

SITREP 10/27/23: Ukraine's Prospects Dim as Russian Gains Grow



SIMPLICIUS THE THINKER

28 OCT 2023



173



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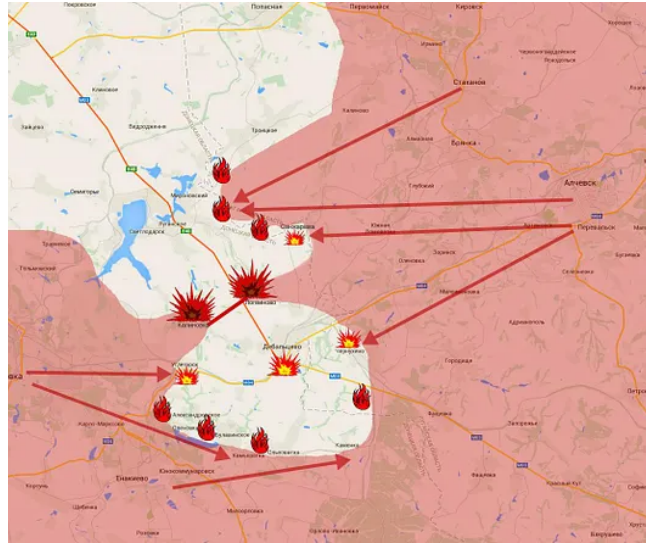
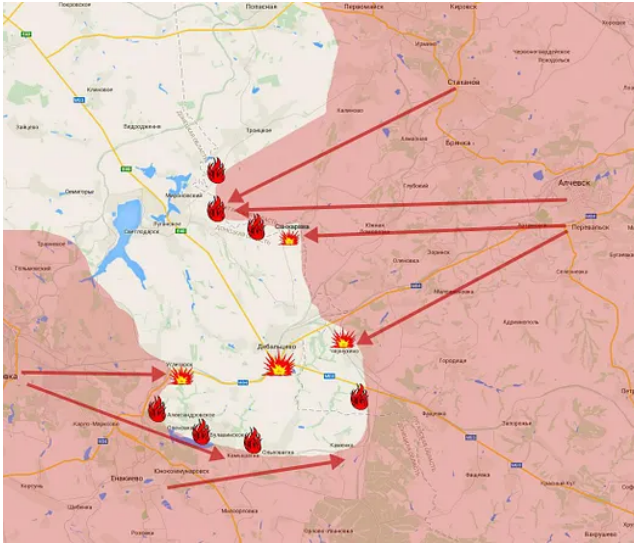
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There are several important Russian breakthroughs in Avdeevka, which are now being bitterly confirmed by Ukrainian sources. It's now without doubt that both sides have gone "all in" and Avdeevka has in fact become the de facto central battlefield to define the latter part of this year.

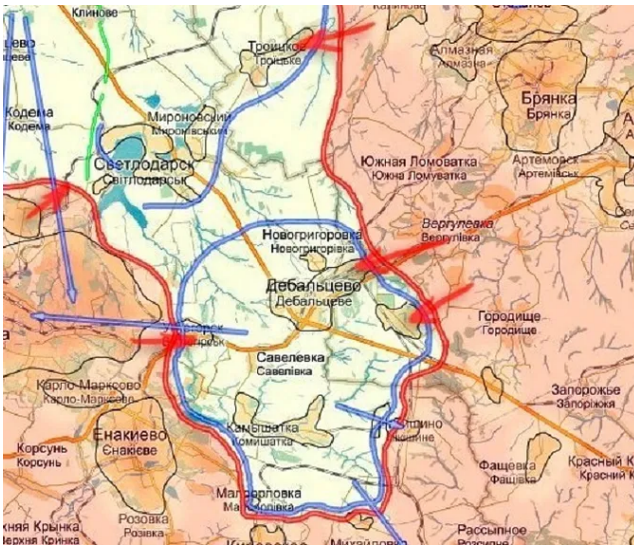
Before I wasn't certain whether Avdeevka may just be a ruse or misdirection from Russian command, or perhaps even a 'testing of the waters' just to see if it's worth committing a large force there, sort of how Ugledar was in early 2023. They never meant Ugledar to be a massive "all in" committed operation, unless the early tests proved that Ukrainian defenses there were weak.

But here, it has become clear that Russia has gone all in and will not stop until it's captured, no matter how stiff the Ukrainian defense is. In short, Avdeevka is set to become the new Mariupol, Lisichansk-Severodonetsk, and Bakhmut.

But some have correctly pointed out that there's actually another, more distant battle which Avdeevka resembles much more closely. That of 2015's Debaltsevo—famed for its unprecedented defeat of Ukraine's JFO/ATO troops in what became one of the first big 'cauldrons' which placed the term on the map for a new generation of would-be armchair generals and war historians.



This February 2015 battle had a closer size to that of Avdeevka and similar smaller troop groupings, compared to the monster groupings that ended up partaking in battles like Bakhmut. The shape and troop dispositions are even similar. Then too, Novorossiyan troops stifled the AFU from cross artillery barrages, inflicting grave losses and forcing a retreat as Novorossiyan forces pushed in from the outskirts with constant squeezing pressure.



