

This letter was coordinated by the following organizations: Verso Energy, Technip Energies, BpiFrance, T&E, Honeywell, EDF-Hynamics, ENGIE, France Hydrogène, Aéro Décarbo, MGH Energy, Power 2 X, Hy24, H2V, H4Fos, Hy2gen, SkyNRG

Brussels, 20 March 2026

Mr Stéphane Séjourné

Executive Vice-President Prosperity and Industrial Strategy

Mr Dan Jørgensen,

Commissioner for Energy and Housing

Mr Apostolos Tzitzikostas,

Commissioner for Sustainable Transport and Tourism

Mr Wopke Hoekstra,

Commissioner for Climate, Net Zero and Clean Growth

European Commission

1049 Brussels

Belgium

Objet : ReFuelEU - Enabling the emergence of a European eSAF industry

Dear Executive Vice-President and Commissioners,

Over the past few weeks, and most recently during the Aviation Summit of Airlines for Europe (A4E), airlines and fuel suppliers have called for a delay or weakening of the eSAF mandates under ReFuelEU Aviation, arguing that supply will not be available by 2030–2031.

We firmly disagree with this assessment.

A significant number of eSAF projects are currently under development across Europe, supported by EU instruments, Member States and industrial players. Many of these projects are progressing towards final investment decision and are designed to deliver volumes within ReFuelEU timeframe.

The issue today is not the absence of supply, but the conditions required to unlock it.

At this critical stage, maintaining a clear, stable and credible regulatory framework is essential. Any signal that the mandate could be weakened would immediately impact financing conditions, delay final investment decisions, and ultimately reduce the availability of eSAF in Europe by 2030. This would in turn make such argument of an alleged unavailability of eSAF volumes applicable on and on to the following years, in a vicious circle.

A strategic risk for Europe

At the same time, several projects outside Europe — particularly in Asia and the Middle East — are advancing rapidly, with some already under construction.

A weakening or delay of the European framework would create a paradoxical situation in which Europe, despite having initiated this transition, would become dependent on imported eSAF, thereby undermining its energy sovereignty and industrial leadership.

The current geopolitical context is a stark reminder that Europe remains highly dependent and lacks sovereignty over its fuels supply. Recent tensions affecting global oil markets highlight the extent to which Europe's aviation sector remains exposed to external shocks and supply disruptions.

A cornerstone of European industrial policy

It is also essential not to overlook the industrial dimension of this transition. eSAF is a cornerstone of Europe's reindustrialisation. At a time when the European Union is seeking to translate into action the recommendations of the Draghi report, eSAF represents exactly the type of strategic industry that can deliver tangible outcomes across the continent.

These projects will anchor industrial activity in European regions, generate significant local economic spillovers, and create a large number of skilled jobs across the value chain. They also provide a pathway to support and sustain existing industrial sites, particularly CO2 emitting facilities, by creating a viable economic use for their emissions on the mid-term while contributing to their decarbonisation.

Enabling deployment without weakening ambition

We recognise that the market remains at an early stage and that cost differentials remain a challenge. In this context, the priority should be to facilitate deployment through appropriate instruments rather than to weaken demand signals.

Mechanisms such as double-sided auctions or contracts for difference, as identified in the Sustainable Transport Investment Plan and implemented in other States such as the United Kingdom, can provide the necessary visibility to investors and enable projects to reach financial close while managing costs.

At the same time, attention should be given to potential distortions of competition with international hubs not subject to comparable requirements, in order to preserve fair competition for European airlines.

Maintaining the course

Maintaining a stable and credible framework is essential to enable the emergence of a European eSAF industry, strengthen energy sovereignty and contribute to the Union's industrial objectives.

Calling this trajectory into question under short-term pressure would risk not only slowing down decarbonisation, but also shifting value creation outside Europe — leaving the Union dependent on imported alternative fuels, as is already partly the case for bio-SAF.

We therefore strongly encourage the European Commission for maintaining the course and upholding the integrity of the ReFuelEU framework.

We remain at your disposal to discuss these points further.

Yours sincerely,

The undersigned organisations engaged in the development of the European eSAF industry

Logos of supporting organisations



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