



U.S. Munitions Supply DANGEROUSLY LOW Former DoD Official Warns

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Glenn Greenwald (GG): Dan Caldwell is a former senior policy advisor to Secretary of Defense, Pete Hegseth. He's a veteran in the United States Marine Corps, where he served during the Iraq War before moving to Capitol Hill to focus on veterans and defense policies. He brings over a decade of experience shaping national security debates in both government and the nonprofit sector. He's a frequent commentator on defense, foreign policy and veterans issues, especially after his short but consequential stay at the highest levels of the Pentagon. And we are delighted to welcome him here tonight. Dan, it is great to see you. Thank you for taking the time to talk to us.

Dan Caldwell (DC): Glenn, thank you for having me on.

GG: Absolutely. So, I want to get to this observation that you offered earlier today in the midst of all of this talk about efforts to end the war in Ukraine and all the different reasons why it may or may not be done, why it should or shouldn't be done. There was a tweet from Fox News correspondent, I think he's the Pentagon correspondent, Lucas Tomlinson. And he said this, he was quoting the NATO Secretary General, Mark Rutte, in June, quote: "Russia produces as much ammunition in three months as NATO produces in a full year". So Russia produces munitions as much in three months as it takes NATO, all of NATO, in three years. And The Economist added: "At current rates of procurement, it will take seven years to bring America's ammunition stocks back to where they were before military aid to Ukraine began". And then you said, about all of that, you said: "This more than any other issue is influencing the administration's thinking about future Ukraine strategy".

So I want to talk about that point in a second, namely how it's affecting Ukraine strategy, but first I want to talk about the underlying fact – because, you know, as Americans, we've always been hearing for a long time now about the enormous sums of money we spend on our military budget, both in absolute numbers and compared to all the other countries in the world. Trump posted, we're going to have our first trillion dollar defense and annual defense budget. We've spent \$850 billion in the last few years. All the different ways to understand it

that we spend more than the next 12 or 15 countries combined. We're talking here about the Russians, who I think spend 1/15th or 1/2th, maybe it's a little more now with the war of their military budget, as we spend in hours. I think a lot of Americans would be listening to this. I know I am. And I'm thinking to myself, given the astronomical military budget we have, like in a different universe than everybody else, how is it possible that we're running low on things like munitions and are so far behind the capability of the Russians – not the most technologically sophisticated or economically powerful country in the world at this point – to produce these kinds of basic weaponry?

DC: Well, Glenn, there's one thing I also think is important to point out here: its that the Russians are achieving that level of munitions production while I believe they are the most sanctioned country in the world. North Korea and Iran may have more sanctions, but again, we impose, along with NATO, massive amounts of sanctions on the Russians and they're still able to out-produce us by three to one or four to one. And that isn't even counting the support that they're getting from North Korea or Iran. So they are beating us at a massive scale after, as you've pointed out, we have spent significantly, particularly the last few years, in trying to scale up our munitions productions. And we're in this mess for a couple of reasons. So first, really after the end of the Cold War, the United States de-industrialized. But our defense spending was really focused on producing high-end precision munitions and what you could call prestige massive acquisition programs. So think of the F-35, think of Gerald Ford Aircraft Carrier, which President Trump has complained a lot about. A lot of these acquisition programs were disasters, but it wasn't focused on building stockpiles of weapons or building weapons and munitions in scale to fight extended war. We were really building to fight these brush fire wars in places like Iraq and Afghanistan, or short, quick conflicts like Desert Storm or the opening invasion of Iraq. All those factors came together to leave us in this situation, along with the rest of NATO, where we really simply don't have the capacity to equip Ukraine to achieve a full victory.

And that's not even getting into the problems that you've talked about with Ukraine's manpower situation, where the Russians not only have a munitions advantage and a weapons advantage, but they also have a three-to-one manpower advantage. So, really, at the end of the day, this is a math problem, and the variables don't favor Ukraine and NATO. So that, I think more than anything, is going to force a conclusion of this war, whether it's now, whether it is in a few months or maybe a year, what may or may not happen in terms of peace negotiations over the next few months. And I want to be clear, I want President Trump to be successful. I'm praying for his success. But a lot of our foreign policy establishment still operates under this delusion that, as you pointed out, that we're still this arsenal of democracy, and we can produce whatever we want, whenever we want. And it's simply not true, and it's very scary that so many of our leaders, particularly in the Biden administration, including President Biden himself, don't recognize that, or didn't recognize that.

