



Agenda Item 3A: Environment

**FRENCH SUSTAINABLE AVIATION FUEL (SAF) POLICY DEVELOPMENT AS AN
 EXAMPLE OF CAAF ROADMAP IMPLEMENTATION ENABLER**
 (Presented by France)

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| SUMMARY | |
| <p>To achieve the implementation of the Assembly Resolution A41-211 and the historic agreement on the LTAG of net-zero carbon emissions by 2050, as well as the roadmap for the implementation of the CAAF/3 outcomes approved by the ICAO Council in June 2024, France has been developing a national policy relying on a dual approach regarding the uptake of SAF: one aiming at creating a demand for SAF, and another supporting the development of a supply chain of SAF in France.</p> <p>In parallel, France has contributed to the ICAO Capacity-building and Training for Sustainable Aviation Fuels program (ACT-SAF).</p> <p>This paper is intended to illustrate a possible way for implementing the CAAF/3 roadmap and to contribute to the information sharing called for RAAC/18 meeting.</p> | |
| <p>References:</p> <ul style="list-style-type: none"> - Assembly Resolution A41-211 - CAAF/3 | |
| ICAO Strategic Objectives: | Environmental Protection |

1. Introduction

1.1 France has been heavily involved in actions aimed at enabling the aviation sector to reduce its environmental footprint at national, European and international level.

1.2 At the ICAO level, France strongly supports the implementation of the four pillars of decarbonisation in air transport, one of which concerns the development of sustainable aviation fuels (SAF), allowing the aviation sector to reduce its reliance on fossil fuels. In this regard, France fully supports the Assembly Resolution A41-211 and the historic agreement on the LTAG of net-zero carbon emissions by

2050, in support of the Paris Agreement's temperature goal, as well as the roadmap for the implementation of the CAAF/3 outcomes, approved by the ICAO Council in June 2024.

1.3 To achieve this implementation, France has been developing a national policy and is relying on a dual approach regarding the uptake of SAF: one aiming at creating a demand for SAF, through SAF blending mandates for fuel suppliers from 2025 now based on the European "Refuel aviation" regulation, and another supporting the development of a supply chain of SAF in France, based on calls for industrial projects.

1.4 Besides, in line with the No Country Left Behind initiative, France has contributed to the ICAO Capacity-building and Training for Sustainable Aviation Fuels program (ACT-SAF), supporting feasibility studies on SAF production for States to realize their potentials in the SAF development and deployment.

1.5 This paper is intended to illustrate a possible way for implementing the CAAF/3 roadmap and to contribute to the information sharing called for the RAAC/18 meeting.

2. Discussion

2.1 The definition of a national policy to achieve the objectives of the ICAO framework

2.1.1 In November 2023, the ICAO Global Framework for SAF, LCAF and other Aviation Cleaner Energies was adopted by CAAF/3, in which ICAO and its Member States strive to achieve a collective global aspirational Vision to reduce CO₂ emissions in international aviation by 5 per cent by 2030 through the use of SAF, LCAF and other aviation cleaner energies (compared to zero cleaner energy use).

2.1.2 In June 2024, ICAO Council has approved a roadmap for the implementation of the CAAF/3 outcomes, including its planned actions, roles and responsibilities, timeframe, and required resources, in connection with the LTAG implementation, while considering different interests of States, and emphasizing the imperative that No Country is Left Behind.

2.1.3 Before these crucial steps at international level, and to build its national strategy, France had set up a public-private partnership gathering the main stakeholders of the sector via a dedicated Green Growth Commitment. Its work was delivered in early 2020, paving the way for the publication of the French governmental roadmap for the deployment of SAF soon afterwards. The blending targets proposed in the roadmap were 2% in 2025 and 5% in 2030. This roadmap complemented the long-term blending target of 50% by 2050 set out in the national low carbon strategy. These targets have now been superseded by European objectives (see below).

2.1.4 To give a clear and early signal to economic players, a 1% blending mandate for fuel providers has been implemented as soon as January 2022. Besides, to make this roadmap operational, an incentive mechanism for the consumption of these products has been implemented through the upgrade of an existing fiscal tool designed to support the uptake of renewable energy in the transport sector.

