NATIONAL INSTITUTE FOR PUBLIC POLICY

INFORMATION SERIES

Issue No. 663 July 1, 2026

The 2025 Pentagon Assessment of Chinese Nuclear Weapons Capabilities

Dr. Mark B. Schneider
Dr. Mark Schneider is a Senior Analyst with the National Institute for Public Policy. Dr. Schneider previously served in DoD as Principal Director for Forces Policy, Principal Director for Strategic Defense, Space and Verification Policy, Director for Strategic Arms Control Policy and Representative of the Secretary of Defense to the Nuclear Arms Control Implementation Commission. He also served in the senior Foreign Service as a Member of the State Department Policy Planning Staff.

The annual legally required Pentagon report on Chinese military power, while very good on many issues, has historically had a bad track record on accurately assessing the growth of Chinese nuclear weapons. In 2025, then-STRATCOM Commander General Anthony Cotton stated that, "I would also note that China has outpaced every previous estimate that we've made."[1] Senator Tom Cotton (R-AR) has pointed out that regarding nuclear weapons, "…given the Pentagon's consistent underestimates in the past, it's fair to assume that China will move even faster."[2]

The December 2025 version of the Pentagon report was even more dire. For the first time in many years it did not update its estimate of the current (2025) number of operational Chinese nuclear weapons. It only stated that:

> China's stockpile of nuclear warheads remained in the low 600s through 2024, reflecting a slower rate of production when compared to previous years. Despite this slowdown, the PLA [People's Liberation Army] has continued its massive nuclear expansion. While this report assessed in 2020 that China's nuclear warhead would

> double from a stockpile of the low 200s over the next decade, the PLA remains on track to have over 1,000 warheads by 2030.[3]

How is it possible to have a "massive nuclear expansion" resulting from "a slower rate of production when compared to previous years."? A reduction in the nuclear weapons production rate in China while it is expanding its nuclear delivery systems makes no sense. Indeed, in the same month the 2025 Pentagon China report was published, *The Washington Post* reported that, "China is rapidly overhauling a network of secret facilities used to manufacture warhead components as it expands its nuclear stockpile faster than any other country, according to an analysis of satellite imagery."[4] It reported sweeping upgrades at nuclear weapons facilities, including pit production (the core fissile material component of a nuclear weapon), since 2019.

A reduction in the Chinese production rate cannot be explained by a shortage of fissile material. A 2019 analysis by nuclear weapons expert James R. Howe estimated that China had enough fissile material for 3,878 nuclear warheads.[5] A 2021 estimate by Dr. John A. Swegle and Dr. Christopher Yeaw (now Assistant Secretary of State for Arms Control and Nonproliferation), both noted experts on nuclear weapons, estimated that China had enough plutonium for 860-1,300 nuclear weapons.[6] In 2021, Henry Sokolski, former Deputy for Nonproliferation Policy in the Office of the Secretary of Defense, concluded that China could produce 1,270 warheads by 2030 and further noted that, "If Beijing instead chooses to develop single-stage nuclear weapons using boosting, highly enriched uranium (HEU) or composite plutonium-HEU warhead designs, it could easily exceed this number by a factor of two or more."[7] Moreover, these estimates predate the evidence of Chinese efforts to increase delivery vehicles and to increase available fissile material.

The scope of the Chinese nuclear weapons buildup has now been generally recognized. In late 2023, former Secretary of Defense Robert Gates wrote, "The United States now confronts graver threats to its security than it has in decades, perhaps ever. Never before has it faced four allied antagonists at the same time—Russia, China, North Korea, and Iran—whose collective nuclear arsenal could within a few years be nearly double the size of its own."[8] Even the Biden Administration recognized this reality. In 2024, Pranay Vaddi, then-Special Assistant to then-President Biden, stated that, "Russia, the PRC and North Korea are all expanding and diversifying their nuclear arsenals at a breakneck pace—showing little or no interest in arms control."[9] Indeed, in August 2024, Acting Assistant Secretary of Defense for Space Policy Vipin Narang observed that, "We have begun exploring options to increase future launcher capacity or additional deployed warheads—on the land, sea, and air legs—that could offer national leadership increased flexibility if executed."[10] Because of the Chinese nuclear weapons buildup, the November 2024 Biden Administration nuclear weapons employment guidance report said "…it may be necessary to adapt current U.S. force capability, posture, composition, or size in order to be able to fulfill the three stated roles of nuclear weapons."[11]