GG: Okay, so I have several questions that I wasn't even necessarily intending to ask you about that arise from what you just said. And I want to start at that last one, which is you say it's a math problem. One of the math problems being a very simple math equation, which is

that Russia is much bigger than Ukraine, and therefore has a lot more men to send to the frontline to fight the kind of conventional war that was obviously expected these two countries to engage in. And I had people on my show, you know, in early 2022, through 2022, saying exactly this: that, look, maybe the Ukrainians are going to have some feisty, impressive victories, which they did. I don't know if you heard, but I was talking about how, you know, being around a lot of dogs, raising a lot of dogs, dogs that defend their property, even if they're weaker, often can win fights against much stronger dogs when they're defending their actual property. That is a very real instinct, I think, in all animals, including humans. And there were some impressive and feisty Ukrainian victories that were maybe surprising, or whatever. Nonetheless, like, at the end of the day, the Russians were going to always win, because not just the population problem, which is bad enough, but also this issue of munitions and the lack of focus on producing them, even though those are going to be crucial to the war, had to have been known at the highest levels, not just the Pentagon, but NATO policy planners. So what explained all of this triumphalist talk in 2022 and 2023, even into 2024, that they were so sure Ukraine was going to win? Were they just deluding themselves? Was this deceitful propaganda? Like, where did this group thing come from that they convinced themselves Ukraine could win, despite these very clear reasons why they couldn't?

DC: It's really two things, delusion and denial. And, you know, there were people in the highest levels of the Biden administration who knew this was a problem. And one of them – I'm not his biggest fan, and I think he did a lot of really bad stuff, particularly at the end of the Trump administration – was Mark Milley. He knew this a problem, which is why he said, at the of 2022 – when Ukraine achieved very stunning victories and pushing out the Russians from most of the Kharkiv province and pushing them out of Kherson city – he said that now's the time for Ukraine to drive on negotiations because going forward, they're going to be at an increasing military disadvantage because now the Russians are mobilizing. But he was dealing with an administration that was delusional at the highest levels. And there's one story that I think that really hammers this home, one episode. And I was reminded of it listening to you playing Biden clips earlier. So if you remember, after October 7th, Joe Biden went on 60 Minutes and he was talking to Scott Pelley. And Scott Pelley asked him: Do we have the capacity to support both Israel and Ukraine? And Joe Biden got angry at him and said, "of course we do, we're the most powerful country in the history of the world". And he said "the history of the word" multiple times, of course, we can support both countries. What happens a few days later? The United States is forced to redirect artillery shells from Ukraine to Israel because we had drawn down war stocks in Israel to support Ukraine and we weren't producing them fast enough. Throughout 2024, both the Ukrainians and Israelis thought we were withholding weapons from them. But the reality is we just didn't have enough to give both of them to sustain their operations. So we had to dribble it out. It wasn't a deliberate policy. It was driven by real constraints. And that is what this administration is dealing with. I have to say, you know, I have a lot of friends still in the administration, there's a lot of people both at the Pentagon and the White House who know this. And that I think is informing a lot of their thinking about how they're approaching this problem.

GG: Let me, I want to get to that as well, but let me just ask you the other thing that I have difficulty understanding in response. So your first description is that the Pentagon is this gigantic entity. It's the biggest employer in the United States in the public or private sector, if I'm not mistaken. You have a lot of people who are career military professionals who have risen to the top levels of war planning, procurement, who are extremely smart. I mean, they study military history. They study military conflict. These are very, very smart people. And they also have compared to pretty much every other country on earth, like virtually unlimited resources. So I understand what you're saying, especially in the wake of the war on terror and the kind of special forces operations and the quick strikes and the kind of posture that we were engaged in other than the full-scale invasion of Iraq, that you would focus on these kind of fancier, high-tech devices that aren't particularly good for the kind of ground war we're seeing between Russia and Ukraine or even what we saw with Israel and Iran. But there had to be a recognition inside these, these upper echelons of Pentagon planning that those kinds of wars aren't over. How did we become so neglectful of building the types of systems and weapons that would be needed for those more conventional wars?