Similarly, it had one main supply route, the Bakhmut Highway, which led in a northwesterly direction toward Bakhmut, and which Novorossiyan troops similarly began to bring into a pincer and under fire control, forcing the AFU to retreat in panic.

Of course everything is harder now in Avdeevka as there have been many more years of fortifications and unprecedented financial NATO support as well as full societal mobilization giving an endless stream of reserves to replenish losses.

But so far, Russian forces are succeeding in the same maneuver once carried out in Ilovaisk and Debaltsevo: pushing in from both south and north of Avdeevka at the same time to

bring the supply route under tighter restriction.

So what are the new advancements?

Firstly and most importantly, there are some key, confirmed advancements from the southern district this time—which truly gives an indication that the jaws are closing. A couple fields were captured about Opytne, but some have it even slightly further than the below visualization:



Russian

Наши продвинулись на 2,5км в ст [more](#)

English

Ours advanced 2.5 km towards the 9th quarter of Avdeevka on the southern flank. Also taking the mine near the village of Opytnoye (Light-colored spot in the red circle)

👉 I'm in the tank [Z] 👉



***RUUA** Russian forces are narrowing the ring around Avdeevka.*

According to Come and See, the Russian army has again launched an offensive both north and south of the Avdeevsky fortified area in the DPR.

"In the south, Russian units are advancing from Yasinovataya. The enemy is rolling back," the source noted.

According to him, the forward speed has increased and can be up to 2 km in this direction.

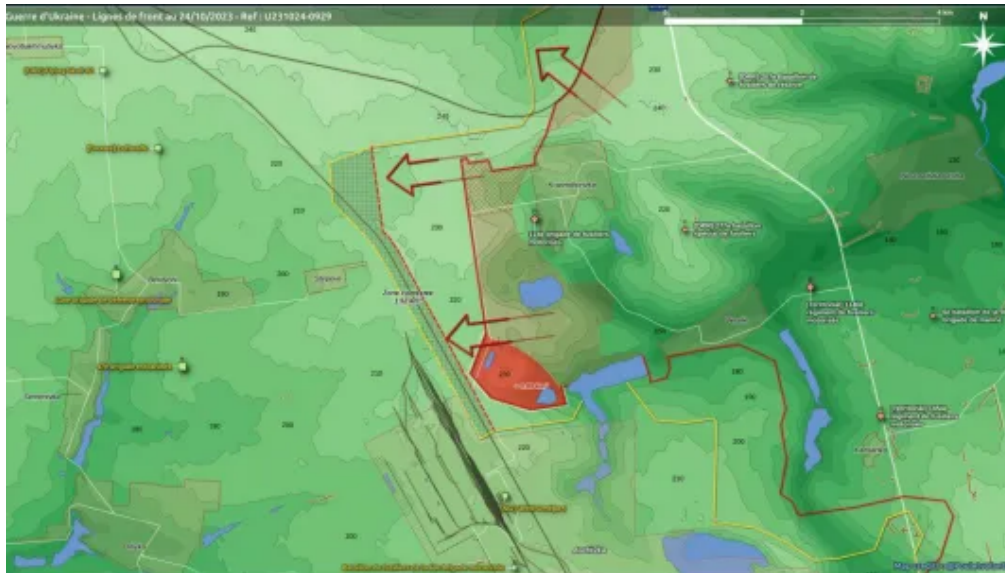
There is also a direct attack on Avdiivka itself. Russian and Ukrainian artillery are in full swing.

The liberation of Avdiivka is important not only strategically but also psychologically. From there, a significant part of the attacks on the civilian population and civilian infrastructure of Donetsk are carried out.

Other sources claim success on the direct southerly and easterly direction. For instance in the 'Royal Hunt' fortification, Russian forces are said to have made headway, and in the east Russian forces reportedly have been fighting for the Filtration Station, which is here:



On the northern front, several Ukrainian accounts have now dispelled rumors that the Slag Heap is still in the 'gray zone' and have confirmed it is not only fully captured by Russian forces, but that the forces are even digging in there with their own positions, which means fire-control weaponry will certainly be brought to bear up there:



!! UKRAINIAN POST !!

ON THE SITUATION IN AVDEEVKA

Unfortunately, the enemy nevertheless occupied the terricone and dug in there, which even European experts admit. This means that the situation on the northern flank is steadily becoming more complicated.

The defense of Bakhmut, despite the much more fortified state of Avdeevka, cannot be repeated here - we don't have the forces or reserves. In addition, the enemy has no problems with communications here - we are right at his gates, and most of our supplies come by rail, which is now under fire control.

