

# Comments on LNG strikes on Qatar & impact on global energy markets in AGBI, Mar 22 2026

Dr. Nasser Saidi's comments appeared in an article in AGBI titled "[How LNG strikes on Qatar could reshape global energy markets](#)" published on 22nd March 2026.

The comments are posted below.

*The impact will extend well beyond energy, with knock-on effects likely to be felt across agriculture and industrial production for years.*

*"The biggest takeaway is the need for greater diversification of energy supplies, to multiple producers versus overdependence on a single source," said Dr Nasser Saidi, founder of economy advisory Nasser Saidi & Associates.*

*Asian countries in particular will be on the hunt for alternative sources. "The immediate gainers will be other natural gas producers, mainly Russia, at the expense of the Gulf countries," Saidi said.*

*The supply shock is particularly acute for Asia's largest buyers. China, India and Japan, among the top LNG importers, remain heavily reliant on Gulf energy flows. China has sourced roughly 25 to 30 percent of its LNG imports from Qatar in recent years, Saidi said, while India buys about two-thirds of its supply from Qatar, the UAE and Oman, according to Kpler data. "The countries that will benefit are those that already have some form of access to Russian energy, for example China and a few other Asian countries," Saidi added.*

*Europe faces an especially delicate moment. The region is entering its critical gas storage replenishment season with inventories below 30 percent, the lowest since the 2022 energy crisis, according to Saidi.*

*While Qatar had been preparing to increase output through its North Field expansion, uncertainty now hangs over those timelines.*

*“Many countries recently secured their energy supply by signing multi-year agreements with QatarEnergy based on when new production from the North Field Expansion comes online,” Saidi said. “These disruptions could potentially delay Qatari LNG expansion projects.”*