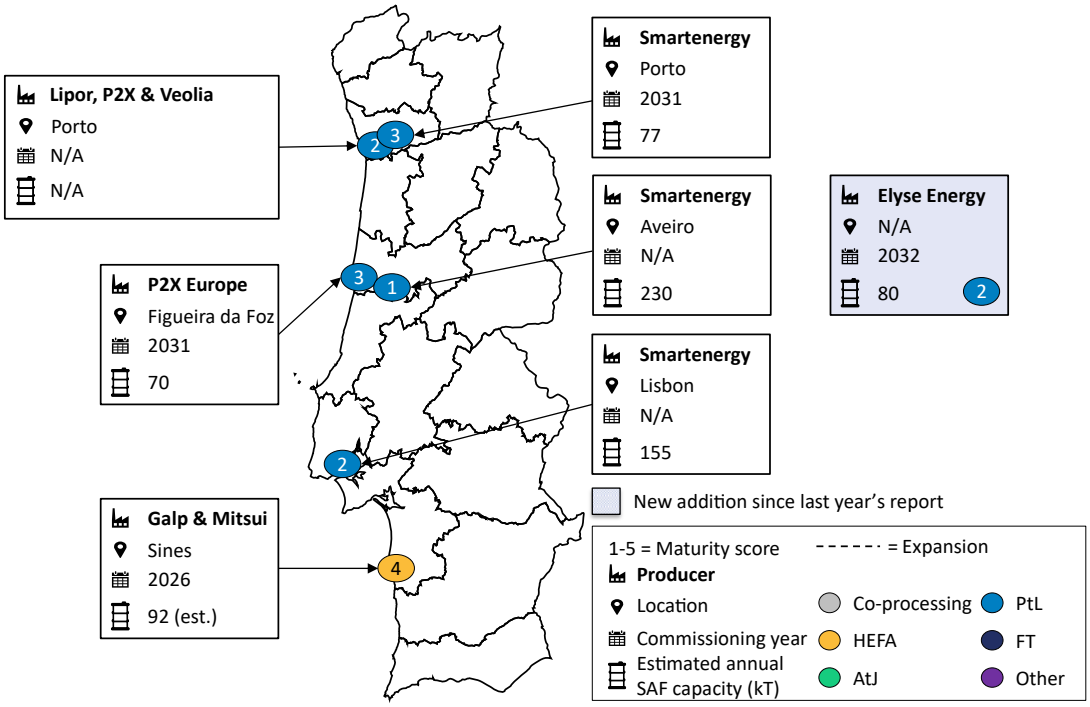


Figure 34 - Map of SAF production facilities in Portugal.

[273]https://www.iata.org/en/about/worldwide/europe/blog/around-european-aviation--focus-on-portugal/

[274] https://www.aman-alliance.org/Home/ContentDetail/84752

[275]https://www.iea.org/policies/27965-saf-production-tenders

[276]https://transport.ec.europa.eu/news-events/news/eu-launches-early-movers-coalition-accelerate-sustainable-aviation-fuel-uptake-2025-12-04_en

Romania



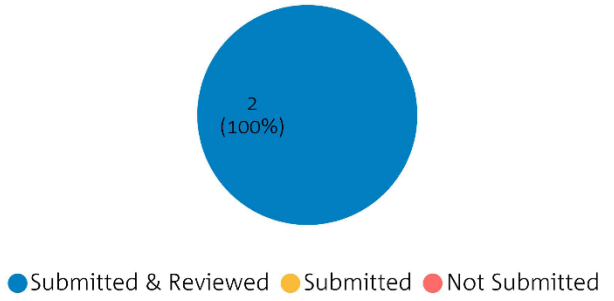
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

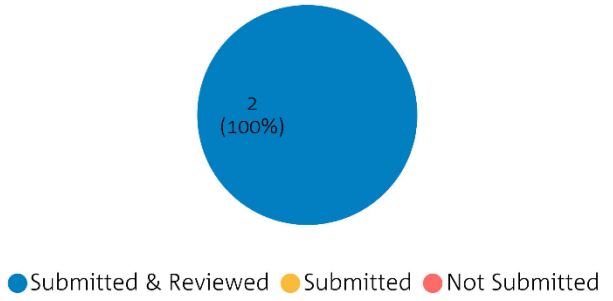
2 aviation fuel suppliers reported on SAF and aviation fuel quantities

Reporting status - SAF and aviation fuel quantities



2 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



8.9 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
204.1 kt	8.9 kt	4.35%

100% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



0.03 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Romania

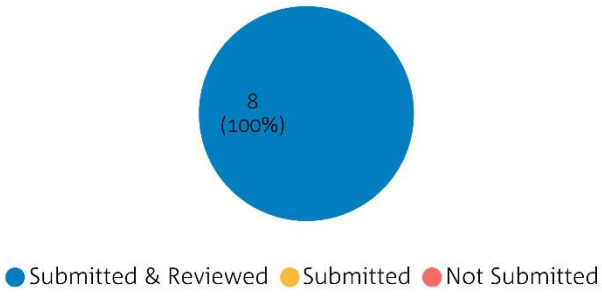
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

8 aircraft operators reported

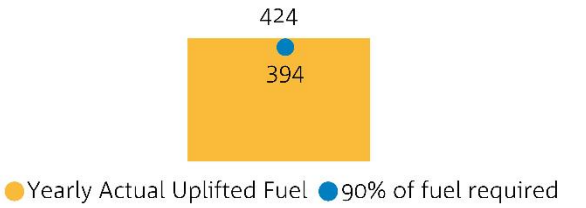
Reporting status of aircraft operators



424 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 75% of Union airports the yearly uplift was above the 90% threshold

75%

3 out of 4

Union airports

8.4 Kt of SAF purchased by aircraft operators

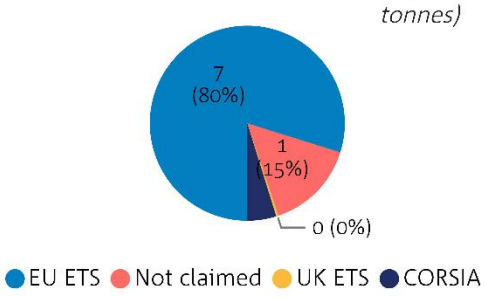
SAF

8.4 Kt

85% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



84% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	1 kt
Aviation biofuels	7 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	**8 kt**



SAF Activity in Romania

2025 in a nutshell

In 2025, 204 kt of aviation fuel was supplied at Union Airports in Romania to aircraft operators in the scope of RFEUA. 195 kt of this was conventional aviation fuel, while SAF accounted for 4.35% or 8.89 kt for the Member State. These figures represent 0.52% and 0.81% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

100% of the supplied SAF was categorised as *aviation biofuel*. China was the only country of origin (100%) for the feedstock used in the supplied SAF in Romania.

Facility overview

Romania is progressing towards domestic SAF production, led by OMV. The company is developing a dedicated SAF and HVO production unit at its Petrobrazi refinery in Ploiești, with a total capacity of 250 kt per year, including 90 kt of SAF. This EUR 750 million project is expected to begin operations in 2028[277].

Other updates

OMV Petrom is also supporting SAF uptake through supply agreements with the national airline, TAROM, enabling SAF deliveries to multiple airports across the country, including Henri Coandă International Airport in Bucharest, Avram Iancu International Airport in Cluj, Traian Vuia International Airport in Timișoara, and Iași International Airport[278].

Romania is also making progress towards realising the "State aid support scheme for investment in biofuel production", which is expected to become operational towards the end of 2026. This scheme aims to provide funding for projects dedicated to SAF production facilities in the country.

