

# Russian Strategic Aerial Campaign (2025)

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## RUSSIAN STRATEGIC AERIAL CAMPAIGN (2025)

### Executive Summary

- ✦ In 2025, Russian Forces (RF) transitioned to a deliberately managed, UAV-led strike architecture, driving a 413% year-on-year increase in unmanned deployments while tightly controlling missile employment.<sup>1</sup> This approach enabled sustained, high-volume pressure at scale, preserved cruise and ballistic missile inventories for selective escalation, and aligned strike tempo and timing with diplomatic developments.
- ✦ Russia's 2025 strike campaign was geographically and functionally segmented: Operational Command (OC) East served as the primary pressure theatre, shifting from civilian disruption to industrial targeting in support of ground operations; strike effort later rebalanced toward northern Ukraine and critical energy and export infrastructure to generate political and economic leverage. Meanwhile, OC West remained a conditional, escalation-signalling theatre, absorbing a disproportionate share of high-end missile systems during mass-combined strike cycles rather than sustained volume attacks.
- ✦ Ukrainian air-defence interception in 2025 remained resilient despite sharply increased strike volumes, with performance shaped primarily by geographic allocation rather than system degradation. Declines in UAV, cruise, and ballistic missile interception reflected Russian adaptation and targeting redistribution toward areas with thinner kinetic coverage, while priority urban centres retained high effectiveness through layered defence and fixed interceptor networks.
- ✦ Russia enters 2026 with the capacity to sustain strike activity at levels comparable to 2025, supported by expanded UAV production, retained stockpiles, and a proven mass-combined strike cycle. This capacity underpins a continued reliance on UAV-centric operations to impose saturation pressure on Ukrainian air defences, likely limiting near-term improvement in interception outcomes during high-tempo phases. At the same time, incremental adaptation toward ground-launched missile systems and continued emphasis on energy infrastructure during periods of heightened vulnerability are assessed as likely.

### Strategic Aerial Launches & Force Generation

In 2025, Audere analysts recorded the launching of 67,028 strategic munitions towards Ukraine, an increase of 323.1% compared to 2024 and accounting for 74.5% of all weapon systems launched towards Ukraine since the onset of the full-scale invasion in February 2022.

<sup>1</sup> This assessment focuses exclusively on strategic-depth aerial strike activity conducted by Russia against Ukraine during 2025. For the purposes of analytical clarity and comparability, the numbers stated are also attributed to Audere's strike data platform, and thus will vary from the official data provided by the Ukrainian Air Force. Primarily, this variation is due to Audere strike data analysts verifying strikes throughout the day, alongside the morning reports published by the Ukrainian Air Force covering nightly activity.

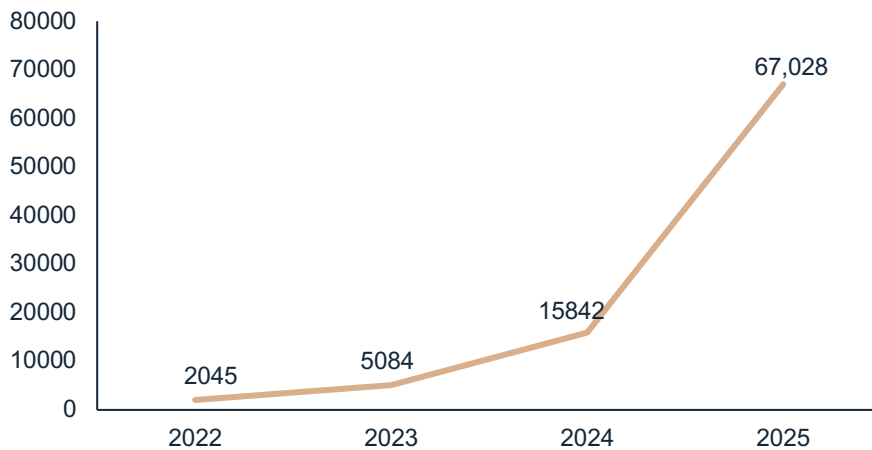


Figure 1: Graph to show total munition launches between 2022 – 2025

## UAV Usage

Notably, 94.9% of these munitions were recorded as UAV-type variants (Shahed 131/136, Geran 2/3, Gerbera, and Parody), with such deployments up 413.3% year-on-year. Russia’s launch model typically involved several days of moderate activity (approximately 60 launches per day), periodically interrupted by large-scale strikes deploying 250 or more UAVs within a single day. Nevertheless, a transition towards a sustained, industrialised strike rhythm occurred throughout 2025, rising from an average of 130.6 UAVS per day in Q1 (with a median average of 148.5) to 210.1 per day in Q4 (with a median average of 365).<sup>2</sup>