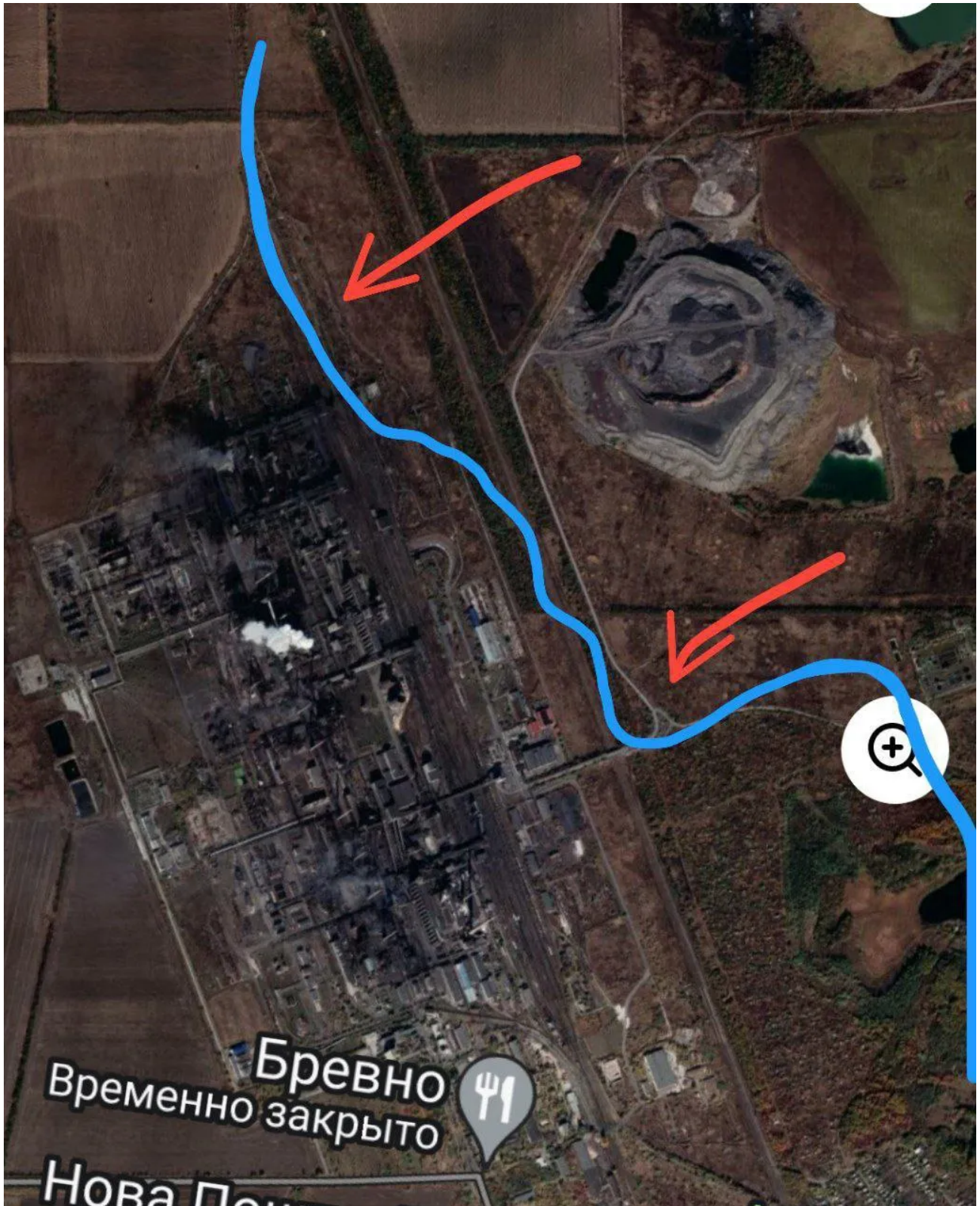
What do we do in the current situation? Prevent a repetition not of Bakhmut, but of Debaltsevo. Because the situation here is more reminiscent of Debaltsevo.



661 The XYZ, edited 3:03 AM

Some sources continue to state that Russian forces are actively storming the northern part of the Coke Plant, as well as clearing and digging into the area *south* of the Slag Heap—though this is not yet confirmed:





It's important to recall many sources, particularly Rybar of late, tend to jump the gun, so these are still very preliminary bits of info that should be taken with a grain of salt.

At the minimum though, if Russian forces haven't fully seized that southern part of the Heap, it is very likely to be a full gray zone with no Ukrainian presence there any longer.

⚡⚡⚡👉 Donetsk volunteer Elena Bobkova told UkrainaRU about the importance of control over the garbage heap for the capture of Avdeevka:

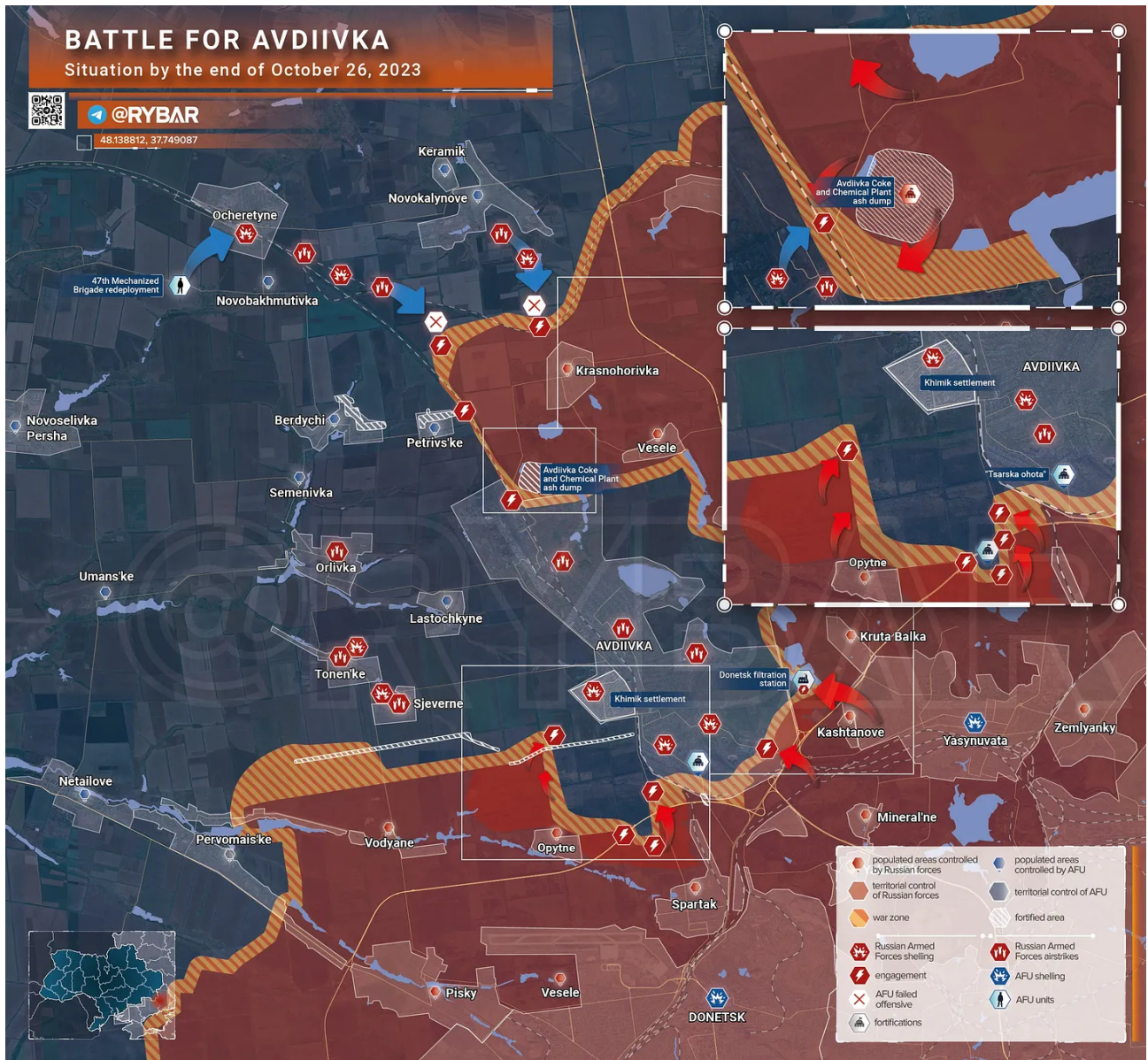
First, and most importantly, thanks to this control, our artillery penetrates through the city. Secondly, it is an excellent observation post that allows us to see everything around. Any movement around the city, any transfer of reserves and military units immediately becomes known to us. After that, at the identified points, our men begin to strike.

Third, the control of the waste pile is actually the beginning of the cleanup of the Avdeevsky coking plant, the largest factory of this profile in Europe in terms of area. Of course it is smaller than Azovstal, but the defense of Avdiivka is actually the defense of the coking plant. There is a garrison headquarters and warehouses with used fuel and lubricants.

At night all of Donetsk sees the glow on Avdeevka. It is the Russian air force and artillery that destroy the warehouses. If the defense of the coking plant collapses, the defense of Avdeevka will also collapse."

If Avdiivka is liberated, the artillery terror to which Yasinovataya, Makeevka and part of Donetsk have been subjected every day for a year and a half will cease ⚡⚡⚡

Here's Rybar's map at least showing the general directions of advancement, most significantly toward the filtration plant in the southeast and the Opytne direction from the southwest:



Julian Ropcke is once again in tatters:



Julian Röpcke

@JulianRoepcke

#NewsMap

The situation around #Avdiivka is deteriorating for the Ukrainian army. After 20 days of attacks and losing some 2000–3000 soldiers, Russian forces managed to shrink the Ukrainian supply corridor to the city from 9 to 7 km. They stand 600 m N-E of the industrial quarter.



