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◆ **WSJ NEWS EXCLUSIVE** NATIONAL SECURITY

U.S. Effort to Arm Taiwan Faces New Challenge With Ukraine Conflict

Flow of weapons to Kyiv taxes an already-stretched U.S. defense industrial base



Sales to Taiwan include Javelin missiles, here being used in an Army training exercise in Colorado.

PHOTO: MICHAEL CIAGLO/GETTY IMAGES

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WASHINGTON—U.S. government and congressional officials fear the conflict in Ukraine is exacerbating a nearly \$19 billion backlog of weapons bound for Taiwan, further delaying efforts to arm the island as tensions with China escalate.

The U.S. has pumped billions of dollars of weapons into Ukraine since the Russian invasion in February, taxing the capacity of the government and defense industry to keep up with a sudden demand to arm Kyiv in a conflict that isn't expected to end soon. The flow of weapons to Ukraine is now running up against the longer-term demands of a U.S. strategy to arm Taiwan to help it defend itself against a possible invasion by China, according to congressional and government officials familiar with the matter.

The backlog of deliveries, which was more than \$14 billion last December, has

grown to \$18.7 billion, according to congressional officials and others familiar with the matter. Included in the backlog are an order made in December 2015 for 208 Javelin antitank weapons and a separate one at the same time for 215 surface-to-air Stinger missiles. None of them have arrived on the island, according to congressional sources and people familiar with the matter.



Deputy Secretary of State Wendy Sherman has said the State Department is working with the Pentagon 'to see where efficiencies can be made' in defense exports.

PHOTO: JOHANNA GERON/PRESS POOL

The weaponry is part of Washington's "porcupine" strategy to arm Taiwan in a way that raises the cost to China should it decide to invade. U.S. military officials said two years ago that Beijing could be poised to reunify with Taiwan forcibly as early as 2026.

A spokeswoman for the Taiwan government in Washington, D.C., declined to comment on arms sales, but officials from the island have previously expressed concern about delays.

"Taiwan would like to request that the weapons the U.S. sells to Taiwan be delivered as scheduled," Gen. Wang Shin-lung, the vice minister for armaments at Taiwan's Ministry of National Defense, said last month.

Neither the State Department nor Pentagon would acknowledge the backlog or provide details on which weapons to Taiwan might have been delayed, but the U.S.-China Economic and Security Review Commission warned of delays to weapons such as Stingers and Paladin self-propelled howitzer artillery.



Taiwan President Tsai Ing-wen and aides at a briefing during an August visit to a naval station.

PHOTO: TAIWAN MINISTRY OF NATIONAL DEFENSE/ASSOCIATED PRESS

“The diversion of existing stocks of weapons and munitions to Ukraine and pandemic-related supply-chain issues have exacerbated a sizable backlog in the delivery of weapons already approved for sale to Taiwan, undermining the island’s readiness,” the commission, a government auditing and monitoring body mandated by Congress more than 20 years ago, said in a report this month.

U.S. officials acknowledged delays to arms deliveries to Taiwan, but say that those purchases are all new off the production line, while the Stingers and Javelins headed to Ukraine come from existing stockpiles within the U.S. arsenal. “We continue to diligently work to provide capabilities to Taiwan as fast as possible while also making sure Ukraine can defend itself against Russian aggression,” Sabrina Singh, a Pentagon spokeswoman, said in a statement.

In May, when asked about Taiwan’s announced plans to look at alternatives to the delayed howitzers, John Kirby, then a Pentagon spokesman, said Ukraine wasn’t the cause of the backlog. Mr. Kirby said deliveries to Ukraine were drawn from existing stockpiles, which “is a different method of providing military articles than what is being provided to Taiwan.”

Executives at Lockheed Martin Corp., Boeing Co. and other defense companies say pandemic-driven supply-chain problems have set back production for many systems and that they have struggled to keep up with orders even before Russia’s invasion of Ukraine boosted demand.