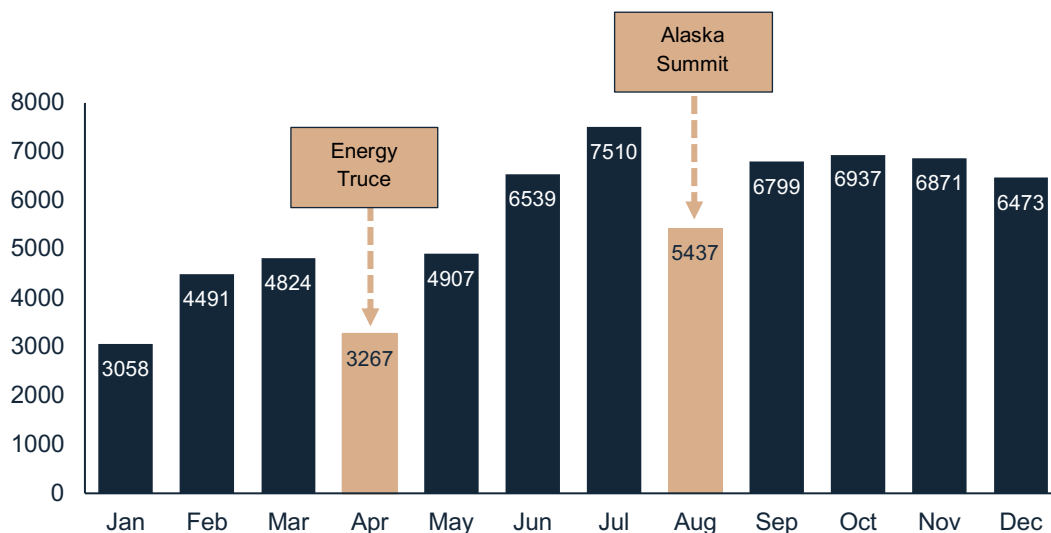


Figure 2: Total number of aerial munitions launched against Ukraine, by month (2025)

This proliferation was underpinned by the continued scaling of domestic production, with estimates conducted by Ukraine's Main Military Intelligence Directorate (HUR) in June 2025

<sup>2</sup> Two nights in Q4 witnessed 653 UAVs launched towards Ukraine. Nevertheless, the largest deployment of UAVs in a single night was on 06-07 September, when 810 UAVs were launched. Meanwhile, on 18 January 2026, the Commander-in-Chief of the Armed Forces of Ukraine, Oleksandr Syrskiy, warned of Russian plans to conduct a 1,000-drone night.

claiming daily production rates of 170 drones; this was said to have risen to 213 (6,500 per month) by year’s end.<sup>3</sup> Higher launch rates were also enabled through the activation of additional UAV launch sites, with at least six new locations assessed to have become operational during the year. Satellite imagery analysis also highlights an expansion of their storage capacity at already developed launch sites, with at least five sites showcasing infrastructural changes by Autumn last year.<sup>4</sup> Finally, RF augmented their use of decoy drones (Gerbera and Parody), which accounted for 35% of all UAV launches throughout the year.

However, from September onwards, aggregate launch volumes stabilised, with a subsequent reduction observed in December and extending into January 2026 (see figure 2). This data, in conjunction with HUMINT reporting, has intensified scrutiny of a potential “logistical ceiling” within Russia’s UAV supply chain. Indeed, sources embedded within Ukraine’s air-defence and long-range UAV units assess that emerging pressure is linked primarily to navigation-system performance and the additional technical demands of sustained operations in severe winter conditions. Specifically, sources report the use of a chemical-based heating element applied to navigation components to preserve functionality in low temperatures.

