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Helium Demand to Rise as US $80 Bn Nuclear Build-out Drives Deployment of Small Modular Reactors (SMRs)

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Technology, Space & Energy

As global power demand continues to surge and decarbonisation imperatives intensify, the nuclear sector is undergoing a rapid transformation - led by helium-dependent Small Modular Reactors (SMRs). Compact, factory-built, and deployable almost anywhere, SMRs are reshaping how nations and industries think about nuclear power. According to multiple market studies, the global SMR market is expected to grow from roughly US $7 billion in 2025 to around US $12 billion by 2035, making it the fastest-growing segment in the nuclear sector.

The **OECD** projects that up to 21 gigawatts of SMR capacity could be installed worldwide within the next decade, positioning SMRs on the frontier of the modern nuclear build-out. Many next-generation designs - particularly high-temperature gas-cooled reactors - use helium as their primary coolant. Inert, thermally efficient, and stable under extreme heat, helium is uniquely suited to transfer energy safely within these advanced systems, making its role in SMRs both critical and irreplaceable.

What makes SMRs particularly compelling is their scalability and cost efficiency. Unlike traditional gigawatt-scale nuclear plants, SMRs can be produced in series, transported by road or rail, and rapidly installed to serve industrial parks, communities, or data-centre clusters. For the world's largest tech firms - now among the biggest consumers of electricity - SMRs offer a pathway to clean, continuous baseload power that renewables alone cannot provide. For industries seeking resilient off-grid energy supply, SMRs are fast becoming the technology of choice. This shift is being accelerated by partnerships such as the recent **Westinghouse–Cameco–Brookfield–U.S. government**

initiative, valued at around US $80 billion, and by energy-hungry technology giants including **Google and Microsoft, which are signing agreements to source power from next-generation nuclear systems**, including SMRs.

As SMRs move toward large-scale deployment, helium demand is set to rise sharply, with each reactor representing a long-term, locked-in supply requirement. At the same time, the rapid expansion of AI and semiconductor manufacturing is amplifying this trend, drawing helium into both the power generation and high-tech domains. The convergence of these forces — power from SMRs and computing from data-centre infrastructure — marks the beginning of a new era in which helium underpins both the energy and technology landscapes. This dynamic, first explored in Pulsar Helium's **The Helium Imperative: Fueling Converging Forces — AI, Energy Resilience and Decarbonisation**, is now playing out in real time: AI expansion is fuelling unprecedented electricity demand, SMRs are emerging as the scalable, low-carbon solution, and helium sits at the core of both.

As the SMR era gathers pace, Pulsar's high-grade assets and safe-jurisdiction positioning leave it uniquely placed to potentially help drive the next phase of nuclear innovation. For investors tracking the future of nuclear power - and the energy sector more broadly - recognising helium's role in fast-developing next-generation technologies could prove highly rewarding.

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