



IPS INSIGHTS

Perspectives On the Issues Shaping Policy

Can the United States Still Defend Israel? Strategic Limits of American Military Capacity

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Introduction

The latest developments in the Middle East and Eastern Europe are exposing an uncomfortable strategic reality: the United States remains the world's most powerful military power, but it no longer possesses unlimited capacity to sustain multiple high-intensity conflicts simultaneously. The recent reports regarding America's commitment to reinforce Israel's missile defence while Ukraine struggles with a severe shortage of Patriot interceptors illustrate an emerging problem of finite resources rather than infinite military superiority.²

A War of Interceptors

Modern wars are increasingly becoming wars of missiles and, more importantly, wars of interceptor missiles. Unlike conventional ammunition that can be manufactured relatively quickly, advanced interceptors such as Patriot PAC-3, THAAD interceptors, Standard Missile (SM-3 and SM-6), and Arrow interceptors (co-produced with Israel) require sophisticated electronics, specialized propulsion systems, advanced seekers and production cycles stretching over many months.

The United States can manufacture only a limited number each year. This reality

was dramatically exposed during the recent Iran-Israel conflict when hundreds of Iranian ballistic missiles and drones forced Israel to consume interceptor missiles at an unprecedented rate. American naval destroyers and ground-based systems also expended large numbers of SM-3, SM-6 and THAAD interceptors in defending Israel and U.S. bases.

Ukraine Becomes the First Casualty

The consequences are already becoming visible in Ukraine. President Volodymyr Zelensky stated that during Russia's latest missile assault on Kyiv, only one ballistic missile could be intercepted because Patriot interceptor stocks had effectively been exhausted. Ukrainian officials attributed part of this shortage to the diversion of missile supplies toward US forces and allies engaged in the Middle East.³

The implications are profound. Russia has correctly assessed that Ukraine's air defence network is becoming increasingly porous. This allows Russia to employ ballistic missiles, cruise missiles, and drones, in much larger coordinated strikes, overwhelming Ukraine's diminished air-defence capacity. The shortage of interceptors is therefore no longer a logistical inconvenience; it is beginning to shape the battlefield itself.

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² Olena Harmash & Yurii Kovalenko, "Russia pounds Kyiv, kills 10 as Ukraine appeals for Patriot interceptors," Reuters, August 1, 2026, <https://www.reuters.com/business/aerospace-defense/russia-pounds-kyiv-with-missiles-2026-07-31/>

³ Olena Harmash & Yurii Kovalenko, "Russia pounds Kyiv, kills 10 as Ukraine appeals for Patriot interceptors," Reuters, August 1, 2026, <https://www.reuters.com/business/aerospace-defense/russia-pounds-kyiv-with-missiles-2026-07-31/>

Israel's Defence Depends on America

Israel possesses one of the world's most sophisticated layered air-defence architectures comprising Iron Dome, David's Sling, Arrow-2, Arrow-3 and Patriot systems. Yet this impressive shield depends heavily upon continuous American support. The United States provides interceptor missiles, radar integration, intelligence, naval ballistic missile defence, strategic logistics, and emergency resupply. Without American replenishment, even Israel's formidable missile shield would gradually be depleted during a prolonged regional war. The United States has been Israel's principal military backer for decades, with extensive aid, pre-positioned stocks, and joint missile-defence cooperation.⁴

The Industrial Constraint

The central issue is no longer military capability but industrial capacity. After decades of relatively limited conflicts in Iraq and Afghanistan, Western defence industries optimized for efficiency rather than surge production. High-end missiles cannot simply be produced overnight.

Production bottlenecks include, solid rocket motors, microelectronics, infrared seekers, specialized explosives, rare earth components, and skilled labour. Even with unlimited funding, expanding production requires years rather than months. This explains why U.S. military leaders have previously acknowledged that not every Israeli request for weapons could be met immediately because of US stockpile and production constraints

Three Simultaneous Commitments

Washington currently faces three major strategic obligations. First is Europe, as NATO expects continued American support to Ukraine against Russia. Second is the Middle East; Israel depends heavily upon American strategic backing. Third is the Asia-Pacific, as the United States must preserve sufficient stocks to deter China over Taiwan and throughout the Western Pacific.

Each theatre requires many of the same scarce precision-guided weapons. This creates direct competition for limited inventories.

The Taiwan Factor

Perhaps the greatest concern for American planners lies in the Indo-Pacific. Any conflict involving Taiwan would consume enormous quantities of SM-6 interceptors, Patriot missiles, THAAD interceptors, Tomahawk cruise missiles, and Long-range anti-ship missiles.

A prolonged Middle Eastern conflict that exhausts these inventories would weaken deterrence against China. Beijing is undoubtedly studying these developments carefully. Chinese military planners are likely concluding that American military power remains formidable but is no longer inexhaustible.

Strategic Overstretch

History repeatedly demonstrates that great powers rarely decline because they lose individual battles. They decline because they become strategically overstretched. Imperial Britain faced similar challenges before the Second World War. The Soviet Union experienced comparable pressures during the 1980s.

The United States now confronts the possibility of sustaining military commitments across Europe, the Middle East and the Indo-Pacific simultaneously. This is a far more demanding proposition than the post-Cold War conflicts of the past three decades.

Can America Continue Defending Israel?

The United States has a treaty obligation to defend Israel. Whether it can militarily do so under the current circumstances is anybody's guess. If it is only a number crunching game, the inventories are at seriously depleted levels. How quickly can the military industrial complex replenish the stocks is not known.

⁴ Jonathan Masters & Will Merrow, "US Aid to Israel in Four Charts," <https://www.cfr.org/articles/us-aid-israel-four-charts>

Defending Israel while simultaneously sustaining Ukraine and deterring China is becoming increasingly expensive, industrially demanding and strategically risky. Future American support may therefore become more selective, prioritized and conditional. Washington may increasingly encourage regional allies to shoulder a greater share of their own defence burden while accelerating domestic defence-industrial expansion.

Conclusion

The shortage of Patriot interceptors in Ukraine is not an isolated logistical problem; it is a warning signal about the limits of American military endurance in an era of concurrent great-power competition. Every interceptor fired over Tel Aviv is one unavailable for Kyiv, and every missile transferred to Europe

or the Middle East reduces inventories available for the Indo-Pacific.

The central question is no longer whether the United States possesses the military capability to defend Israel. The more pressing question is whether it can continue to defend Israel, sustain Ukraine, and deter China simultaneously over an extended period without placing intolerable strain on its industrial base and strategic readiness.

The emerging evidence suggests that the decisive factor in future wars may not be battlefield brilliance but the ability of nations to produce advanced munitions faster than they are consumed. In that contest, industrial resilience is becoming as important as military power itself.