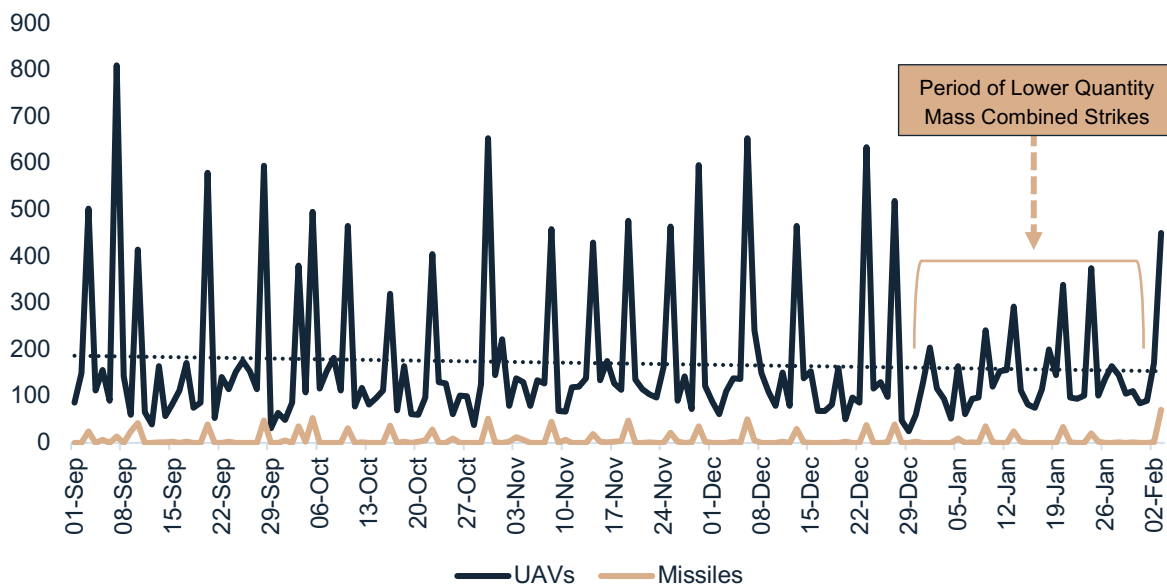


Figure 3: Graph to show daily launch rates (September 2025 – February 2026)

It remains unconfirmed whether this capability has been standardised across all new Geran-type production lines. Nevertheless, the observed reduction in monthly launch volumes from December, alongside a contraction in peak mass-strike events (see figure 3), is assessed to be consistent with constraints associated with producing and fielding winter-adapted variants at scale. Indeed, since January, coinciding with a marked deterioration in weather conditions, UAV launch volumes during mass combined strikes have averaged approximately 34% below

<sup>3</sup> On 18 January, Oleksandr Syrskiy claimed that Russia “is currently producing 404 Shaheds of a various type every day.”

<sup>4</sup> Sites under expansion include Primorsk-Ahtarsk', 'Navli', 'Tsimbulovaya', 'Millerovo', and 'Donetsk'. At the former, satellite imagery tracks 16 garages for storing up to two UAVs, and 17 garages for storing up to five. As such, during a single attack, OSINT notes “there could be more than 100 drones located and launched here, and this does not take into account the fact that a significant number of 'Shahed' drones could also be present in the aviation hangars.”

the September–December baseline. This reduction persisted during the most recent mass combined strike on 02–03 February, when launch volumes remained approximately 13% below the same reference period.

### Missile Usage

At the same time, Russia’s employment of missile system variants also increased 6.5% vis-à-vis 2024. Notably, this increase was balanced out by competing factors, with ballistic missile launches rising by 17.5% vis-à-vis 2024. This was almost certainly enabled by Russia’s production and stockpiling capabilities (with up to 60 Iskander-M ballistic missiles produced per month by June 2025). Nevertheless, there was a notable tapering of usage in Q4 2025, with Audere sources attributing this shift to the expanding counterstrike capability of the Armed Forces of Ukraine (AFU).

Specifically, between July and December, Ukrainian UAV and missile strikes against targets inside Russia increased by 50.4%, driving a reprioritisation of Russian air-defence assets. Indeed, it is highly likely that S-300 and S-400 systems were increasingly redeployed to protect rear-area critical infrastructure, reducing their secondary employment in ground-attack roles against frontline-adjacent Ukrainian cities by year’s end.