[277]https://www.omvpetrom.com/en/media/latest-news/2025/omv-petrom-starts-construction-of-sustainable-fuels-unit-at-petrobrazi-refinery

[278]https://www.omvpetrom.com/en/media/latest-news/2024/omv-petrom-and-tarom-signed-a-contract-for-the-supply-of-sustainable-aviation-fuel-saf-

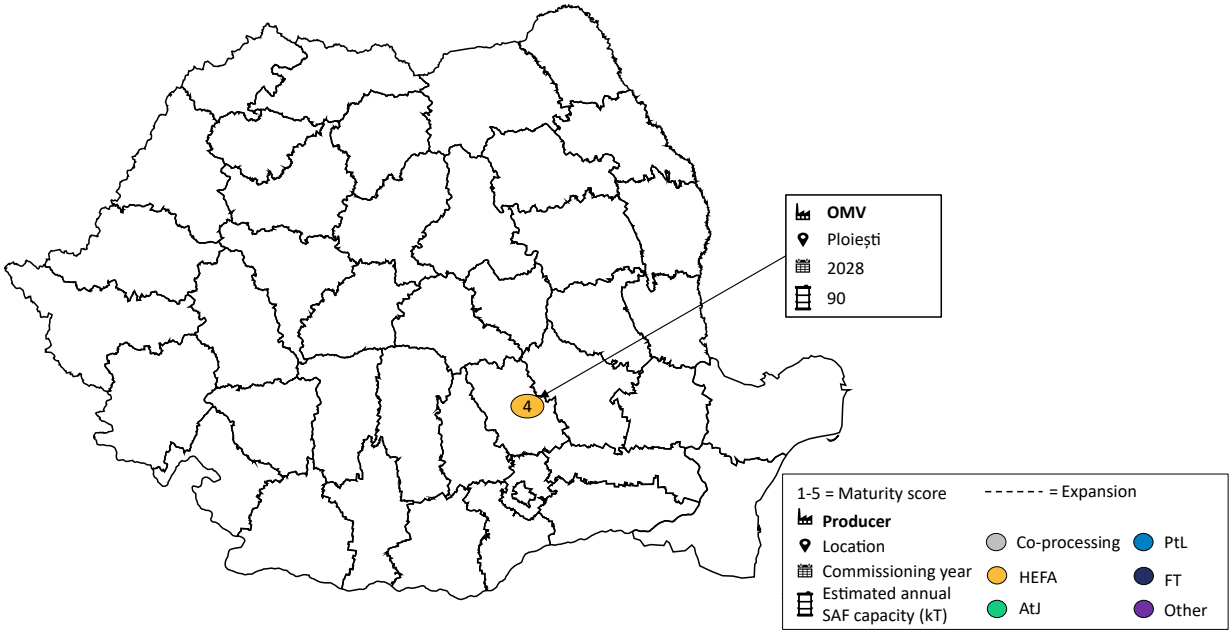


Figure 35 - Map of SAF production facilities in Romania.





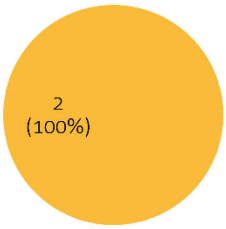
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

2 aviation fuel suppliers reported on SAF and aviation fuel quantities

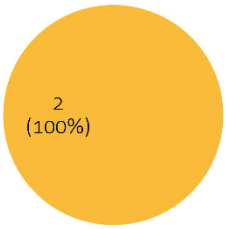
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

2 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

1.2 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
45.6 kt	1.2 kt	2.66%

100% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels

0.00 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings



Slovakia



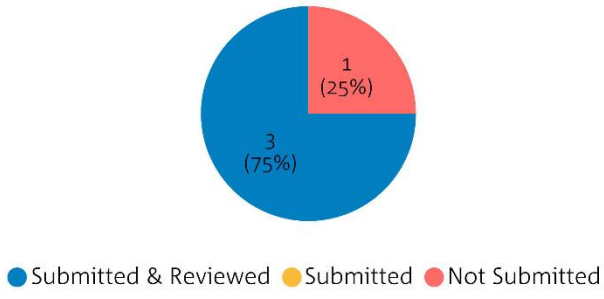
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

3 aircraft operators reported

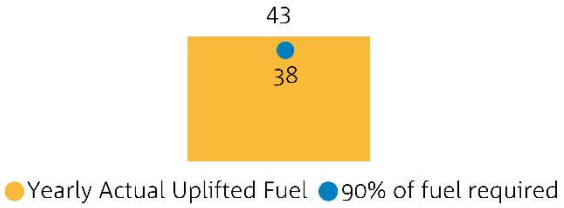
Reporting status of aircraft operators



43 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

1 out of 1

Union airports

0.9 Kt of SAF purchased by aircraft operators

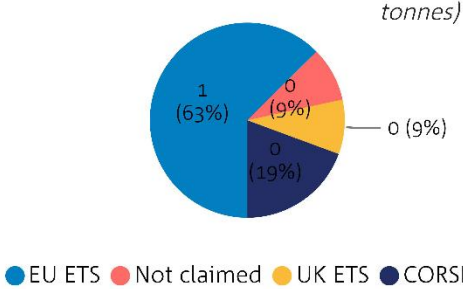
SAF

0.9 Kt

91% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



99% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	1 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	**1 kt**



SAF Activity in Slovakia

2025 in a nutshell

In 2025, 46 kt of aviation fuel was supplied at Union Airports in Slovakia to aircraft operators in the scope of RFEUA. 44 kt of this was conventional aviation fuel, while SAF accounted for 2.66% or 1.21 kt for the Member State. These figures represent 0.12% and 0.11% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

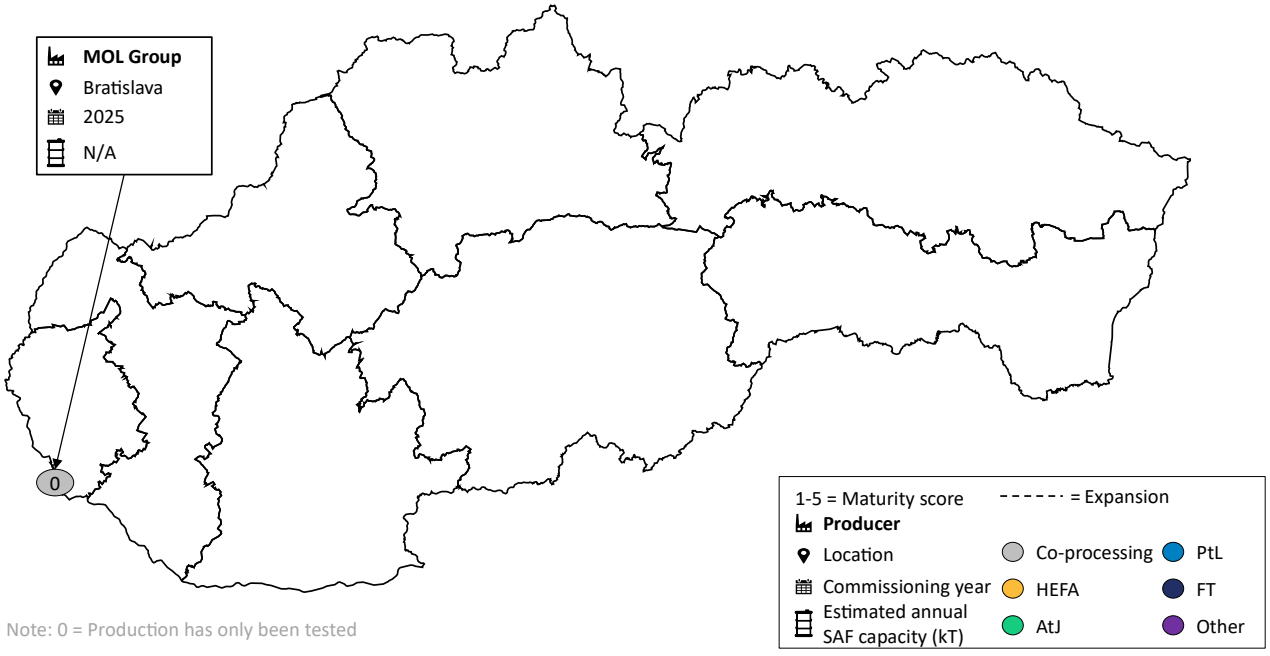
100% of the supplied SAF was categorised as *aviation biofuel*. Largest share of the feedstock used in the supplied SAF originated from Netherlands (73%), with the rest from China (27%).