4:29 AM · Oct 26, 2023 · 234.3K Views



68



164



425

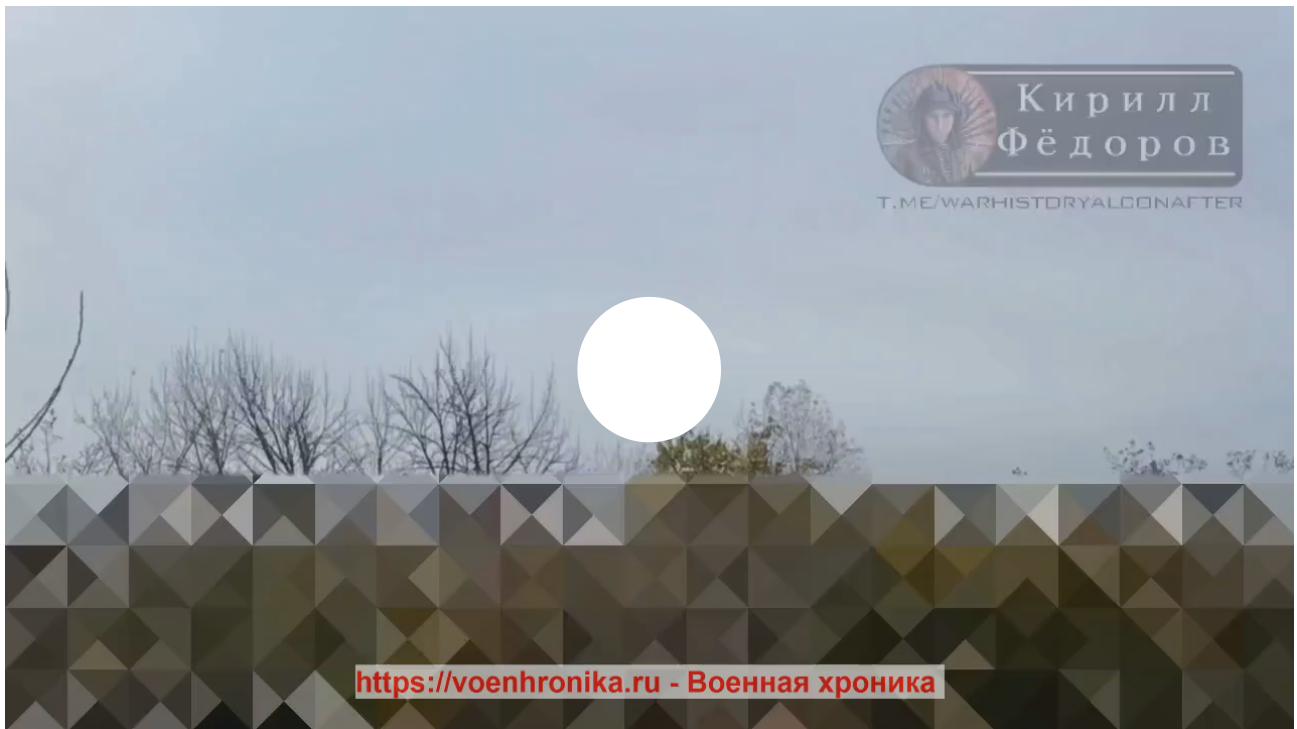


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Russia is said to be mercilessly pounding Avdeevka, and another recent frontline report confirms that the AFU suffers much higher losses than Russian forces, *particularly* at the current phase where Russia has shortened the lines and is not currently making huge armored assaults across open stretches of land.

A small glimpse—you can see 6 x Russian Su-25s heading to Avdeevka, a sign of how much simultaneous airpower is being utilized just on this one front:



This is followed by many attack helicopters as well, which were reported to have made these shots:



The Russian channel Vozhak Z who has been updating from the front writes another detailed post. By the way, it turns out this fighter is actually an award winning Russian writer named [Dmitry Fillipov](#), who volunteered for the SMO.



Member of the Saint Petersburg Writers ' Union. Born in Kirishi, Leningrad region. Graduated from the Faculty of Philology of Kursk State University.

Publications in the literary magazines "Znamya", "Neva", "Volga", "Sever", in the weekly magazines "Literaturnaya Gazeta", "Literaturnaya Rossiya", online publications "Svobodnaya Pressa", "Russkaya Planeta".

Winner of the Alternative Literature Award 2012, winner of the Russian-Italian Rainbow Award 2015, winner of the V. G. Korolenko Short Story Award (2015); longlisted for the National Bestseller Award 2015.

Author of two books of prose: the novel "I am a Russian" (publishing house "Literary Russia") and a collection of short stories and novellas "Three times of solitude" (publishing house "Helikon plus").

Now he fights in the southern quarters of the 'Royal Hunt' section of Avdeevka. From today:

DAY SEVENTEEN

There was a thick fog from the very morning and all day. At 50 meters you can no longer see anything. The weather gave us all a break. There was a calm in our area, so unusual that it was a little annoying.

For two weeks in a row, even going to the toilet was an adventure, but then you go out into the street - and there is silence... Only in the north did heavy art continue to work somewhere in the Koksokhim area.

*Today was time to think about everything that was happening. Objectively, the situation is such that from the north the railway is in a gray zone. Delivery of BC through it is impossible. **The road through Lastochkino is under our fire control.***

I think we'll get them. It is already clear to everyone that we will not stop. This is clear to us. This is clear to the enemy. They still have enough strength, the battle will be difficult, but deep

down the crests already know that they will lose Avdeevka. And we know that they will not give up, they will not leave on their own. Therefore, we will encircle them and kill everyone who resists. And they will kill us as much as they can. This is how this war goes.

