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Opinion: EVs and renewables are best way for South Africa to loosen oil's grip

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*In this article, South African offgrid electric vehicle (EV) charging infrastructure developer Zero Carbon Charge co-founder and chairperson **Joubert Roux** writes about the renewed use of oil as a geopolitical weapon under US President **Donald Trump** and what this means for South Africa as a fuel-import-dependent economy.*

Every time international geopolitics turns hostile, South Africans feel it immediately – first at the petrol station, then in the cost of food, transport and electricity. Donald Trump has once again made it clear that oil is not a neutral market commodity, but a geopolitical weapon. Oil is power, and oil importers surrender economic control to those who produce, sanction or manipulate it.

Trump has been explicit about this dynamic. His administration has treated oil as a strategic resource to be managed in its national interest, whether through tightening sanctions around Venezuelan crude or through aggressive energy nationalism at home. These moves go well beyond climate denial or domestic political theatre. They are about leverage. In a fractured global system, oil is no longer merely traded – it is weaponised.

For South Africa, this reality matters far more than our current political discourse suggests.

We do not produce crude oil. We import it – and increasingly so. Official data for 2024 shows a 13% year-on-year increase in crude oil imports, rising from 8.4-billion litres in 2023 to 9.5-billion litres in 2024. Imported diesel reached about 10.8-billion litres for the year, making up nearly two-thirds of total refined fuel imports. This is non-discretionary fuel. Freight, agriculture, mining and public transport depend on it. When the global oil market convulses, South Africa's economy does not gently adjust – it jolts.

Stats SA has already identified where the pain originates. Its analysis of fuel price components shows that the largest contributor to the pump price is the basic fuel price, driven mainly by international oil prices and the rand:dollar exchange rate. Taxes and levies are politically convenient targets, but they are not the core problem. Exposure to global oil markets is.

This is why oil dependence is not merely an energy issue. It is a sovereignty issue.

President **Cyril Ramaphosa** regularly speaks about energy transition, green growth and climate commitments. Yet the strongest argument for renewable energy and EVs has little to do with climate virtue-signalling. It has everything to do with freedom – freedom from global chaos, from oil politics and from being economically bullied whenever a foreign leader decides to flex power.

Other countries already understand this. Ethiopia has banned internal combustion engine vehicle imports, securing energy independence for its mobility sector. Morocco has cut barriers to EVs and is emerging as a regional EV leader.

China, still a net importer of oil, has made a deliberate strategic decision to loosen oil's grip on its transport system. The International Energy Agency estimated in 2025 that electric vehicles account for roughly half of new car sales in China, helping to flatten fuel demand growth. At the same time, China has built renewable energy at unprecedented scale, reaching its 2030 wind and solar targets years ahead of schedule. The outcome is straightforward: oil plays a far smaller role in Chinese domestic mobility today than it did a decade ago.

Europe has followed a similar trajectory. Across the EU, wind and solar power have overtaken fossil fuels in electricity generation. Norway has gone further still. In 2025, more than 95% of new passenger vehicle sales there were electric. This is significant because Norway is transitioning in spite of having massive oil reserves. These countries are not immune to geopolitics – but they are far less exposed to oil price shocks than South Africa.

Herein lies the contradiction. South Africa has some of the best solar and wind resources in the world, yet continues to make the transition unnecessarily difficult. Renewable projects are delayed by permitting bottlenecks, grid access constraints and policy uncertainty. EV adoption is slowed by fragmented charging infrastructure, import tariffs and a planning framework that treats energy innovation as a threat rather than a necessity. Off-grid and embedded generation projects – which could directly power electric transport – remain trapped in red tape designed for a fossil-era grid.

This self-defeating approach is no longer defensible.

The cost of delay is not abstract. It appears in inflation figures, interest rates, food prices and freight costs. Every geopolitical flare-up – from Venezuelan sanctions to Middle Eastern conflict to the next US election cycle – feeds directly into South Africa's cost structure because our transport system still runs on imported fuel.

Electric vehicles powered by renewable energy offer a true structural exit. The sun can't be sanctioned. Wind doesn't respond to tariffs. Solar and wind are now globally cost-competitive with all new power generation. When transport runs on local electricity, exposure to oil price shocks disappears.

The most urgent opportunity lies in freight. Diesel-powered logistics is South Africa's economic choke point. Electrifying trucks and developing renewable-powered charging infrastructure along major corridors would stabilise prices far more effectively than any adjustment to the fuel levy. This is not a climate experiment. It is economic self-defence.

Trump's hardball oil tactic should dispel any remaining uncertainty. The world is not becoming calmer. Oil will remain a geopolitical weapon and oil-dependent nations will remain vulnerable and reactive.

South Africa faces a choice: continue complaining about fuel prices while preserving a system that guarantees volatility, or remove oil from its position of power altogether. That choice demands urgency – and a willingness to stop obstructing the very solutions we claim to support.

The hard truth is this: when you import your energy, you import uncertainty. As Steve Jobs said: "Keep moving or start dying." Until South Africa decisively breaks oil's grip through renewable energy and EVs, we will keep paying for other people's politics – one tank at a time. 

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