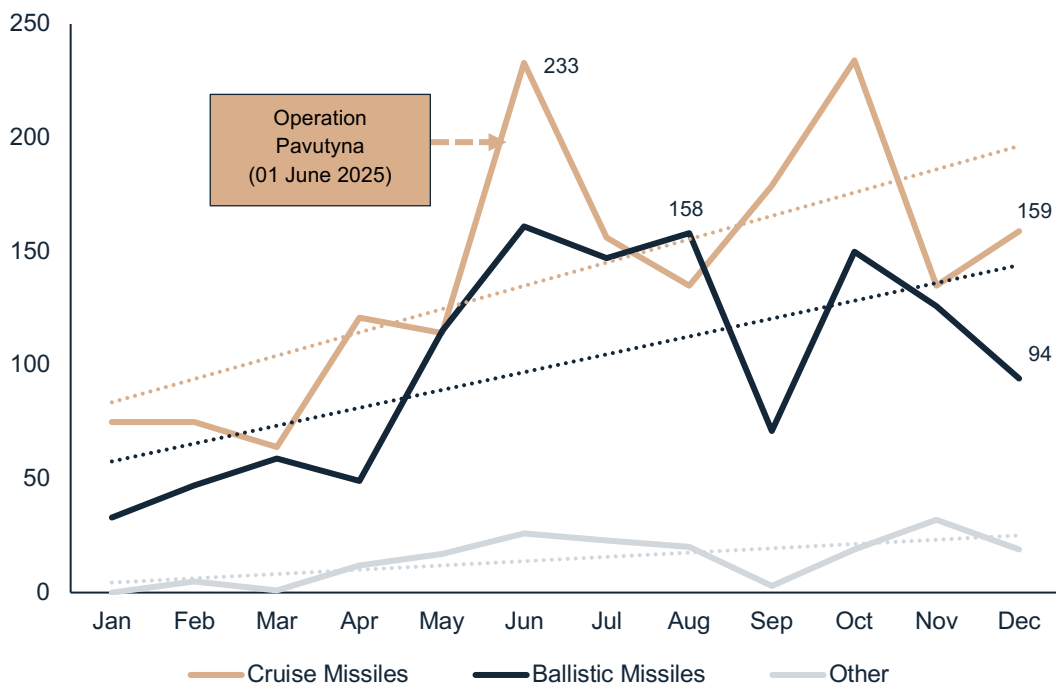


Figure 4: Graph to show Russia’s use of cruise, ballistic, and “other” missiles (2025)

Meanwhile, Russia’s reliance on cruise missile systems – which had accounted for 59.9% of missile launches in 2024 – marginally decreased last year, dropping from 1726 to 1680. Utilising HUR estimates from June–July 2025 and Audere’s internal production and launch tracking, it is assessed that this decline is unlikely to have resulted from supply chain / production issues; as of 03 February 2026, it is possible that Russia holds between 770 – 1020 cruise missile munitions of the Iskander-K, Kh-101, Kh-22/32, and Kalibr variants alone.

<sup>5</sup> <sup>6</sup> Rather, this reduction is assessed to reflect deliberate force-management decisions shaped by the prevailing geopolitical context, as evidenced by the temporal correlation between strike activity and diplomatic developments outlined in Figures 2 and 4.

### *Strategic & Operational Influences*

Indeed, across 2025, the pattern of Russian attacks on Ukraine demonstrated a clear linkage between operational tactics and the foreign-policy context. Specifically, the sharp decline in April followed the energy truce reached between Ukraine and Russia on 25 March, which temporarily constrained strikes on energy infrastructure and reduced overall campaign intensity; the peak in July coincided with intensified Ukraine–US negotiations; meanwhile, an 18-day lull in August aligned with the meeting between US President Donald Trump and Russian President Vladimir Putin in Alaska and, in retrospect, served as a period of resource accumulation and planning ahead of the next operational phase in September.

2025 also saw a systematic adjustment at the operational level – particularly strike timing. During the first half of the year, strike sequencing followed a stable and repeatable pattern consistent with 2024: UAV launches commenced from approximately 1800 EET, followed by strategic bomber departures around 2300 EET, with air-launched cruise missiles released between 0200–0300 EET and arrival windows clustering around 0400 EET for central and western targets, including Kyiv. However, from July 2025 onwards, strike sequencing shifted later. Strategic bomber departures occurred from approximately 0100 EET or later, with missile arrival windows consistently falling between 0530–0730 EET.

*Note: OC West strike-timing data illustrates this shift clearly: between January 2024 and June 2025, 76.4% of strikes occurred between 0000–0500 EET, including 40.1% between 0000–0300 EET. Between July and December 2025, these proportions adjusted to 57.3% and 24.4% respectively.*

Notably, this change followed the integration of strategic bombers redeployed from the Russian Far East after Operation Pavutyna, which were subsequently combined with aircraft forward-positioned at Olenya and Engels. The assembly of mixed-origin strike groupings likely extended force-generation timelines upstream, delaying execution.

Nevertheless, strike coordination remained intact: UAV launches continued to precede missile employment, preserving their role in air-defence activation, pathfinding, and interception loading. The effect of the temporal shift was therefore a re-timing of defensive stress, shifting pressure away from deep-night windows and into the early-morning transition period, with direct implications for crew rotation, alert posture, and civilian exposure.

