OVERVIEW OF THE PETROL AND DIESEL MARKET

IN SOUTH AFRICA BETWEEN 2015 AND 2024

DIRECTORATE: ENERGY ECONOMICS AND STATISTICS

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Electricity and Energy
REPUBLIC OF SOUTH AFRICA

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FOREWORD

It gives me a great honour to introduce the report: Overview of petrol and diesel market in South Africa between 2015 and 2024. This report is based on information collated from government departments, the petroleum industry and research papers, with the purpose of keeping stakeholders informed about the latest developments as well as key issues affecting the liquid fuels industry. The report gives an insight into the overall petrol and diesel market dynamics as well as the relationship between the two products nationally and provincially.

Petrol and diesel play a central role in the socio-economic development in South Africa, whilst simultaneously providing the much-needed infrastructural economic base for the country to become an attractive host for foreign investment in the energy space. The liquid fuels industry contributes significantly to both the GDP with about 13% (FIASA,2023) and sustaining employment opportunities within the country. The Department of Electricity and Energy is working hard to ensure the accurate, timely and reliable provision of data in its publications and hopes that this report will become a source of reference among energy analysts in South Africa and abroad.

I extend my utmost sincere thanks and appreciation to the Energy Economics and Statistics Directorate for the hard work that went into the compilation of this publication. I would also like to record my appreciation to all the energy data providers who have helped us to accomplish the compilation of this report. Comments and inputs are welcome and could be addressed to**:** **Ramaano.Nembahe@dee.gov.za** ***/*** **Thapelo.Manyane@dee.gov.za**

Mr. S. Pillay.

Acting Director-General.

Department of Electricity and Energy.

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ABBREVIATIONS AND ACRONYMS

BFP	–	Basic Fuel Price
CIF	–	Cost, Insurance and Freight
CPI	–	Consumer Price Index
CTL	_	Coal-To-Liquid
DMRE	–	Department of Minerals Resources and Energy
DOE	–	Department of Energy
FOB	_	Free on Board
FOR	_	Free on Road
GDP	_	Gross Domestic Product
GTL	_	Gas-To-Liquid
IBLC	–	In-Bond-Landed-Cost
IEA	–	International Energy Agency
LPG	–	Liquefied Petroleum Gas
LRP	–	Lead Replacement Petrol
NERSA	–	National Energy Regulator of South Africa
OECD	–	The Organisation for Economic Co-operation and Development
OPEC	–	Organization of the Petroleum Exporting Countries
PPM	–	Parts per million
Stats SA	–	Statistics South Africa
ULP	–	Unleaded Petrol
USD	–	United States Dollar

1. INTRODUCTION

The market for petrol and diesel is crucial to South Africa's energy and transportation industries since liquid fuels continue to be the main energy source for automobiles, freight, and industrial processes. South Africa's small proven Oil reserves make it heavily reliant on crude Oil imports, in contrast to its locally produced energy. The much reliance on imports of Oil by South Africa comes because of the lasting impact of The Ukraine and Russian war that occurred in February 2022. South Africa has been high on imports and low on production and exports since then.

Due to a persistent pattern of high imports of both crude oil and processed products, South Africa's liquid fuel market is currently severely unbalanced. This dependence on outside sources is linked with the nation's struggle to be self-sufficient due to poor domestic output and, as a result, limited liquid fuel exports. The country is extremely exposed to fluctuations in world oil prices and geopolitical supply interruptions because of this basic imbalance between the high domestic demand satisfied by imports and the low output from local production. As a result of this high reliance on imports, Consumers have minimal control over the fuel costs locally because supply of fuel is tied to the global market fluctuations and geopolitical dynamics. The closure of 3 refineries in South Africa has created more challenges in the economy as more people lost their jobs in the petroleum sector and this complicates the future of energy security in the country. More imports of petroleum products to the country poses other challenges in the transportation sector, the environment and the economy. There is a need for extended supply chain to move the imported petroleum products across the country, resulting in long distance shipping which contribute to the greenhouse gas emissions and resulting in increase in South Africa's carbon footprint (focusontransport, 2024)[1].

The National Development Plan envisages that by 2030, South Africa will have an energy sector that promotes:

[1] Focus on transport and logistics (2025)

- Economic growth and development through adequate investment in energy infrastructure. The sector should provide reliable and efficient energy service at competitive rates while supporting economic growth through job creation
- Social equity through expanded access to energy at affordable tariffs and through targeted, sustainable subsidies for needy households.
- Environmental sustainability through efforts to reduce pollution and mitigate the effects of climate change. (NDP 2030:163)[2].

1.1. Outlook

The future outlook of the Petrol and diesel market in South Africa is being reshaped by Infrastructure development and modernisation efforts. Infrastructure such as electric vehicles, signals a broader transition in South Africa's energy landscape. Sales of electric vehicles continue to increase rapidly, with China accounting for over half of global sales in recent years (BP Outlook, 2025). The Global energy system is increasingly moving away from the energy addition phase of the energy transition which involves using fossil fuels and low carbon energy to the energy substitution phase where the steady increase in low carbon energy displaces the usage of fossil fuels.

According to BP Outlook, the future for Oil demand is shaped by two counteracting forces: the diminishing role of oil in road transport as vehicles become more efficient and are increasingly electrified, offset by more persistent use of oil as a feedstock in the petrochemicals sector, predominantly to produce plastics. The consumption of oil is shifting with the use of feedstock in the petrochemical industry replacing road transport demand as the primary source of future growth. The consumption of Petrol and Diesel remains the most important component in the economic growth of South Africa as the country's transport system depends on petroleum fuels for almost all its energy needs. (BP Outlook,2025).

[2] National Development Plan 2030

1.2. Legislation and Regulation governing the petroleum industry.

The Department of Electricity and Energy is mandated to oversee the development of energy policy and implementation. The department's strategic goals, among others, are to ensure that the energy supply and demand are well managed and that there is an efficient and diverse energy mix for universal access within a transformed energy sector, and also to implement policies that adapt to and mitigate the effects of climate change. Energy policy and its subsequent legislative and regulatory frameworks are the foundation upon which the regulator and investors make decisions and consumers make choices about which energy solution to use.

Following the 1994 South Africa democratic elections, the new government reviewed and developed policies in the energy sector driven by international trends. As a result, the White Paper on Energy Policy was developed in 1998, and it has been used as the premier policy document that guides all subsequent policies, strategies and legislation within the energy sector. The objectives of the White Paper are to increase access to affordable energy services, improve energy governance, stimulate economic development, manage energy-related environmental and health effects and secure supply through diversity.

This was reiterated in the National Development Plan 2030, which was adopted in 2013 as a blueprint for future economic and socio-economic development strategy for the country. The plan envisages that by 2030, South Africa will have an energy sector that promotes economic growth and development through adequate investment in energy infrastructure. The plan also envisages that by 2030 South Africa will have an adequate supply of electricity and liquid fuels to ensure that economic activities and welfare are not disrupted.

Subsequently, to achieve these objectives, new policies and strategies were developed, and the existing policies were amended. The following are legislative regulations about the petroleum sector post the promulgation of the White Paper: -

- *National Energy Act,2008*:- The aim of the National Energy Act No 34 of 2008 is to ensure that diverse energy resources are available, in sustainable

quantities and affordable prices, to the South African economy in support of economic growth and poverty alleviation, taking into account environmental management requirements and interactions amongst economic sectors; to provide for energy planning, increased generation and consumption of renewable energies, contingency energy supply, holding of strategic energy feedstocks and carriers, adequate investment in, appropriate upkeep and access to energy infrastructure; to provide measures for the furnishing of certain data and information regarding energy demand, supply and generation; to establish an institution to be responsible for promotion of efficient generation and consumption of energy and energy research; and to provide for all matters connected therewith.

- *Petroleum Products Amendment Act:* - The Act was promulgated in 1977 but has since undergone several amendments, of which the last two were during 2003 and 2008. The objectives of the Act are for the government to limit the number of licences allocated. The Act prohibits manufacturers and wholesalers from holding a retail licence except for training purposes. Also, it aims to facilitate the transformation of South Africa's petroleum and liquid fuels industry, ensure a system for the allocation of licences, prescribe offences and penalties, and provide for appeal and arbitration as well as annex the liquid fuels charter.

- *Regulations Regarding Petroleum Products Specifications and Standards for South Africa:* - The regulation aims to recommend the tightening of fuel specifications by further reducing the levels of sulphur in both petrol and diesel, as well as the reduction of benzene and aromatic levels in petrol to levels equivalent to Euro 5 emissions standard.

- *The regulations on the Mandatory Provision of Energy Data*: - The regulations were first gazetted in 2012 to enable the Department to collect, collate, and publish quality energy data and information effectively and efficiently. The regulations also empower the Department to stipulate the type, manner, and form of energy data and information that must be provided by any data provider.

- *Petroleum Products Act,1977:-* The aim of Petroleum Products Act, 120 of 1977 is to provide measures in the saving of petroleum products and an economy in the cost of the distribution thereof, the maintenance and control of a price, for the furnishing of certain information regarding petroleum products, and for the rendering of services of a particular standard, in connection with petroleum products; provide for the licensing of persons involved in manufacturing and sale of certain petroleum products; Promote transformation of the South African petroleum and liquid fuels industry; provide for the promulgation of regulations relating to such licenses; and to provide for matters incidental.

- *Central Energy Fund Act,1977*: - The aim of the Central Energy Fund Act 38 of 1977 is to provide for the payment as a charge to the State Revenue Fund of certain moneys into the State Oil Fund and for the utilisation and investment thereof, and for incidental matters.

- *The Gas Act,2001*: - The aim of the Gas Act No. 48 of 2001 is to promote the orderly development of the piped gas industry; To establish a national regulatory framework; To establish a National Gas Regulator as the custodian and enforcer of the national regulatory framework; and to provide for matters connected therewith.

- *Petroleum Pipelines Act, 2003*: - The Petroleum Pipelines Act No. 60 of 2003 intends to establish a National Regulatory framework for petroleum pipelines; To establish a Petroleum Pipelines Regulatory Authority as the custodian and enforcer of the National Regulatory Framework, and to provide for matters connected therewith.

- *Gas Regulator Levies Act,2002*: - The Gas Regulator Levies Act No 75 of 2002 aims to provide for the imposition of levies by the National Gas Regulator; and to provide for matters connected therewith.

- *Petroleum Pipelines Levies Act, 2004*: - The Petroleum Pipelines Levies Act No 28 of 2004 aims to provide for the imposition of levies by the Petroleum Pipelines Regulatory Authority, and to provide for matters connected therewith.

- *National Energy Regulator Act, 2004*: - The aim of the National Energy Regulator Act No 40 of 2004 is to establish a single regulator to regulate the electricity, piped-gas and petroleum pipeline industries; and to provide for matters connected therewith.

Aspects of the South African petroleum value chain are regulated largely under the mandate of the Department of Electricity and Energy and administered either directly or by the National Energy Regulator of South Africa (NERSA). The then DMRE (Department of Mineral Resources and Energy) was responsible for the setting of various price levels for petroleum products and licensing activities throughout the downstream liquid fuels value chain in terms of the Petroleum Products Act, No 120 of 1977, as amended. NERSA sets tariffs for the infrastructure linked to the value chain, e.g., petroleum pipelines and storage facilities.

The report scope of analysis.

This report provides an in-depth analysis of the South African petrol and diesel market. This report systematically also examines the entire fuel value chain, encompassing the sources of supply (crude oil, imports, etc.) and the overall market dynamics that govern the flow and trade of these products. A key focus is the relationship and interplay between petrol and diesel, considering how factors affecting one product might influence the other.

