

## NEWS RELEASE

# Trump's c.\$600B Middle East Deals Signal Potential Surge in U.S. Demand for Critical Raw Materials

2025-05-23

Technology, Space &amp; Energy

President Trump's recent \$600 billion investment announcement marks a pivotal moment for the U.S. economy - particularly across technology, aerospace, and defense sectors. The agreement includes major partnerships with NVIDIA, Amazon, and others to develop an AI corridor across the Middle East - an initiative that will hinge on U.S. manufacturing expertise to supply the advanced hardware, infrastructure, and innovation needed to power the region's technological ambitions.

**The UAE has signed a framework agreement that paves the way for acquiring the advanced semiconductors** needed to realize its long-held ambition of becoming a regional leader in AI technologies. Under this initial agreement, the **UAE will be permitted to import 500,000 of NVIDIA's most advanced AI chips annually**, starting in 2025. Meanwhile, Saudi Arabia's DataVolt has committed to investing \$20 billion in **AI data centers and energy infrastructure across the United States**.



With global helium demand projected to double by 2035, domestic AI infrastructure - which relies heavily on helium - faces a set of compounding challenges: rising costs, geopolitical bottlenecks, and the reality that 95% of the world's helium is extracted as a byproduct of natural gas. Together, these pressures are driving a rapidly emerging structural supply risk, with helium scarcity moving steadily to the forefront.

Helium is indispensable across the data infrastructure stack. AI data centers rely on advanced hardware - such as semiconductors, fiber optics, and cryogenic cooling systems - all of which depend on helium at critical stages of manufacturing or operation. In semiconductor production, helium serves as an inert purge gas, ensuring the creation of defect-free chips. Fibre optic cables - essential for low-latency, high-speed data transmission - are tested and sealed using helium-based leak detection techniques. For cooling, high-performance AI computing clusters require liquid helium, the only substance capable of achieving the ultra-low temperatures needed for superconducting materials and efficient heat dissipation in GPU arrays.

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With institutional interest accelerating, and federal attention now turning toward domestic resilience, it is becoming clear: those already invested in Pulsar Helium are part of a rare cohort. Not merely early - visionary.

#### Disclaimer

This article contains information based on current market conditions and publicly available data. It does not constitute financial advice, and investors should conduct their own due diligence before making any investment decisions.

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