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# ramp-up adoption of Sustainable Aviation Fuels



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fuel providers working together to find solutions for reaching net-zero emissions from global aviation by mid-century. European CST Champions include: Airbus, Boeing, DPDHL, Groupe AdP, Heathrow Airport, IAG, KLM Royal Dutch Airlines, Lufthansa, Neste, Ørsted, Royal Schiphol Group, Shell, SkyNRG and Velocys. CST is convened by the World Economic Forum and supported by the Energy Transitions Commission.

Aviation now accounts for 3.6% of total greenhouse gas (GHG) emissions in the EU and, despite the COVID-19 crisis, its contribution is set to continue to increase over the coming decades in the absence of coordinated action from industry and policy. As the EU and the UK refine their strategy to deliver on their respective net-zero emissions targets, it is crucial that they establish a coherent and decisive policy package in support of SAFs to simultaneously drive up SAF production and consumption, and to unlock cost reductions that will benefit the whole aviation sector.

European CST members have devised a policy package to support the adoption of SAFs in Europe that includes measures aimed at increasing both SAF supply and demand. It is vital that these policies work hand in hand to simultaneously boost production and consumption of SAFs in a strategic and sequenced manner and that they are coherent with the technically feasible pace of production ramp- up to avoid supply bottlenecks and price volatility.

1. Support innovation to bring lignocellulosic/bio-waste and power-to-liquid pathways to market. Given limits on future supply of feedstock, bringing SAF uptake in Europe to a meaningful scale will not be possible by relying exclusively on technology pathways

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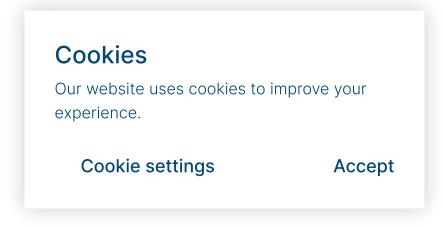
de-risk these projects and secure uptront private capital investment.

4. Announce in 2021 a SAF blending mandate for European aviation to be enforced by no later than 2025 with a blending level increasing progressively over time to 2050. The obligation should initially apply to intra-European flights, ideally encompassing both the EU and the UK. This will serve as a powerful incentive to boost production and secure investment in SAFs. Public financial support will be required to compensate for the effect of competitive distortions. Additional measures will be needed by 2030 at the latest to ensure the decarbonisation of long-haul aviation. Further work will be required to determine the exact appropriate design of such a blending mandate as well as appropriate levels of blending through time given feasible ramp-up of SAF production.

The aviation industry finds itself at a critical juncture in history. Amid arguably the worst crisis it has ever faced, it must also contend with finding a viable decarbonisation strategy to preserve its mandate to operate and help avoid future climate crises. With appropriate government support, the current situation could offer an opportunity to re-set the industry along a more sustainable path.

"The aviation sector is facing a pivotal time in its history and must now meet the dual challenge of the economic and environmental impact. Key to the sector reaching carbon neutrality is the use of sustainable aviation fuels", said Christoph Wolff, Head of Mobility Industries at the World Economic Forum.

"There is no technical barrier to the rapid deployment of sustainable aviation fuels. But a co-





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- Neste
- Ørsted
- Royal Schiphol Group
- Shell
- SkyNRG
- Velocys

# Supporting quotes

"We, in DPDHL Group, have been focusing on environmental and climate protection for a long time and it is a core element of our Strategy 2025. The path to net-zero-carbon aviation in the coming decade relies heavily on sustainable aviation fuels, especially synthetic fuels. SAF are essential for the sector to overcome its environmental challenges by enabling carbon neutral aviation logistics for a functioning global economy. Overall, we need strong cross-border and

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decarbonize aviation. Sustainable aviation can therefore fulfill its role as a driver of our economies."

#### Thorsten Lange, Executive Vice-President, Renewable Aviation, Neste

"We believe power-to-liquid fuels will be critical to decarbonise aviation. To make them competitive and bring down costs, we need to start investing now. Investments in the next decade will faciliate the industrialisation and scale that will mature the technology for the full sector deployment needed to realise decarbonisation by mid-century."

#### Jakob Askou Bøss, Seniro Vice-President of Strategy and Stakeholder Relations, Ørsted

"We are aiming for a net-zero-carbon aviation sector in 2050. Innovation is the way forward to realize this ambition. Sustainable aviation fuel is a proven technology which need to be scaled up. An European blending mandate is an great example of a policy measure that drives investments and innovation."

#### Dick Benschop, President and CEO, Royal Schiphol Group

"Shell Aviation supports the policies recommended by the CST paper. We encourage industry and governments to work together to introduce ambitious, global blending mandates to promote the use of Sustainable Aviation Fuel. Coupled with fiscal incentives, such collaborations could drive new technologies and help establish SAF production plants and

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mechanism for leaders throughout aviation's value chain to facilitate the transition to net-zero flying by mid-century. In partnership with ambitious senior leadership across industry, government and civil society, this public-private partnership is driving a shift to zero-emissions aviation through sustainable aviation fuels (SAF) and other clean propulsion technologies.

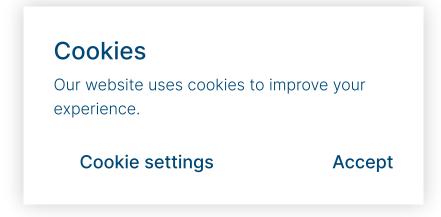
# About the World Economic Forum

The World Economic Forum, committed to improving the state of the world, is the international organization for Public-Private Cooperation. The Forum engages the foremost political, business and other leaders of society to shape global, regional and industry agendas.

For further information please visit the WEF website: www.weforum.org

# **About the Energy Transitions Commission**

The Energy Transitions Commission (ETC) is a global coalition of leaders from across the energy landscape committed to achieving net-zero emissions by mid-century, in line with the Paris climate objective of limiting global warming to well below 2°C and ideally to 1.5°C. Our commissioners come from a range of organisations – energy producers, energy-intensive industries, technology providers, finance players and environmental NGOs – which operate across developed and developing countries and play different roles in the energy transition. This diversity of viewpoints informs our work: our analyses are developed with a systems





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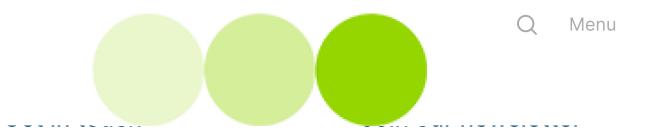
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