Key Market Influences.

Two important topics are also critically discussed in the overview:

Influence of the Transport Sector: The demand, consumption, and general structure of the fuel market are all significantly impacted by South Africa's transportation sector, which includes road, rail, aviation, and marine.

Fuel Pricing Structure: A thorough analysis sheds light on the intricate processes and variables that affect the nation's petrol and diesel pricing.

Data Granularity and Sales Categories

Due to constraints, specifically a lack of reliable data at a highly disaggregated level, the analysis is conducted primarily on a national and provincial basis.

The report distinguishes between two major sales categories:

Retail Sales: Fuel sold directly to the end-consumer (e.g., at service stations).

Commercial Sales: This broader category includes products sold by oil companies to independent wholesalers **and products sold directly to** various economic sectors **(e.g., mining, agriculture, manufacturing, and transport fleets).**

2. OVERVIEW OF PETROL AND DIESEL MARKET IN SOUTH AFRICA

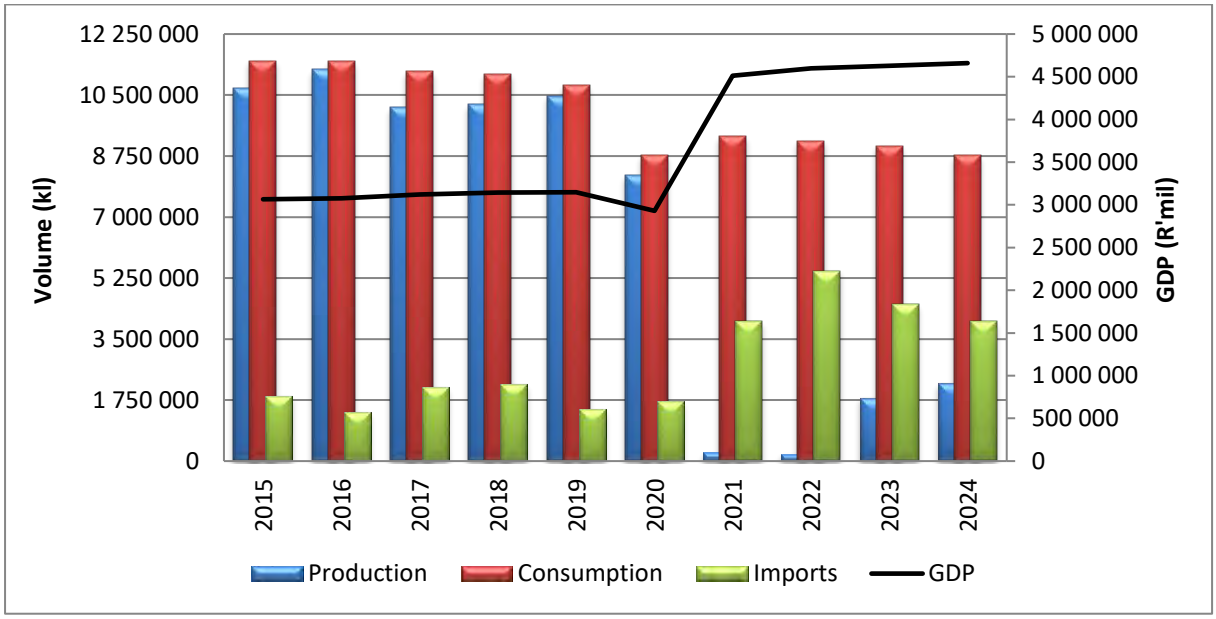
South Africa follows Nigeria as the second-largest economy in Sub-Saharan Africa in 2023, in terms of the Gross Domestic Product (GDP) (IMF,2023). According to IEA, South Africa imported about 80% of total Oil products for final consumption, and this percentage has been rising since the year 2000. South Africa is still importing crude Oil irrespective of the rising imports of finished Oil products. (IEA,2025) South Africa has a sophisticated synthetic fuels industry and produces liquid fuels from its gas-to-liquids (GTL) plant in Mossel Bay and its coal-to-liquids (CTL) plant in Secunda. (US EIA,2025)[3].

The production of petrol was the lowest in 2020 and 2021 as a result of the 2020 COVID 19 lockdown restrictions and refinery closures, then started picking up in the year 2023, rising steadily to the year 2024. Petrol production increased at an average rate of 65% regardless of a decline from 10.6 billion litres in 2015 to 2.2 billion litres in 2024. The increase is due to a jump from 208 million litres in 2022 to 2.2 billion litres going into 2023 because of re- opening of one of the refineries in January 2023.

[3] US Energy Information Administration: Country Analysis Executive Summary South Africa(2025)

Imports of Petrol increased at an average rate of 22% while consumption declined from 11.4 billion litres in 2015 to 8.7 billion litres in 2024 as illustrated in the Figure 1 below.

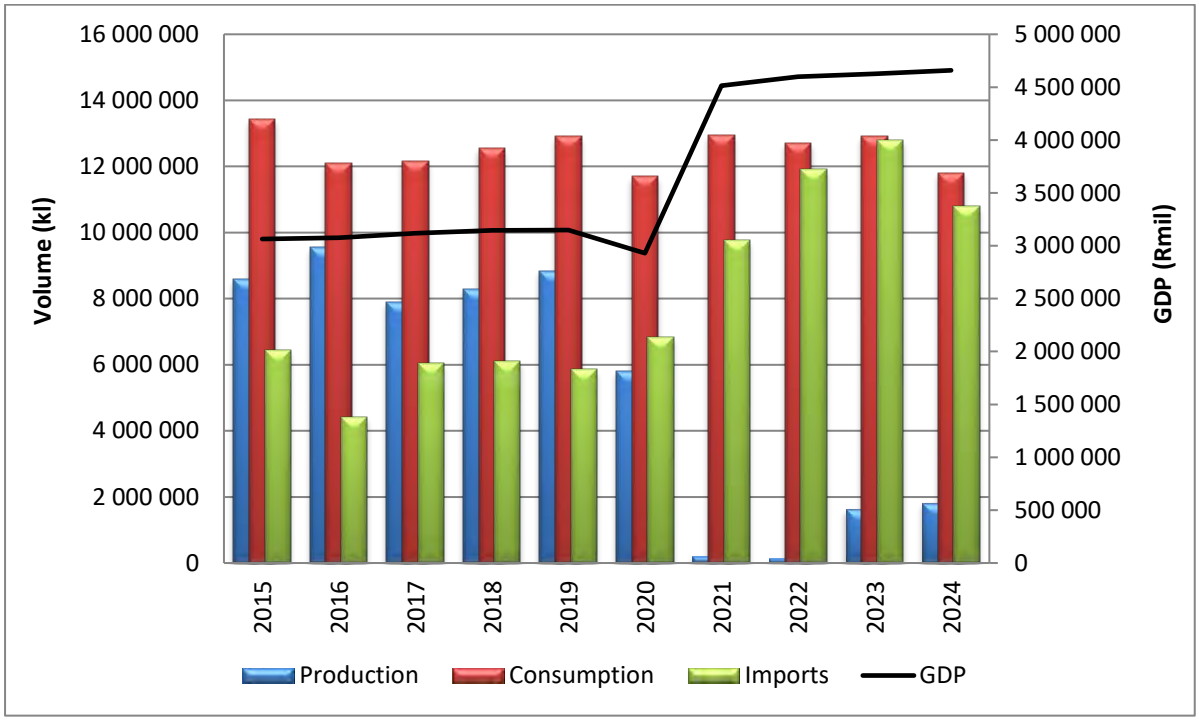
Figure 1: Supply and demand of petrol, 2015 – 2024



Source: Supply, demand and imports - Department of Electricity and Energy (DEE), GDP – Statistics South Africa (StatsSA,2024)

Diesel production increased at an average rate of 94% per annum between 2015 and 2024. This high percentage increase is due to one of the refineries returning to its full operations after it closed in 2020. Consumption of Diesel has been stable since a low in 2020 that was caused by the COVID 19 Pandemic. Consumption remains high as demand exceeded the domestic supply, of which most of the local demand was met by diesel imports. Diesel imports grew at an average rate of 10% per annum between 2015 and 2024. GDP has been steadily recovering since 2020 as illustrated in Figure 2 below.

Figure 2: Supply and demand of diesel 2015 – 2024



Source: Supply, demand and imports - Department of Electricity and Energy(DEE), GDP – Statistics South Africa (Stats SA, 2024)

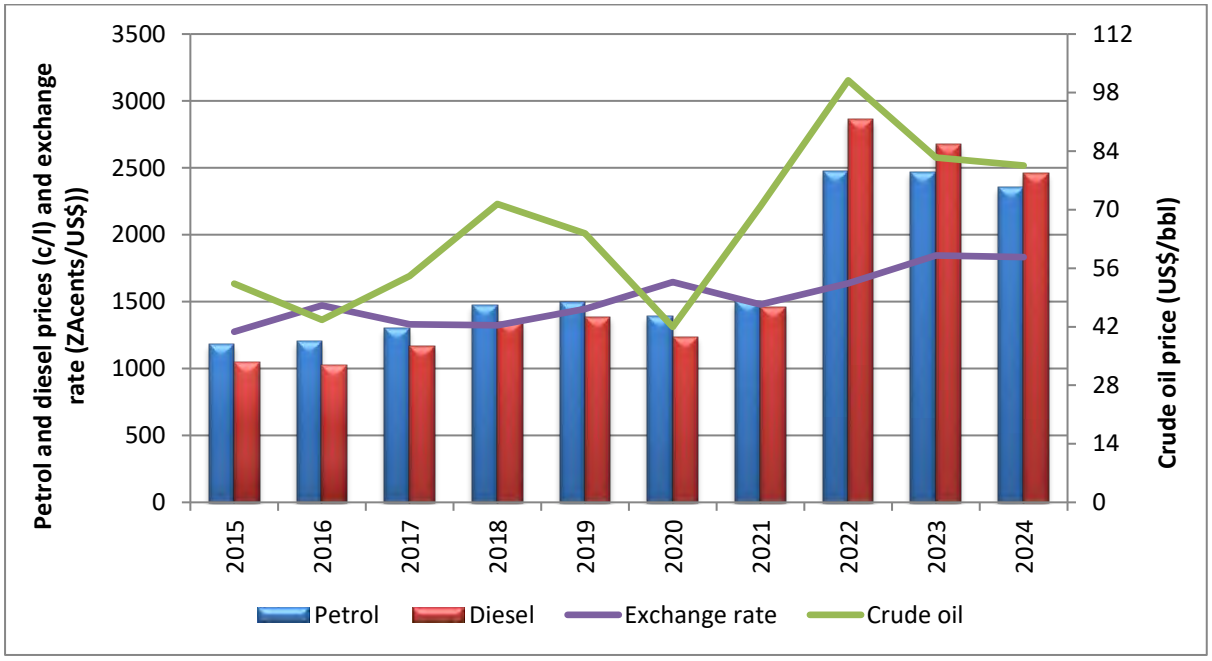
The fuel pump price in South Africa is composed of several price elements and these can be divided into international and domestic elements. South Africa's fuel prices are heavily influenced by trends in the global oil market and are linked to the global market by the international element, Basic Fuel Price (BFP) system, which replaced the In-Bond-Landed-Cost (IBLC) system in 2003. The BFP determines the movement of international petroleum products prices as well as the United States (US) Dollar/Rand exchange rate.

The largest component of the BFP is the price that one would be paying on international markets when physically importing product to South Africa and it includes freight, insurance, ocean loss, landing, wharfage, coastal storage, the financing of the coastal storage and demurrage from refining centres in the Mediterranean, Arab Gulf and Singapore. In turn, the BFP constituted approximately 36% of the retail fuel price in 2020.