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<sup>5</sup> In June 2025, HUR stated that Russia possessed a stockpile of 300 Iskander-Ks, 260 Kh-101s, and 280 Kh-22 / Kh-32. Meanwhile, in July 2025, the Kyiv Independent, citing HUR, noted that Moscow was “producing 60 to 70 Kh-101 cruise missiles, 20 to 30 Iskander cruise missiles, 25 to 30 3M-14 Kalibr cruise missiles, and 20 to 30 3M55 Onyx and 3M22 Zircon anti-ship missiles per month.”

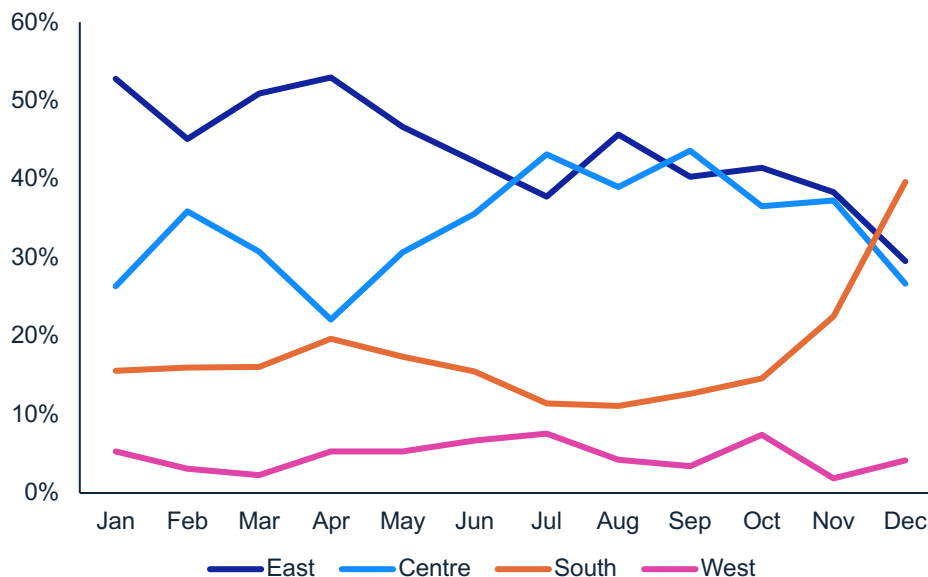
<sup>6</sup> Other analysts – previously integrated with the Ukrainian Air Force – suggested in December 2025 that Russian replenishment rates of the Iskander-K, Kh-101, and Kh-59/69 are estimated to be 160%, 120% and over 200% respectively.

## Strike Employment & Campaign Design

Throughout the year, OC East remained the principal theatre of Russian strategic aerial strike activity, accounting for approximately 44% of all recorded launches. During the first four months of the year, strike employment in this region was dominated by civilian and dual-use infrastructure, which accounted for over 60% of all targets, consistent with a population-pressure and sustainment-disruption approach in immediate proximity to the frontline.

Nevertheless, from the second quarter onwards, target composition within OC East shifted progressively. Strikes against industrial facilities increased steadily from approximately 20% to 35%, with the majority of this activity concentrated in Kharkiv, Donetsk, Sumy, and Dnipropetrovsk. This reweighting supported Russia’s summer offensive by constraining the production, repair, and distribution of materiel supporting Ukrainian units operating along the Kharkiv, Luhansk, and Donetsk axes.

In parallel, a north-central reallocation of effort became evident. Indeed, OC Centre’s share of total launches increased from 29% between January–April to 37% between May–December, following the conclusion of Russian counter-operations in Kursk oblast and the recapture of Sudzha in March 2025. This development restored Russian freedom to redirect strike capacity away from Russian territory and towards northern Ukraine. As highlighted above, there was also an alignment with geopolitical developments, with the concentration of effort peaking in July, when Kyiv region recorded 188 strike incidents – the city accounting for 73.4% of those events.



*Figure 5: Graph to show the geographic breakdown of aerial activity (January – December 2025)*

From August 2025, Russian strategic aerial strike activity shifted towards critical national infrastructure (CNI). In quantitative terms, between October and December, up to 49% of all recorded strategic aerial strikes were directed against CNI, compared with around 10% during spring 2025. This escalation mirrored a comparable CNI-focused campaign observed in

March–April 2024, which preceded widespread power outages during the subsequent summer period. In 2025, however, the renewed campaign was more geographically selective and operationally concentrated. Repeated strikes against grid-splitting substations and key transmission nodes reduced network redundancy and increased outage persistence across northern, eastern, southern, and central regions.<sup>7</sup> Accordingly, these cumulative effects preceded the Ukrainian government’s declaration of a state of energy emergency on 14 January.