In March 2025, General Cotton stated that: 1) "The CCP's nuclear modernization efforts continued throughout 2024"[12] and 2) "China, meanwhile, which used to be considered a lesser

included case, is expanding its own arsenal at a breathtaking pace. China now has more ICBM launchers than the United States and is expected at least to triple its stockpile by 2035."[13]

In May 2025, Lieutenant General Andrew Gebara, Air Force Deputy Chief of Staff for Strategic Deterrence and Nuclear Integration, stated that, "China is rapidly expanding its nuclear and conventional forces as part of a broader project to reshape the Indo-Pacific and to challenge U.S. interests."[14]

In his October 2025 address at Quantico to American Generals and Admirals, President Trump revealed that in "…five years they'll [the Chinese] be equal" in nuclear weapons.[15]

In 2026, Secretary of State Marco Rubio wrote "… the United States could soon face not one, but two, nuclear peers in Russia and China."[16] Under Secretary of State for Arms Control and International Security Thomas DiNanno observed that China was "…undergoing a massive and deliberate buildup, as it pursues a nuclear arsenal close to that of the United States and Russia."[17] The Assistant Secretary of State for Arms Control and Proliferation Dr. Christopher Yeaw stated that, "Beijing rapidly builds up toward parity."[18] In a February 2026 address at the United Nations Conference on Disarmament, he stated:

> Despite its claims to the contrary, China has deliberately, and without constraint, massively expanded its nuclear arsenal. Without transparency or any indication of China's intent or endpoint—including in its most recent white paper—we believe China may achieve parity within the next four or five years.[19]

To date, no action has been taken to increase deployed U.S. nuclear weapons. While the Trump Administration has significantly improved funding for nuclear deterrence programs, the main effect appears to be to prevent further slippage of the availability date for the new nuclear deterrent systems under development to replace the very old ones that now exist. The one exception has been a substantial funding increase for more rapid production of the B-21 bomber. The Air Force has stated that "…agreement had been reached with Northrop Grumman to increase production capability by 25%" and that the program "…remains on track for aircraft on the ramp at Ellsworth Air Force Base, South Dakota, in 2027."[20] Note that the Air Force has not said that in 2027 the aircraft will be operational or nuclear capable but simply that the first B-21s will have been delivered to the first B-21 base.

Once again, the 2025 Pentagon report did not update the estimate in the 2022 edition of the report that China would have around 1,500 nuclear warheads in 2035.[21] Indeed, it did not even mention a warhead number for 2035. Its overall treatment of Chinese nuclear weapons capability was minimal.

In May 2025, the Defense Intelligence Agency (DIA) issued a rare threat assessment that credited China with 700 ICBMs and at least 132 SLBMs by 2025.[22] This is more than the United States would have had under the Biden legacy program. Moreover, China expert Richard Fisher has projected a substantially larger Chinese strategic nuclear force in 2035.[23] In light of these assessments, the 2022 Pentagon report estimate of Chinese nuclear weapons numbers in 2035 is very low. The failure of the Pentagon report to update this number is inexplicable.

Richard Fisher estimates that by 2035 China could have between 6,328 and 8,260 nuclear warheads,[24] many times larger than the projected U.S. strategic nuclear force.

The 2025 Pentagon report did say that, "The PLA has likely loaded more than 100 solid-propellant ICBM missile silos at its three silo fields with DF-31 class ICBMs, which are very likely intended to support EWCS [Early Warning Counter Strikes, or launch under attack]."[25] No number for armed silos had been released in the prior reports. The December 2025 report stated that China had 550 ICBM launchers and 400 missiles.[26] This suggests that "more than 100 solid-propellant ICBM missile silos" actually means closer to 150 ICBM armed launchers.

If the Pentagon 2025 China report is compared with the 2024 edition,[27] the number of Chinese ICBM launchers and missiles is the same. Indeed, the only increase in China's reported numbers is 50 more Intermediate-Range Ballistic Missile (IRBM) launchers and IRBMs. Thus, the Pentagon bureaucracy wants us to believe that the Chinese are continuing to load missiles into their new silos without building any more ICBMs. In effect, the Pentagon report says that China is planning to achieve a 2027 "Strategic decisive victory" in "a Taiwan conflict with U.S. involvement"[28] by ending the expansion of their missile force with the exception of IRBMs.

