To: The Nordic Council of Ministers and Ministers for Nordic Cooperation

November 2026

A call for Nordic cooperation and action on sustainable aviation fuels

ReFuelEU Aviation requires fuel suppliers to increase the share of sustainable aviation fuels (SAF) at EU airports covered by the regulation. Both sustainable aviation biofuels (bioSAF) and synthetic aviation fuels (eSAF) count towards this obligation. From 2030, European aviation will be required to use increasing volumes of synthetic aviation fuel (eSAF). From 2050, SAF must account for at least 70% of all aviation fuel supplied at these airports. Within that total, eSAF must account for at least 35% of all aviation fuel supplied.

The European Union Aviation Safety Agency (EASA) reports that SAF accounted for just 2.8% of aviation fuel supplied in 2025, most of it bioSAF. Meeting the rising targets will require a rapid expansion of production. The challenge is particularly acute for eSAF. Its minimum share takes effect in 2030, yet EASA's 2026 ReFuelEU Aviation Annual Technical Report identifies around 50 European eSAF projects still awaiting final investment decisions.

The political question is not whether eSAF will be needed, but whether the Nordic region will be able to produce it or become dependent on imports. Hence, the decisions taken now will determine how much of this fuel the Nordic countries can produce themselves.

The Nordic countries have many of the necessary foundations: Renewable energy, access to sustainable carbon sources, strong industrial capabilities, advanced Power-to-X expertise and significant demand from both civil aviation and defence. Yet no commercial-scale eSAF production facility is currently under construction in the Nordic region. Without coordinated political action, the Nordic region risks losing investment, industrial development and technological leadership to other parts of Europe and the world.

This is not only a matter of aviation climate policy. It is a strategic question concerning:

- **Nordic competitiveness, industrial development and green jobs**
- **Energy security of supply, civil and military resilience**
- **The ability of Nordic aviation to meet binding European requirements**

The challenge cannot be solved by industry alone. eSAF projects require major upfront investments and face considerable uncertainty around future prices and long-term demand. The Nordic countries can individually take important steps, but acting together would significantly increase the prospects for success by aggregating demand, reducing investment risk and creating a stronger market for first-mover production.

Together, the Nordic countries possess greater strength to reduce investment risk, aggregate demand, and create a stronger market for first-mover production.

We therefore call on the Nordic governments to give the Nordic Council of Ministers a mandate to establish a joint Nordic task force and fund an initial analysis phase, with the objective of presenting a Nordic roadmap and recommendations for joint action bringing the first commercial-scale eSAF plants into operation in the Nordics.

NISA palta ICELANDAIR Dansk Luftfart NHO Luftfart TRANSPORTFÖRETAGEN

As an immediate first step, the Nordic Council of Ministers should bring together governments and industry to establish Nordic cooperation on a Nordic eSAF roadmap that addresses:

1. **Demand**: Aggregate future demand from aviation, public procurement and defence.
2. **Identification**: The most promising Nordic production conditions and frontrunner projects.
3. **Development and Scale**: Competitive Nordic tender process, support and financing models and proposals for reducing investment, price, and offtake risks.
4. F**ramework conditions:** Coordination of regulation, permitting and EU funding opportunities (eSAF Early Movers Coalition a.o.)
5. **Measures to mitigate** the cost impacts of the transition to eSAF and safeguard the competitiveness of Nordic aviation.

The initiative should build on market principles and competition. Its purpose is not to select individual producers, but to create the conditions for private investment and commercial production in the Nordics.

The window for action is now. If Nordic eSAF production is to contribute meaningfully from around 2030, investment decisions will need to be taken well before then. The Nordic countries have the resources, industrial capabilities and aviation market. What is needed now is a joint political ambition to turn those strengths into Nordic production.

Yours sincerely,

Martin Porsgaard, Nordic Initiative for Sustainable Aviation (NISA)

Jonas Haqelqvist, Transportföretagen Flyg (Swedish Aviation Industry Group)

Erik Lahnstein, The Federation of Norwegian Aviation Industries (NHO Luftfart)

Mathias Milling, Danish Aviation (BDL)

Tatu Rauhamäki, Service Sector Employers Palta (Finland)

Guðrún Helga Heiðarsdóttir, Icelandair