



EUBCE 2026
34th European Biomass Conference & Exhibition

18 May 2026
World Forum The Hague
The Netherlands

Industry Track Highlights

SAF Roundtable, Monday 18 May 2026

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Key Messages from the SAF Industry



Jet fuel security is critical as it plays a much more important role for the economy than the size of its market. Developing SAF from a variety of domestic feedstocks will support jet fuel security, reduce price volatility and economic activity. Short-term leveraging of existing refining capacity is critical with a credible plan to develop different types of SAF's in the longer-term.

Public policies need to support at the same time demand and supply to be successful. With demand policies, a certain level of certainty on market existence is created to derisk projects. Supply policies provide visibility on future cash-flow, increasing project economics and attracting investors. Supply policies are also supporting the innovation required for the SAF pathways of the future.

Public financing is required to reduce the gap with private sector financial instruments. Main challenge of SAF is its cost spread with jet fuel requiring lower cost of capital, fiscal incentives, offtake agreement with price guaranty. Considering the existing fiscal context, leveraging private funds and the energy industry who is leading SAF development is primordial to accelerating SAF deployment at the required scale.

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The EU must develop a functioning Ecosystem

Industry Track Key Messages

Industry Track 2023.....2024.....2025.....2026: Policy

The developments in European legislation and policy discussions create opportunities for investment in certain sectors, however, there is still significant confusion related to several critical areas.

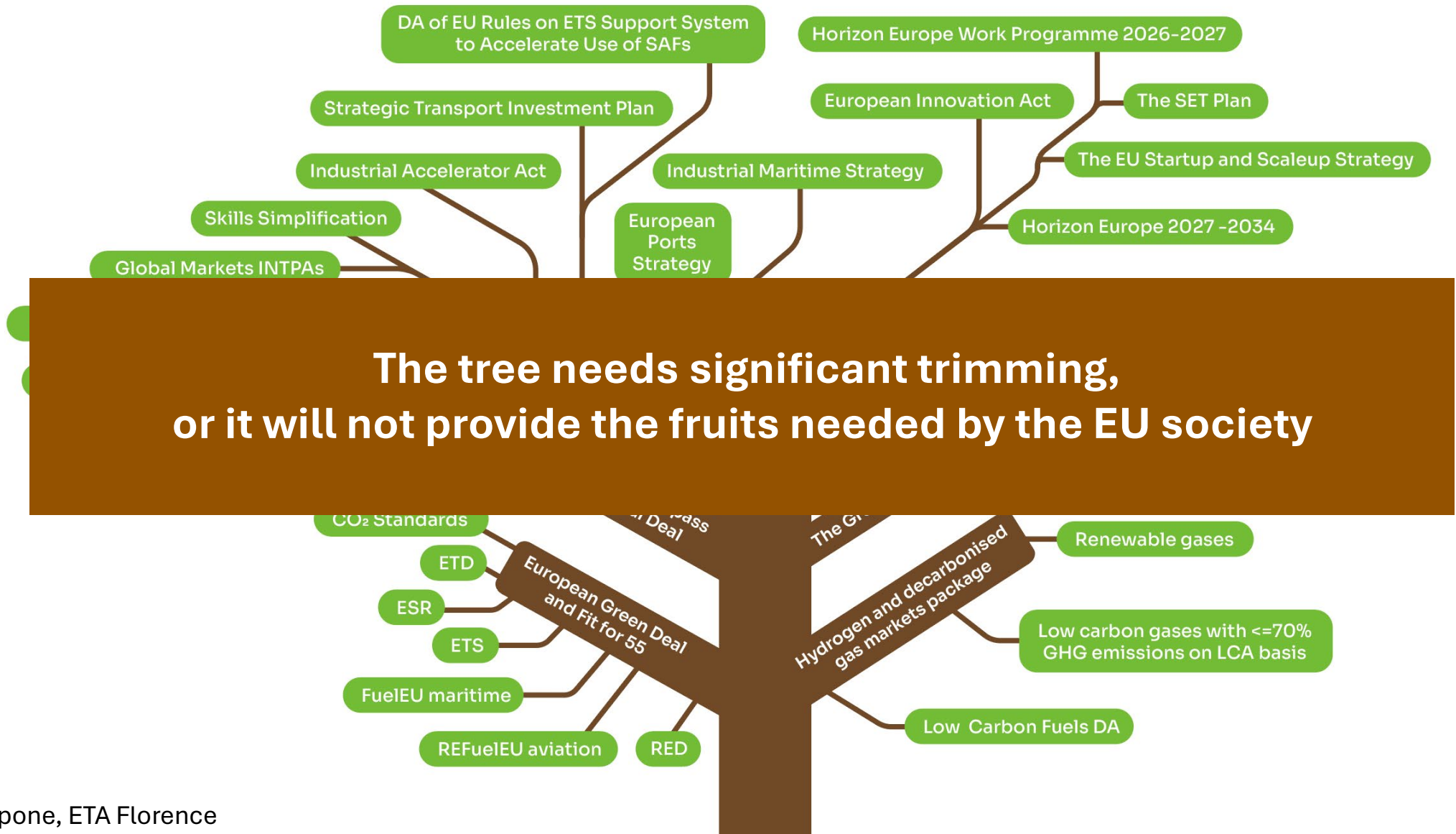
Investors are concerned that the legislation may be revised again in 2-4 years in RED IV creating significant uncertainty and postponing investments. And now the Commission is preparing a series of new initiatives to clarify policy areas, strengthen other and facilitate financing.

It takes 3 years to built an industrial biorefinery and thus it is doubtful whether the ambitious 2030 targets can be met.

The RefuelEU Aviation and the FuelEU Maritime have given new impetus creating opportunities in these sectors. However, parts of the legislation needs clarity especially in relation to other legislation which for the moment hinder investments.

Targeted financial instruments are need to support the deployment of advanced biomass plants especially in the area of advanced fuels for aviation and maritime uses.

EU Policies



Industry Track Key Messages

Industry Track 2023....2024.....2025.....2026: Technology

The Horizon Europe programme has given strong and continuous support to innovation and technological progress in all areas of the bioeconomy including international collaboration. However, there is a feeling that the programme aims for the “*perfect and complex technology*” rather than “*which technology can be used now?*”. All the projects presented in EUBCE 2026 are of high quality and have real innovation but how long will it take to bring them to investment technical reliability?

There is a general scare in the research community that the Horizon Europe Calls are too open and not at all specific in what the EC is looking for resulting that numerous proposals are submitted but only a trickle are approved.

The Circular Biobased Europe JU has facilitated the deployment of innovative technologies and bioeconomy products in the EU markets. **We must consider** an “*Advanced Biofuels Europe Joint Undertaking*”?

Industry Track Key Messages

Industry Track 2023....2024.....2025.....2026: India & China

Both India and China are moving very fast in developing their bioeconomy with state-of-the-art technologies.

There is an impressive development going on in India *with good coordination between the state and the industry*. Strong policy initiatives in biomass procurement/value chain and biomethane, ethanol and SAF. **Impressive progress in E25. India has established a very good functioning ecosystem.**

There is strong industry initiatives in China in producing biochemicals and advanced biofuels with main export market the EU. China's advances in UCO, SAF and **cellulosic ethanol** are significant, and it is expected that China will progress much faster. **New initiatives in green and e-methanol.**

Thank you all and see you in EUBCE 2027 in Reims