The left of center Federation of American Scientists' (FAS) early 2025 annual China nuclear weapons report also credited it with "approximately 600 nuclear warheads" but estimated only 30 armed silos.[29] The difference between the early 2025 FAS estimate and the December 2025 Pentagon report number is just over 70 more armed ICBM launchers, which both reports say house DF-31 ICBMs rather than the much more capable DF-41s. At a minimum, the FAS report implies an increase of, at a minimum, more than 70 warheads on the silo-based ICBM force alone. Since previous Pentagon China reports had reported an increase of about 100 warheads a year on the entire Chinese strategic nuclear force, where is the slowdown?

The 2025 DIA's Golden Dome threat assessment also projected a large increase by 2035 in nuclear-capable boosted hypersonic missiles (from 600 to 4,000), land-attack cruise missiles (1,000 to 5,000), and nuclear Fractional Orbital Bombardment Systems (60 by 2035).[30] In addition, according to General Cotton, there is a version of the DF-31 that carries multiple independently targetable warheads (MIRVs).[31] China expert Richard Fisher writes that the silos are armed with the DF-31BJ.[32] A U.S. Army publication states that, "The DF-31BJ is expected to maintain or enhance this MIRV capability, potentially incorporating more advanced penetration aids and decoys to overcome missile defense systems."[33] Thus, if MIRVed DF-31BJs are being deployed in Chinese silos, the warhead increase could be up to five to eight times as great.[34] Unless the Chinese are deploying ICBMs without warheads, there is no way that there could have been a slowdown in Chinese nuclear weapons deployment. At a minimum, China is expanding its force of nuclear-armed ICBMs, nuclear-capable intermediate-range ballistic missiles, hypersonic missiles, air-launched ballistic missiles and Fractional Orbital Bombardment Systems.[35]

The 2025 Pentagon report does not mention nuclear-capable Chinese Medium-Range Ballistic Missiles (MRBMs) despite the fact that they clearly exist.[36] There are many reports, including statements by senior U.S. generals, that China has nuclear-capable cruise missiles.[37] These are not included in any recent edition of the Pentagon report or the 2024 DIA report on

Nuclear Challenges. Neither the 2025 Pentagon report nor the 2024 DIA *Nuclear Challenges* report mention Chinese possession of nuclear artillery which has been reported.[38] As far back as 1988, the Chinese tested an enhanced radiation warhead that had a yield of 1–5 kilotons.[39] According to a declassified CIA report, in 1995, China conducted a possible nuclear artillery shell nuclear test.[40]

In September 2025, Communist China staged a massive military parade that celebrated the Chinese victory in World II, a war that Mao's Communist forces largely did not fight by avoiding combat against the Japanese. During the parade, for the first time, China displayed the new large road-mobile DF-61 ICBM.[41] The missile is in the same size class as the DF-41 and, hence, could be heavily MIRVed.[42] It certainly would be more capable than the DF-41 even if it is just an improved version of this missile. The DF-61 is not even mentioned in the 2025 Pentagon report, which remarkably has only a passing reference to the DF-41.

One of the most important developments in China's expanding nuclear capability is the acquisition of low-yield nuclear weapons. The 2025 Pentagon China report said, "The PLA is probably pursuing nuclear weapons with yields below 10 kilotons."[43] Previous reports characterized these weapons as "low-yield." There are reports of Chinese nuclear weapons with much lower yields than 10-kilotons.[44]

The December 2025 Pentagon China report appears to be a classic example of what Captain James Fanell (Ret.), former Senior Intelligence Officer for the U.S. Pacific Fleet, told Congress: "For a generation, the IC [Intelligence Community] failed national security decision-makers, and the American people, regarding the growth of China's capabilities and intentions," systematically engaging in what he referred to as "threat deflation."[45] China has no interest today in full Western recognition of its nuclear buildup since the Trump Administration may take corrective action. It is certainly possible that the December 2025 Pentagon China report's assessment is the result of Chinese active measures. The Pentagon report's assessment of Chinese nuclear weapons production is so unreasonable that the only apparent explanation is that it is a direct result of Chinese disinformation, "deep state" type analysis, or perhaps both.