Do I feel sorry for them? No. They killed and injured my friends, they want to kill me every day. I don't feel sorry for them. Although, for the most part, the people who stand against us are not rabid Nazis, but ordinary Hataskrayniks who were forcibly driven to slaughter.

But if you look at everything in its entirety, it was they who brought Ukraine to its current state. That same silent majority who don't care about Bandera, or the Russians, or the USA - as long as their farm, kindergarten, pigs are not touched, as long as they don't run out of vodka and lard, and at least the grass doesn't grow.

They didn't care about the Maidan, about the shelling of Donetsk and Lugansk, about the genocide of the Russian population, about the murders of children, women and the elderly, about Azov's torture, about language bans, about the split in faith... And then it turned out that they couldn't sit it out that you have to take a machine gun and die for the interests and goals of NATO.

And then they hated us, with a fierce, terrible hatred. Because their little farmstead world collapsed. Because this war reminds them every day of their cowardice, weakness and silence. And in their anger they blame us for everything, because they are afraid to look in the mirror and ask themselves uncomfortable questions.

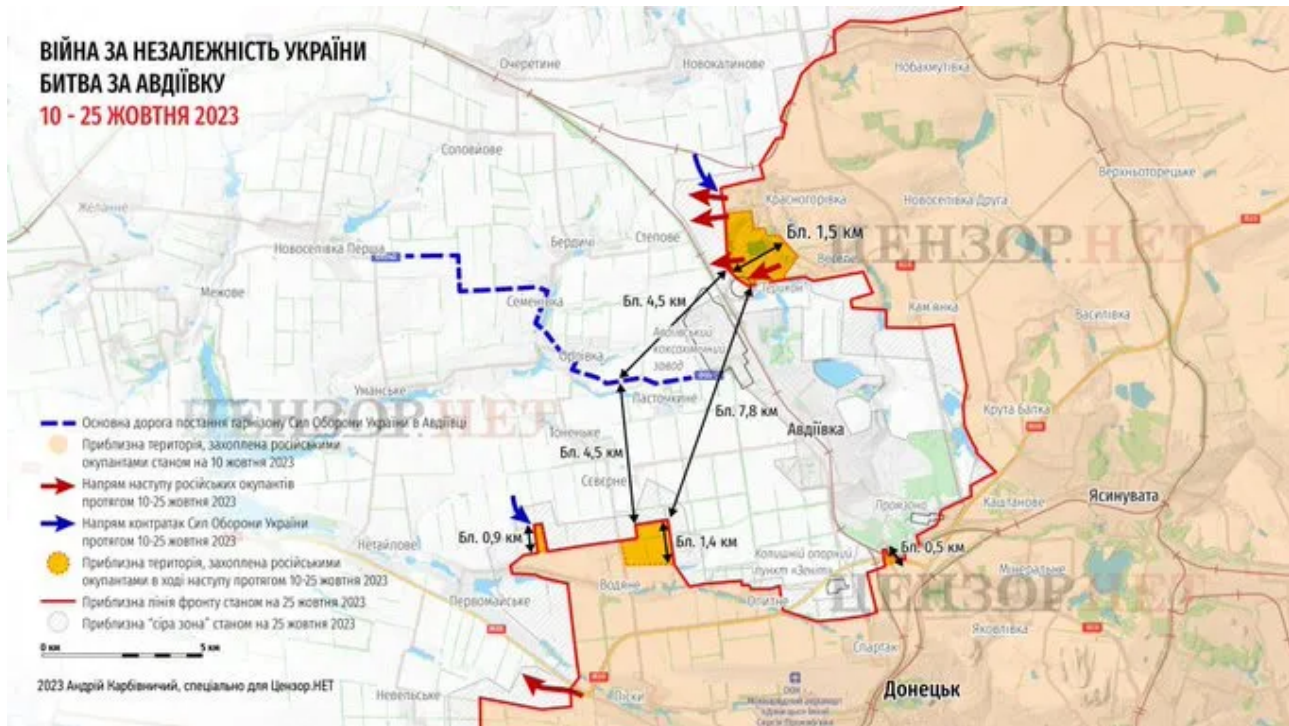
And we, of course, will win. We know that. And they know it. And this makes them hate us even more.

My call sign is Leader!

Victory will be ours!

PS. Frequency 149.200, call Volga, you will stay alive. Otherwise, we will come and kill everyone who holds weapons in their hands.

He confirms that the rail is under fire control, and more importantly that the 'road through Lastochkino' is also under fire control. This is the one and only main supply route we've seen on so many maps now:



One analyst has written up a detailed deep dive on those actual supply routes, and what can be expected—I encourage you to [read it here](#).

He highlights the following: orange is the main supply route, while brown are the secondary routes:



As you can see, the orange MSR coming from the northern part of Avdeevka toward Lastochkino is the only accessible MSR. This is a paved road which can move much heavier equipment and is not as affected by weather, i.e. sludge and mud.

The brown lines represent small dirt roads which can be used for certain things, but particularly in the wet boggy weather of the present time, they could be impassable.