Facility overview

Slovakia currently has no dedicated continuous SAF production capacity. MOL Group conducted a SAF production test at its Bratislava refinery in early 2025 via co-processing of used cooking oil. While the company demonstrated technical capability to produce SAF, no further plans for commercial production have been announced[279].

Other updates

No other SAF related updates available.



Note: 0 = Production has only been tested

Figure 36 - Map of SAF production facilities in Slovakia.

[279] https://www.ogj.com/refining-processing/refining/article/55268200/slovnafts-bratislava-refinery-advances-renewable-fuels-production



Slovenia



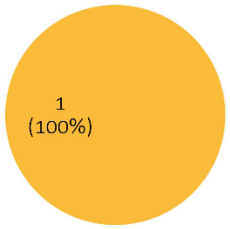
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

1 aviation fuel supplier reported on SAF and aviation fuel quantities

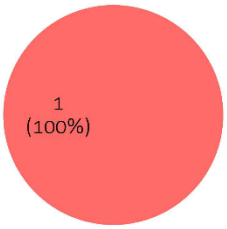
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

0 aviation fuel supplier reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

0.6 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
30.3 kt	0.6 kt	2.03%

100% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels

0.00 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings



Slovenia



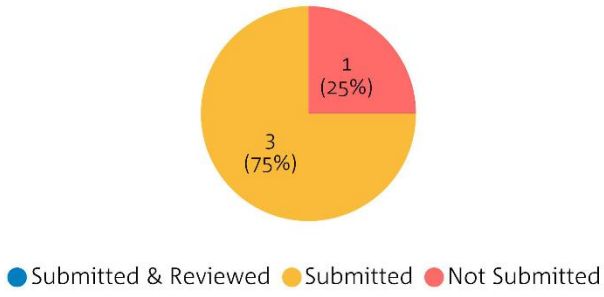
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

3 aircraft operators reported

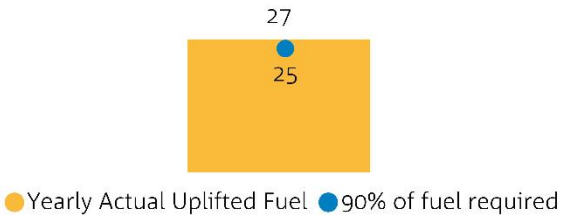
Reporting status of aircraft operators



27 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



In 100% of Union airports the yearly uplift was above the 90% threshold

100%

1 out of 1

Union airports

0.7 Kt of SAF purchased by aircraft operators

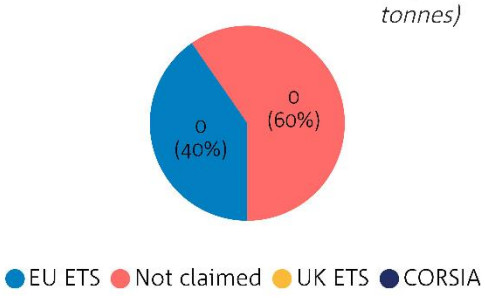
SAF

0.7 Kt

40% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



98% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	1 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	**1 kt**



Slovenia



SAF Activity in Slovenia

2025 in a nutshell

In 2025, 30.33 kt of aviation fuel was supplied at Union Airports in Slovenia to aircraft operators in the scope of RFEUA. 29.71 kt of this was conventional aviation fuel, while SAF accounted for 2.03% or 0.62 kt for the Member State. These figures represent 0.08% and 0.06% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

100% of the supplied SAF was categorised as *aviation biofuel*. China was the only country of origin (100%) for the feedstock used in the supplied SAF in Slovenia.

Facility overview

Slovenia currently has no domestic SAF production capacity, and no public announcements have been made regarding future SAF production projects in the country.

Other updates

No other SAF related updates available.



Spain



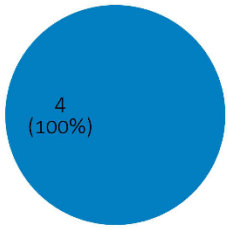
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

4 aviation fuel suppliers reported on SAF and aviation fuel quantities

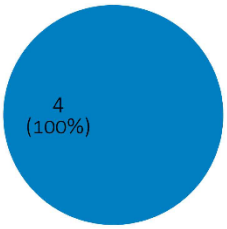
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

4 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

152.5 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
5.9 Mt	152.5 kt	2.59%

100% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Other aviation biofuels

0.52 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Spain

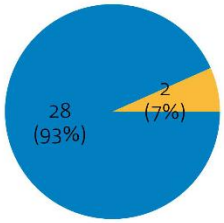
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

30 aircraft operators reported

Reporting status of aircraft operators



Submitted & Reviewed Submitted Not Submitted

6,153 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)



Yearly Actual Uplifted Fuel 90% of fuel required

In 86% of Union airports the yearly uplift was above the 90% threshold

86%

18 out of 21

Union airports

141.7 Kt of SAF purchased by aircraft operators

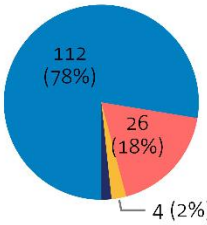
SAF

141.7 Kt

82% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)



EU ETS Not claimed UK ETS CORSIA

97% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	1 kt
Aviation biofuels	137 kt
Not Categorised	2 kt
Other aviation biofuels	1 kt
Synthetic aviation fuels	0 kt
Total	**142 kt**



Spain



SAF Activity in Spain

2025 in a nutshell

In 2025, 5.9 Mt of aviation fuel was supplied at Union Airports in Spain to aircraft operators in the scope of RFEUA. 5.7 Mt of this was conventional aviation fuel, while SAF) accounted for 2.59% or 152.49 kt for the Member State. These figures represent 14.97% and 13.92% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

Close to 100% of the supplied SAF was categorised as *aviation biofuel*, while only 0.4% was *other aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (69%), followed by Spain (9%), with Indonesia (6%), Malaysia (6%) and United Kingdom (1%) completing the top 5 contributors of feedstock to supplied SAF in Spain.

Facility overview

There are seven operational SAF production facilities in Spain. These are producing SAF via co-processing and the HEFA pathway. Repsol began domestic SAF production in 2020 at its Puertollano refinery[280]. The company has since expanded SAF production capacity at three additional refineries in Bilbao, Tarragona and Coruña, where SAF is derived through co-processing. It also built a dedicated renewable fuel platform in Cartagena, which has been operational since 2024 and has annual capacity of 190 kt of SAF[281,282].

Moeve's has been producing SAF through co-processing at its refinery in Huelva since 2023, with 25 kt annual capacity. The company is also constructing a dedicated renewable fuels platform in Huelva, targeting 400 kt of SAF per year and anticipated to commission in 2026[283].

BP has also been producing SAF via co-processing at its refinery in Castellón since 2023[284,285]. It had announced plans for a dedicated HEFA unit, however this was put on hold in 2025, and no further information has been disclosed[286].

