

Military

China presents the most comprehensive and robust military threat to U.S. national security. The People's Liberation Army (PLA) is fielding a joint force that is capable of full-spectrum warfare to challenge intervention by the United States in a regional contingency, projecting power globally, and securing what Beijing claims is its sovereign territory. A major portion of China's military modernization efforts is focused on developing counter-intervention capabilities tailored against all aspects of U.S. and allied military operations in the Pacific. Beijing will focus on meeting key modernization milestones by 2027 and 2035, aimed at making the PLA a world-class military by 2049.

- Examples of PLA advances in 2024 include the PLA Navy's third carrier (CV-18 Fujian) beginning sea trials and likely being ready to enter operational service in 2025. The PLA Rocket Force probably is fielding the DF-27 ballistic missile, with a hypersonic glide vehicle payload option and an estimated range of between 5,000 and 8,000 kilometers. The PLA ground forces are also fielding its most advanced multiple rocket launcher, the PCH191, increasing its long-range, precision strike capability.
- The PLA has improved its force structure, readiness, and training. The PLA probably has made particular progress in critical areas, such as modernizing key ground forces, expanding its navy with more modern combatants, and fielding a wide variety of new missile systems; it has also improved its electronic warfare (EW) capabilities.

The PLA has the capability to conduct long-range precision-strikes with conventional weapons against the Homeland's periphery in the Western Pacific, including Guam, Hawaii, and Alaska. China has developed a range of ballistic and cruise missiles with conventional payloads that can be delivered from its mainland as well as by air and sea, including by nuclear-powered submarines. China may be exploring development of conventionally-armed intercontinental range missile systems, which, if developed and fielded, would allow China to threaten conventional strikes against targets in the continental United States.

The PLA will continue to pursue the establishment of overseas military installations and access agreements to project power and protect China's interests abroad. Beijing may also pursue a mixture of military logistics models, including preferred access to commercial infrastructure abroad, exclusive PLA logistics facilities with pre-positioned supplies co-located with commercial infrastructure, and bases with stationed forces, to meet its overseas military logistics needs.

China is using complex, whole-of-government campaigns featuring coercive military, economic, and influence operations short of war to assert its positions and strength against others, reserving more destructive tools for full-scale conflict. Beijing will likely expand these campaigns to advance unification with Taiwan, project power in East Asia, and reverse perceived U.S. hegemony.

- Beijing has pushed back against U.S. military operations, such as reconnaissance and bomber flights, freedom of navigation operations, and exercises around PRC borders and maritime claims. The PLA regularly intercepts and shadows U.S. forces and sometimes conducts unsafe maneuvers in their vicinity.

Taiwan and Maritime Flashpoints

In 2025, Beijing will likely apply stronger coercive pressure against Taiwan and perceived increases in U.S. support to the island to further its goal of eventual unification. The PRC calls for a peaceful unification with Taiwan to resolve the Civil War that drove Taiwan's separation, even as it threatens to use force to compel unification if necessary and counter what it sees as a U.S. attempt to use Taiwan to undermine China's rise.

A conflict between China and Taiwan would disrupt U.S. access to trade and semiconductor technology critical to the global economy. Even without U.S. involvement in such a conflict, there would likely be significant and costly consequences to U.S. and global economic and security interests.

Beijing is working to isolate Taipei by pressuring states to downgrade diplomatic ties and support China's unification goal. Since 2016, Taiwan's official diplomatic relationships have dropped from 22 to only 12, and several of the remaining ones are vulnerable to Chinese pressure.

China is advancing military capabilities for a cross-Strait campaign while also using its armed forces to exert steady state pressure on Taiwan. The PLA probably is making steady but uneven progress on capabilities it would use in an attempt to seize Taiwan and deter—and if necessary, defeat—U.S. military intervention, and it is intensifying the scope, size, and pace of operations around Taiwan.

Beijing will continue to pressure Taipei with economic coercion and probably will increase it if it sees Taiwan taking steps toward formal independence. It could suspend preferential tariff terms, selectively ban Taiwan imports to China, and arbitrarily enforce regulations.

Beijing's aggressive efforts to assert sovereignty claims in the South and East China Seas are heightening tensions that could trigger a broader conflict.

- In 2024, PRC tactics in the South China Sea led to the loss of the Philippines' unilateral access to some disputed areas, and forced talks between Beijing and Manila in which the Philippines agreed to concessions in exchange for access. However, Manila is unlikely to relinquish its claims, creating potential for escalation by either side.
- Tension between China and Japan over the Senkaku Islands last flared up a decade ago. Since then, Chinese ships have remained in proximity of the disputed islands, occasionally entering the territorial zone, and driving responses from Japan's Self-Defense Force to monitor the activity.

Cyber

The PRC remains the most active and persistent cyber threat to U.S. government, private-sector, and critical infrastructure networks. The PRC's campaign to preposition access on critical infrastructure for attacks during crisis or conflict, tracked publicly as Volt Typhoon, and its more recently identified compromise of U.S. telecommunications infrastructure, also referred to as Salt Typhoon, demonstrates the growing breadth and depth of the PRC's capabilities to compromise U.S. infrastructure.