2.2 The introduction of a mandatory blending mandate to support a SAF demand

2.2.1 One of the key elements of the French roadmap was the introduction of SAF blending objectives in 2025 and 2030, as mentioned above. By creating an increasing and predictable SAF demand on the fuel suppliers' side, such blending objectives are an important lever to support the development of a

SAF industry. The choice was made in France not to use feedstock intended for human or animal food for the production of SAF to avoid any risk of competition between uses.

2.2.2 In 2023, the French mandate was superseded by the European mandate through the “ReFuelEU Aviation” regulation, starting with a 2% SAF blending mandate from January 2025 for fuel suppliers in major European airports. Fuel suppliers will have to provide SAF (including a sub-target on synthetic aviation fuels) according to increasing targets every five years (2% in 2025, 6% in 2030, 20% in 2035 and up to 70% in 2050). The application of this regulation will be subject to an evaluation no later than 1 January 2027 and every four years thereafter, analysing the evolution of the aviation fuel market and the impact of this evolution on the aviation sector in Europe, as well as the effectiveness of the financial incentives for the use of SAF.

2.2.3 The mandate focuses on biofuels not produced from feedstocks intended for human or animal feeding, on waste-based and on synthetic aviation fuels, offering significant emissions gains compared to jet fuel. Its 2030 milestone is in line with the objective agreed at a global level adopted by the 3rd ICAO Conference on Aviation and Alternative Fuels (CAAF/3) on 24 November 2023

2.3 **The implementation of a public policy to stimulate the industrial production**

2.3.1 In parallel to this mandatory SAF blending mandate, France has developed an industrial policy aiming at creating a supply of SAF by supporting the production of SAF on the French territory.

2.3.2 A call for expression of interest (CEI) has been launched in 2020 to assess stakeholders' interests and needs regarding the development of a national SAF industry. It allowed the identification of 15 innovative industrial projects with detailed valuable information to build the additional tools needed to support the development of a French SAF production sector.

2.3.3 Following the CEI, a first call for projects (CfP) was launched mid-2021 to provide short-term investment aids on both engineering work targeting projects with mature manufacturing processes and demonstration work targeting projects with a lower level of maturity. The CfP was closed in September 2022, granting 18 million euros to help financing the engineering studies and demonstrators selected within the framework of this CfP.

2.3.4 A high-level working group, bringing together stakeholders from the air transport, aeronautics and energy sectors, has been set to identify the conditions necessary for the launch of industrial SAF production projects in France. Following on from the first call for projects mentioned above, the group's work clarified the industry's needs and the conditions required to step up investment in the construction of SAF production plants in France.

2.3.5 Based on this work, a second call for projects was launched in mid-December 2023, to support FEED studies - the work required before an industrial investment decision can be made. This second call for projects has a budget of 200 million euros as part of France 2030's "Biobased Products and Industrial Biotechnologies - Sustainable Fuels" acceleration strategy. It was closed on June 28, 2024.

2.4 **Contribution of France to capacity building on SAF**

2.4.1 In line with the No Country Left Behind initiative, France has contributed to the ICAO Capacity-building and Training for Sustainable Aviation Fuels program (ACT-SAF), aimed at assisting developing countries and States with particular needs, more particularly by supporting feasibility studies on SAF production for States to realize their potentials in the SAF development and deployment. Indeed, France supported developing countries in strengthening their capacities in sustainable aviation fuels, by

contributing 200,000 euros in 2023 to the Environment Fund of the International Civil Aviation Organization (ICAO).

2.4.2 Besides, experts from the French DGAC have been participating in various international forums to illustrate different possible national and regional SAF uptake policies and provided feedback on SAF policy development for the ACT-SAF series initiative.

2.4.3 In conclusion, this paper is aiming at contributing to the information sharing exercise as one of the enablers of the CAAF/3 roadmap implementation. France stands ready to share information and exchange with other SAM States in this regard.

3. **Suggested action**

3.1 The Meeting is invited to:

- a) share views regarding the ways to implement the CAAF/3 outcomes;
- b) share views on the capacities, possible framework and incentives at States level for the emergence of a robust SAF demand and an efficient SAF industry.

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