[280] https://www.repsol.com/content/dam/repsol-corporate/es/accionistas-e-inversores/impulsando-la-transformacion-del-refino.pdf

[281] https://www.repsol.com/en/about-us/our-operations/industrial/renewable-fuels/index.cshtml

[282] From Member State feedback

[283] https://www.moeve.es/es/empresa/biocombustibles/planta-de-biocombustibles-2g

[284] https://www.cepsa.com/en/press/cepsa-starts-selling-sustainable-aviation-fuel-in-spain

[285] https://www.bp.com/en/global/air-bp/news-and-views/air-bp-news/bps_castellon_refinery_celebrates_first_sale_of_ISCC_EU_SAF.html

[286] https://biofuels-news.com/news/bp-halts-plan-to-produce-saf-at-spanish-plant/

There are also twelve synthetic aviation fuel projects announced in Spain. Solarig has announced the development of two projects. Numantia SAF, located in Soria, is in a Front-End Engineering Design (FEED) stage and has targeted capacity of 60 kt of SAF annually with planned commissioning in 2034[287,288]. Turboleta SAF, located in Teruel has targeted capacity of 75 kt of SAF per year and is planned for commissioning in 2032[289,290].

Repsol in collaboration with Petronor and Saudi Aramco has announced a pilot plant in Bilbao. It aims to start production of 2.1 kt of SAF annually by 2026[291]. Greenalia and P2X Europe have announced project Breogan in Teixeiro, aiming to start production in 2027 with estimated annual capacity of 11 kt of SAF (from 20 kt of renewable fuel announced)[292]. Synhelion has also announced project RISE, expected to commence production from 2027, although no further details have been disclosed[293]. Neither of these three projects has any recent updates available.

Eight new projects have been identified since the publication of the *ReFuelEU Aviation Annual Technical Report 2025*. RIC Energy has three announced projects in Spain. The most advanced one, Compostilla Green project in Cubillos del Sil has targeted annual SAF capacity of 59 kt of SAF and is planned for commissioning in 2030. The project was awarded funding from the country's Hydrogen Valleys programme[294,295]. Besaya Green project in Torrelavega is also targeting 59 kt of SAF annually and is anticipated to become operational in 2032[296,297]. The third project, Tajuña H2 near Madrid is expected to produce 60 kt of SAF per year and commission in 2032[298].

Avalon Renovables has also announced three projects in Huelva (Huelva Bay Project), Malaga (La Joya Project) and Valdepeñas (H2 Valdepeñas Project), aiming to commission production by 2029. All these projects are based on the methanol-to-jet (MtJ) pathway and target capacity of 44 kt, 20 kt and 33 kt of SAF per year, respectively[299].

Ignis P2X, Holcim and Exolum have formed a strategic alliance to develop project ECO2FLY in Toledo which is expected to produce 100 kt of SAF annually and commission in 2031. The project received STEP Seal certification from the European Commission in 2025[300,301].

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287 https://www.vadeaviones.com/2024/04/08/planta-de-combustible-sostenible-saf-en-espana/actualidad/

288 From Member State feedback

289 From Member State feedback

290 https://solarig.com/en/solarig-leads-the-development-of-sustainable-aviation-fuel-with-a-project-portfolio-exceeding-400000-tons-per-year-of-saf-in-spain/

291 https://www.repsol.com/es/sostenibilidad/ejes-sostenibilidad/medio-ambiente/economia-circular/nuestros-proyectos/combustibles-sinteticos/index.cshtml

292 https://www.p2x-europe.com/news/detail/greenalia-and-p2x-europe-join-forces-to-develop-efuel-production-project-in-galicia/

293 https://www.investinspain.org/content/icex-invest/en/noticias-main/2024/synhelion.html

294 https://ric.energy/en/ric-energy-definitive-awardee-of-the-h2-valles-program-with-its-esaf-compostilla-green-project-in-leon/

295 From Member State feedback

296 https://ric.energy/en/ric-energy-and-siemens-partner-to-jointly-develop-renewable-hydrogen-green-ammonia-and-e-fuels/

297 From Member State feedback

298 https://ric.energy/en/ric-energy-aims-to-lead-the-production-of-sustainable-aviation-fuel-e-saf-in-spain/

299 https://avalonrenovables.com/en/

300 https://ignis.es/en/ignis-p2x-holcim-and-exolum-unveil-eco2fly-a-pioneering-project-to-decarbonize-the-construction-materials-industry-and-air-transport/

301 From Member State feedback

Metafuels has also announced a project in Spain. Project Scaletta, based on the MtJ pathway, targets production of 36.5 kt of SAF per year starting 2032[302].

Other updates

Beyond production facilities, Spain has undertaken additional initiatives related to SAF. In 2025, Moeve joined a book-and-claim platform to support SAF adoption across multiple airports, enabling collaboration between fuel suppliers, airlines and corporate customers[303]. Spain also announced participation in the eSAF Early Movers Coalition, launched by the European Commission in December 2025 to accelerate the deployment of synthetic aviation fuels through co-ordinated financial support and auction mechanisms[304].

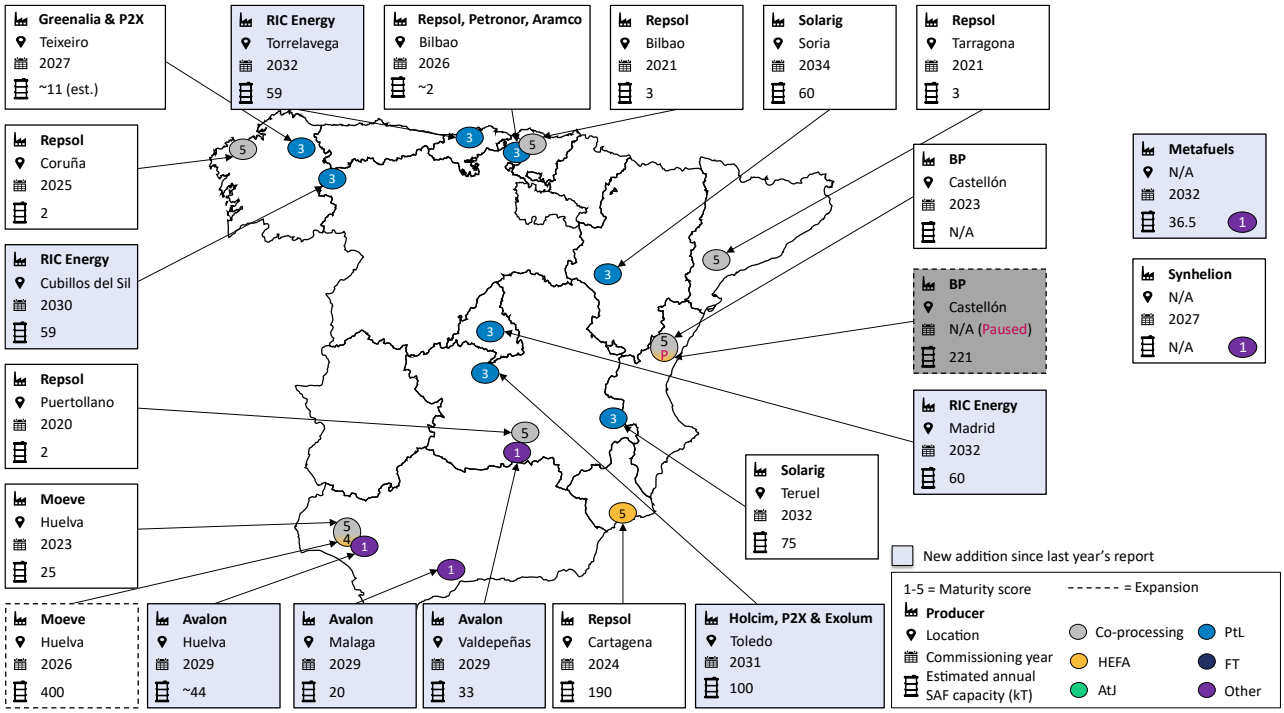


Figure 37 - Map of SAF production facilities in Spain.

