

# SUSTAINABLE & SMART MOBILITY STRATEGY

EU support measures for sustainable  
marine fuels  
and "FuelEU Maritime"



# EU maritime transport sector in short

- Shipping accounts for 75 % of the EU's external trade and 31 % of its internal trade in terms of volume.
- Ship traffic to or from ports in the EU accounts for 3 -4 % of total EU CO2 emissions and 11 % of all CO2 emissions from transport.
- Emissions from maritime transport are expected to increase exponentially unless action is taken.
- All sectors of the EU are to contribute to the reduction of greenhouse gas (GHG) emissions to net zero at the latest by 2050, as enshrined in EU Climate Law.



# Maritime decarbonisation framework

## **GLOBAL** **IMO GHG Strategy**

- Emission reduction objectives agreed in 2023
- Net Zero Framework agreed in April 2025

## **EU domestic** **Fitfor55 maritime instruments**

In short/ Objective

### **FuelEU Maritime Regulation**

- Promote the use of renewable and low-carbon fuels in maritime transport.

### **ETS –Emission Trading Scheme for maritime transport**

- Carbon tax/ Trading scheme
- Promote Energy Efficiency and Energy Transition

### **AFIR – Alternative Fuels Infrastructure Regulation**

- Require EU ports to develop shore-power
- Bunkering infrastructure for alternative fuels.

### **Renewable Energy Directive**

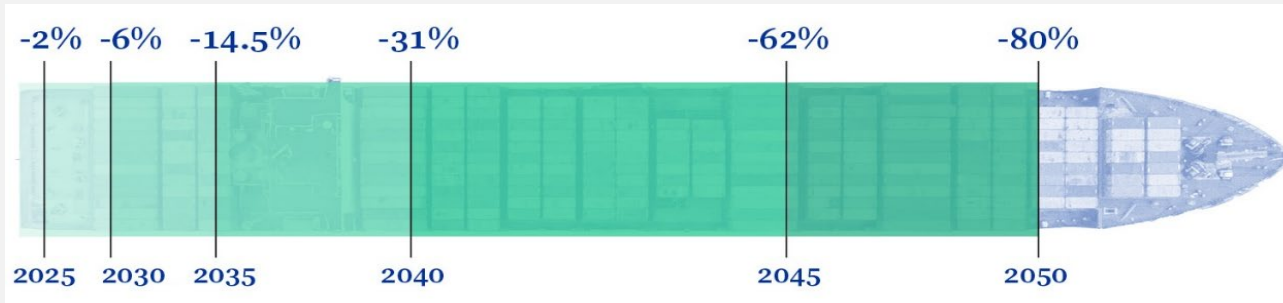
- Renewable Energy targets for transport sector
- Sustainability criteria and certification framework for renewable fuels.