Concurrently, in the run-up to the EU’s financial assistance package and discussions on the use of frozen Russian assets, strategic aerial strikes expanded against export-enabling infrastructure, primarily ports and associated logistics.<sup>8</sup> During the final quarter, Odesa region accounted for the highest concentration of port-related strikes, reducing maritime throughput and contributing to an estimated \$1 billion reduction in export revenues in Q1 2026, imposing short-term economic costs intended to offset – at least in the near-term – the stabilising effects of external financial support.

*Note: The co-location of energy transmission and maritime export infrastructure in southern Ukraine enabled Russia to apply both effects simultaneously without increasing overall strike volume.*

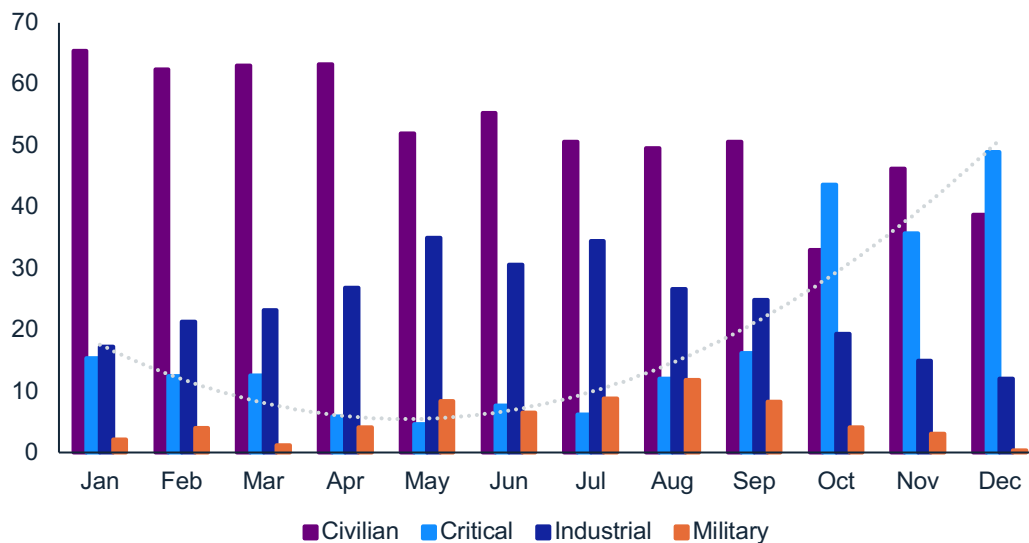


Figure 6: Bar chart to show monthly distribution of strikes by category (January – December 2025)

By contrast, OC West accounted for approximately 5% of total strategic aerial strike activity in 2025 and did not form part of Russia’s routine, volume-based strike campaign. Instead, the region largely functioned as a conditional target set, incorporated primarily during mass-combined strike operations.

This conditional inclusion is reflected in system allocation and strike timing. Despite low overall strike volume, OC West absorbed 15% of all missile launches and 44% of hypersonic Kinzhal

<sup>7</sup> Since the start of the heating season on 01 November, Ukraine’s Security Service (SBU) has documented 256 Russian attacks against the country’s energy facilities and district heating systems.

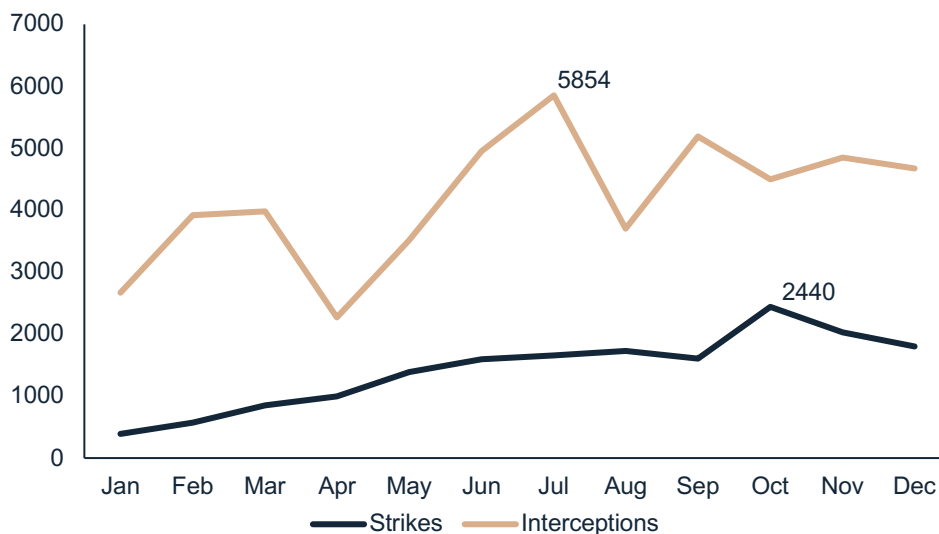
<sup>8</sup> According to the Ukrainian Sea Ports Authority, 96 Russian attacks were recorded in 2025, compared with 36 in 2024.