[302]https://metafuels.ch/making-it-happen/

[303]https://www.moeveglobal.com/en/press/moeve-first-saf-supplier-avelia-blockchain

[304]https://transport.ec.europa.eu/news-events/news/eu-launches-early-movers-coalition-accelerate-sustainable-aviation-fuel-uptake-2025-12-04_en



Sweden

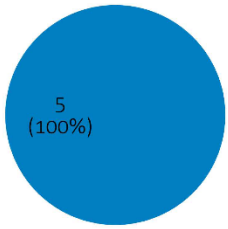
At a glance – Aviation fuel suppliers

Key performance indicators for the 2025 reporting period

1/1

5 aviation fuel suppliers reported on SAF and aviation fuel quantities

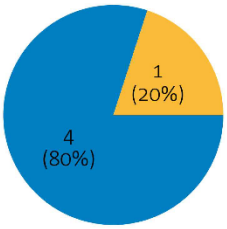
Reporting status - SAF and aviation fuel quantities



Submitted & Reviewed Submitted Not Submitted

5 aviation fuel suppliers reported on aviation fuel properties

Reporting status - Aviation fuel properties



Submitted & Reviewed Submitted Not Submitted

15.7 kt of SAF supplied by aviation fuel suppliers in the Member State

Aviation Fuel	SAF	Share of SAF
644.5 kt	15.7 kt	2.43%

97% of SAF supplied was aviation biofuel

SAF supplied per category of RFEUA eligible aviation fuel

in kt (000s tonnes)



Aviation biofuels Other aviation biofuels

0.05 Mt of CO2e savings from SAF supplied in the Member State

SAF CO_2e savings





Sweden

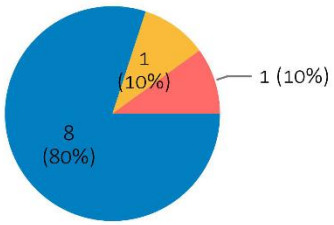
At a glance – Aircraft operators

Key performance indicators for the 2025 reporting period

1/1

9 aircraft operators reported

Reporting status of aircraft operators





644 Kt of aviation fuel uplifted by aircraft operators

Total fuel uplifted versus 90% of fuel required

In Kt (000s tonnes)





In 80% of Union airports the yearly uplift was above the 90% threshold

80%

4 out of 5

Union airports

12.2 Kt of SAF purchased by aircraft operators

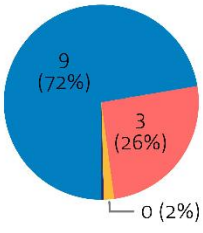
SAF

12.2 Kt

74% of SAF reported is intended to be claimed in an MBM scheme

SAF intended to be claimed by MBM scheme

In kt (000s tonnes)





97% of SAF purchased was aviation biofuels

RFEUA eligible fuel category

Category of eligible fuel	SAF Quantity
Advanced aviation biofuels	0 kt
Aviation biofuels	12 kt
Not Categorised	0 kt
Other aviation biofuels	0 kt
Synthetic aviation fuels	0 kt
Total	12 kt



Sweden



SAF Activity in Sweden

2025 in a nutshell

In 2025, 645 kt of aviation fuel was supplied at Union Airports in Sweden to aircraft operators in the scope of RFEUA. 629 kt of this was conventional aviation fuel, while SAF accounted for 2.43% or 15.67 kt for the Member State. These figures represent 1.64% and 1.43% of total EU conventional aviation fuel supplied to aircraft operators in scope for 2025 and total SAF supply, respectively.

97% of the supplied SAF was categorised as *aviation biofuel*, while 3% was *other aviation biofuels*. Largest share of the feedstock used in the supplied SAF originated from China (83%), followed by Singapore (5%), with Thailand (3%), Poland (2%) and Malaysia (2%) completing the top 5 contributors of feedstock to supplied SAF in Sweden.

Facility overview

Sweden currently has one operational SAF production facility. Finnish energy company St1 and Swedish company SCA operate a jointly owned refinery in Gothenburg, commissioned in 2024, with a capacity to produce 200 kt of renewable fuel per year including estimated 90 kt of SAF using HEFA technology[305].

VAROPreem Sverige AB is also developing two HEFA-based facilities in Sweden. The ICR project in Lysekil is expected to produce 480 kt of SAF annually by 2029[306,307]. The Gothenburg based Viking project has a total planned annual capacity of 800 kt, including an estimated SAF capacity of approximately 270 kt[308]. Timeline for the commissioning of this project has not been disclosed.

The BioÖstrand project, led by St1 and SCA in Östrand targets production of 185 kt of advanced aviation biofuel using forestry residues with planned commissioning in 2029[309]. In 2026, Umeå Energi has announced the development of Green Birch project in Umeå, aiming to produce 100 kt of SAF annually from municipal solid waste, split between both advanced aviation biofuel and synthetic aviation fuel[310]. The commissioning of the project is planned for the early 2030s[311].

Sweden also hosts synthetic aviation fuel projects under development. SkyNRG and Skellefteå Kraft are developing a project in Skellefteå with a planned capacity of 100 kt of SAF per year, expected to be operational by 2030[312]. Norsk e-Fuel is developing project Alby in Ånge with total capacity of 80 kt including an estimated capacity of approximately 44 kt SAF per year[313]. The targeted commissioning of this project has not been disclosed.

Several projects in Sweden have faced pausing or cancellation. Two synthetic aviation fuel projects announced by Vattenfall - HySkies and Hy X, remain paused. Since the publication of the *ReFuelEU Aviation Annual Technical Report*

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[305]https://www.argusmedia.com/en/news-and-insights/latest-market-news/2556277-st1-and-sca-start-saf-hvo-production-in-sweden

[306]https://www.varopreem.com/en/sustainability/decades-of-progress/

[307] https://stainless-steel-world.net/preem-investing-billions-to-convert-refinery-from-fossil-fuels-to-renewables/

[308]https://www.preem.com/in-english/investors/preemholding/renewable-fuel-projects/

[309]https://www.biorefineryostrand.com/en/

[310]https://cdn.prod.website-files.com/6731c0f2b838c7d9b2335832/697a6067f126fd097837f4e0_Green_Birch_press_release_EN_28jan_2026.pdf

[311] https://www.greenbirch.info/

[312]https://skynrg.com/skynrg-and-skelleftea-kraft-announce-project-skykraft-a-pioneering-esaf-project-in-northern-sweden/

[313]https://www.norsk-e-fuel.com/articles/project-alby

2025, two advanced aviation biofuel projects with a combined capacity of approximately 220 kt have been identified as cancelled. Among them is Colabit's biorefinery in Gävle, which aimed to produce 400 kt of renewable fuels annually, and the consortium-based project in Växjö which was targeting capacity of 16 kt of SAF annually[314,315,316]. Additionally, Swedish Biofuels was testing SAF production using the AtJ pathway at its demonstration plant in Brista, however there is this has been cancelled and there are no plans for commercial-scale production[317,318,319].

Other updates

SAF activity in Sweden spans beyond production. Swedavia has provided financial incentives to support SAF uptake at its airports, and partnered with Luleå Municipality, Aviator Airport Alliance and SOS Alarm for procurement of SAF in 2026[320,321].