The Ukraine war, even if it isn't the primary reason for the backlog, is still an aggravating factor. Doug Bush, the Army's chief acquisition official, said that while no single delay could be connected to Ukraine, the war does affect "prioritization" in the short term.



Marines working with a surface-to-air Stinger missile system during training in Arizona.

PHOTO: U.S. MARINE CORPS

The backlog has raised concern that Washington is running out of time to help defend Taiwan against China adequately, because Taiwan, unlike Ukraine, can't be effectively armed after an invasion. The backlog highlights the challenges the American industrial base faces in producing enough armaments to protect the U.S. and its allies.

Rep. Michael McCaul (R., Texas) said in a statement that he would be working with the House Armed Services Committee on addressing the industrial-base issues contributing to the delays. "In some cases, we have more than a three-year backlog of foreign military sales that I signed off on in my position that have yet to be delivered into Taiwan," said Mr. McCaul, currently the ranking member of the House Foreign Affairs Committee. "As we have seen in Ukraine, it's far better to get the weapons prior to an invasion than after."

Officials at the State and Defense departments and at the Defense Security Cooperation Agency declined to give details on which weapons for Taiwan are backlogged. Frustration over a lack of clarity on the issue prompted House Republicans to introduce legislation that would require the Biden

administration to provide details on major arms sales to Taiwan.

The U.S. has agreed to sell Taiwan nearly \$30 billion of arms since 2009, including about \$18 billion since 2017, according to Deputy Secretary of State Wendy Sherman during testimony in April. Ms. Sherman said the department is working with the Pentagon to review the entire defense-trade enterprise “to see where efficiencies can be made and get those articles to them more quickly.”

Defense Secretary Lloyd Austin earlier this year created an ad hoc team to review issues that hold up foreign military sales, but officials haven’t yet provided details on what progress they have made. Another Pentagon ad hoc group that was specifically assembled to look at Taiwan arm sales is reviewing ways to expedite them, officials said.

“The department will continue to look for ways to accelerate delivery of capabilities for all our partners, based on the urgency of the threat,” Ms. Singh, the Pentagon spokeswoman, said in a statement.

In a parallel effort, the State Department created its own group, led by Assistant Secretary of State Jessica Lewis, congressional officials said.

One of Taiwan’s biggest U.S. orders—an \$8 billion deal for 66 F-16 combat jets made by Lockheed Martin—is now on schedule to be delivered from the mid-2020s as planned, according to people familiar with the issue.

The U.S. military is seeking to step up arms production to replenish its stockpiles, and that could speed deliveries, said Mr. Bush, the Army acquisition official. “If the Army in certain areas ends up with more capacity, it will allow us to move faster for everyone,” he said.

The sales of arms to Taiwan since 2019 include weapons also being sent to Ukraine, including Stinger missiles, Javelins, High Mobility Artillery Rocket Systems, or Himars, and howitzers. Taipei signed a contract in March for Harpoon antiship missiles, but won’t get them until at least 2026, officials said.

Lockheed Martin and Raytheon Technologies Corp. are expanding production of Stingers, Javelins and Himars. The British arms maker BAE Systems PLC is in talks to restart Howitzer production.

Howitzer artillery systems rely on 155mm shells, the stockpiles of which are dwindling quickly in the U.S. since the war began in Ukraine nine months ago. The U.S. has shipped nearly a million such rounds to Kyiv, according to government records.

The companies referred questions about Taiwan arms sales to the Pentagon.

The U.S. is by far the largest overseas provider of arms to Taiwan, though overall weapons imports have shrunk considerably over the past decade, according to the Stockholm International Peace Research Institute, a nonprofit that tracks arms transfers. The institute said it expects Taiwan's imports to increase significantly as weapons that have been approved for sale by the U.S. government are put under contract with American companies.

—*Charles Hutzler contributed to this article.*

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