The remaining 64% was made up of domestic elements, which are subject to government control. These elements are comprised of fuel tax, equalisation fund levy,

customs and excise levy, Road Accident Fund, Slate levy, transport costs, wholesale margins, retail margins, and service costs. The domestic elements are then added to the BFP to make the final pump price in the different pricing zones (magisterial district zones). The increase in the price of petrol and diesel has been highly significant since the year 2022 As illustrated in Figure 3 below.

Figure 3: Petrol and diesel prices, 2015 – 2024



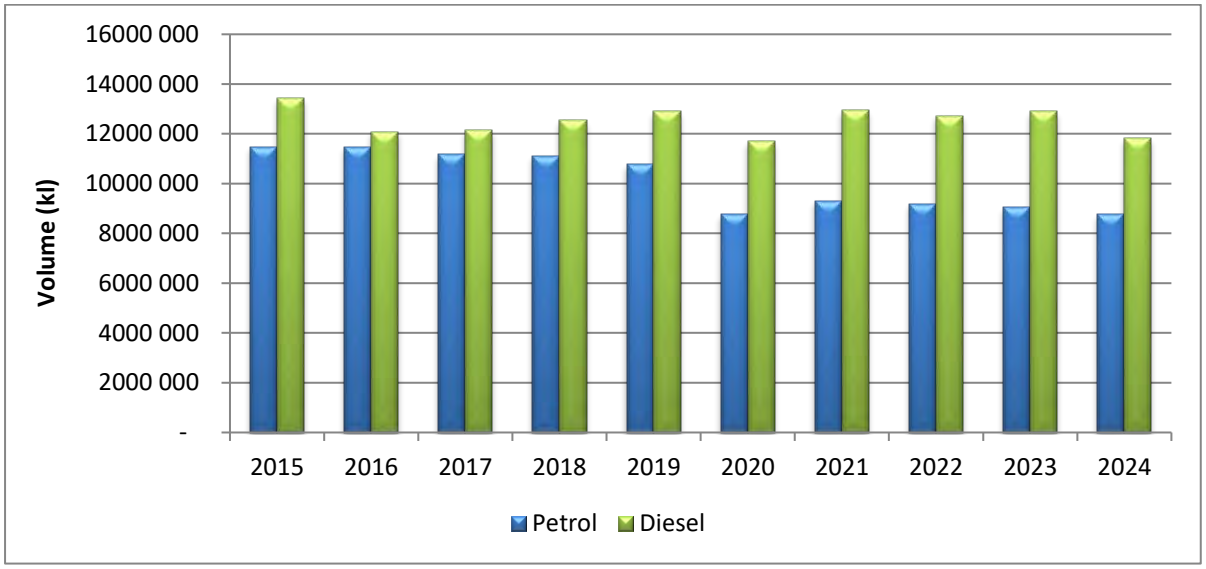
Sources: Petrol and diesel prices - Department of Electricity and Energy (DEE), Exchange rates - South African Reserve Bank (SARB), Crude oil prices – Statista.com ,2025.

3. NATIONAL PETROL AND DIESEL MARKET TRENDS

3.1 Consumption per product type

Petrol consumption in South Africa had an average decline of 2% from 11 billion litres to 8 billion litres between 2015 and 2024. Petrol consumption was at its lowest in 2020 and increased by 6% going into 2021. On average, the consumption of Diesel declined slightly from 13 billion litres in 2015 to 12 billion litres in 2024.

Figure 4: Petrol and diesel consumption, 2015 – 2024



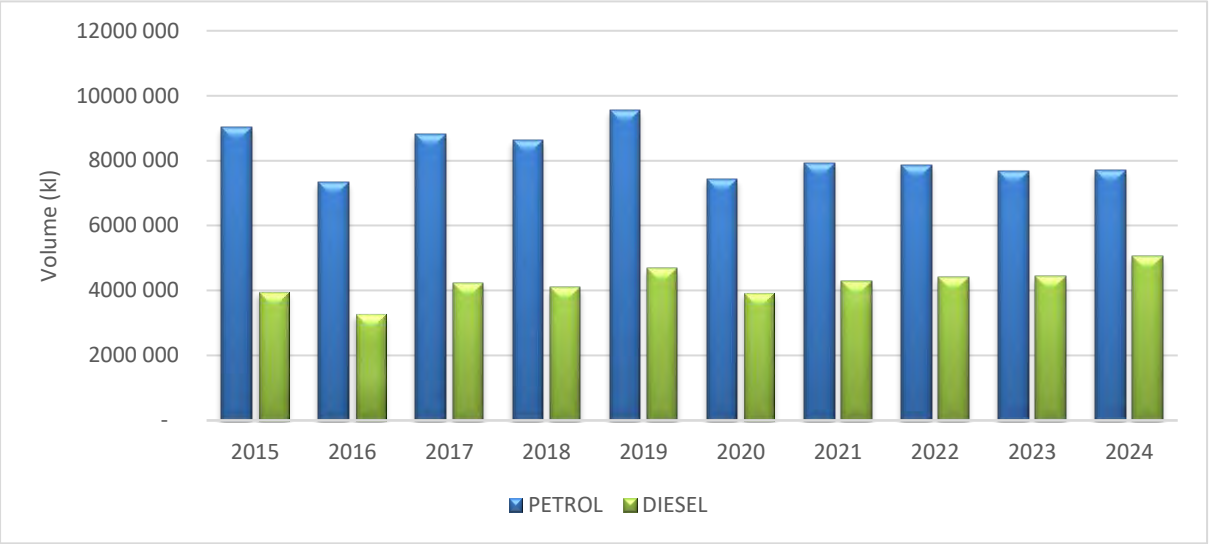
Source: Department of Electricity and Energy (DEE).

3.2 Petrol and Diesel consumption per trade sector

3.2.1 Retail

Petrol is still the most common fuel used in the retail sector. Petrol consumption in the retail sector declined at an annual average rate of 1% from 9 billion litres in 2015 to 8 billion litres in 2024. Diesel consumption in the retail sector increased from 4 billion litres in 2015 to 5 billion litres in 2024, with an annual average increase of 3% as illustrated in Figure 5 below.

Figure 5: Petrol and diesel consumption in the retail sector, 2015 – 2024

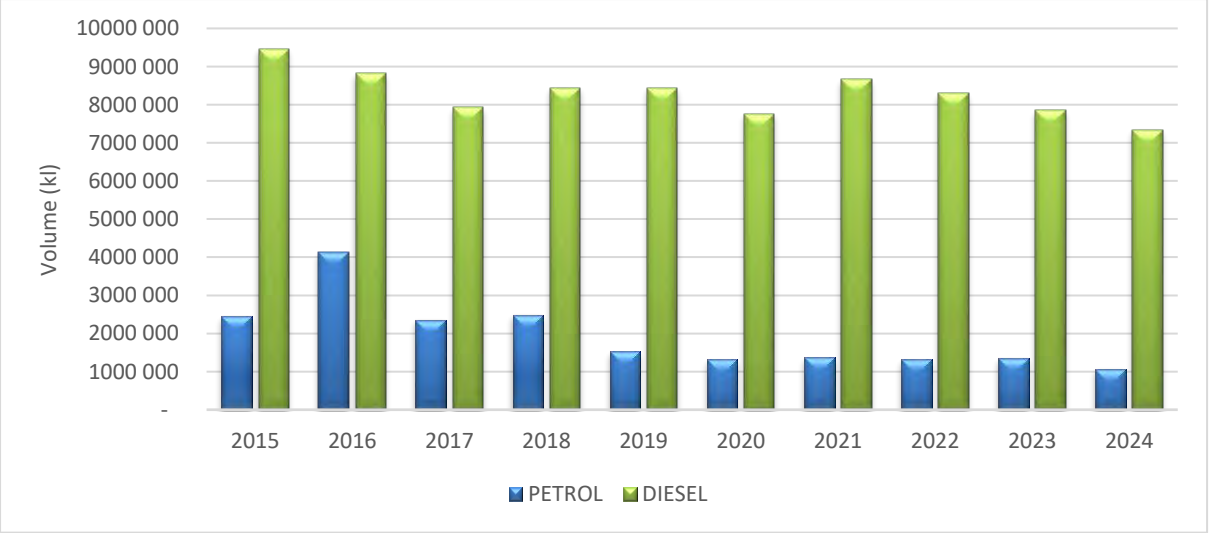


Source: Department of Electricity and Energy (DEE).

3.2.2 Commercial

Diesel remains the highest consumed fuel in the commercial sector. Consumption of diesel in the commercial sector declined from 9.4 billion litres in 2015 to 7.3 billion litres in 2024. On average, diesel declined by 1%. The consumption of petrol in the commercial sector reached the highest level in 2016 at 4.1 billion litres and declined from 2.4 billion litres in 2015 to 1 billion litres in 2024, as illustrated in Figure 6 below.

Figure 5: Petrol and diesel sales volumes in the commercial sector, 2015 – 2024

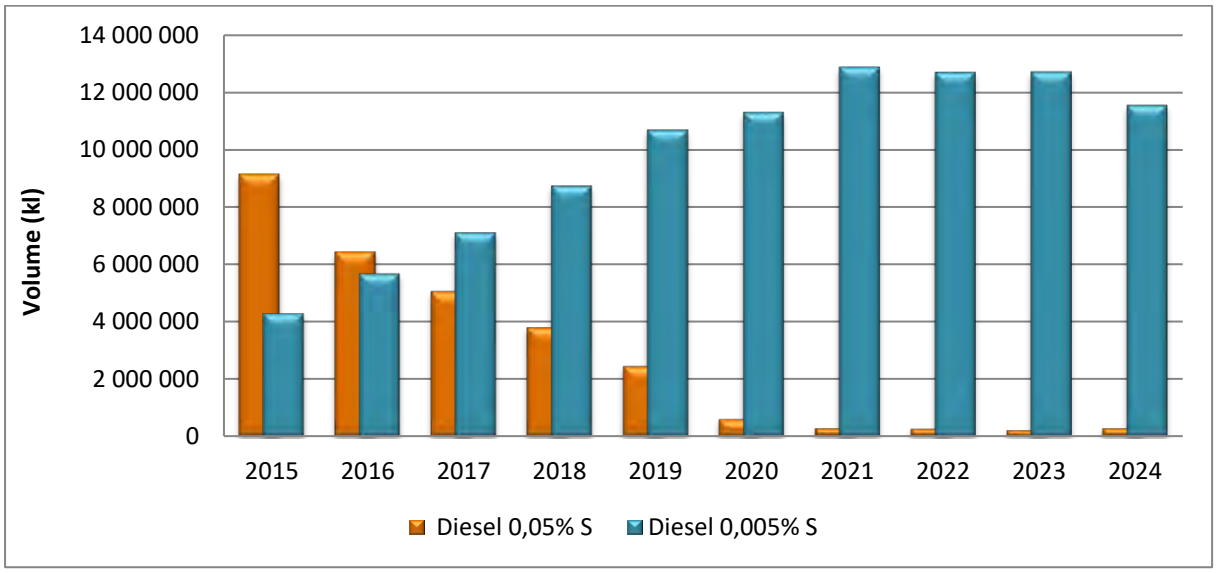


Source: Department of Electricity and Energy (DEE.)

3.3 Petrol and Diesel consumption per grade

The consumption of diesel 500ppm declined at an average rate of 30% per annum as a result of a drop from 9.1 billion litres in 2015 to 273 million litres in 2024. In contrast, Diesel 50ppm grew at an average annual rate of 17% per annum from 4.2 billion litres in 2015 to 12 billion litres in 2024, as illustrated in Figure 7 below.