But one key development I've noted is that many of the top Ukrainian accounts are becoming absolutely exasperated and flat out tired of the overly-optimistic pro-Ukrainian cheerleaders, who continue to spout unfounded claims about Russian losses and Ukraine's 'easy' victory in Avdeevka, etc.

Here's [one such long NAFO post](#), censuring fellow NAFO bots for their constant, exhausting stream of unhelpful positivism. Even big names like AFU reserve officer

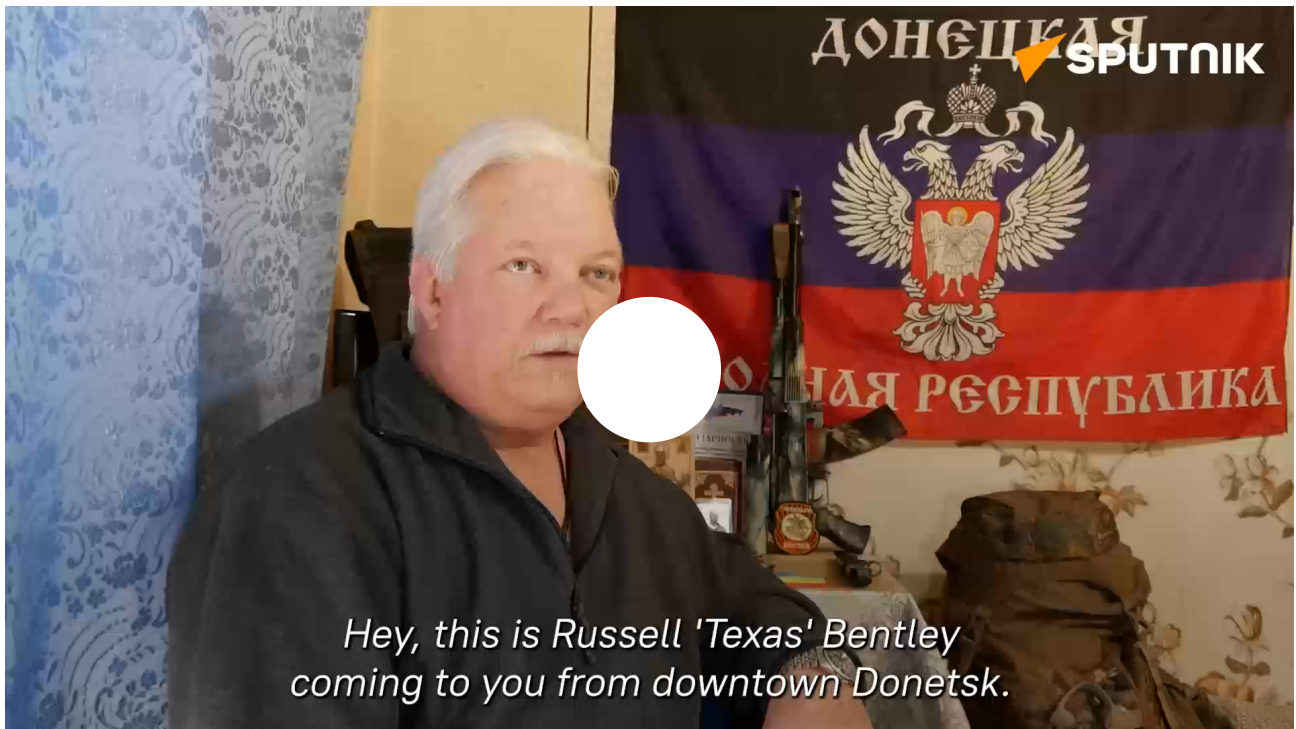
Tatarigami are sick of it. Here he points to the very real threat of Avdeevka's MSR being cut:



Another NAFO bot points out the significance of Avdeevka, which in his opinion is even higher than that of Bakhmut:



This highlights something being echoed by other analysts, like Russell Bentley here:



“Avdeevka is a very strategic position—when it falls, the whole Donbass front will shatter like glass.”

The reason I highlight this is because one thing that must be noted is how significant even psychologically Avdeevka’s fall would be at this very crucial time. Recall that, after the hugely failed summer counteroffensive, Zelensky is now on the ropes. Ukrainian support is heavily waning all around the globe, particularly with the Israeli situation heating up. Zelensky’s own support is now heavily waning, as a new survey showed that Ukrainian citizens no longer support him, though they continue to show heavy support for the AFU military in general.

