The Moscow Times
30 YEARS
INDEPENDENT NEWS FROM RUSSIA

Trump's Russian Diesel Debacle Risks Backfiring

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October 12, 2026



Vladimir Putin and Donald Trump. **Benjamin Applebaum / DOD**

President Donald Trump's announcement on Oct. 9 that the United States would begin importing Russian diesel has roiled transatlantic relations. Such abrupt and dizzying shifts have been a consistent feature of Trump's war diplomacy.

To assess its significance, we must distinguish the genuinely new from the wearily familiar. Since there is less to this policy than meets the eye, it is unlikely to have any real impact on the course of the war. Its few novel aspects will merely compound failure with ignominy.

This latest initiative resembles earlier Trumpian forays in three ways.

First, it restores Trump's natural preference for Russia. Despite taking occasional steps that displeased Moscow, such as sanctioning its two biggest oil companies, Rosneft and Lukoil, Trump always returns to his default setting of rewarding Russia and pressuring Ukraine. Since

the fighting can only stop if Moscow is decisively constrained from achieving its war aims, such a policy pursues the opposite of what is needed to end the war. It thus cannot succeed in its strategic goal.

Second, Trump's main goal is to restore economic ties with Russia and, above all, to make new energy deals. Moscow has repeatedly dangled the carrots of huge investment proposals to American negotiators. While Trump's latest move concerns energy trade, not investment, even this is not new. From March to June this year, the U.S. granted a temporary license allowing Russia to ship crude and oil products to mitigate the supply shock caused by the war with Iran.

Third, in importing Russian fuel without a quid pro quo, the White House is not striking a deal but making a unilateral concession to Moscow that weakens its negotiating position. Again, this is not new. In 2025, America abandoned earlier positions, notably by dropping the demand on Russia for an immediate ceasefire and the threat of new sanctions. In doing so, it surrendered its leverage and put its own objectives further out of reach. Now, it is repeating this error.

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So what is new and consequential about the diesel deal? First, it is driven not by the prospect of lucrative deals for those around the White House, but by the urgent political need to reduce domestic fuel prices before the U.S. midterm elections on November 3.

Unlike the temporary waiver in March, which allowed more Russian oil onto the world market, the new volumes will be shipped specifically to the U.S. For this reason, it may be found illegal. A bipartisan group of senators has already declared that the trade would violate the 2022 ban on Russian energy imports and has called for the administration to "immediately reverse course." The trade also cuts directly across the Lindsey Graham Act, passed with overwhelming congressional support last month, which included provisions to punish major importers of Russian oil.

Second, even in its own terms, the deal may fail. The modest volumes are too small to have any significant effect on prices at the pump and will likely arrive too late for the midterms.

Moreover, Russia may not even be able to deliver them. While it could make use of the temporary waiver Washington granted earlier this year to sell more oil products, Ukrainian attacks on its refineries caused exports to collapse in June. Russia imposed an export ban in July to stem and secure its own supply, but has now lifted it to export to the U.S. But its ability to do so will depend on the perilous security of its energy infrastructure.

All this lays bare the central contradiction in Trump's position. On the one hand, he attributes the global fuel shortage to Ukraine's attacks on Russian facilities when his own war against Iran is primarily responsible for the worldwide fuel deficit. On the other hand, he claims that supplies from Russia can meet the shortages that its absence from the market has created.

Third, America has reportedly threatened to cut off Ukraine's access to intelligence and the PURL program if it continues to target Russian refineries. We have been here before, too.

Washington suspended such support for brief periods several times in 2025, most severely in March, and issued similar threats last November to try to compel Zelensky to accept the administration's 28-point peace plan. These cut-offs lasted only a few days, but hindered Ukraine's operations.

What is new is the prospect of a longer, perhaps permanent, cut-off from all assistance that would be harmful to Kyiv, but not fatal. Ukraine has developed its own long-range strike weapons and Europe can provide some intelligence. The most serious consequence would be the loss of critically needed Patriot interceptors, 95% of which are obtained for Ukraine through PURL.

But America's defense industry would suffer too. It would lose not only billions of dollars in weapons sales paid by Europe and delivered to Ukraine, but potentially also Kyiv's cooperation as a unique and valuable source of technology and data. These losses would far outweigh any impact of a small, brief fall in domestic fuel prices.

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In short, much about the diesel deal is a repeat of past efforts. Since it shares their flaws, it will share their failure.

But it adds contradictions of its own: trivial volumes of fuel that may not even arrive and are likely illegal if they do; threats that, if carried out, would hurt America's national security.

Fresh absurdities appear every day. In its dealings with Russia, the administration has reportedly tried to offer assets, frozen in Europe, that it does not control; has proposed reviving the Nord Stream gas pipeline, a move that would require Europe's consent; and has announced an energy ceasefire between Russia and Ukraine that neither country was aware of. This is a policy approaching total incoherence.

It was said of the Bourbon dynasty that it learned nothing and forgot nothing. History may record of this White House that, on its Russia policy at least, it learned nothing and understood nothing. Other countries have learned, to their cost, the lessons that await. When policy is driven by venal ineptitude rather than a judicious understanding of the national interest, the result is a masterclass in strategic failure.

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