



Helium shortages becoming more likely

By [Rob Cockerill](#) on Mar 07, 2026

Significant disruption to helium supply is now much more likely with the news that QatarEnergy will not restart LNG production at its Ras Laffan Industrial City complex until the escalating Middle East conflict comes to an end.

The company **halted production of all LNG and associated products** on Monday (2nd March). Two days later (4th March), it **declared Force Majeure** to affected buyers.

In an interview with the *Financial Times* on Friday, widely reported by various other outlets, QatarEnergy CEO Saad Sherida Al-Kaabi said the company would not be able to restart LNG production at its shuttered complex until the conflict ends completely. It is also assessing any damage to its LNG facilities.

The timing and the depth of the effects of the conflict have been the key questions for helium markets – as well as various other supply chains – for several days since military action escalated in the Middle East.

It's widely understood that LNG production in Qatar could take weeks to return to normal capacities once service does resume.

Industry confidence in the global helium supply chain had already been rocked by the escalating conflict, [as reported by gasworld](#) earlier this week.

It now appears likely that significant disruption, if not widespread shortages, will arise as a result of both the continued pause in Qatar's LNG production and the logistical complexities related to the closed Strait of Hormuz shipping route.

Global helium consultant Phil Kornbluth, President of Kornbluth Helium Consulting, said in a post on *LinkedIn* it is 'hard to imagine' that supply will not be disrupted.

"Based on the time required to reposition helium containers, it is hard to imagine that helium supply will not be disrupted for a minimum of three months," he said. "My thinking is that however long the helium production shutdown lasts, we'll need to add at least two months to sort out the logistics and truly get back to normal."

Speaking to gasworld, he added, "Due to relatively long transit times between Qatar and its primary markets and high inventory levels going into the Middle East crisis, the physical market will not feel much in the way of supply deficits for several weeks. But spot prices have already spiked higher and at least one major supplier has implemented a pricing surcharge."

Read more: Helium players introduce surcharges

Industry reaction appears to affirm the outlook, with one participant even commenting that "the worst-case scenario now seems to be materialising."

gasworld had revealed in recent days that 39% of respondents now had heightened concerns about helium supply disruption, while a further 24% saying they now had an increased risk perception in the short-term.



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Helium containers become a problem

Given the effects of rerouting helium cargoes when de-escalation does eventually occur, fears also exist that containers and transport capacity for helium will be in shortage in addition to the product itself.

Richard Brook, consultant and CEO at Garrison Ventures, had already raised this concern [during a gasworld webinar on 4th March](#), in which he advised customers to think about diversifying their helium supplies amidst the possibility of a Helium Shortage 5.0.

On the issue of shipping and distribution, he explained, "The number of ISO containers that have to flow to Qatar to be filled and then reverse course and come out on ships to be distributed around the world is literally a third of the world's supply. And to lose that won't really matter as long as this doesn't last for more than a couple of weeks. But as this drags on, companies will need to reorient their supply chains."

"There are full ISOs of helium that were produced at Ras Laffan before it shut down. Getting them out is a problem. The companies involved in that activity are going to have to come up with alternative supply chains that go by land around the Straits of Hormuz. That's possible, but those supply chains are very tenuous."

“And then when it all tries to correct itself, there’ll be a reverse course of all this activity to reorient all those ISOs going back to where they should have been in the first place. This will be extremely disruptive, and I cannot understate the level of that disruption.”

Confidence in helium supply rocked – access gasworld’s new report

Confidence in the stability and reliability of the global helium supply through to 2030 has been rocked by the Iran-Gulf conflict, according to new sentiment analysis from gasworld.

The confidence index found that more than half (52%) of respondents are concerned about the stability and reliability of the global helium supply chain.

The *Helium Outlook Report – Q1 2026* analyses the latest industry responses across Helium Supply Chain Assurance & Reliability (HeSCAR), to assess how sentiment has shifted across global markets.

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