NO FUEL.
NO DEFENCE.

EUROPEAN eSAF COALITION ADVOCACY CAMPAIGN

Fuel sovereignty is not only an aviation or climate issue.
It is a defence readiness and sovereignty issue.

Europe’s armed forces, critical transport systems and emergency response capabilities all depend on secure access to reliable fuel.
Without fuel, there is no resilience. Without fuel, there is no defence.

NO FUEL.
NO DEFENCE.

The European eSAF Coalition is launching an advocacy campaign to make eSAF a central part of Europe’s fuel security, resilience and long-term readiness agenda. At a time of growing geopolitical uncertainty and increasing pressure on critical supply chains, this campaign highlights the strategic role of eSAF in strengthening Europe’s defence preparedness and operational autonomy.

It will give voice to the strategic importance of eSAF, stimulate policy debate on Europe’s future fuel supply, and bring together EU institutions, national governments, defence stakeholders, aviation leaders, industrial partners and investors behind a shared European scale-up agenda.

The Coalition will advocate for the policy frameworks, investment tools and market mechanisms needed to unlock production, mobilise capital and establish Europe as a global leader in eSAF deployment.

Our objective is clear: to help Europe build a secure, sustainable and sovereign fuel supply chain that supports aviation decarbonisation, strengthens industrial competitiveness and contributes to the resilience of Europe’s economy, security systems, and defence capabilities.

THREE PRIORITY ACTIONS FOR DEFENCE READINESS

The European eSAF coalition calls on EU institutions, national governments, defence stakeholders and NATO partners to act in three priority areas:

1. SECURE SOVEREIGN DEMAND

Europe needs to create clear, long-term demand for domestically produced eSAF by integrating it into defence procurement, military fuel planning and strategic resilience frameworks.

National defence procurement bodies and military forces should support market certainty by signing long-term offtake agreements with eSAF producers. Additional mechanisms, including direct investment in eSAF production facilities or buyer-of-last-resort arrangements, should also be explored to de-risk early projects and accelerate deployment.

The European Commission and national stockpiling agencies should review stockpiling rules and guidelines to enable the inclusion of eSAF production capacity and/or government procurement of eSAF volumes as part of Europe’s strategic fuel reserves.

2. UNLOCK STRATEGIC FUNDING

Europe must mobilise dedicated EU and national funding to support first-of-a-kind eSAF projects and technology champions to build a resilient, homegrown fuel supply chain.

The European Commission, supported by the European Parliament, therefore needs to make eSAF production facilities and technologies eligible for funding under relevant EU defence and competitiveness instruments, including the European Competitiveness Fund and the Connecting Europe Facility.

Revenues from the Emissions Trading System (ETS) should also be used to help bridge the cost gap and support mechanisms such as a European market intermediary model.

National governments, including ministries of transport, energy and defence, should earmark funding for resilient fuel supply infrastructure, with a focus on domestic eSAF production, renewable energy, hydrogen, CO_2 capture and fuel synthesis capacity.

3. CLASSIFY FUEL PRODUCTION AS CRITICAL DUAL-USE INFRASTRUCTURE

Europe must recognise eSAF production as strategic Infrastructure that strengthens energy security, military readiness and economic resilience.

NATO should amend its spending guidelines to facilitate investment in strategic fuel production under the 1.5% NATO dual-use spending targets.

National ministries of defence should formally recognise the importance of resilient fuel supply and qualify domestic fuel production capacity, including eSAF, as strategic defence infrastructure.

THE FOUNDATIONS ARE IN PLACE

What is needed now is coordinated EU, national and NATO-level action to secure demand, unlock investment and establish eSAF as a strategic European fuel for aviation, defence and long-term resilience.

EUROPE MUST ACT NOW

A resilient European jet fuel supply chain is not only a climate objective. It is a strategic requirement, and fuel reserves alone are not resilience. True resilience means domestic production capacity that can be scaled, diversified and sustained through disruption.

The capacity to produce critical fuels at home is essential to securing Europe's industrial future, strengthening energy independence, protecting critical transport systems, supporting defence readiness and keeping European aviation competitive in a rapidly changing global market.

Europe already has the technology, industrial capacity and policy tools to lead. What it needs now is coordinated action, long-term policy certainty and strategic investment to move from projects and ambition to production at scale.

The resilience of Europe's aviation sector will be shaped by the industrial choices made today. Scaling eSAF is one of those choices. It is a climate solution, an industrial opportunity and a strategic necessity.

No fuel sovereignty.
No European resilience.
Now is the time to build both.

THE EUROPEAN eSAF COALITION – Arcadia eFuels, INERATEC, Norsk e-Fuel, SkyNRG, and ZAFFRA brings together leaders across the full Power-to-Liquid value chain, from technology development and project delivery to fuel production, offtake and aviation market deployment. Collectively, its members represent a multi-billion-euro eSAF opportunity, with activities across key markets including France, Germany, the Nordics, Spain and major European aviation hubs.

Over the coming decade, Coalition projects have the potential to scale to hundreds of thousands of tonnes of domestically produced eSAF annually. This would strengthen Europe's industrial base, energy security, aviation competitiveness and climate resilience, while helping to reduce dependence on imported fossil fuels.

Together, the European eSAF Coalition is building the foundations for a more secure, competitive and sustainable Europe. By scaling domestic eSAF production, strengthening industrial capacity, supporting defence readiness and enabling the future of sustainable aviation.

Arcadia eFuels is an early mover developing commercial-scale eSAF produced from renewable power, water and captured carbon. The company brings project development expertise, commercial experience in bringing new products to market, and experience operating large chemical and refinery assets. With a flagship project in Denmark, Arcadia has a growing European and global pipeline aimed at accelerating the deployment of industrial-scale Power-to-Liquid production.

INERATEC is a leading European pioneer in the production of sustainable e-Fuels and e-Chemicals. The company develops and deploys modular, scalable Power-to-X plants that convert renewable hydrogen and CO_2 into synthetic fuels and chemical products, enabling the defossilization of aviation, shipping, and the chemical industry. With ERA ONE, INERATEC has brought Europe's most advanced e-Fuels production plant into operation, marking a key step toward industrial-scale availability of sustainable fuels. Its technology allows decentralized production, strengthening energy resilience while supporting climate targets. Founded in 2016 and headquartered in Karlsruhe, Germany, INERATEC is backed by a strong group of international investors and partners. More Information: www.ineratec.com

Norsk e-Fuel develops industrial-scale facilities to produce eSAF and other synthetic fuels from fossil-free electricity, water, and captured CO_2. With projects across the Nordic region, the company is building a regional value chain with strong strategic partnerships for sustainable fuels, leveraging abundant clean energy resources to help defossilise aviation.

SkyNRG founded in 2009, SkyNRG has driven the development of sustainable aviation fuel (SAF) supply and production pathways, building partnerships across the industry to advance aviation decarbonization. Its SAF facilities include DSL-01, a renewable fuels plant in the Netherlands that employs a HEFA pathway to convert residual fats and greases into SAF, and SkyKraft, an eSAF project in Sweden developed in collaboration with Skellefteå Kraft.

ZAFFRA is the joint venture formed by Topsoe and Sasol. Backed by commercial-scale technology and deep build-to-operate experience, ZAFFRA advances projects from early development through financing, construction start-up and operations – ensuring a reliable, long-term supply of eSAF to help future-proof sustainable flight for generations to come.