

## Mainstream Media Highlight Helium Supply-Shock Risk As Iran Conflict Persists

Developments in the Middle East are once again reminding markets that global energy supply chains remain deeply exposed to geopolitical risk. [Reporting from the Financial Times and Reuters highlights a stark warning from Qatar's Energy Minister](#), Saad Sherida Al-Kaabi, who stated that if the ongoing conflict involving Iran continues, Gulf nations may be forced to halt energy exports within weeks.

Qatar sits at the centre of this vulnerability and according to the United States Geological Survey, in 2024 Qatar supplied 36% of global helium supply. The country's Ras Laffan Industrial City, operated and administered by QatarEnergy, hosts one of the world's largest helium refining and liquefaction complexes. Crucially, the same infrastructure, export routes and industrial systems that underpin Qatar's LNG industry also produce and export a significant share of the world's helium. Following escalating tensions, QatarEnergy has halted LNG production, which by extension has also halted helium output, as helium is recovered as a by-product of natural gas processing and can only be produced alongside LNG at Ras Laffan.

Energy Minister Al-Kaabi further cautioned that Qatar would not be able to restart LNG, and by implication helium, production until the conflict has completely ended. Even then, returning to normal operations could take weeks as facilities are assessed, supply chains stabilised and export logistics restored. Industry experts have warned that the logistical complexity of repositioning helium containers and rebuilding supply chains means the current disruption could realistically translate into a minimum three-month supply interruption before meaningful volumes begin flowing again.

### For helium markets time is of the essence

Both [Reuters](#) and [Sky News](#) have recently highlighted that the availability of helium, an irreplaceable element used across electronics manufacturing, medical imaging, aerospace systems and advanced research, could soon be severely impacted if the conflict escalates further, a dynamic already becoming visible across broader energy markets. Escalating tensions around the Strait of Hormuz have this week pushed oil prices back above \$100 per barrel, highlighting how rapidly geopolitical shocks can ripple through globally interconnected commodity markets.

As detailed in last week's Insights piece, ["Qatar's Sizable Helium Share Spotlights Concentration Risk As Iran War And Hormuz Tensions Escalate"](#), a defining feature of the helium market is its supply concentration, with a small number of regions accounting for a significant share of global production. When instability affects one of these hubs, the impact quickly ripples across industries that rely on helium for mission-critical applications. In this context, jurisdictionally secure helium supply becomes increasingly valuable. Projects

advancing within stable regulatory environments, such as [Pulsar Helium's Topaz Project](#) in Minnesota, USA, have the potential to help diversify global supply chains and reduce exposure to geopolitical bottlenecks, reinforcing the strategic importance of secure upstream helium resources.

Pulsar Helium's shares trade on TSXV: PLSR | OTCQB: PSRHF | AIM: PLSR

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