Low Information Voters

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A cold-eyed engineer's timeline of how the Hormuz disruption arrives at voters who do not know and do not care about urea, helium, or LNG trains; from March's gasoline insult through November's stacked sensory impression, and the cybernetic attribution error by which a new majority would inherit the tail rather than the event. With a postscript, one week later, on the New York Times *catching up —by way of a nice white Iowan farmer, sans brown people.*

I am writing this morning as a cold-eyed rocket man, an engineer looking at the overall cybernetic system of logistics and asking how it ripples through time into the perceptions of low-information voters. Such voters do not know, and do not care, about helium, urea, sulfur, LNG trains, or the finer poetry of marine insurance. They care about their own observables. They care about the gas-station sign, the grocery bill, the car lot, and then, at some lower level of salience, the price and availability of phones and large-screen televisions. Reuters/Ipsos reported on March 20 that cost of living was already the top issue affecting November vote choice, that 55% of Americans said rising gasoline prices were already hurting household finances, and that 87% expected prices to rise further over the next month. That is the sensorium through which logistics closes the loop politically.

The first thing to say, in resistance to stylish melodrama, is that the system is under strain, not in theatrical collapse. Some analysts appear to have discovered that saying "everything"in a grave tone makes them sound profound. It does not. The useful question is which disruptions are physically real, which are merely expensive, and which have a long tail because plant, routing, inventory, and qualification changes do not reverse on command when a waterway reopens. On that score, the serious breaks are energy, fertilizer, shipping and insurance, petrochemicals, selected industrial gases such as helium, and some metals and air-cargo flows. Reuters reports that damage in Qatar has sidelined 12.8 million tons per year of LNG for an estimated three to five years, while fertilizer and helium flows have also been hit and broader shipping costs have risen sharply.

So I looked about and composed a timeline.

March is the phase of immediate insult. Gasoline moves first because it is posted publicly, encountered repeatedly, and requires no theory. The voter need not know where Hormuz is to understand that filling the tank feels like undeserved punishment. Meanwhile, upstream, other machinery has begun to deform. Fertilizer prices have jumped, helium supply has tightened, and large buyers are invoking contracts while smaller buyers start feeling the floor tilt beneath them. Reuters reports urea prices up roughly 30% to 40% since the conflict began, and reports that helium shortages are already affecting some tech production and causing sourcing difficulties and longer lead times. The public mostly sees gasoline in this phase, while the industrial world sees allocation, rerouting, and procurement panic. Choices are being made that are generally unseen; the unseen becomes seen in daily life over time as consequences at gas stations, grocery stores, and big box stores.

April is when groceries will begin to grow teeth and bite. Fertilizer stress does not need to produce literal empty shelves in Iowa tomorrow to matter politically. It only needs to push costs upward through farm inputs while everyone is already raw from fuel prices. Other countries, especially poorer and more import-dependent ones, will feel this faster and harder than the United States. Bangladesh had already shut four of its five fertilizer factories by March 5 because of gas shortages, and Reuters reports price-sensitive countries such as Bangladesh, Pakistan, and India are cutting industrial gas use and suffering demand destruction as LNG prices spike. This is where the food story becomes much grimmer abroad than at home. Americans may experience irritation; poorer countries can experience real food insecurity. But low information voters still won't know what the word "urea"means.

May is when the industrial hidden gods begin translating themselves into more visible nuisances. Helium is politically invisible in itself, but that is beside the point. It matters because it lives inside semiconductor manufacturing for cooling, leak detection, and precision processes. Reuters reports that executives at Semicon China said helium shortages have already started affecting production, with possible impacts across electronics, autos, and smartphones if the shortage persists. The likely near-term symptom is not universal fab shutdown. It is throughput loss, longer lead times, and triage. The important lines will get protected. The lesser lines get invited to go hang. That is how supply chains usually fail in grown-up countries: not with a scream, but with a queue. Automobile production lines will start to feel this keenly.

June is when cars begin to matter more, publicly. Not all at once, and not in the opera-buffa style beloved of headline writers, but as a return of that familiar showroom ugliness: fewer trims, odd shortages, delayed deliveries, sticky prices, and dealers wearing the expression of men who have rediscovered original sin. Cars are politically potent because they are expensive, highly visible, and emotionally loaded purchases. If semiconductor stress, metals stress, plastics stress, and freight stress converge, then cars become an ideal voter-facing proxy for a supply system that has ceased to behave. Reuters explicitly reported warnings that helium-linked tech disruptions could ripple into autos. The USA is very much a culture of cars, and the showroom remains one of its most politically sensitive theaters.

