

A quiet weapons crisis is building up within the US military

The extension of the fragile ceasefire between the US and Iran is widely seen as a diplomatic tactic aimed at preserving space for negotiations. Yet beneath the surface of official messaging lies a harder strategic reality. Trump's decision to pause may not only be about political calculation but also material constraint.

's own munition constraints could be shaping Trump approach to Iran due to a less publicly acknowledged factor that another round of war could dangerously strain American weapons stockpiles.

The official rationale for extending the ceasefire has centered on diplomacy. The Trump administration has argued that giving Iran more time could help internal divisions within the Iranian leadership resolve into a coherent negotiating stance. Mediators, particularly

, have also pushed for additional time. Also, immediate escalation could destabilise energy markets further. Simultaneously, the US has maintained pressure through a

However, this perspective, though compelling, assumes that the US retains full freedom of military choice. Latest expert analysis, however, suggests that the assumption may not fully hold.

CSIS flags American stockpile is running low

A recent analysis by the Center for Strategic and International Studies (CSIS) presents a far more granular and sobering picture of US military readiness than is typically reflected in official statements and Trump's social media posts. The report underlines a general depletion of weapons, and identifies specific categories of precision-guided munitions that have been heavily drawn down during the Iran conflict, particularly long-range strike missiles and advanced air-delivered systems that are central to modern US warfighting doctrine.

Among the systems highlighted by CSIS are long-range cruise missiles and precision strike weapons

that enable the US to hit hardened or high-value targets from a distance while minimising risk to personnel. These munitions are not easily or quickly replaced. The CSIS analysis underlines that production lines for many of these systems were never designed for sustained, high-intensity conflict against a capable adversary. Instead, they were designed for shorter campaigns or lower-intensity operations, meaning that current industrial capacity cannot rapidly replenish what has been expended.

further stresses that the issue is not just the absolute number of munitions remaining, but the rate at which they have been consumed relative to replenishment timelines. In several categories, the US has been using weapons faster than they can be produced, creating a widening gap that could persist for years. This imbalance is particularly acute for advanced systems that rely on complex supply chains, specialised components and limited manufacturing infrastructure. Expanding production is possible, but it requires sustained investment, contractual adjustments and time that cannot be compressed in the middle of a crisis.

Another key concern raised by CSIS is strategic sufficiency. While the US may retain enough munitions to resume operations against Iran, those same stockpiles must also serve as a deterrent against other potential adversaries. The report warns that current inventory levels would be insufficient for a simultaneous or subsequent high-end conflict, particularly against a near-peer competitor such as China. This introduces a critical constraint -- every missile used in a resumed

is one that cannot be reserved for other contingencies.

Trump orders 'shoot-to-kill' action on Iranian vessels choking Strait of Hormuz

The analysis points to the strain on specific weapons. Precision-guided munitions used for suppression of air defenses, deep strike and anti-ship operations are among those most heavily depleted. These are not interchangeable with older or less sophisticated weapons, meaning that substitution is limited. In practical terms, this reduces operational flexibility and could force commanders to make trade-offs between target sets, tempo and risk tolerance if hostilities resume.

Equally important is the time horizon for recovery. CSIS estimates that rebuilding inventories to pre-conflict levels will likely take several years at the current production pace. Even with accelerated procurement, bottlenecks in manufacturing and supply chains could slow the process. This creates a prolonged window during which the US would be operating with reduced margins of safety in its global military posture.

These details transform the depleted stockpile issue from a background concern into a central strategic variable. The constraint is not simply about whether the US can continue fighting Iran today. It is about whether doing so would compromise its ability to manage future conflicts, sustain deterrence and respond to crises elsewhere. In that context, the decision to extend the ceasefire begins to look less like optional restraint and more like a recognition of tangible operational limits.

The implication is not that the US cannot fight, but that doing so now could compromise its ability to respond to future crises. In strategic terms, this introduces a trade-off between immediate military pressure on Iran and broader global readiness for any conflicts in next few years, the time it will take for stockpiles to be replenished.

'Sealed up tight': Trump says US controls Hormuz until Iran agrees to deal

Iran retains the capacity to keep fighting

Compounding this dilemma is new reporting on Iran's own military capabilities. According to CBS News, US intelligence assessments indicate that Iran retains more significant capabilities than publicly acknowledged by the White House and Pentagon. Despite claims that Iranian forces have been severely degraded, official sources told CBS News that Iran still possesses a substantial arsenal. About half of Iran's stockpile of ballistic missiles and its associated launch systems were still intact as of the start of the ceasefire in early April, three of the officials told CBS News. Roughly 60% of the naval arm of the IRGC is still in existence, the officials said, including fast-attack speed boats. Iranian air power has been significantly degraded but not erased, said the officials, About two-thirds of Iran's air force is still believed to be operational, the officials said, after an intensive US and Israeli campaign that struck thousands of targets, including storage and production facilities.

This matters because it alters the expected cost of renewed conflict. If Iran can still fight for weeks or longer, any US campaign would require a sustained expenditure of already strained munitions stockpile. In other words, the US is more likely to run out of key munitions.

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