### **Energy Taxation Directive**

- Maritime fuels are exempt from minimum fuel taxation rates

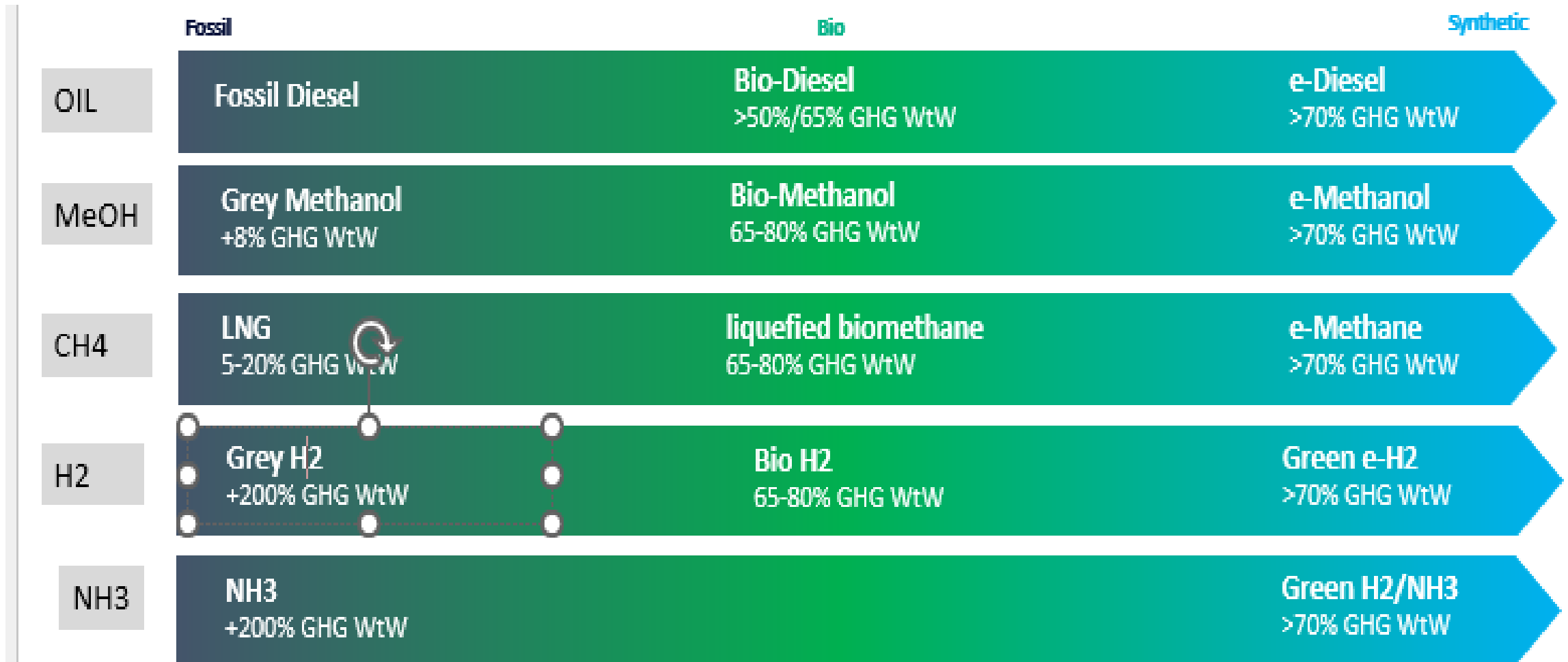
# FuelEU Maritime Regulation

## 1) Requirements to reduce the yearly average GHG intensity of the energy used on-board by ships (fuel standard)



- **Non-discriminatory:** applies to all ships regardless their flag
- **Technology and fuel neutral approach:** operators will need to use an increasing proportion sustainable fuels, without obligation to use a specific fuel type or technology
- **Exemptions:** Small islands < 200,000 residents; outermost regions; ships navigating in ice.
- **Scope:** above 5000 GT, intra-EU traffic + 50% international

# The fuel of the future



## Supply of sustainable maritime fuels – main bottleneck

- Implementation of FuelEU requires the scale-up in the production of renewable & low-carbon fuels.
- Overall production capacity and availability worldwide and in the EU is still limited. Total investment need of approx. 100 billion EUR to 2035 in the EU.
- Private investment hampered by large upfront investment cost with continued uncertainty over price/revenue stability; a significant price gap with conventional fuels; uncertainty over fuels and production pathways.

# Existing EU funding for sustainable maritime fuels

- EU Innovation Fund Commitment to dedicate 20 million EU Allowances (EUR 1.6 billion) to the maritime sector up to 2030
- Horizon Europe programme with EUR 530 million budget for waterborne research and innovation
- Member States' domestic subsidy schemes
- ETS revenues and FuelEU penalties



# Forthcoming Sustainable Transport Investment Plan

Strategic policy framework for renewable and low-carbon fuels that identifies fuel needs and investment gaps and sets objectives and measures boost and derisk investment of first movers.

- A strategic framework - roadmaps to support energy transition in aviation/waterborne
- Actions to better target support under existing and new financial instruments and build measures to de-risk private investment, under the umbrella of a Sustainable Fuels Bank
- Dedicated Clean Trade and Investment Partnerships on fuels with third countries



# Instruments to ramp up fuels production

- Identify transformative projects, Renewable Fuels and Low Carbon Alliance, providing visibility (label, matchmaking) and technical assistance with European Investment Bank.
- Action to better align and use existing financial instruments: Horizon Europe Clean Industrial Deal calls; Connecting Europe -Alternative Fuels Infrastructure Facility, InvestEU, better uptake of projects under Innovation Fund.
- Structured mechanism to de-risk financing decisions: price support through contracts for difference/guarantees, extension of SAF allowances, double auctioning & possible joint purchasing – under the umbrella of a Sustainable Fuels Bank, in collaboration with EIB.

# Thank you

**Dedicated Helpdesk: [fitfor55@emsa.europa.eu](mailto:fitfor55@emsa.europa.eu)**



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