[314] https://colabit.com/en/energy-innovation/biorefinery/

[315] https://www.konkurslistan.se/konkurser/5569956658

[316]https://skynrg.com/dutch-swedish-consortium-gets-go-ahead-to-continue-study-on-production-of-sustainable-aviation-fuel-from-forestry-residues-in-sweden/

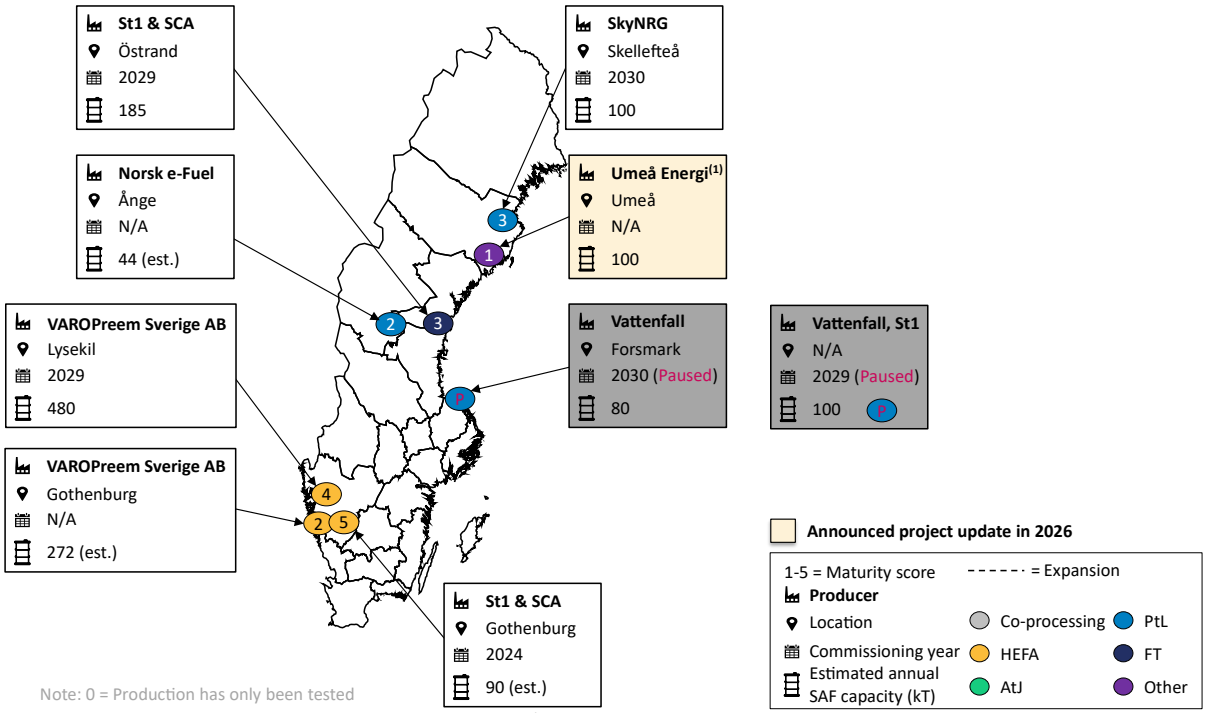
[317]https://swedishbiofuels.se/projects/biological-fully-synthetic-jet

[318]EU Member State feedback

[319] https://www.sverigesradio.se/artikel/marvikensatsning-fortsatter-trots-bakslag-vid-arlanda

[320]https://www.internationalairportreview.com/swedavia-expands-sustainable-aviation-fuel-procurement-with-new-municipal-participation/1671897.article

[321]https://www.swedavia.com/contentassets/6452d7c55b3c42da80b1aeecde456925/saf-incentive-programme-2025.pdf



Note: 0 = Production has only been tested
(1) Announced project in January 2026. Scenario analysis as of 31st December 2025

Figure 38 - Map of SAF production facilities in Sweden.

6. Annexes

6.1 List of EU based SAF projects

Member State	Producer	Project/ facility	ReFuelEU category	Project Stage (score)	SAF capacity (t)	Commissioning year	Reference
Austria	OMV	Schwechat	Aviation biofuels	Operational (5)	4,000	2022	[LINK]
Austria	AVL List	Graz	Synthetic aviation fuel	Test/Trial (0)	N/A	N/A	[LINK]
Belgium	Terra Mater	Ghent	Advanced aviation biofuels	Pre-FEED (2)	N/A	N/A	[LINK]
Belgium	OMV	Antwerp	Aviation biofuels	Pre-FEED (3)	98,600 (est.)	2028	[LINK]
Belgium	Total Energies	Antwerp	Aviation biofuels	Operational (5)	50,000	2025	[LINK]
Belgium	Total Energies	Antwerp - Expansion	Aviation biofuels	Pre-FEED (2)	30,000	N/A	[LINK]
Belgium	LanzaTech	North Sea Port AtJ	Advanced aviation biofuels	Pre-FEED (2)	79,000	N/A	[LINK]
Croatia	INA	Rijeka	Advanced aviation biofuels	Pre-FEED (3)	4,900[322]	2029	[LINK]
Denmark	Arcadia eFuels	Vordingborg	Synthetic aviation fuel	FEED (3)	68,000	2028	[LINK]
Denmark	Metafuels, European Energy	Padborg	Synthetic aviation fuel	Pre-FEED (1)	3,500	2029	[LINK]
Denmark	CIP	Aalborg	Synthetic aviation fuel	Pre-FEED (3)	90,000	2030	[LINK]

[322] From Member State feedback

Member State	Producer	Project/ facility	ReFuelEU category	Project Stage (score)	SAF capacity (t)	Commissioning year	Reference
Denmark	Topsoe	Foulum	Synthetic aviation fuel	Test/Trial (0)	N/A	2024	[LINK]
Denmark	Kosan Gas, European Energy, Vertimass	Aalborg	Synthetic aviation fuel	Pre-FEED (1)	N/A	N/A	[LINK]
Denmark	Kosan Gas, European Energy, Vertimass	Aalborg – Expansion	Synthetic aviation fuel	Pre-FEED (1)	10,000	N/A	[LINK]
Denmark	Skovgaard Energy, Sumitomo Corporation	Holstebro	Synthetic aviation fuel/ Advanced aviation biofuels	Pre-FEED (1)	N/A	N/A	[LINK]
Estonia	Protio	Tallinn	Synthetic aviation fuel	Paused	N/A	N/A	[LINK]
Estonia	Biojet	Narva	Advanced aviation biofuels	Pre-FEED (1)	N/A	N/A	[LINK]
Finland	Neste	Porvoo	Aviation biofuels	Operational (5)	100,000	2016	[LINK]
Finland	Neste	Porvoo - Expansion	Aviation biofuels	Pre-FEED (3)	1,400,000	2035	[LINK]
Finland	Norsk e-Fuel	Rauma	Synthetic aviation fuel	Pre-FEED (2)	44,200	2031	[LINK]
Finland	Norsk e-Fuel	Imatra	Synthetic aviation fuel	Pre-FEED (2)	44,200	N/A	[LINK]
Finland	Norsk e-Fuel	Tornio	Synthetic aviation fuel	Pre-FEED (3)	80,000	2032	[LINK]
Finland	Verso Energy	Oulu	Synthetic aviation fuel	Pre-FEED (1)	81,000	N/A	[LINK]
Finland	Verso Energy	Tornio	Synthetic aviation fuel	Pre-FEED (1)	81,000	N/A	[LINK]
Finland	Liquid Sun	Espoo	Synthetic aviation fuel	Test/Trial (0)	N/A	2025	[LINK]
Finland	Nordic Generation Fuels	N/A	Synthetic aviation fuel	Pre-FEED (1)	N/A	N/A	[LINK]