employment during the year, indicating a targeting model that assigns high-end, low-volume systems to the region. These inclusions occurred within recurring mass-combined strike cycles, which, over the past five months, have been observed at an average interval of 8.5 days, providing a consistent temporal framework for rear-area strike inclusion.<sup>9</sup>

Outside mass-combined strike cycles, strike activity against OC West was largely confined to isolated Kinzhal employment against military infrastructure.

**Effectiveness & Air Defence Interaction**

Ukrainian air-defence effectiveness in 2025 averaged 74.6%, compared with 76.4% in 2024, sustaining performance despite a substantial increase in Russian strike volume. Nevertheless, air-defence effectiveness in 2025 averaged 74.6%, compared with 76.4% in 2024, sustaining performance despite a substantial increase in Russian strike volume. Interception outcomes diverged primarily by theatre: effectiveness declined during periods of concentrated strike activity in OC East, where frontline proximity compressed engagement timelines and defensive density was limited, while performance remained higher when strikes weighted toward Kyiv and Odesa, where layered air-defence coverage and prioritised asset allocation dominated. For example, between October and December, OC South recorded an interception rate of 82.5%, compared with 56.7% in OC East.



*Figure 7: Graph to show monthly strike and interception rates (January – December 2025)*

**UAVs**

This pattern reflected Ukraine’s shift toward fixed UAV-interceptor networks concentrated within defended urban hubs, replacing broader reliance on mobile fire groups. By anchoring

<sup>9</sup> During mass-combined strike operations, target selection within OC West concentrated on high-value military aviation infrastructure and CNI. Specifically, military targeting was weighted towards western-linked airbases assessed to support the basing, preparation, or enabling infrastructure for Western-supplied long-range strike capabilities. Key sites include Starokostiantyniv, Dubno, and Lutsk, which possess the runway standards, hardened facilities, and support infrastructure required for advanced aircraft operations. In parallel, mass-combined strikes incorporated CNI targets associated with power generation and transmission, reflecting OC West’s role as a rear-area energy hub. Targeting aligned with infrastructure linked to Burshtyn, Dobrotvir, Ternopil, Lviv, and Rivne, including grid nodes connected to the Rivne Nuclear Power Plant, which feeds electricity into the national grid and supports onward transmission towards Kyiv.

interception around dense population and economic nodes, this posture preserved effectiveness under elevated UAV volumes in priority cities, while peripheral areas remained more vulnerable during high-tempo strike phases.

Russian forces adapted to this defensive posture through a combination of volume escalation (including the use of decoy drones, as previously mentioned) and technical modification. Moscow had maintained continuity of the Geran airframe while introducing simplified composite materials, more jamming-resistant GNSS antenna types, limited datalink functionality, and mesh-enabled loitering variants, enabling rapid production scaling with incremental resilience gains. Nevertheless, as Ukrainian interceptor employment expanded, these measures delivered diminishing returns, driving a shift toward higher-speed UAV employment. This transition is reflected in the introduction of jet-powered Geran variants and the reported testing of Geran-4 and Geran-5 systems.

While Ukrainian interceptor drones have demonstrated the ability to engage these systems, engagement conditions are assessed to have become more demanding. Specifically, higher-speed variants compress engagement timelines, complicate interception by gun-based systems and interceptor UAVs operating in the 200–300 km/h range, and reduce interception margins outside dense defensive hubs. These dynamics are reflected in interception outcomes. Across 2025, UAV interception averaged 76.9%, declining from 90.1% in 2024, with quarterly interception rates decreasing from 87.4% in Q1 to 71.2% in Q4.

### *Ballistic Missiles*

Interception effectiveness against ground-launched ballistic missiles reached 10.3% in 2025, up from 3.9% in 2024, with quarterly performance stable through Q3 before declining to 9.2% in Q4. Whilst ballistic missile employment was weighted primarily towards OC East, the decline observed was, nevertheless, caused by a redistribution of ballistic missile targeting towards Odesa oblast; between October – December, Audere’s analysts recorded 17 ballistic strikes with zero interceptions, including 10 against CNI. This final quarter decline is therefore assessed to reflect defensive allocation decisions, with high-end ballistic missile defence assets concentrated in OC Centre and OC East, where ballistic threat density remains highest.