DC: I think this is a very good question and there's a couple of different reasons why. So I think first and foremost, you know, one observation that I had from my time in the Pentagon and then working around it is that there's a lot of incentives to talk big, but very little incentives to actually follow through. And I think that this is most prominent with what the Marine Corps did a few years ago. General Berger at the Marine Corps did some pretty radical reforms to the Marine Corps that recognized the reality that the Marines were facing constrained budget environments, that they needed to re-adapt for a potential war against China and that they couldn't still have a force that was built to fight Desert Storm and then the Iraq and Afghanistan wars. And General Berger, who was a commander in the Marine Corps at the time, cut the Marine Corps by 12,000 Marines. When's the last time you've heard of a service chief cutting 12,000 Marines? But he did that to free up money to buy new and better weapon systems and scale. And he ended some major acquisition programs. He did exactly what all these generals and all these big think tank events had talked about for years – transformation and innovation. Well, what happens to him? He's attacked by almost every living Marine Corps general with these nasty open letters. You have people trying to undermine the reforms in Congress.

So the point of that story is that it's very easy to talk about a big game about innovation and transformation, but when the rubber meets the road, there's so many people that pop out of the woodwork and try to stop and undermine you. And I would say in terms of the types of systems that you need for these types of wars – like, look, a lot of these drones that you're seeing in Ukraine and that the Houthis have built and Iranians have built, they're cheap. They don't cost a lot of money, therefore they don't have a lot of big profit margins. So a lot of these systems don't buy big beach houses in Rehoboth, Delaware. A lot of the systems don't buy second homes in the Shenandoah Valley out here in Northern Virginia. So there's that. And I also just say too, there's a final component here that you can't underestimate: a lot of these generals and a lot of these civilians still have these emotional attachments to where they made their careers. And for most people in the Pentagon right now, that's two places: that's

Europe and that is the Middle East. So they constantly want to still focus there and fight the last wars there, whether it's in Europe, defending the Fulda Gap during the Cold War, which is the dividing line, between the Warsaw Pact and NATO or continuing to still fight the Iraq and Afghanistan wars. And that sometimes more than even a financial incentive or a career incentive really pushes people to maintain a status quo that isn't working.

GG: I think that's an interesting dynamic that I've noticed before in journalism and even other professions where people who say "come of age as a journalist and find success" and say the Clinteneers, we'll always look at everything through the prism of the politics that prevailed in the Clinteneers. You know, they need to become the democratic party, more moderate, more attached to corporatism. And it worked then so it must work 30 years later. I think it's a very common problem that a lot of people in different professions have, which is why I think generational change is often so crucial to kind of cleanse various sectors of this archaic form of thinking. But let me ask you, you mentioned this focus on Europe and the Middle East. And for as long as I remember now, this goes back to the Obama years where the whole idea was that we need to pivot to Asia, this emerging threat from China, we spent way too much time in the Middle East, even Europe is no longer the fulcrum of where our defense interests lie. And it seems like – I mean, we have done more in the Pacific than previously, but to some extent, but clearly, like everything that we talk about, all the wars that we discussed, the conflicts we're constantly faced with continue to have their epicenter in the Middle East and in Europe. Why is it that we just simply can't extricate ourselves from those regions, even though you talk to every policy planner and they will say, there's far more US interests at stake in Asia?

DC: There's a line that I heard Steve Bannon and Jack Posobiec used that I always have to steal because I thought it was so good. Its that "Washington D.C. is still a CENTCOM company town". And I think you could also say it's still a EUCOM, European Command company town. And that, again, has to do with some of the dynamics I talked about earlier, where people still have this personal attachment to those regions. But also, too, there's a lot of special interests here. I'm not even really talking about the military industrial complex. In some ways, the opportunity for them to make money on certain systems is bigger in the Pacific, but you have a lot of think tanks and you have a lot of media here in town that really informs the debate and creates not just advocacy pressure on members of Congress or decision makers, but also social pressure. Like when your neighbor, for example, the coach of your kid's soccer team works for the Atlantic council, you're kinda going to be a little worried about advocating a massive withdrawal from Europe because that may create your social pressures if that's all your neighbors and whatnot. And you can apply that too to some of the special interests that you have around the Middle East. So that's another dynamic here is that you so much money, and again, a lot of people focus on the Middle East money, but it's hard to overstate, and I think you've covered it, how much money particularly after the Ukraine war flowed in from Ukrainian oligarchs and other Eastern European interests. And even countries like Norway that you don't hear a lot about. Countries, you know, foundations attached to parts of the French or British government. They flow into a lot of think tanks here