Member State	Producer	Project/ facility	ReFuelEU category	Project Stage (score)	SAF capacity (t)	Commissioning year	Reference
Finland	Nordic Genera-tion Fuels	N/A	Synthetic aviation fuel	Pre-FEED (1)	N/A	N/A	[LINK]
France	TotalEnergies	La Mède	Aviation biofuels	Operational (5)	N/A	2021	[LINK]
France	TotalEnergies	La Mède - Ex-pansion	Aviation biofuels	Operational (5)	15,000	2025	[LINK]
France	TotalEnergies	Grandpuits-Bailly-Carrois	Aviation biofuels	EPC (4)	230,000	2026	[LINK]
France	TotalEnergies	Grandpuits-Bailly-Carrois	Aviation biofuels	EPC (4)	55,000	2027	[LINK]
France	TotalEnergies	Gonfreville-l'Orcher (Nor-mandy)	Aviation biofuels	Operational (5)	N/A	2022	[LINK]
France	TotalEnergies	Gonfreville-l'Orcher (Nor-mandy)	Aviation biofuels	Operational (5)	160,000	2025	[LINK]
France	Elyse Energy	Lacq	Advanced aviation biofuels	Pre-FEED (3)	87,000	2030	[LINK]
France	Elyse Energy & Khimond Greentech	Tartas	Synthetic aviation fuel	Pre-FEED (2)	N/A	N/A	[LINK]
France	Hynamics	Donges	Synthetic aviation fuel	Pre-FEED (3)	37,500	2030	[LINK]
France	ENGIE	Le Havre	Synthetic aviation fuel	Pre-FEED (3)	70,000	2031	[LINK]
France	SAF+ & Lhyfe	Le Havre	Synthetic aviation fuel	Pre-FEED (2)	N/A	2030	[LINK]
France	Hy2GEn & H2V	Fos-sur-mer	Synthetic aviation fuel	Pre-FEED (1)	75,000	2030	[LINK]

Member State	Producer	Project/ facility	ReFuelEU category	Project Stage (score)	SAF capacity (t)	Commissioning year	Reference
France	Hy2Gen	Hynovera	Synthetic aviation fuel	Pre-FEED (3)[323]	32,000	2029	[LINK]
France	Verso Energy	Tartas	Synthetic aviation fuel	Pre-FEED (1)	81,000	2030	[LINK]
France	Verso Energy	Rouen	Synthetic aviation fuel	FEED (1)	81,000	2029	[LINK]
France	Verso Energy	Epinal	Synthetic aviation fuel	Pre-FEED (1)	81,000	2029	[LINK]
France	Verso Energy	Saillat-Sur-Vienne	Synthetic aviation fuel	Pre-FEED (1)	153,000	2029	[LINK]
France	Qair	Lannemezan	Synthetic aviation fuel	Pre-FEED (3)	70,000	2030	[LINK]
France	Haffner Energy & LanzaJet	Paris	Advanced aviation biofuels	Pre-FEED (3)	60,000	2028	[LINK]
France	EQTEC & Com-pactGTL	Epinal	Advanced aviation biofuels	Test/Trial (0)	N/A	N/A	[LINK]
France	Elyse Energy	Fos-sur-Mer	Synthetic aviation fuel	Pre-FEED (1)	75,000	N/A	[LINK]
France	North Atlantic Energies	Gravenchon	Aviation biofuels	Test/Trial (0)	N/A	N/A	[LINK]
France	Consortium	Rebound	Advanced aviation biofuels	Pre-FEED (2)	160,000	N/A	[LINK]
Germany	BP	Lingen	Aviation biofuels	Operational (5)	N/A	2022	[LINK]

[323] Project has been cancelled in March 2026 - https://concertation.hynovera.fr/. This would mean maturity score of 0. However, quantitative data presented is as of 31st December 2025

Member State	Producer	Project/ facility	ReFuelEU category	Project Stage (score)	SAF capacity (t)	Commissioning year	Reference
Germany	DLR	Leuna	Synthetic aviation fuel	EPC (4)	1,381 (est.)	2027	[LINK]
Germany	Hy2Gen	Jänschwalde	Synthetic aviation fuel	Pre-FEED (1)	28,000	2030	[LINK]
Germany	Ineratec	ERA ONE	Synthetic aviation fuel	Operational (5)	2,000	2025	[LINK]
Germany	TBD[324]	Lausitz	Synthetic aviation fuel	Pre-FEED (1)	N/A	N/A	[LINK]
Germany	Zaffra, Enertag	Brandenburg eSAF	Synthetic aviation fuel	Pre-FEED (3)	30,000	2030	[LINK]
Germany	Sasol, DHL, HH2E, Airbus	Leuna	Synthetic aviation fuel	Paused	200,000	2030	[LINK]
Germany	Solarbelt (Atmosfair)	Werlte	Synthetic aviation fuel	Test/Trial (0)	N/A	2021	[LINK]
Germany	Xfuels (EDL)	Böhlen	Synthetic aviation fuel	Pre-FEED (3)[325]	50,000	2028	[LINK]
Germany	Synhelion	Jülich	Advanced aviation biofuels	Operational (5)	N/A	2024	[LINK]
Germany	Frauenhofer ISE	Freiburg	Synthetic aviation fuel	Test/Trial (0)	N/A	2028	[LINK]
Germany	Spark e-fuels	N/A	Synthetic aviation fuel	Pre-FEED (1)	N/A	N/A	[LINK]
Germany	KIT	Karlsruhe	Synthetic aviation fuel	Pre-FEED (2)	365 (est.)	N/A	[LINK]
Germany	Caphenia	Germany I	Advanced Aviation biofuels	EPC (4)	500	2026	[LINK]

[324] Project developer is unknown

[325] Project might be on hold, but no official confirmation has been announced – from Member State feedback

Member State	Producer	Project/ facility	ReFuelEU category	Project Stage (score)	SAF capacity (t)	Commissioning year	Reference
Germany	Caphenia	Germany II / BAYSAF	Advanced Aviation biofuels	Pre-FEED (1)	15,000	2029	[LINK]
Germany	Greenlyte Carbon Technologies	Dusseldorf	Synthetic aviation fuel	Pre-FEED (3)	150	2028	[LINK]
Germany	TotalEnergies	Leuna	Aviation biofuels	Pre-FEED (3)	50,000	2026	[LINK]
Germany	HOLBORN	Hamburg	Aviation biofuels	EPC (4)	74,800 (est.)	2027	[LINK]
Germany	Bayernoil (Varo Energy)	Vohburg	Advanced Aviation biofuels	Paused	N/A	N/A	[LINK]
Germany	Flugplatz Straubing-Wall-mühle GmbH	Straubing	Advanced aviation biofuels	FEED (3)	10,000	2028	Member State feedback
Ireland	Galetech Energy	Galetech Ireland pilot	Synthetic aviation fuel	Test/Trial (0)	286	2027	[LINK]
Italy	Enilive	Gela	Aviation biofuels	Operational (5)	350,000	2025	[LINK]
Italy	Enilive	Venice	Aviation biofuels	FEED (3)	200,000	2027	[LINK]
Italy	Enilive	Pavia	Aviation biofuels	Pre-FEED (3)[326]	400,000	2028	[LINK]
Italy	Enilive	Priolo	Aviation biofuels	Pre-FEED (3)[327]	180,000	2028	[LINK]
Italy	SARPOM	Trecate	Advanced aviation biofuels	Operational (5)	12,000	2023	Member State feedback

[326] In February 2026, this project reached FID and would be a maturity score 4. However, quantitative data presented in the report is as of 31st December 2025

[327] In February 2026, this project reached FID and would be a maturity score 4. However, quantitative data presented in the report is as of 31st December 2025