*Note: While OC South maintains robust defensive coverage against UAVs and cruise missiles, it has intercepted only seven ballistic missiles since 01 January 2024, indicating structurally limited ballistic missile defence capacity.*

### *Cruise Missiles*

Meanwhile, interception effectiveness against cruise missiles declined in 2025. The annual interception rate stood at 56.7%, down from 66.8% in 2024, despite a marginal decline in cruise missile launch volume. The reduction followed a redistribution of targeting, with OC Centre witnessing a 16% increase in strikes vis-à-vis 2024. This is reflective of Russia’s broader distribution across secondary urban and industrial targets; while Kyiv experienced only a limited increase in strike activity, locations including Kremenchuk, Bila Tserkva, Nedryhailiv, Vasylykiv, Cherkasy, Uman, and Boryspil absorbed materially higher strike

volumes, reducing aggregate interception outcomes due to less dense layered air-defence coverage.

The decline in interception effectiveness was reinforced by increased strike weighting toward OC West relative to 2024. This is notable as HUMINT reporting from the second half of 2025 indicates that local air-defence resilience within OC West is limited, particularly in terms of kinetic interception capacity. Indeed, sources assessed that the regional defensive posture is structured around upstream interception layers and non-kinetic mitigation, with minimal reliance on dense local missile-defence coverage.

*Note: An important qualification applies near key western-based military airbases, where concentrated advanced air-defence assets provide locally enhanced protection. This concentration likely skews regional interception figures upward, masking weaker defensive coverage beyond airbase perimeters and causing aggregate OC West data to overstate effectiveness outside these protected nodes.*

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## 2026 Outlook

While 2025 represented the most intensive year of the full-scale war to date, observed trends indicate that Russia is positioned to operate at, at least, a comparable level in 2026. This assessment is grounded in sustained UAV production expansion, demonstrated capacity to generate recurrent mass-combined strike cycles, and cumulative stockpiling achieved throughout 2025, which together provide the material basis for continued high-tempo operations.

Reliance on UAV-centric strike activity is assessed to remain central in 2026. UAVs continue to offer a favourable balance of cost, scalability, and operational effect, particularly through their ability to impose saturation pressure on Ukrainian air-defence systems. Within this context, interception ratios are unlikely to improve materially in the near term, especially during periods of repeated large-scale attacks that place sustained strain on defensive resources.

Meanwhile, strike tempo over the course of the year will remain sensitive to the geopolitical environment, particularly developments in peace negotiations. Consistent with established practice, Russia is assessed to continue employing its aerial strike campaign as a tool of political leverage. In this context, the emergence of temporary arrangements – similar to the March 2025 energy ceasefire – or limited, symbolic “*holiday*” ceasefires, as observed in spring 2025, cannot be ruled out. However, such pauses are likely to remain tactical and declaratory in nature, without translating into systemic de-escalation.

At the same time, a departure from the established model of massed attacks interspersed with accumulation periods is not assessed as likely. This approach has proven operationally effective, particularly in degrading Ukraine’s critical infrastructure and exploiting periods of peak system vulnerability. Some adaptation within this framework is nevertheless possible, including an increased reliance on ground-launched cruise and ballistic missile systems at the expense of strategic aviation and maritime launch platforms. This trend may be reinforced by Ukraine’s demonstrated ability to successfully target high-value Russian platforms and launch assets.

Finally, it is assessed that several constraints will continue to shape, but not fundamentally limit, Russia's strike campaign in 2026. In particular, periods of severe cold are likely to reinforce a continued focus on strikes against critical energy infrastructure, as low temperatures amplify system vulnerability and increase the coercive effect of such attacks. Meanwhile, sanctions and logistical pressures may complicate production and supply chains, yet experience in 2024–2025 suggests these factors have thus far constrained efficiency rather than output volume.

# Audere

GROUP



## Addressing Risk with Intelligence

### About us

The Audere Group is a specialist global intelligence and security risk advisory firm, with over a decade of operations spanning Ukraine and Eastern Europe.

Our commitment to Ukraine was solidified in May 2022 with the establishment of a physical office, the opening of a Security Operations Centre in Kyiv, and a joint venture comprising over 8,000 personnel and 600 vehicles.

### We are a trusted, long-term partner to

- Multinational corporations
- Commercial entities
- Law Firms
- Government organisations
- NGOs
- Charities
- High Net Worth Individuals

### Who we are









Our team comprises highly experienced international military and intelligence professionals. Their extensive expertise and specialised knowledge enable our clients to navigate an increasingly dynamic and complex security landscape.

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### Our locations

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