in town, and then those think tanks sponsor media events, so that helps fund the media here. So there's an incentive there that helps keep people focused.

And I also just say this too, is that for part of the political spectrum, there is more of this belief that, particularly when it comes to Europe, that there's a political affinity dynamic of this. That the Europeans, the left liberals and even some people on the center right – those are our ideological allies. Those are our people, they're going to ally with us to push back against this global surge in populism. And we need to be with them and back them no matter what. And any time you do something like pull troops out of Europe, or you talk about cutting off aid to Ukraine, you're helping the evil forces of global populism or the axis of autocracy, which really doesn't exist, you are helping them win. And I think that gets down to, and again, you've talked more about this than I have, but the political dimension of the Ukraine war. And we can't forget that for a lot of left liberals, including ones that were very anti-war when it came to the Middle East, is that Russia is this regressive evil power that helped get the orange man elected. And therefore we need to do everything that we need to do to defeat it. So even if you had people rightly opposing supporting the Saudi-led war in Yemen or oppose the Iraq war or the war in Afghanistan, they're all in for dumping arms and weapons into Ukraine and doubling up in NATO because Russia is this bad regressive power that helped elect Donald Trump here in the United States.

GG: Yeah, it's ironic for so many reasons, including the fact that the left and American liberalism during the Cold War was vehemently opposed to exactly that argument. Like, yeah, the Soviets are bad, we wouldn't want to live there, they're repressive, but we don't want to exaggerate the threat they pose nor go to war with them in every place we can find. And I always thought Russiagate – and my contempt for it from the start was in part the fact that I thought it was a journalistic debate based on scandal – but my bigger concern was that it was intended to rejuvenate this kind of visceral hatred for fear of Russia to lead to exactly the sort of thing that we're now seeing where the entire Democratic Party is ignited in the belief that no matter what, you have to defeat it.

All right, let me ask you, this is a point I've seen you make, not just with respect to Ukraine, but other conflicts as well – and I want to get to those in a second, but before I leave Ukraine – this idea that, look, we're standing by Israel. We're going to continue to provide weapons to Israel. Israel is now expanding its operations. They are absolutely fully committed to this complete occupation of Gaza, whatever that might entail. For however long it might entail, it's going to take a lot of US support and a lot of US weapons, which presumably at least maintains our difficulty in supplying Ukraine, if not makes it even more difficult. I have to assume there are a lot of people in the Trump administration now who are telling Trump this. He seems to want to end the war, in part, you suggest, that's a reason. But what if we can't get this deal done because it's far from guaranteed that no matter how much Trump wants it, that a deal can be had – will the US, do you think, simply continue to arm and fuel the Ukrainian effort against the Russians? Or will they be kind of forced to pull back simply because they don't have the equipment and ammunition?