Figure 6: Consumption per grade of diesel, 2015 – 2024

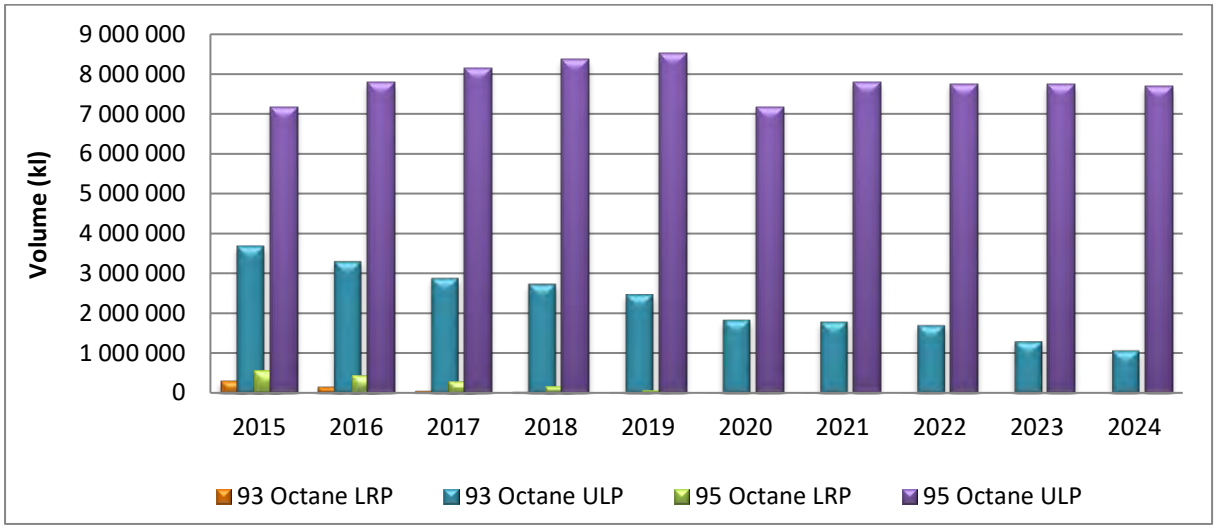


Source: Department of Electricity and Energy (DEE).

The decline in the usage of 93 Octane LRP and 95 Octane LRP is highly significant.

The market share of ULP increased from 93% in 2015 to 100% in 2024, with the 95-octane ULP grade dominating the market from 61% in 2015 to 88% in 2024. The consumption of 93 octane ULP declined at an average rate of 12% per annum from 4 billion litres in 2015 to 1 billion litres in 2024, as illustrated in Figure 8 below.

Figure 7: Consumption per grade of petrol, 2015 – 2024



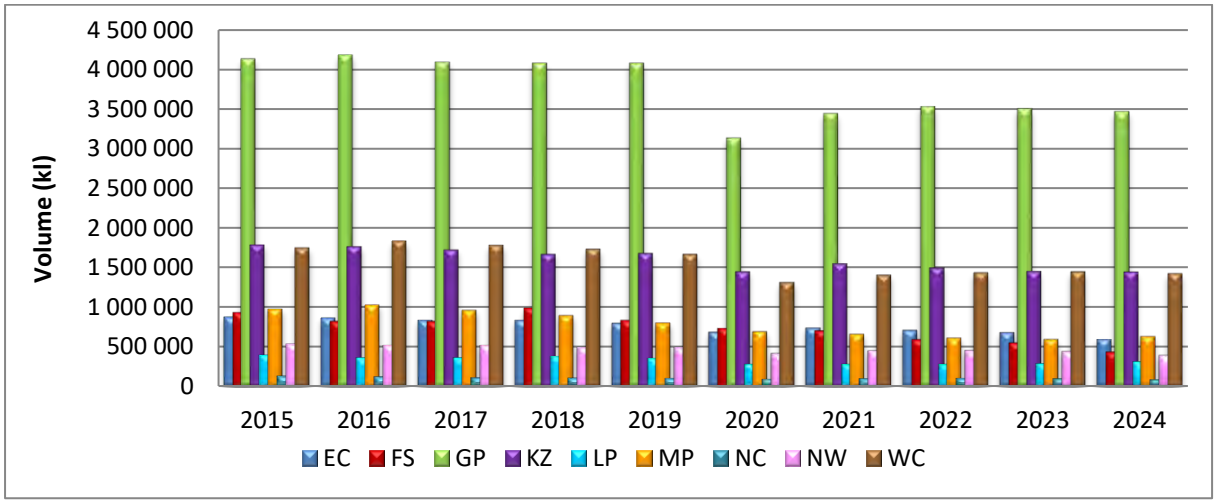
Source: Department of Electricity and Energy (DEE).

4 PROVINCIAL PETROL AND DIESEL MARKET TRENDS

4.1 Petrol consumption per province

Gauteng Province dominates the petrol market as it consumes the highest volumes of petrol compared to all other provinces. On average, Gauteng consumed 38% of the total consumption in the past 10 years, followed by Kwa-Zulu Natal and Western Cape, both at 16% respectively. The rest of the provinces consumed below 1 billion litres over the 10 years. Northern Cape continues to be the lowest consumer of Petrol compared to all other provinces, as illustrated in Figure 9 below.

Figure 8: Petrol sales volumes per province, 2015 – 2024



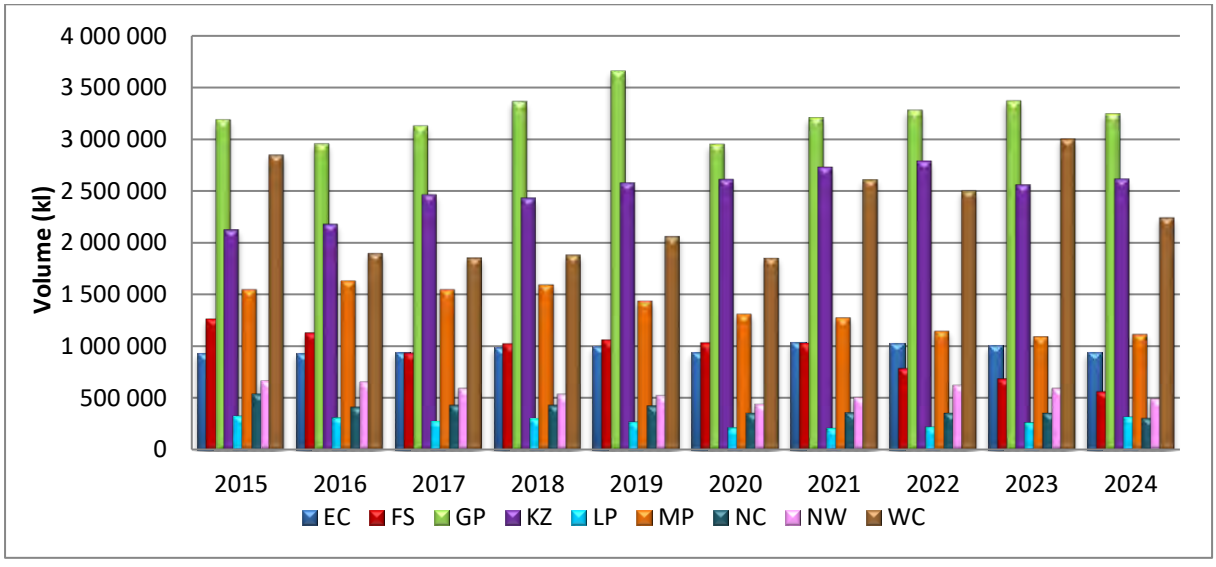
Source: Department of Electricity and Energy (DEE).

4.2 Diesel consumption per province

With Gauteng being the largest market by far and making up a considerable share of the country's overall retail fuel demand, diesel consumption in South Africa is concentrated in the economic powerhouse provinces. Together, the inland provinces use more than half of the nation's gasoline, diesel, and kerosene due to Gauteng's economic and transportation activity. KwaZulu-Natal (KZN) and the Western Cape are two other important consumption centres. KZN frequently exhibits a higher average fuel throughput per site due to significant diesel volumes, which are probably related to its major port and logistics business.

The consumption of Diesel per province was dominated by Gauteng at 26% followed by Kwa-Zulu Natal and Western Cape at 20% and 18% respectively. Mpumalanga was the fourth largest consumer of diesel at 11%. The remaining 5 provinces had a growth of less than 10% in the 10 years, with Limpopo reporting the lowest diesel consumption. Figure 10 below.

Figure 9: Diesel sales volumes per province, 2015 – 2024



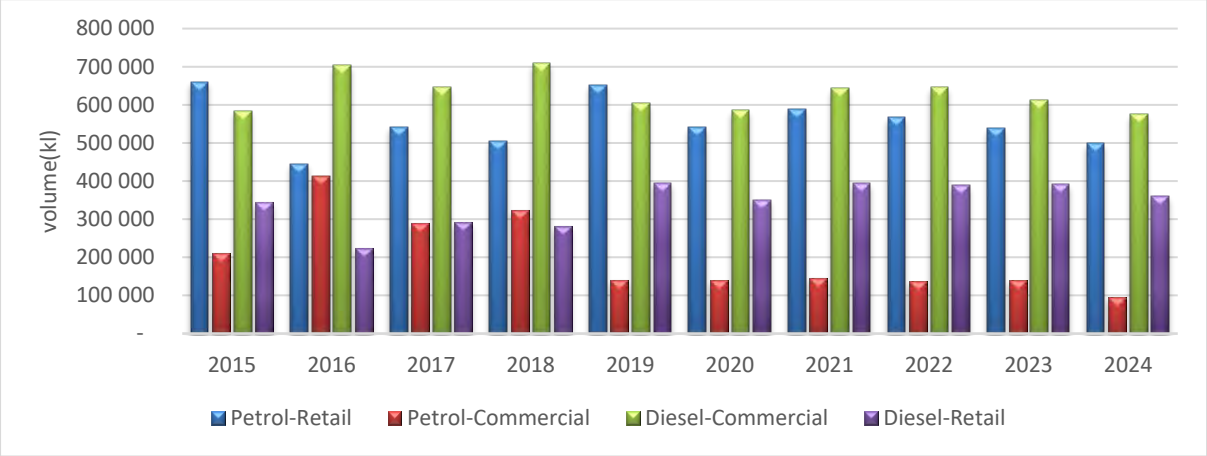
Source: Department of Electricity and Energy (DEE).

4.3 Provincial petrol and diesel consumption per trade sector

4.3.1 Eastern Cape

Consumption of fuel in the Eastern Cape was dominated by petrol in the Retail sector and diesel in the commercial sector. Petrol consumption in the retail sector reached a low in 2016 and overall declined at an average annual rate of 2% from 2015 to 2024 while Petrol consumption in the Commercial sector increased at an annual average rate of 10% in the 10 years. Diesel consumption in the retail sector reached a low in 2016 and from there on increased at an average annual rate of 2%, while the use of diesel in the commercial sector grew at an average annual rate of 4% per annum in the 10 years as shown in Figure 11 below.

