



â??Drill, baby, drillâ?? backfires: Trumpâ??s illegal war may trigger permanent shift away from oil

Description

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Oil

US oil exports are surging as Saudi and Russian exports are disrupted by US-led wars and sanctions a?? but, there is a big a??butâ?? here, the true and permanent winner of Trumpâ??s Iran war might be Chinaâ??s clean-tech industry.

Exports of Chinese-made solar cells hit 1.7bn units in March, a record high for a single month, the *Financial Times* reported.

Trumpâ??s Iran war has propelled Chinaâ??s cleantech industry <https://t.co/cme8pBMfew>

â?? Financial Times (@FT) [June 11, 2026](#)

Demand in March and April was led by Southeast Asia and Africa, highlighting â??how swaths of the oil-dependent developing world have emerged as key markets for low-cost Chinese renewable energy technologies.â??

Asia and Africa leading the change â?? from oil to renewable

Germanyâ??s *DW* noted that renewable initiatives since US/Israel/UK war on Iran include but are not limited to:

- Indonesia â?? The president called the crisis a â??[wakeup call](#) for electrificationâ?? and announced that motorcycles need to switch to electric.

- Vietnam – The country’s largest conglomerate, Vingroup, [cancelled](#) its largest LNG-fired power plant project and is replacing it with renewables.
- Philippines – Announced big solar pledges in response to the energy shock.
- South Korea – Announced big solar [pledges](#) as part of its energy security [push](#)

All of this renewable infrastructure will largely be purchased from China, which manufactures roughly 90% of the world’s solar panels and dominates wind turbines, batteries, and EV supply chains, DW said.

DW interviewed Sam Geall, associate fellow at Chatham House, who emphasized the lower risk involved in renewable energy systems:

But I will say that there is a difference between fossil fuel energy imports and renewable energy systems in so far as you can’t actually blockade the sun. You can’t blockade the wind. Once you build out these systems, they do provide greater resilience from the kind of entanglements and volatility associated with imported fossil fuels.

In other words, unlike oil tankers or pipelines, sunlight and wind cannot be cut off by foreign powers, military conflict, or blocked shipping lanes.

This means good news for China’s electricity output and clean technology [exports](#) which had already scaled record highs in 2025.

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Scam or opportunity of the century

The [Wall Street Journal](#) said that despite Trump branding wind and solar power – the scam of the century. – One outcome of his Iran war will be increased demand for Chinese solar panels and wind turbines. This is an unlikely legacy for a president who promised to unleash American fossil fuels – “drill, baby, drill.”

FT cited data from Mission Possible Partnership, which showed nineteen clean industry projects globally reached final investment decisions in the past six months, more than double the rate recorded a year earlier.

Of these projects more than two-thirds are in China.

US is currently benefiting from their destabilization of oil production in Middle East, Russia and South America.

WSJ noted Trump saying that “countries should respond to Middle East uncertainty by buying more American oil and natural gas. – [We have plenty](#) – he said in early April.”

Trump is calling renewables the scam, not his destabilisation-led increase in US oil exports.

But the evidence is suggesting – destabilisation will also lead to long-term reality demand destruction for oil.

The scammer-in-chief is accidentally scamming himself.

Featured image via Scott Olson/Getty Images

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