China has every reason to manipulate U.S. threat assessments to reduce the possibility that they could result in an increase in U.S. nuclear capabilities. Hard intelligence on China's nuclear weapons production rates is very difficult to obtain. Hence, China has the potential to manipulate U.S. perceptions by passing disinformation through double agents. This is facilitated by the deficiencies in U.S. counterintelligence. According to Michelle Van Cleave, the first statutory head of U.S. counterintelligence, "…hostile penetrations and foreign deception operations … have grown far bolder and deeper than the resources we have available to counter them…."[46]

The greatest danger of "threat deflation" is that China will take military action based upon its perception of the military balance, not that of the Pentagon bureaucracy. Threat deflation, if it impacts U.S. decisions on deterrence programs, can increase the risk of war and even Chinese nuclear escalation.

[1] "Statement of General Anthony J. Cotton, Commander, United States Strategic Command Before the Subcommittee on Strategic Forces, Senate Armed Services Committee," March 26, 2025, p. 3, https://www.armed-services.senate.gov/imo/media/doc/ testimony_of_general_anthony_jcotton1.pdf.

[2] Senator Tom Cotton, *Seven Things You Can't Say About China* (New York: HarperCollins Publishers, 2025), p. 52.

[3] Department of War, *Annual Report to Congress: Military and Security Developments Involving the People's Republic of China 2025*, December 2025, p. 22, https://media.defense.gov/2025/Dec/23/2003849070/-1/-1/1/ANNUAL-REPORT-TO-CONGRESS-MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2025.PDF.

[4] Cate Cadell and Christian Shepherd, "China expands nuclear warhead manufacturing capacity, research finds," *The Washington Post*, December 28, 2025, https://www.washingtonpost.com/world/2025/12/28/china-nuclear-warhead-expansion/.

[5] James Howe, "Chinese Strategic Nuclear Force Posture: Current and 2035 Forecast," *YouTube*, 2019, https://www.youtube.com/watch?v=TH1xLRezJzA.

[6] John Swegle and Christopher Yeaw, *China's Historical Plutonium Production* (Omaha: National Strategic Research Institute at the University of Nebraska, March 24, 2021), p. 16, https://nsri.nebraska.edu/-/media/projects/nsri/docs/academicpublications/2021/march/china-historical-plutonium-production.pdf.

[7] Henry D. Sokolski, "Introduction: China's Civil Nuclear Sector: Plowshares to Swords?," in Henry D. Sokolski, ed., *Civil Nuclear Sector: Plowshares to Swords?*, Occasional Paper 2102 (Arlington, VA: Nonproliferation Policy Education Center, March 2021), p. 3, https://npolicy.org/wpcontent/uploads/2021/10/2102-Chinas-Civil-Nuclear-Sector-3.29.pdf.

[8] Robert M. Gates, "The Dysfunctional Superpower - Can a Divided America Deter China and Russia?," *Foreign Affairs*, November/December 2023, https://www.foreignaffairs.com/united-states/robert-gates-america-china-russia-dysfunctional-superpower.

[9] Pranay Vaddi, "Adapting the U.S. Approach to Arms Control and Nonproliferation to a New Era," Arms Control Association, June 7, 2024, https://www.armscontrol.org/2024AnnualMeeting/Pranay-Vaddiremarks.

[10] "'Nuclear Threats and the Role of Allies': Remarks by Acting Assistant Secretary of Defense for Space Policy Dr. Vipin Narang at CSIS," Department of Defense, August 1, 2024, https://www.defense.gov/News/Speeches/Speech/Article/3858311/nuclear-threats-and-the-role-of-allies-remarks-by-acting-assistantsecretary-of/.

[11] Department of Defense, "Report on the Nuclear Employment Strategy of the United States," November 2024, p. 4, available at https://media.defense.gov/2024/Nov/15/2003584623/-1/-1/1/REPORT-ON-THE-NUCLEAR-EMPLOYMENT-STRATEGY-OF-THE-UNITED-STATES.PDF.

