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Hidden bottleneck of modern warfare: Supply chains, rare earths & new era of conflict

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Economist

OPINION EXCLUSIVE

The opening stages of the recent military confrontation between the United States, Israel, and Iran—codenamed Operation Epic Fury—have laid bare a sobering reality about the nature of 21st-century warfare. Beyond the immediate geopolitical shockwaves, including the sudden martyrdom of Ayatollah Seyyed Ali Khamenei after the strikes, the conflict exposed a profound vulnerability hidden deep within the Western military-industrial complex. The true bottleneck of modern military supremacy is no longer merely the availability of operational funds or the courage of frontline forces; it is the fragile global supply chain, the rigid limits of industrial manufacturing capacity, and an uncomfortable reliance on critical minerals controlled by geopolitical rivals.

Math of attrition

To understand the immense strain placed on military logistics, one must look at the sheer volume of ordnance expended. In a remarkably short window, the United States and Israel deployed more than 3,000 precision-guided munitions and sophisticated interceptors. On the other side, Iran launched over 1,000 projectiles across the Middle East, necessitating rapid and continuous interception efforts by the U.S. and its allied forces.

The United States utilized a highly advanced mix of weaponry: standoff strike missiles for the initial waves, ground-launched rockets for time-sensitive targets, suppression weapons designed to neutralize radar systems, and large volumes of precision-guided bombs. Specifically, the U.S. arsenal utilized in these crucial hours included an estimated 250 JDAMs, 120 Tomahawk cruise missiles, 60 Hellfire missiles fired from MQ-9 Reapers, and 10 Massive Ordnance Penetrators. Defensively, the U.S. fired 90 Patriot missiles and 180 SM-family naval missiles.

Israel's offensive strategy similarly relied on vast quantities of precision weaponry that can be manufactured in quantity and linked to aircraft capable of relentless sortie rates. Their forces expended approximately 280 Spice guided bombs, 70 Rampage supersonic missiles, 50 Delilah cruise missiles, and 140 smart bomb kits, alongside their Tamir interceptors which formed the backbone of their defensive shield. While these high-tech interception efforts were largely successful, they came at an exorbitant logistical cost. Reports indicate that at least one U.S. ally in the Persian Gulf is currently running dangerously low on the crucial interceptor munitions required to defend against Iranian drone and missile attacks.

Illusion of checkbook

A common misconception among policymakers is that massive defense budgets can immediately solve these shortfalls. However, while Western defense departments can swiftly allocate funding and award emergency contracts, the physical reality of manufacturing cannot be accelerated by executive decree. Building sophisticated weaponry requires qualified tooling, highly trained labor, and specialized production facilities that cannot be increased overnight.

When advanced systems are depleted, replacing them takes years. For instance, manufacturing a new AN/FPS-132 radar costs approximately $1.1 billion and requires five to eight years to complete. Similarly, replacing an AN/TPS-59 radar takes between 12 and 24 months, with an estimated price tag of $50 million to $75 million. Time, therefore, acts as a rigid barrier that capital alone cannot overcome.

Gallium ghost in machine

Intertwined with the challenges of time and industrial capacity is the critical variable of raw materials and mining. Even the most seemingly straightforward modern munitions rely on complex guidance kits, which in turn depend on high-performance components manufactured using rare earth elements. This is where the defense supply chain intersects dangerously with global resource monopolies.

For example, the production of advanced radar systems requires significant amounts of gallium. The strategic vulnerability here is stark: China currently controls 98 percent of the global supply of this specific mineral. While the mining sector is not the sole deciding factor in a war, this near-total monopoly transforms access to basic minerals into a potent geopolitical lever, underscoring how Western military sustainability remains tethered to the resource extraction of a primary competitor.

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Funeral held for top commanders martyred in US-Israel aggression

We will defend country until last drop of our blood: *Army chief* 2

Iranians attend a funeral ceremony held for military commanders and civilians killed in the US-Israel aggression in Tehran on March 11, 2026.
IRNA

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