

NEWS RELEASE

As Saudi Arabia Eyes the F-35, Demand for the Raw Materials Behind Modern Defence Platforms Looks Set to Rise

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Legislature & Geopolitics

Saudi Arabia's Crown Prince visited Washington this week for high-stakes talks expected to produce a series of high-value agreements, with the headline attention on Riyadh's ambition to secure multiple units of **one of the most advanced military platforms ever developed: the Lockheed Martin F-35**. Combining cutting-edge sensors, stealth architecture, high-power computing and extreme-temperature materials, the F-35 represents the pinnacle of modern defense engineering, and one that depends on an integrated, highly reliable raw-material supply chain.

For helium, the connection is both clear and immediate. Helium plays a critical role at multiple stages of the lifecycle of advanced fighter jets, from component testing and leak-checking to the manufacture and cooling of high-performance sensors and electronics. Precision avionics, guided munitions, infrared surveillance arrays and advanced cooling systems increasingly depend on components and manufacturing processes that make intensive use of high-purity helium. As defense budgets continue to rise worldwide, demand for these sophisticated aerial capabilities, and the enabling raw materials required to manufacture them, shows no sign of abating.



As detailed in previous #PLSRINSIGHTS articles, military strategists increasingly recognize that advanced platforms are only as resilient as the supply chains that support them. From orbital surveillance systems to missile-guidance technologies and UAVs, helium plays a recurring role that cannot be easily substituted or synthetically replicated. It is this combination of unique molecular properties and constrained global supply that has, in recent years, elevated helium from a scientific speciality to a strategic resource - one that is foundational across the modern defense performance envelope.

Major US defense agreements, including new multi-billion-dollar Middle East deals, signal rising demand for the semiconductor-rich sensors and onboard electronics embedded in every next-generation aircraft. These components depend on reliable access to high-purity gases to support precision manufacturing. As the US doubles

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down on domestic production of key defense technologies, the pressure on upstream, safe-jurisdiction supply chains continues to intensify.

Against this backdrop, the timing of Crown Prince Mohammed bin Salman's US visit, and Saudi Arabia's renewed push for F-35 access, reflects a broader effort among resource-rich nations to establish more formidable defense postures. Given the United States' dominant position in arms manufacturing, that momentum is likely to accelerate high-tech defense production across the country, from next-generation stealth aircraft to emerging hypersonic programs, further underscoring how the upstream materials enabling these platforms are rapidly becoming strategic priorities in their own right. For the United States, home to Pulsar's helium-rich Topaz project in Minnesota, the prospect of rising demand reinforces the importance of this discovery as the Company works to establish itself as one of the country's most important producers of primary helium.

Helium may not feature prominently in diplomatic headlines this week, but its relevance is embedded in every advanced system under discussion - the race for next-generation military capability begins at the source, and investors would be well served to take note.

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