DC: Again, I'm not in the administration anymore. So these are just observations from the outside. But I was watching what happened with the new plan to fund Ukraine, or excuse me, to support Ukraine with weapons. And you may disagree with this, Glenn. I have some other very smart friends, some who are smarter than me who disagree with it. But I actually viewed that – and you've seen kind of both Vice President Vance and President Trump allude to this – that was a way of actually taking a step away from the war. And let me explain why. So essentially what that deal was, was that the Europeans were going to send forward their own stocks of gear. And then they were going to buy backfill of those stocks from the United States. And what the United States was to do to, in the short term, refill those stocks was actually redirect sales that were in the works from other countries. So the Germans and some other countries were sending Patriot missiles and to backfill those, we redirected an order from the [inaudible]. And that was an acknowledgement, one, of our constraints. That we can't draw down our own stockpiles much anymore without severely undermining our own readiness. And two, we have other production pipelines that are responsible for backfilling and supporting our own stocks that we didn't want to redirect from those. So to me, that was almost a first kind of step away from the war. And you also haven't seen the Trump administration yet tap into the remaining presidential drawdown authority left over from the Biden administration, which is authority to send weapons directly from American stocks. They have not tapped into that yet. So to me, that shows that they are trying to find more options to continue to support Ukraine to give, I think, diplomatic leverage, but they're recognizing there's the end of the war. So I think that if this is still dragging on, meaning these diplomatic negotiations for three or four months, there is a world where President Trump makes the difficult decision to walk away. Again, I could be proven wrong on this. I have been wrong about President Trump before, but I kind of see them already laying the groundwork for that. Notice the emphasis on this is Biden's war, you know, we're not funding it anymore. It almost seems like they're laying the groundwork increasingly for that possibility in a way you didn't see in the first six months of the administration.

GG: Let me ask you about the whole issue involving China, because so often, I don't know how many times I've heard this argued before in pretty much response to every war, but certainly the one in Ukraine, which is, okay, look, even if you don't think there's a lot of American interests at stake in who governs various provinces in eastern Ukraine, whether it's some semi-autonomous body that's more loyal to Russia or Russia annexes itself or remains central to Kiev. Like, who cares from the American perspective? The reason you should care is because it sends a very important signal to the Chinese about our ability or willingness to stand by allies in defense when some other bigger country attacks them. Namely, if we let Ukraine go to Russia, that basically tells the Chinese, oh, you know, we're never going to really keep the commitment to defend Taiwan in the way that we would have to to prevent you from having it. To me, it seems like, as I'm listening to you, if I'm in Beijing and I really do have my design set on taking Taiwan in the near future – and I'm not at all convinced they do, but let's assume, since a lot of people claim that, that that's the case – it seems to me like, given how depleted we are and how many different commitments we have between the Middle East in general, Israel in particular, and still some residual commitments with Ukraine and we haven't built back and replenished our stockpile, that this seems like it would be a

good time if the Chinese really wanted to take Taiwan. Has our spreading ourselves too thin with financing all these wars and arming all these wars created the exact kind of threat that we claim is the one we're most concerned about?

DC: You know, this argument that we have to support Ukraine to maintain our credibility to deter China is, I'm sorry, it's utterly ridiculous. The Chinese are going to make a decision around Taiwan based on a variety of factors, political, whether or not Taiwan is declaring or moving away from independence. That's a much longer conversation about what their intentions are, but ultimately, what they're going to look at is, is the hard power balance in the Pacific. The ability of Taiwan or the Philippines or the United States to ultimately deter or defeat or raise the cost substantially of a Chinese invasion of either Taiwan or a potential other country in the region. Now, I'm somebody who believes that China is our main competitor. It poses a real military threat, much worse than Russia. It is effectively an economic peer competitor at this point. And that we have much more interest in East Asia than other parts of the world. However, I'm not somebody who wants to pre-ordain a war. I don't want to end strategic ambiguity. And I certainly don't think we should trade Taipei for Los Angeles. And I gotta be honest with you, President Trump is actually much more pragmatic and realistic about China than President Biden was, who constantly undermines strategic ambiguity. But I will tell you indisputably, our support of Ukraine is undermining Taiwan's ability to deter an invasion. Now, the Taiwanese are doing a bunch of dumb stuff. They aren't investing enough in their own defense. They're buying the wrong weapons systems. But right now there is a \$20 billion plus backlog of arms sales to Taiwan in large part because the Biden administration redirected munitions from Taiwan to Ukraine. And when Nancy Pelosi went over to Taiwan in 2022 and undermined strategic ambiguity and was beating her chest about how important Taiwan is – at that same time, the Biden administration was delaying deliveries of things like Stinger missiles and HIMARS missiles that were critical to the Taiwanese plan to defeat a Chinese invasion. So what do you think that the Chinese are more afraid of – copies of *The Atlantic* being distributed in Taipei? Or, you know, speeches about the glories of liberal internationalism from Nancy Pelosi? Or Taiwanese of Stinger missiles and HIMARS and Patriot missiles? I think we all know the answer to that.

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