Figure 10: Petrol and diesel consumption per trade sector in Eastern Cape, 2015 – 2024



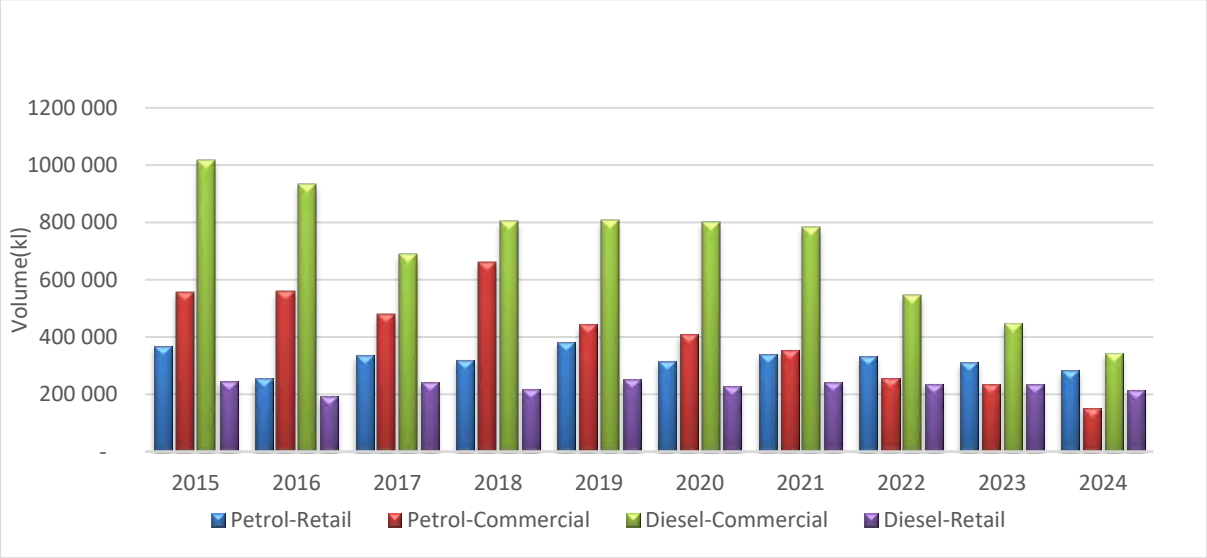
Source: Department of Electricity and Energy (DEE).

4.3.2 Free State

Diesel was the most consumed fuel in the Free State as compared to petrol, with the market share standing at 56% in 2024. Diesel consumption in the commercial sector decreased at an average annual rate of 9% from 1 billion litres in 2015 to 343 million litres in 2024. Diesel consumption in the retail sector remained stagnant in 10 years, while consumption of petrol in the retail sector decreased at an average annual rate of 3% per annum. The consumption of petrol in the commercial sector declined at an

average rate of 9% per annum from 554 million litres in 2015 to 151 million litres in 2024, as shown in Figure 12 below.

Figure 11: Petrol and diesel consumption per trade sector in Free State, 2015 – 2024

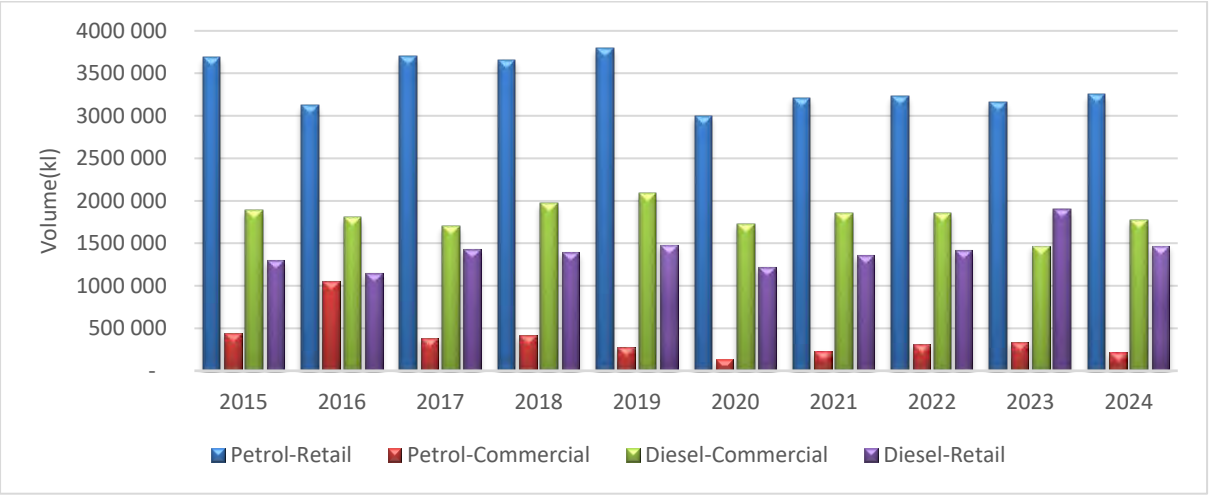


Source: Department of Electricity and Energy (DEE).

4.3.3 Gauteng

Petrol dominated the fuel consumption market in Gauteng throughout the 10 years, regardless of a drop in its market share from 56% in 2015 to 51% in 2024. Petrol consumption in the retail sector declined from 3.6 billion litres in 2015 to 3.2 billion litres in 2024, while the consumption of diesel in the retail sector grew at an average annual rate of 3%. Diesel consumption in the commercial sector was fairly the same and remained at 2 billion between 2015 and 2024, while the consumption of petrol in the same sector declined from 445 million litres in 2015 to 213 million litres in 2024. Petrol consumption in the commercial sector was the highest in 2016, at 1 billion litres, as illustrated in Figure 13 below.

Figure 12: Petrol and diesel consumption per trade sector in Gauteng, 2015 – 2024

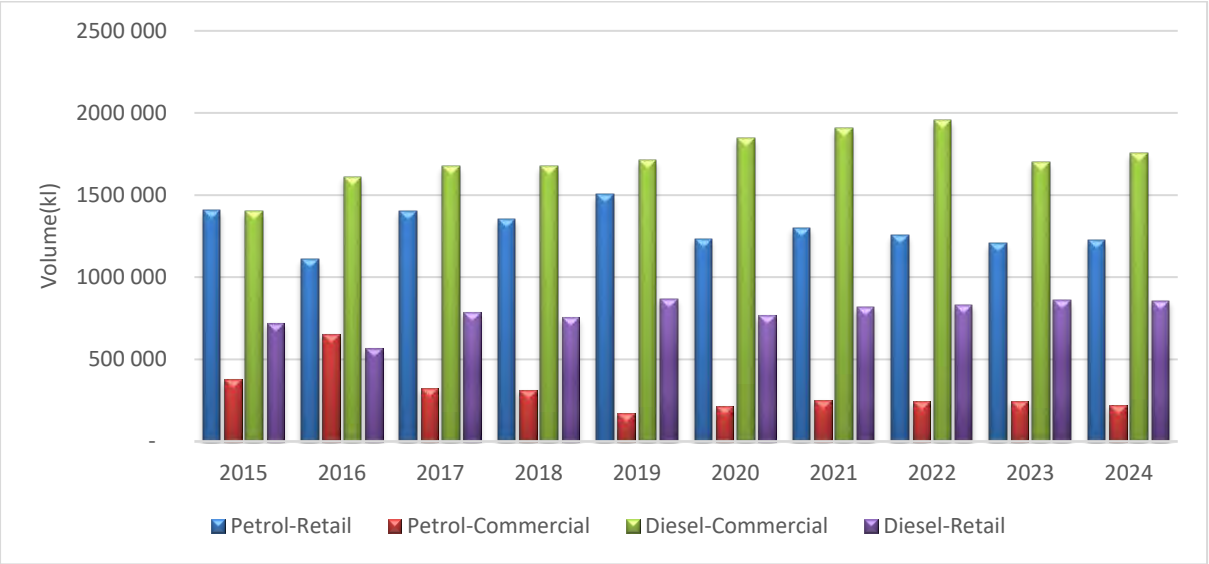


Source: Department of Electricity and Energy (DEE).

4.3.4 Kwa-Zulu Natal

Diesel usage in Kwa-Zulu Natal is still dominant, especially in the commercial sector, and its market share stood at 64% in 2024. Petrol consumption in the retail sector had declined by 1% while petrol uses in the commercial sector declined at a very steady rate. Diesel consumption in the commercial sector increased at an average annual rate of 3% while consumption of diesel in the retail sector grew by an average rate of 2% per annum, as shown in Figure 14 below.

Figure 13: Petrol and diesel consumption per trade sector in Kwa-Zulu Natal, 2015 – 2024

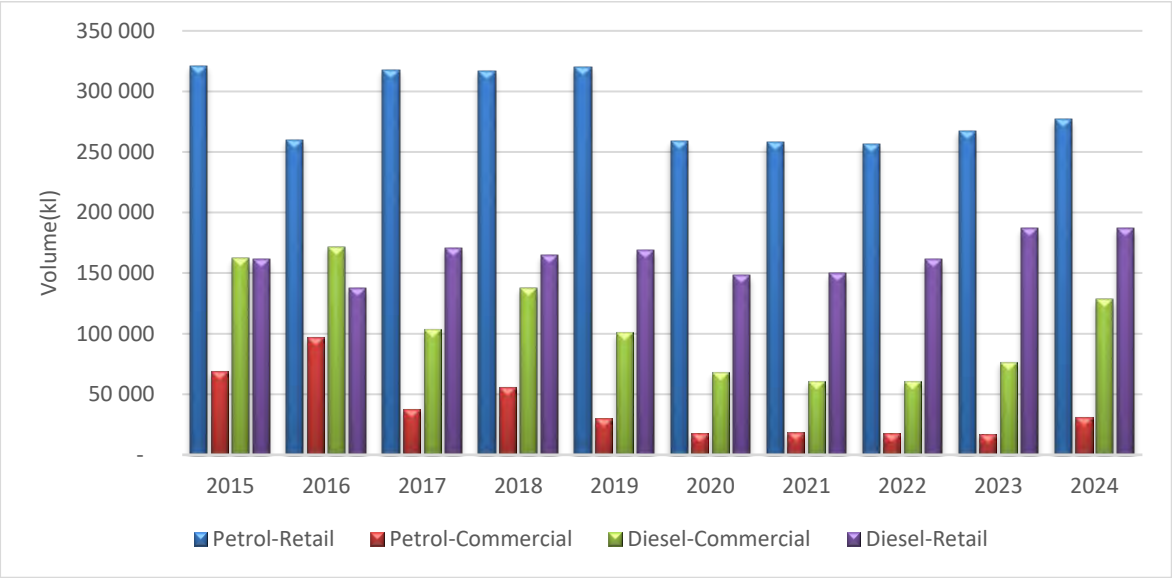


Source: Department of Electricity and Energy (DEE).

4.3.5 Limpopo

Petrol consumption in Limpopo decreased at an average rate of 1% in the retail sector. With regards to the commercial sector, petrol consumption declined from 68 million litres in 2015 to 31 million litres in 2024. The consumption of diesel in the commercial sector was the lowest in the year 2020,2021,2022, and started increasing to 128 million litres in 2024, while consumption in the retail sector increased at an average annual rate of 2% from 161 million litres in 2015 to 186 million litres in 2024, illustrated in Figure 15.

