The Shifting Balance in the Taiwan Strait

by Andrew Davidson - June 3, 2026

For decades, the United States has been able to project military power across the Pacific through regional bases, carrier strike groups, long-range aircraft and alliances. That posture helped sustain the regional balance of power and reinforced the assumption that Washington could intervene in a Taiwan crisis if it chose to do so. Today, China's growing ability to strike the regional infrastructure needed for U.S. operations is making distant power projection costlier, more vulnerable and less reliable.

To overcome the U.S. in a conflict over Taiwan, China does not need to defeat the United States globally or replicate its worldwide military network. It would be operating near its own infrastructure and supply lines, while the United States would depend on a limited number of airfields, ports, fuel depots and access agreements spread across the Pacific. At a time when long-range precision strike is becoming more widespread, distance and mobility are increasingly consequential. Ships and aircraft can move, but the bases, ports, fuel depots and command nodes required to support them are harder to disperse, protect and replace.

Taiwan is pursuing a related strategy against China. Its porcupine defense is intended to deny Beijing a rapid victory through mobile anti-ship missiles, mines, drones and dispersed forces. Taiwan is also expanding missile capabilities that could threaten coastal targets and fixed military sites on the mainland.

The Taiwan Strait is becoming a layered contest of denial. China is trying to raise the cost of U.S. intervention, while Taiwan is trying to raise the cost of Chinese operations. The central question is which side can keep its operational system functioning under sustained disruption.

Home-Field Advantage

China's navy, anti-ship missile networks, satellite surveillance and long-range strike capabilities place growing strain on U.S. carriers, forward bases and supply lines. Recent Chinese carrier deployments beyond the first island chain reflect a navy gaining experience operating farther from China's shores. Beijing also has a growing ability to impose a blockade or apply coercive pressure around Taiwan without launching a full-scale invasion.

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The imbalance extends beyond military platforms. China accounts for roughly 53 percent of global commercial shipbuilding, compared with 0.1 percent for the United States. Its shipyards can produce naval vessels, while recent exercises involving civilian roll-on/roll-off ferries and cargo ships practicing beach landings with ramps and temporary piers show how its commercial fleet could support transport and resupply. China's maritime militia can also contribute reconnaissance, logistics and disruption operations. These assets would not replace advanced warships lost in combat, but proximity to domestic shipyards, ports and supply chains gives Beijing greater capacity to repair, resupply and restore usable operational capacity over time.

The geographic imbalance is also stark. Taiwan lies roughly 100 miles (160 kilometers) from the Chinese mainland, while a ship sailing from the U.S. West Coast to Taiwan would travel more than 6,000 nautical miles and take roughly two weeks under favorable conditions. The United States can still deploy significant forces into the region, but sustaining them through attrition would be far more difficult. Fuel, munitions, replacement equipment and damaged vessels would have to move across long and increasingly contested supply lines while China operated close to its own ports, shipyards and logistics networks. Washington is adapting through distributed basing, submarines, long-range strike and dispersed logistics. The question is whether those changes will be enough to sustain U.S.

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operations near China as the cost continues to rise.

Allies, Access and the Political Limits of Coalition Warfare

U.S. power projection in the Western Pacific depends not only on military capacity but also on geography and political access. Guam provides an important U.S. hub, but it is distant from Taiwan and exposed to long-range strikes. Operations closer to the conflict would depend heavily on access to bases, ports and airspace in Japan, South Korea and the Philippines, where the U.S. has rotational access to nine sites under the Enhanced Defense Cooperation Agreement.

That access cannot be treated as permanent or automatic. The current U.S. conflict with Iran has demonstrated how quickly political calculations can alter military operations. Saudi Arabia and Kuwait reportedly restricted U.S. use of bases and airspace during an operation intended to reopen the Strait of Hormuz. Spain refused to allow jointly operated bases, and later its airspace, to support attacks on Iran. Broader alignment with the United States did not guarantee unrestricted operational support.