[12] "Statement of General Anthony J. Cotton, Commander, United States Strategic Command Before the Subcommittee on Strategic Forces, Senate Armed Services Committee," op. cit., p. 3.

[13] "SASC Fiscal Year 2026 U.S. Strategic Command and U.S. Space Command Posture Hearing," March 27, 2025, https://www.stratcom.mil/Media/Speeches/Article/4137505/sasc-fiscal-year-2026-us-strategic-command-and-us-space-command-posture-hearing/.

[14] "Statement of Lieutenant General Andrew J. Gebara, USAF Deputy Chief of Staff for Strategic Deterrence & Nuclear Integration Before the Subcommittee on Strategic Forces of the House Armed Services Committee on Nuclear Forces & Atomic Energy Defense Activities," May 7, 2025, p. 2, https://armedservices.house.gov/uploadedfiles/lt_gen_gebara_written_posture_statement.pdf.

[15] "Transcript: President Trump's Remarks To Top Military Leaders in Quantico," *The Singju Post*, October 1, 2025, https://singjupost.com/transcript-president-trumps-remarks-to-top-military-leaders-in-quantico/.

[16] Marco Rubio, "The Next Era of Nuclear Arms Control, U.S. Department of State," February 6, 2026, https://statedept.substack.com/p/the-next-era-of-nuclear-arms-control.

[17] "United States Statement by Under Secretary of State for Arms Control and International Security The Honorable Thomas DiNanno to the Conference on Disarmament," U.S. Mission to International Organizations in Geneva, February 6, 2026, https://geneva.usmission.gov/2026/02/06/u-s-statement-at-the-conference-on-disarmament/.

[18] "Assistant Secretary of State Christopher Yeaw on the End of the New START Treaty" (Washington, D.C.: Hudson Institute, February 17, 2026), https://www.hudson.org/events/assistant-secretary-state-christopher-yeaw-end-new-start-treaty.

[19] "Statement by U.S. Assistant Secretary of State for the Bureau of Arms Control and Nonproliferation The Honorable Dr. Christopher Yeaw to the Conference on Disarmament," U.S. Mission to International Organizations in Geneva, February 23, 2026, https://geneva.usmission.gov/2026/02/23/statement-by-u-s-assistant-secretary-of-state-for-the-bureau-of-arms-control-and-nonproliferation/.

[20] Secretary of the Air Force Public Affairs, "DAF increases B-21 Raider production capacity to deliver combat capability faster," February 23, 2026, https://www.af.mil/News/Article-Display/Article/4412198/daf-increases-b-21-raider-production-capacity-to-deliver-combat-capability-fast/.

[21] Department of Defense, *Military and Security Developments Involving the People's Republic of China 2022,* 2022, p. 98, https://media.defense.gov/2022/Nov/29/2003122279/-1/-1/1/2022-MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLESREPUBLIC-OF-CHINA.PDF.

[22] The Defense Intelligence Agency, "Golden Dome for America: Current and Future Missile Threats to the U.S. Homeland," May 13, 2025, https://www.dia.mil/Portals/110/Documents/News/golden_dome.pdf.

[23] "Is China Seeking Nuclear Superiority? Unpacking 2025 Developments with Rick Fisher," National Institute for Deterrence Studies, January 23, 2026, https://www.youtube.com/watch?v=-zjyCiTwWpw.

[24] Ibid.

[25] *Annual Report to Congress: Military and Security Developments Involving the People's Republic of China 2025*, op. cit., p. 24.

[26] Ibid., p.71.

[27] Department of Defense, *Annual Report to Congress: Military and Security Developments Involving the People's Republic of China 2024*, 2024, p. 66, https://media.defense.gov/2024/Dec/18/2003615520/-1/-1/0/MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA-2024.PDF.

[28] *Annual Report to Congress: Military and Security Developments Involving the People's Republic of China 2025*, op. cit., p. 10.

[29] Hans M. Kristensen, Matt Korda, Eliana Johns and Mackenzie Knight, "Chinese nuclear weapons, 2025," *Bulletin of the Atomic Scientists 2025,* Vol. 81, No. 2, p. 136, https://doi.org/10.1080/00963402.2025.2467011.

[30] "Golden Dome for America: Current and Future Missile Threats to the U.S. Homeland," op. cit.