Figure 14: Petrol and diesel consumption per trade sector in Limpopo, 2015 – 2024

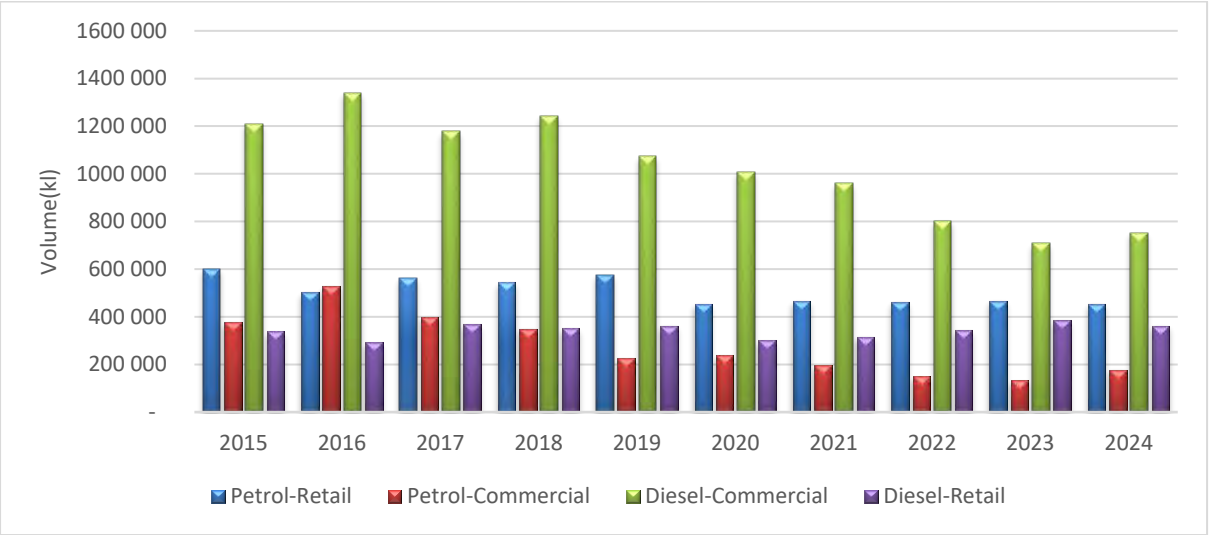


Source: Department of Electricity and Energy (DEE).

4.3.6 Mpumalanga

The consumption of diesel in Mpumalanga declined at an average rate of 4% in the commercial sector, while consumption in the retail sector increased at an average rate of 1%. Fuel consumption in Mpumalanga was dominated by diesel, with a market share that remained at 64% in 2015 and 2024. Petrol consumption in the retail sector declined at an average annual rate of 3% from 600 million litres in 2015 to 453 million litres in 2024, while consumption of petrol in the commercial sector grew at an annual rate of 3% during the period of study, as illustrated Figure 16.

Figure 15: Petrol and diesel consumption per trade sector in Mpumalanga, 2015–2024

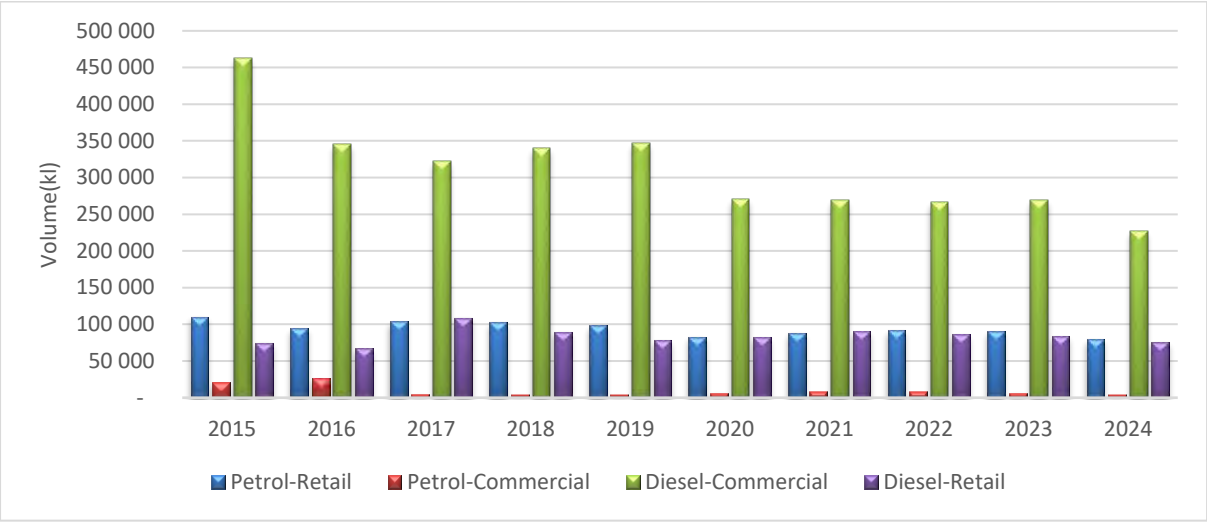


Source: Department of Electricity and Energy (DEE).

4.3.7 Northern Cape

Diesel consumption was dominant in the Northern Cape between 2015 and 2024, mainly due to the mining activities in the province, despite its market share falling from 80% to 78% during the period. Diesel consumption in the commercial sector reached its peak of 462 million litres in 2015; however, it started declining to a low of 226 million litres in 2024. The consumption of diesel in the retail sector grew at an average rate of 2% per year. Consumption of petrol in the retail sector declined at an average rate of 2% from 110 million litres in 2015 to 79 million litres in 2024, while the use of petrol in commercial dropped significantly from 20 million litres in 2015 to 8 million litres in 2024, as illustrated in Figure 17.

Figure 16: Petrol and diesel consumption per trade sector in Northern Cape, 2015 – 2024

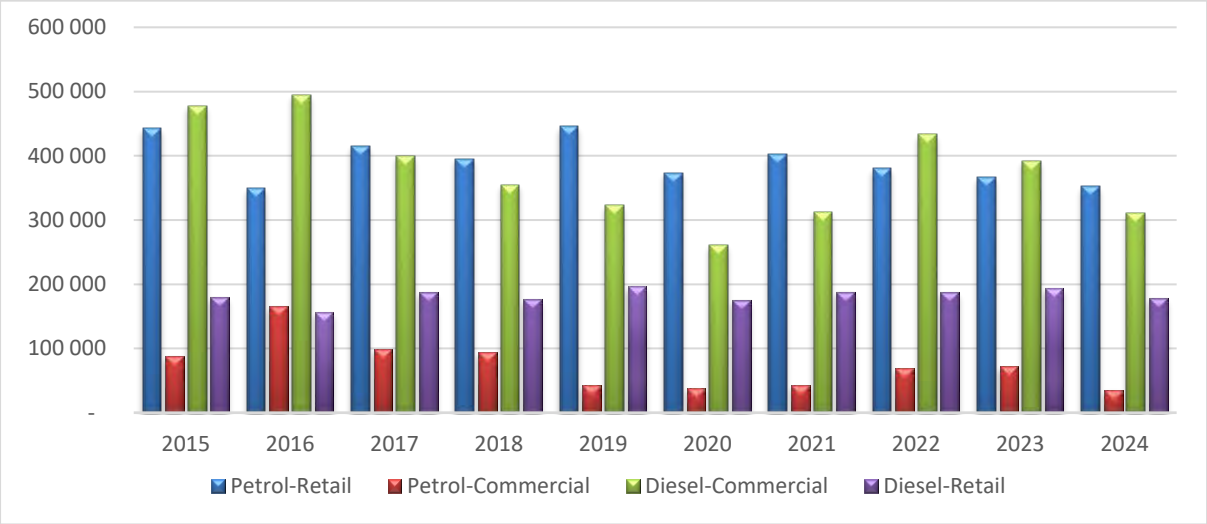


Source: Department of Electricity and Energy (DEE).

4.3.8 Northwest

Diesel consumption in the Commercial sector and Petrol consumption in the Retail sector continued to dominate in the Northwest province. In the Commercial sector, Diesel dropped from 477 million litres in 2015 to 310 million litres in 2024. Consumption of diesel in the Retail sector has been stable throughout the 10-year study. Petrol consumption in the Retail sector declined at an average annual rate of 2% while the consumption of Petrol in the commercial sector decreased from 87 million litres in 2015 to 35 million litres in 2024, as illustrated in Figure 18.

Figure 17: Petrol and diesel consumption per trade sector in Northwest, 2015 – 2024

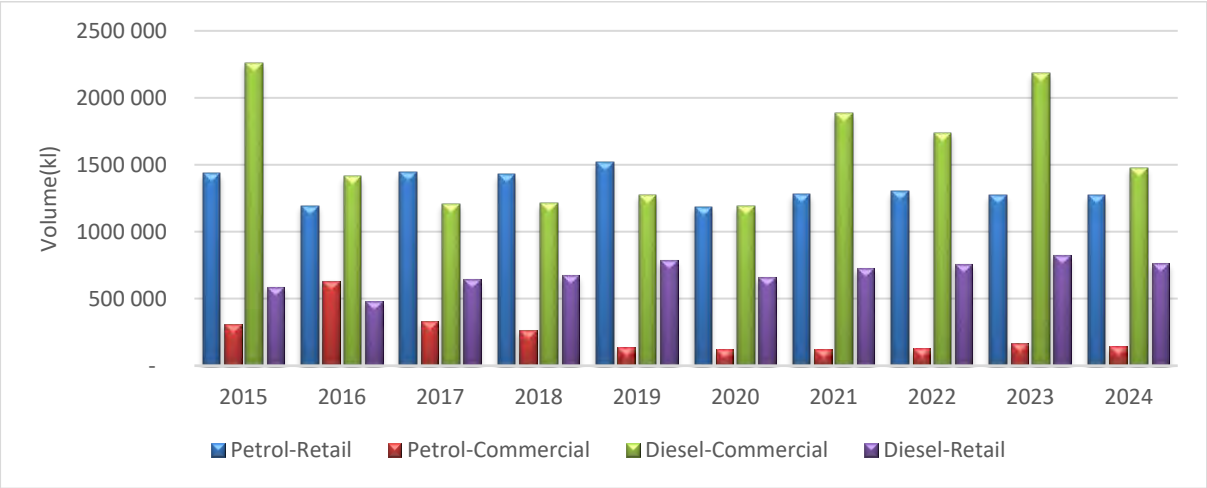


Source: Department of Electricity and Energy (DEE).

4.3.9 Western Cape

The Consumption of petrol in the Western Cape declined by an annual average rate of 1% in the retail sector and decreased from 307 million litres in 2015 to 140 million litres in 2024 in the commercial sector. Diesel consumption continued to dominate the total fuel consumption from 2015, with a market share of 62% to a 67% share in 2024. The consumption of Diesel in the commercial sector declined from 2.3 billion litres in 2015 to 1.5 billion litres in 2024. Diesel uses in the retail sector increased at an average annual rate of 2% from 587 million litres in 2015 to 763 million litres in 2024, as shown in Figure 19.

Figure 18: Petrol and diesel consumption per trade sector in Western Cape, 2015 – 2024



Source: Department of Electricity and Energy (DEE).