The same constraint would shape a Taiwan crisis. Japan and the Philippines have strong reasons to resist a major expansion of Chinese power. South Korea would face a more complicated calculus shaped partly by the continuing threat from North Korea. In every case, domestic politics, economic exposure and the risk that facilities on their territory could become targets would affect operational participation. Allies may support deterrence while limiting their participation in an escalating conflict.

A blockade or prolonged exchange around Taiwan would also disrupt regional shipping and trade flows extending toward the Strait of Malacca. As the economic and military costs rose, coalition cohesion would become an operational variable shaped by whether national interests remain aligned under stress.

Taiwan’s Long-Term Pressure Environment

Taiwan’s vulnerability is not limited to invasion. China can also apply pressure through military exercises, maritime disruption, economic coercion and other gray-zone tactics intended to raise the long-term cost of resistance without triggering a war.

Taiwan imports more than 94 percent of its energy, including oil and liquefied natural gas delivered by sea. Its vulnerability is especially acute in natural gas; the mandated safety-stock minimum is 11 days, leaving the island dependent on regular maritime deliveries. Oil reserves provide a larger

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buffer, but a prolonged disruption would still strain electricity generation, industrial production and public confidence.

Taiwan has unconventional strengths of its own, such as its semiconductor industry, which rests on an integrated ecosystem of suppliers, engineers and advanced manufacturing capacity that would be difficult to replicate fully elsewhere. But the so-called silicon shield is becoming less absolute. The United States is expanding domestic semiconductor production, while China is trying to narrow parts of the technology gap. Over time, diversification could reduce the degree to which the global economy depends on production concentrated in Taiwan.

Geography also constrains China. Amphibious invasions are among the most difficult military operations possible, complicated here by Taiwan's narrow landing areas, mountainous terrain and limited transport corridors. But geography also constrains Taiwan: Its eastern ports and supporting infrastructure are not designed to receive and move the volume of personnel, fuel, equipment and supplies required for large-scale reinforcement and sustained wartime logistics.

None of this guarantees political realignment toward Beijing, as Taiwanese identity has diverged from mainland China. The issue is whether sustained pressure gradually changes the conditions under which Taiwan makes political and security decisions.

The New Geography of Deterrence

If current trends continue, U.S. strategy in the Pacific is likely to shift away from assumptions of sustained forward dominance near China. The planned relocation of Marines from Okinawa to Guam, alongside expanding facilities, logistics networks and rotational deployments in northern Australia, reflects a broader effort to disperse forces across the region. This improves survivability by reducing reliance on a small number of exposed forward bases, but it also increases the distance over which the United States must move fuel, munitions, personnel and repair capacity.

The U.S. will not abandon the region, but it may place greater emphasis on submarines, long-range strike and logistics networks extending through Japan, the Philippines, Australia and the second island chain. This shift will also require greater burden sharing among regional allies. Japan and South Korea are already discussing a military logistics support agreement and have agreed to resume joint naval search-and-rescue exercises after nearly a decade, despite the historical tensions that have often limited closer defense cooperation. The objective would be less to control the waters closest to China at all times and more to preserve the ability to deny Beijing uncontested regional dominance.

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Even a gradual shift in Taiwan's strategic alignment, short of formal reunification, could reduce the geographic constraints on Chinese operations beyond the first island chain. But this would not automatically translate into Chinese dominance of the Pacific. Beijing would still face the challenge of sustaining operations across vast maritime distances. Its economy would also remain dependent on trade and energy flows moving through vulnerable sea lanes. Nuclear deterrence would further constrain how far either China or the U.S. could escalate a conventional conflict without incurring broader strategic risks.

The long-term issue is therefore not the inevitability of a Chinese conquest of Taiwan or a U.S. withdrawal from Asia. It is the gradual reshaping of the conditions that underpin deterrence. China does not need to make conquest inevitable to alter the regional balance. It needs only to make sustained external intervention progressively more difficult, uncertain and costly. If those pressures continue to accumulate, U.S. strategy is likely to become more distributed, with allies shouldering more of the deterrence and logistics burden.

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