Member State	Producer	Project/ facility	ReFuelEU category	Project Stage (score)	SAF capacity (t)	Commissioning year	Reference
Latvia	Amber Flow Fuels	Port of Riga	Aviation biofuels	EPC (4)	87,000	2027	[LINK]
Latvia	NorSAF	Liepaja Special Economic Zone project	Advanced aviation biofuels/ Synthetic aviation fuels	Pre-FEED (3)	100,000	2030	[LINK]
Netherlands	Neste	Rotterdam	Aviation biofuels	Operational (5)	500,000	2025	[LINK]
Netherlands	Neste	Rotterdam - Ex-pansion	Aviation biofuels	EPC (4)	700,000	2027	[LINK]
Netherlands	Chane Terminals	Koole Tankstor-age Botlek	Aviation biofuels	Operational (5)	N/A	2020	[LINK]
Netherlands	Chane Terminals	Koole Tankstor-age Botlek - Expansion	Aviation biofuels	EPC (4)	N/A	2026	[LINK]
Netherlands	SkyNRG	SkyNRG Delfzijl (DSL-01)	Aviation biofuels	FEED (3)[328]	100,000	2028	[LINK]
Netherlands	Varo Energy & Gunvor	Rotterdam	Aviation biofuels	FEED (3)	245,000	2026	[LINK]
Netherlands	Ineratec	Amsterdam	Synthetic aviation fuel	Pre-FEED (3)	19,000 (est.)	2027	[LINK]
Netherlands	Power2X	Rotterdam	Synthetic aviation fuel	Pre-FEED (1)	250,000	N/A	[LINK]
Netherlands	Metafuels	Turbe	Synthetic aviation fuel	Pre-FEED (1)	350	2028	[LINK]
Netherlands	Metafuels	Turbe – Expansion	Synthetic aviation fuel	Pre-FEED (1)	35,000	2031	[LINK]
Netherlands	SkyNRG	Synkero	Synthetic aviation fuel	Paused	50,000	2030	[LINK]

[328] As of February 2026, this project is in EPC stage and maturity score 4. However, quantitative data presented in the report is as of 31st December 2025

Member State	Producer	Project/ facility	ReFuelEU category	Project Stage (score)	SAF capacity (t)	Commissioning year	Reference
Poland	Orlen	Płock	Aviation biofuels	EPC (4)	300,000	N/A	[LINK]
Portugal	Galp & Mitsui	Sines	Aviation biofuels	EPC (4)	92,000 (est.)	2026	[LINK]
Portugal	Smartenergy	Leça H2 Green Valley	Synthetic aviation fuel	Pre-FEED (3)	77,000	2031	[LINK]
Portugal	Smartenergy	Galileu Green H2 Valley	Synthetic aviation fuel	Pre-FEED (2)	155,000	N/A	[LINK]
Portugal	Smartenergy	Mondego	Synthetic aviation fuel	Pre-FEED (1)	230,000	N/A	[LINK]
Portugal	P2X Europe	P2X-Portugal	Synthetic aviation fuel	Pre-FEED (3)	70,000	2031	[LINK]
Portugal	Lipor, P2X, Veo-lia	Porto	Synthetic aviation fuel	Pre-FEED (2)	N/A	N/A	[LINK]
Portugal	Elyse Energy	Lusitania	Synthetic aviation fuel	Pre-FEED (2)	80,000	2032	Member State feedback
Romania	OMV Petrom S.A.	Ploiești	Aviation Biofuels	EPC (4)	90,000	2028	[LINK]
Slovakia	MOL Group	Bratislava	Aviation Biofuels	Test (0)	N/A	N/A	[LINK]
Spain	Repsol	Tarragona	Aviation biofuels	Operational (5)	3,000	2021	[LINK]
Spain	Repsol	Puertollano	Aviation biofuels	Operational (5)	2,000	2020	[LINK]
Spain	Repsol	Bilbao	Aviation biofuels	Operational (5)	3,000	2021	[LINK]
Spain	Repsol	Coruña	Aviation biofuels	Operational (5)	2,000	2025	Member State feedback
Spain	BP	Castellón	Aviation biofuels	Operational (5)	N/A	2023	[LINK]
Spain	Moeve	Huelva	Aviation biofuels	Operational (5)	25,000	2023	[LINK]

Member State	Producer	Project/ facility	ReFuelEU category	Project Stage (score)	SAF capacity (t)	Commissioning year	Reference
Spain	Moeve	Huelva - Expansion	Aviation biofuels	EPC (4)	400,000	2026	[LINK]
Spain	Repsol	Cartagena	Aviation biofuels	Operational (5)	190,000	2024	[LINK]
Spain	Repsol, Petronor, Aramco	Bilbao	Synthetic aviation fuel	FEED (3)	2,100	2026	[LINK]
Spain	Solarig	Soria	Synthetic aviation fuel	FEED (3)	60,000	2034	[LINK]
Spain	Solarig	Teruel	Synthetic aviation fuel	Pre-FEED (3)	75,000	2032	[LINK]
Spain	RIC Energy	Cubillos del Sil	Synthetic aviation fuel	Pre-FEED (3)	59,000	2030	[LINK]
Spain	RIC Energy	Torrelavega	Synthetic aviation fuel	Pre-FEED (3)	59,000	2032	[LINK]
Spain	RIC Energy	Community of Madrid	Synthetic aviation fuel	Pre-FEED (3)	60,000	2032	[LINK]
Spain	Metafuels	N/A	Synthetic aviation fuel	Pre-FEED (1)	36,500	2032	[LINK]
Spain	Ignis P2X, Holcim, Exolum	Toledo	Synthetic aviation fuel	Pre-FEED (3)	100,000	2031	[LINK]
Spain	Avalon Renovables	Malaga	Synthetic aviation fuel	EPC (1)	20,000	2029	[LINK]
Spain	Avalon Renovables	Valdepeñas	Synthetic aviation fuel	EPC (1)	33,000	2029	[LINK]
Spain	Avalon Renovables	Huelva	Synthetic aviation fuel	EPC (1)	43,800	2029	[LINK]
Spain	Greenalia & P2X	Teixeiro	Synthetic aviation fuel	Pre-FEED (3)	11,050	2027	[LINK]
Spain	Synhelion	N/A	Advanced Aviation biofuels	Pre-FEED (1)	N/A	2027	[LINK]

Member State	Producer	Project/ facility	ReFuelEU category	Project Stage (score)	SAF capacity (t)	Commissioning year	Reference
Sweden	St1 & SCA	Gothenburg	Aviation biofuels	Operational (5)	90,000 (est.)	2024	[LINK]
Sweden	VAROPreem Sverige AB	Lysekil	Aviation biofuels	EPC (4)	480,000	2029	[LINK]
Sweden	VAROPreem Sverige AB	Gothenburg	Aviation biofuels	Pre-FEED (2)	272,000 (est.)	N/A	[LINK]
Sweden	St1 & SCA	Östrand	Advanced aviation biofuels	Pre-FEED (3)	100,000	2029	[LINK]
Sweden	Umeå Energi	Umeå	Advanced aviation biofuels/ Synthetic aviation fuel	Pre-FEED (1)	100,000	N/A	[LINK]
Sweden	SkyNRG	Skellefteå	Synthetic aviation fuel	Pre-FEED (3)	100,000	2030	[LINK]
Sweden	Norsk e-Fuel	Ånge	Synthetic aviation fuel	Pre-FEED (2)	44,200 (est.)	N/A	[LINK]
Sweden	Vattenfall	Forsmark	Synthetic aviation fuel	Paused	80,000	2030	[LINK]
Sweden	Vattenfall & St1	N/A	Synthetic aviation fuel	Paused	100,000	2029	[LINK]

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