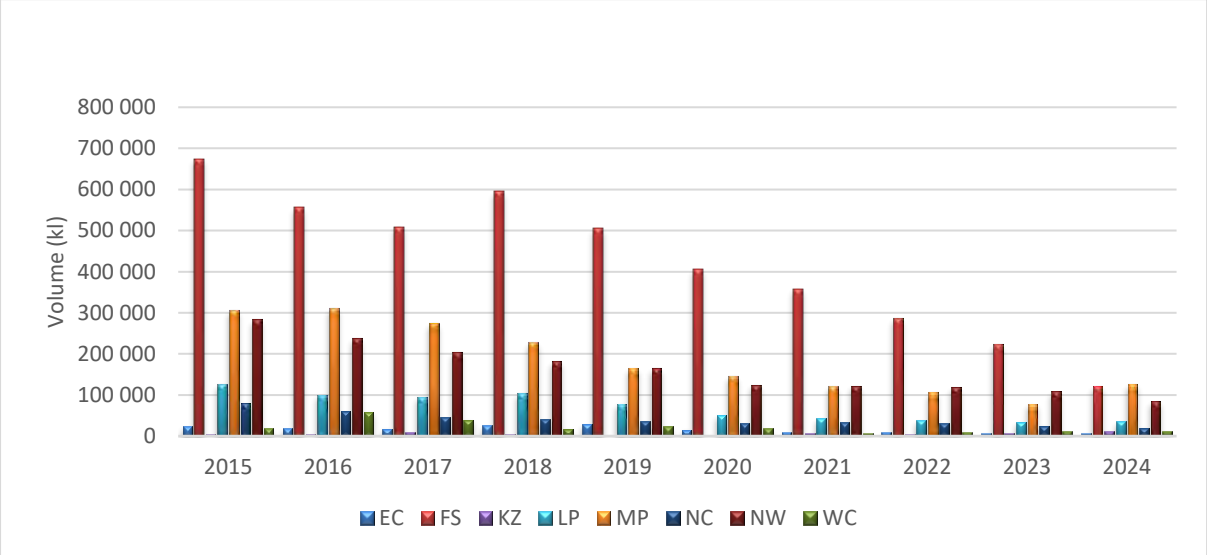
4.4 Provincial petrol and diesel consumption per grade

4.4.1 Petrol

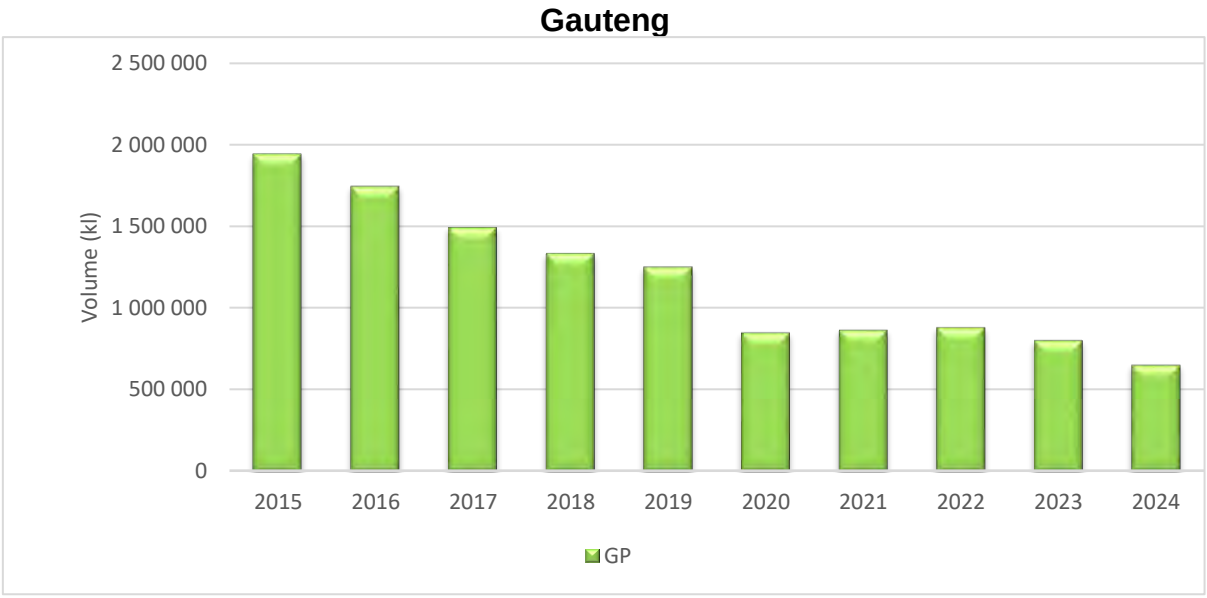
The country's reliance on road freight and personal car usage, as well as trends in the transportation industry, are strongly linked to the total national petrol consumption, with Gauteng, the economic centre, using the most.

The consumption of ULP 93 was dominated by Gauteng, and the market share increased from 56% in 2015 to 61% in 2024. The use of ULP 93 in Gauteng declined from 1.9 billion litres in 2015 to 650 million litres in 2024. Free State followed as the second-highest consumer of ULP 93, which also declined from 674 million in 2015 to 121 million litres in 2024. Mpumalanga was the third highest with Northwest the fourth highest consumer of ULP 93. In general, all the 9 provinces experienced negative trends in the last 10 years as shown in Figure 20.

Figure 19: 93 Unleaded Petrol (ULP) consumption per province, 2015 – 2024



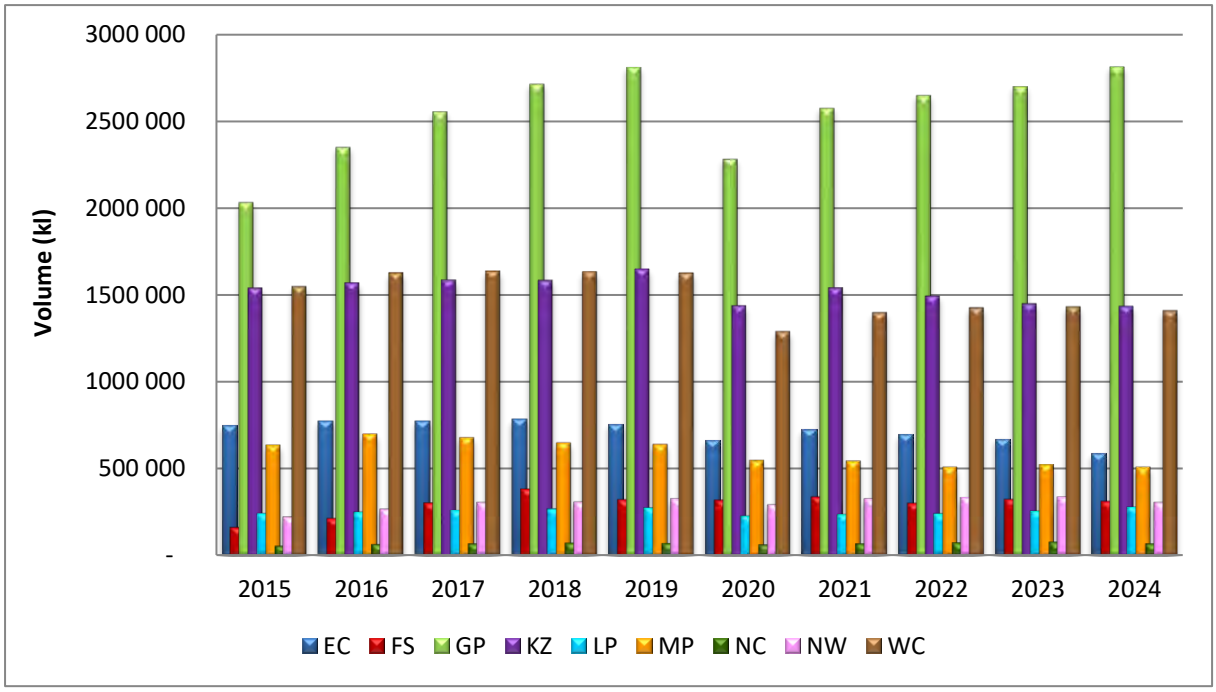
Source: Department of Electricity and Energy (DEE).



Source: Department of Electricity and Energy (DEE).

The consumption of ULP 95 in Gauteng remains the highest as compared to other provinces and grew at an average rate of 4% per year, from 2 billion litres to 2.8 billion litres between 2015 and 2024. Consumption of ULP 95 in the Eastern Cape and Mpumalanga had an average decline of 2%, while KwaZulu-Natal and Western Cape declined by 1% respectively. Freestate, Limpopo, Northern Cape, and Northwest grew by 9%,2%,3% and 4% per annum respectively as illustrated in Figure 21.

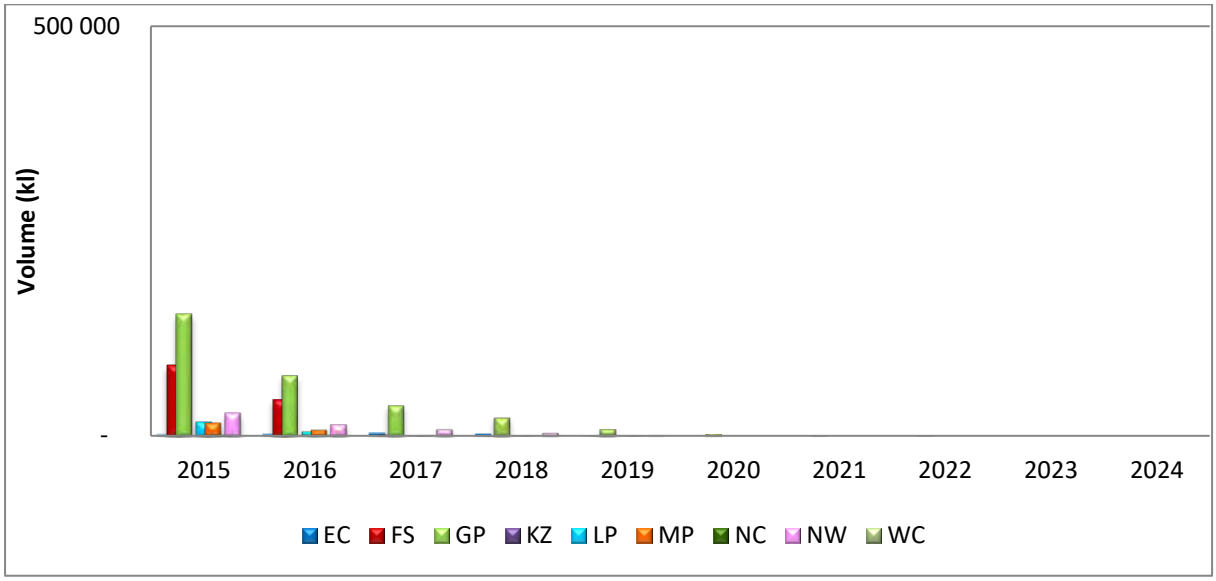
Figure 20: 95 Unleaded Petrol (ULP) consumption per province, 2015 – 2024



Source: Department of Electricity and Energy (DEE).

The consumption of 93 LRP Octane in South Africa has dropped to nothing in the past 10-year period from 2015 to 2024. The consumption went down from 147 million litres in 2015 to nothing in 2024. Consumption mainly used to come from Gauteng, with other provinces not reporting any consumption at all in the last 5 years. In general, there was no consumption of 93 LRP in all provinces in the last two years as shown in Figure 22.