[31] General Anthony Cotton, "Statement of Anthony J. Cotton, Commander, United States Strategic Command Before the Senate Committee on Armed Services, March 9, 2023," p. 6, https://www.armedservices.senate.gov/imo/media/doc/2023%20USSTRATCOM%20Congressional%20Posture%20Statement%20-%20SASC.pdf.

[32] Richard D. Fisher, Jr., "On Taiwan: 2026: The Year To Lose Our Fear Of China," January 5, 2026, https://www.taipeitimes.com/News/editorials/archives/2026/01/05/2003850045.

[33] U.S. Army, "DF-31BJ Chinese Intercontinental Ballistic Missile (ICBM)," November 7, 2025, https://odin.tradoc.army.mil/WEG/Asset/e14a9a357bb1d4c695ec81589b93475e.

[34] Fisher, "On Taiwan: 2026: The Year To Lose Our Fear Of China," op. cit.

[35] "Golden Dome for America: Current and Future Missile Threats to the U.S. Homeland," op. cit.; Defense Intelligence Agency, "Nuclear Challenges - The Growing Capabilities of Strategic Competitors and Regional Rivals," 2024, p. VI, https://www.dia.mil/Portals/110/Images/News/Military_Powers_Publications/Nuclear_Challenges_2024.pdf.

[36] Ibid.; Department of Defense, *Military and Security Developments Involving the People's Republic of China 2020*, 2020, p. 86, https://media.defense.gov/2020/Sep/01/2002488689/-1/-1/1/2020-DOD-CHINA-MILITARY-POWER-REPORT-FINAL.PDF.

[37] Mark B. Schneider, *Current and Projected Growth of China's Nuclear Arsenal* (Fairfax, VA: National Institute for Public Policy, 2025), p. 46; Mark B. Schneider, "The Chinese Nuclear Threat," *Information Series*, No 599, September 26, 2024, p. 257, https://nipp.org/information_series/mark-b-schneider-the-chinese-nuclear-threat-no-599-september-26-2024/.

[38] You Ji, *The Armed Forces of China* (London: I.B. Tauris, 1999), p. 247.

[39] Mark B. Schneider, "The Nuclear Doctrine and Forces of the People's Republic of China," *Comparative Strategy*, July 1, 2009, p. 257, http://www.informaworld.com/smpp/title~content=t713769613.

[40] "Possible Nuclear Artillery Test," National Intelligence Daily, September 14, 1995, https://nsarchive2.gwu.edu/NSAEBB/NSAEBB200/19950914.pdf.

[41] Henry Boyd, "Chinese triad: a nuclear family affair," *IISS*, September 9, 2025, https://www.iiss.org/online-analysis/military-balance/2025/09/chinese-triad-a-nuclear-family-affair/.

[42] Mark B. Schneider, "Communist China's 80th Anniversary Victory Parade: Nuclear Intimidation," *RealClearDefense*, September 25, 2025, https://www.realcleardefense.com/articles/2025/09/22/communist_chinas_80th_anniversary_victory_parade_nuclear_intimidation_1136171.html.

[43] *Annual Report to Congress: Military and Security Developments Involving the People's Republic of China 2025*, op. cit., p. 24.

[44] Schneider, "The Nuclear Doctrine and Forces of the People's Republic of China," op. cit., p. 257.

[45] "Congressional Testimony of James E. Fanell, CAPT USN (Retired)," House Committee on Oversight and Accountability, June 26, 2024, pp. 3, 6, https://oversight.house.gov/wp-content/uploads/2024/06/Fanell-Testimony.pdf.

[46] Michelle Van Cleave, "Strategic Counterintelligence: What Is It and What Should We Do About It?," *Studies in Intelligence*, Vol. 51, No. 2 (2007), https://www.cia.gov/static/6adf09076081439a16d353b398420f33/what-is-what-do.pdf.

The National Institute for Public Policy's *Information Series* is a periodic publication focusing on contemporary strategic issues affecting U.S. foreign and defense policy. It is a forum for promoting critical thinking on the evolving international security environment and how the dynamic geostrategic landscape affects U.S. national security. Contributors are recognized experts in the field of national security. National Institute for Public Policy would like to thank the Sarah Scaife Foundation for the generous support that made this *Information Series* possible.