

Helium & National Security: The Hidden Frontline of Soaring Defence Budgets

Global military spending is accelerating at a pace not seen in decades. [The UN recently confirmed worldwide expenditure reached \\$2.7 trillion in 2024](#) - the highest level on record. Sweden has since announced plans to raise defence spending to 2.8% of GDP by 2026, while the UK has committed to the biggest sustained increase since the Cold War, targeting 2.5% of GDP by 2027 and signalling further ambitions beyond that.

Headlines often spotlight new military hardware, but the true enabler lies in critical materials. Chief among them is helium: a finite, non-substitutable resource vital to defence technologies. As nations roll out more high-tech systems, helium demand rises in step, with advanced semiconductors and electronics reliant on stable, plentiful, and uninterrupted supply.

As Cliff Cain, CEO of The Edelgas Group, recently noted: 'The supply chain is fragile. Exports are concentrated in Qatar, Algeria, and Russia, with clear chokepoints like the Strait of Hormuz and Russian export policy. The U.S. Federal Helium Reserve sell-off has eroded domestic buffer capacity, and there is a single-point-of-failure risk: a shutdown at ExxonMobil's LaBarge, Wyoming facility can materially affect U.S. supply. And because helium is largely a byproduct, supply cannot simply be dialed up; ramp times are slow, outages cascade for months, and price spikes can sideline critical equipment and hamper production.' [Read Cliff's full article here.](#)

Recent shortages have shown the risk of disruption is real. Diversified, secure sources in stable jurisdictions are vital, with strategic sectors - alongside defence - such as quantum computing, satellites, aerospace, and advanced manufacturing all heavily reliant on helium.

As supply chain resilience is increasingly recognised as central to national security, helium stands out: it cannot be manufactured, and substitution is not an option. Today, over 90% of helium production is concentrated in just five countries - a vulnerability that should not be ignored. For policymakers, this underscores the need to treat helium as more than a commodity - it is a strategic enabler of military readiness and technological sovereignty.

For investors, it highlights why stable jurisdiction projects such as Pulsar's Topaz discovery in Minnesota, with high helium grades and strong flow results, are attracting attention - helium is emerging as one of the most critical resources on the new security frontline.

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

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