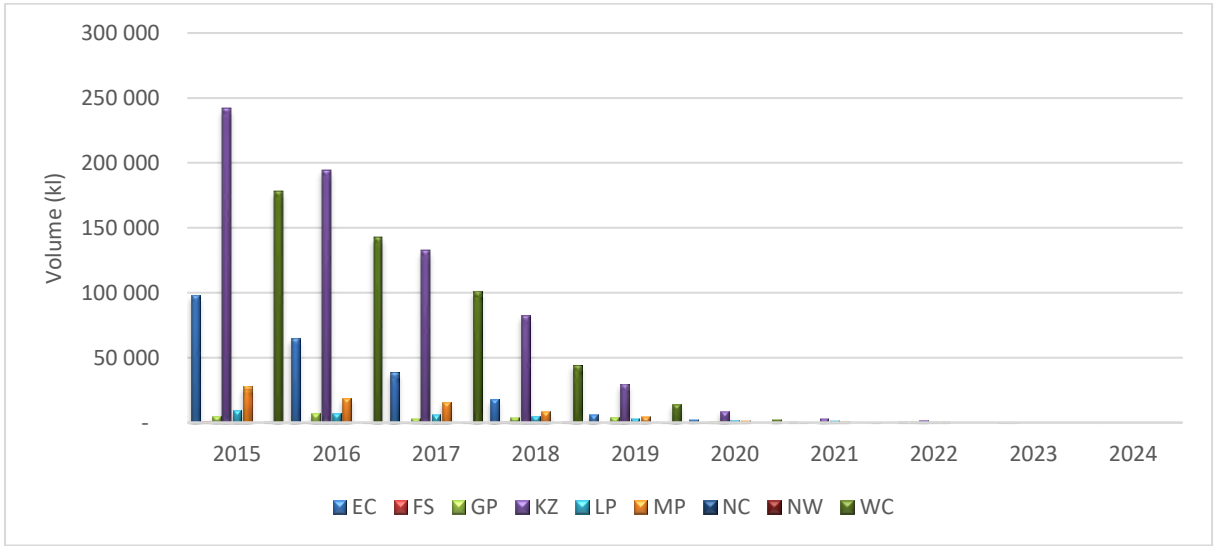
Figure 21: 93 Lead Replacement Petrol (LRP) consumption per province, 2015 – 2024



Source: Department of Electricity and Energy (DEE).

The consumption of 95 LRP grade in the country has also declined drastically in the past 10 years, with KwaZulu-Natal dominating the consumption, declining from a total of 241 million litres in 2015 to almost nothing in 2024 . The consumption of 95 LRP was dominated by Kwa-Zulu Natal, followed by Western Cape and Eastern Cape, respectively as illustrated in Figure 23 below.

Figure 22: 95 Lead Replacement Petrol (LRP) consumption per province, 2015 – 2024

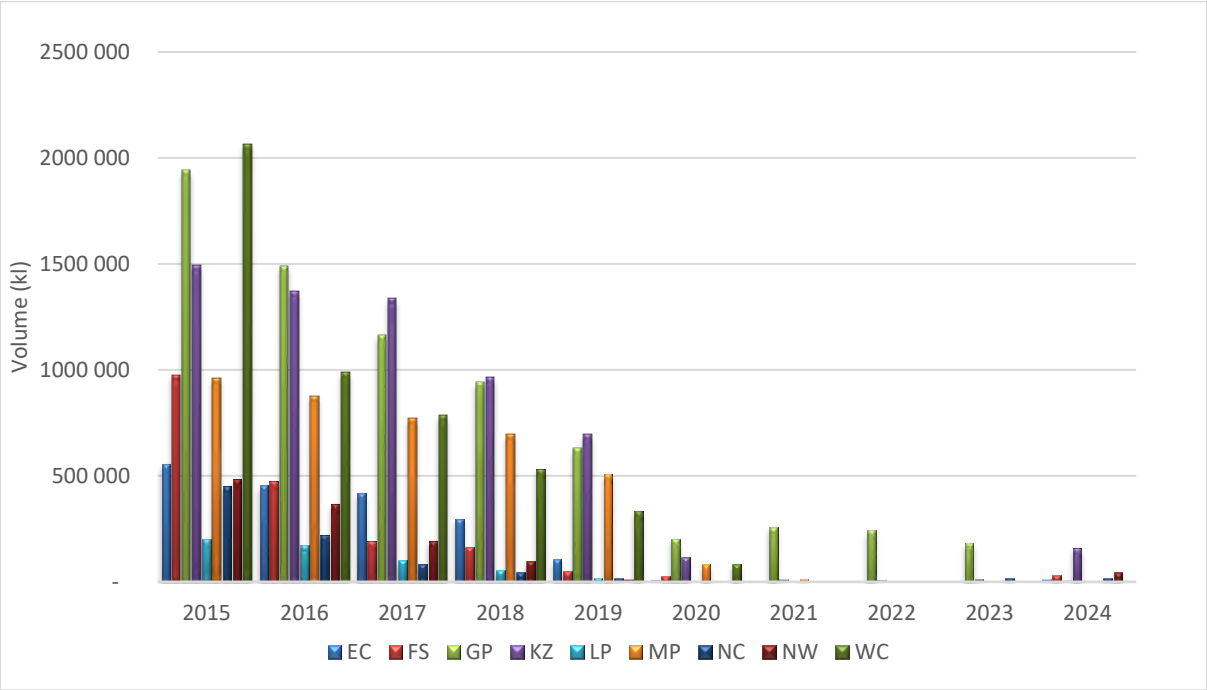


Source: Department of Electricity and Energy (DEE).

4.4.2 Diesel

The consumption of Diesel with a maximum content of 0,05% Sulphur drastically declined in the 10 years reported. Gauteng and Western Cape remained the highest consumers of Diesel 0,05% Sulphur. Although at a declining rate, other provinces followed a similar trend in the 10-year study. KwaZulu-Natal reported the highest consumption of Diesel 0,05% Sulphur at 157 million litres in the year 2024, as compared with other provinces, which had almost no consumption, as illustrated in Figure 24 below.

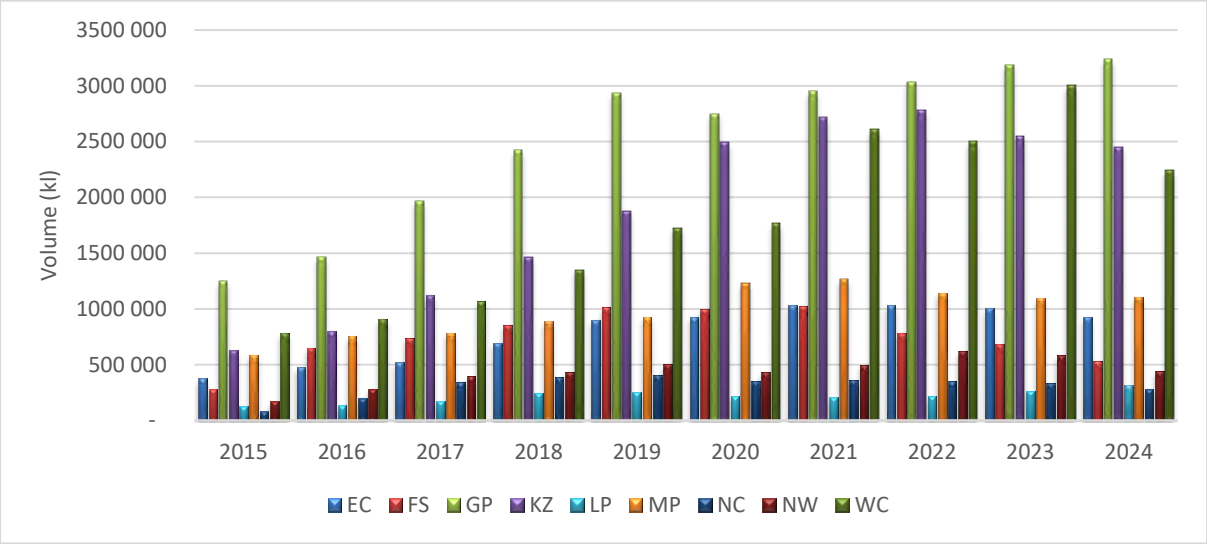
Figure 23: 500 ppm sulphur diesel consumption per province, 2015 – 2024



Source: Department of Electricity and Energy (DEE).

The consumption of diesel with the maximum sulphur content of 0,005% was dominated by Gauteng. The use of Diesel with the lower sulphur content in Gauteng has increased at an average rate of 14% with an increase from 1.2 billion litres in 2015 to 3 billion litres in 2024. Kwa-Zulu Natal also had the highest consumption reported from 630 million litres in 2015 to 2.4 billion litres in 2024. The third largest consumer of Diesel 0,005% Sulphur was Western Cape, with an increase from 782 million litres in 2015 to 2.2 billion litres in 2024, as shown in Figure 25 below

Figure 24: 50 ppm sulphur diesel consumption per province, 2015 – 2024



Source: Department of Electricity and Energy (DEE).

5. CRITICAL ANALYSIS OF PETROL AND DIESEL MARKET 2015 – 2024

An analysis key points may be structured in key points which are summarised in the conclusion as follows: - Structural vulnerability and import dependence, Spatial and economic concentration of demand, Transition in petrol grades and future outlook.

South Africa is importing high volumes of finished petroleum products as a result of global challenges such as 2022 Ukraine- Russian War,2020 Covid-19 Pandemic and closures of several refineries since 2020. Petroleum products remain high in demand amid all challenges faced by the country, both global and local. Diesel is highly traded in the Commercial sector while Petrol is highly traded in the Retail sector. Gauteng, KZN and Western Cape remain the economic hubs of South Africa as they consumed high volumes of both Petrol and Diesel. LRP 95 and LRP 93 Petrol grades have been on a decline and reported almost nothing as of the year 2024. ULP 95 usage has been declining since 2015 to current. For long-term sustainability, Industry stakeholders should concentrate on investing in infrastructure, adapt to global challenges to achieve the Just Energy Transition and other energy policies in place.

6. CONCLUSION

The petroleum industry of South Africa grew from 2015 to 2024 (10-year period reported). South Africa, and possibly the whole world, is still suffering from the consequences of the COVID-19 pandemic. The War between Ukraine and Russia has affected the petroleum industry since 2022. South Africa is no longer producing petroleum products due to the closure of refineries. These are the main reasons for high imports of petroleum products to South Africa.

Considering the above challenges, petrol and diesel remained highly in demand. Petrol was highly traded in the retail Sector while Diesel is highly traded in the Commercial sector. Diesel remains the highest imported petroleum product as it went from 6.4 billion litres in 2015 to 10.7 billion litres in 2024. At a provincial level, Gauteng was the highest consumer of both Petrol and Diesel, followed by Kwa-Zulu-Natal and Western Cape, respectively. These provinces remain the economic hubs of South Africa, which contribute more to the country`s Gross Domestic Product.

The Fuel consumption patterns per trade sector have been differently displayed and are unique for each province. Each province also displays unique consumption patterns with regard to petrol and diesel. The usage of Diesel has been high in all 9 provinces with Northern Cape and Mpumalanga consuming higher volumes of diesel due to their mining activities. Petrol in the retail sector has been high in Limpopo and Gauteng, with KwaZulu-Natal and Eastern Cape having both high consumption volumes of petrol and diesel. The use of ULP 95 has been on a downtrend since 2015 going into 2024. LRP 95 and LRP 93 Petrol have been fading away and have almost reported nothing as of the year 2024. ULP 95 is highly used in the Gauteng province and is the most demanded product in all 9 provinces.

The petrol and diesel industry is an essential part of South Africa’s economic and energy landscape as it supports the key sectors of the economy. Industry stakeholders should concentrate on strengthening supply chain resilience and investing in modern infrastructure to ensure long-term sustainability. The sector must adapt to global challenges to maintain and achieve a competitive advantage and the just energy transition in the future.

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8. APPENDIX A: DATA SCOPE

The report was compiled with data from the following sources:

Fuel Sales Volume (FSV) data: The data was collected by DOE from the 7 oil companies in South Africa.

Petrol and Diesel trade data: The data was collected by DOE from the South African Revenue Services (SARS).

SA Gross Domestic Product (GDP) data: The data was collected by DOE from the South African Reserve Bank.

DOE Annual Energy Balances: SA Energy Balances are compiled and published annually by the Department of Mineral Resources and Energy (DMRE).

Vehicle Sales data: The data was collected by DOE from the National Association of Automobile Manufactures of South Africa (NAAMSA)

South African Petrol and Diesel Prices: The data was published on DOE`s website.

Crude Oil Prices: The data was collected by DOE from the United States Energy Information Administration (EIA).