July and **August** are the months in which the wider durable-goods haze will thicken. Phones, large-screen televisions, appliances, and assorted electronics will begin to look a bit strange, with price firmness where discounting ought to be, and selective delays where abundance ought to be. These effects are real but electorally secondary, because people do not buy televisions with the same weekly frequency with which they buy gasoline and food. Still, they contribute to the atmosphere. Modern politics is exquisitely sensitive to ambient annoyance. If enough ordinary purchases begin to feel delayed, pricier, or faintly absurd, people conclude, with some justice, that nobody competent is at the helm. Reuters reported that the conflict is already lifting inflation expectations and damping activity across major economies.

September and **October** are when the accumulation of annoyance becomes political narrative. By then, the average voter still will not have developed a touching amateur interest in urea chemistry or noble gases. But they will have spent months being mugged at the pump, insulted at the supermarket, and increasingly irritated by the price or scarcity of vehicles and consumer goods. This is how supply systems become politics. Not through comprehension, but through repetition. The observables pile up, and the electorate infers that prices are high, supplies are odd, and the people in charge are either fools or liars... or both in alternating sequence. Reuters/Ipsos already shows how strongly fuel pain and cost of living are feeding voter sentiment.

November, then, is likely to be shaped less by any named commodity than by a stacked sensory impression. Gasoline first; groceries second; cars third; electronics after that. In poorer countries the consequences will be harsher, especially around food, because energy and fertilizer shocks are less buffered there and can move more directly into shortages, factory stoppages, and reduced agricultural capacity. Reuters' reporting on Bangladesh is a warning flare here, not an isolated curiosity. The same disruption can register as annoyance in one country and genuine subsistence danger in another. Wealth does not repeal the system. It merely buys a little delay.

And even if Hormuz reopens, the long tail does not politely vanish as the politicians shake hands and sign agreements. This is the part that political romantics dislike because it denies them their faith that a dramatic event can also have a dramatic ending. Reopening a chokepoint helps future flow, but it does not rebuild damaged LNG trains, replace long lead time massive heat exchangers, refill burned inventories, normalize war-risk insurance overnight, unstrand specialized containers, undo supplier reallocations, or recover missed production windows. Reuters reports that the damage to part of Qatar's LNG system could sideline capacity for three to five years, and that broader LNG, helium, sulphur, and related outputs have already been reduced. Networks remember shock and queues have hysteresis. Industrial lead times do not respond to speeches.

If Democrats retake Congress, they will inherit the tail rather than the event. That is a distinction the political class rarely grasps, because it treats elections as magical valves. Win in November, turn the handle, and the machine obediently forgives you. In the real world, a new majority can investigate, posture, legislate around the edges, and attempt some mitigation. What it cannot do is conjure back lost molecules, repaired cryogenic infrastructure, cheaper marine insurance, or unburned inventories. If the public is still being pinched by gasoline, groceries, and cars next year, it will punish the new custodians for the old damage with the usual democratic fairness, which is to say not at all. Politics is a cybernetic system too, but one with poor sensors, atrocious delay, and almost comic attribution error.

This is my wintery engineering summary. By November, low-information voters are most likely to feel this through fuel, food, and vehicles, with electronics and other durable goods contributing to the atmosphere of creeping dysfunction. Abroad, especially in poorer import-dependent countries, the food channel is harder and more dangerous. And even under the optimistic scenario of a reopened Hormuz, the tail is measured not in applause lines but in months and, in some infrastructure cases, years. The machine will go on functioning. It will simply do so more expensively, more slowly, and with less grace, which is often the most politically poisonous condition of all.

Postscript, 3 April 2026

This morning I see that the newspaper for high-information voters, the *New York Times*, has discovered that the closure of Hormuz is causing fertilizer prices to jump for U.S. farmers.

They managed to report on this without mentioning the word "urea,"focusing instead on a nice white Iowan woman farmer of a certain age. No mention of Bangladesh or Yemen, where true "food insecurity,"an antiseptic bureaucratic phrase on a par with rocketry' s "sudden in-flight unplanned disassembly,"looms over this year's crops.

The trick, as ever, is to ignore the actual molecule. Then the logistics disappear. Then the system disappears. One is provided instead with a soft domestic vignette, suitable for readers who prefer their global supply chains narrated as weather, not even as climate. Sans brown people.

Yes, I am being snarky.

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