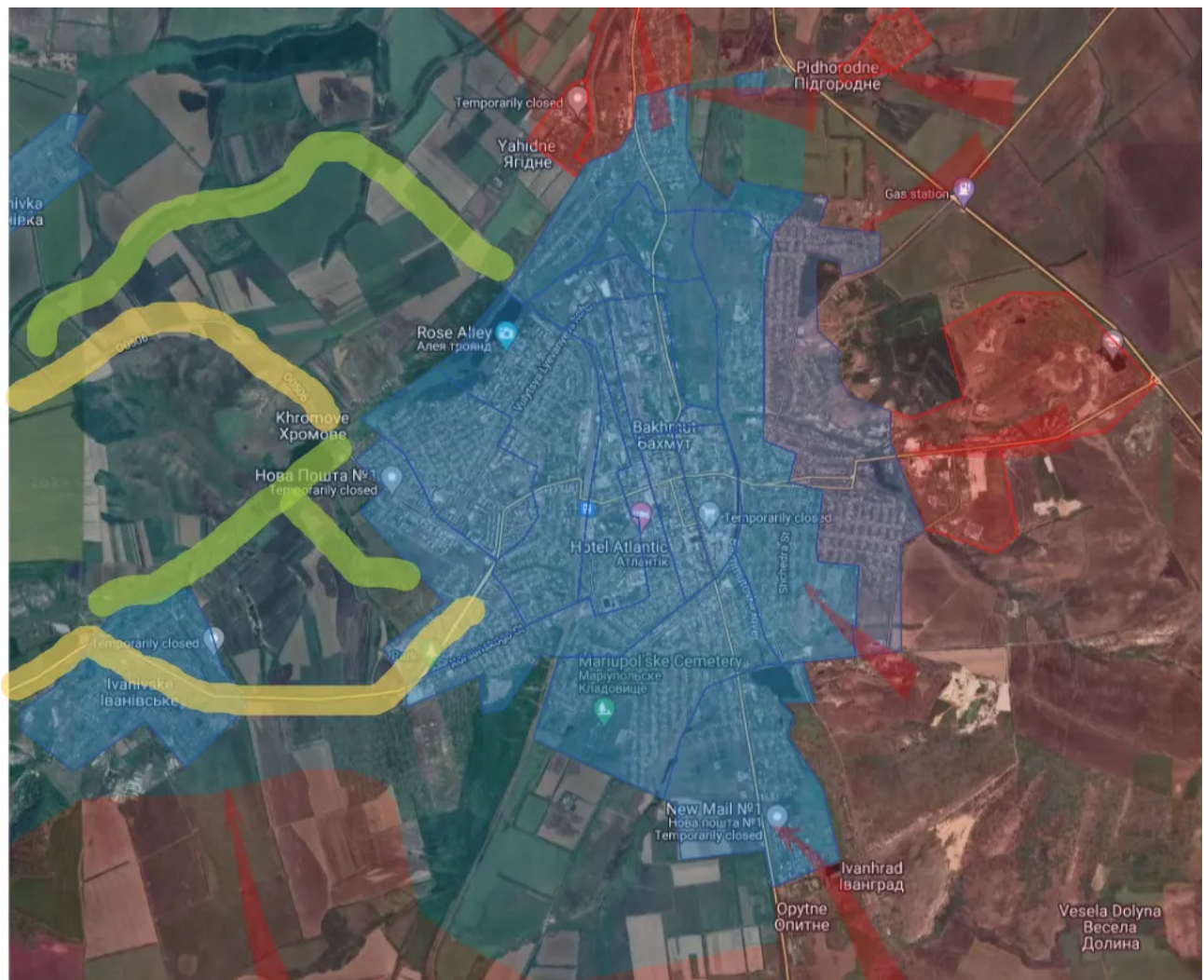
With elections potentially coming up, and with other key inflection points for Ukraine’s support—like the situation in the U.S. House of Reps, and whether new aid will be decided on, etc.—this is all an extremely critical time for Ukraine. Perception management is at its absolute highest and Ukraine cannot risk even the slightest further degradation of its perception.

Another loss will come as a major blow that will demonstrate to Western audiences that it’s no longer worth it to financially support Ukraine because any long-hoped-for victory is simply impossible at this point.

That’s why I believe the fall of Avdeevka could be a major unraveling blow that will dictate the entire next phase of the SMO, potentially to a catastrophic bent for Ukraine in general.

And the Ukrainian leadership recognizes this, which is why there are repeated reports of Zelensky going 'all out' in sending reinforcements there. One report said that the Avdeevka garrison is to be immediately ballooned from around 8-10k men to 30k+. That would be entering Bakhmut levels of troop commitments. But the problem is, the AFU is already in a far more perilous situation here than they were in Bakhmut.

The reason is Bakhmut had two solid MSR, represented in yellow below:



With a few more decent secondary routes in green.

And it took Russian forces a long time before they could get reliable fire control on either of those. But Avdeevka with its single reliable MSR is already in a far more troubled state than even Bakhmut was toward its last month, which is why Avdeevka much more closely resembles Debaltseve, which didn't last long.

I do think Avdeevka can last a lot longer simply owing to the way it's fortified and undergirded with subterranean structures, but it will still end up turning into a terrible bloodbath for the AFU.

A last frontline report which emphasizes some of these logistical issues, and how Russian logistics lines are far shorter and more manageable:

In addition to the thick fog, rain continues for the second day, which will certainly add difficulty to both sides, as the positions are flooded with water, and most importantly, the dirt roads become muddy.

The latter is a much more significant problem for the enemy than for us, for a simple reason - the transport arm of ammunition and fuel and lubricants for our advancing group is much shorter, and, most importantly, safer than that of the enemy.

Our troops take advantage of the enemy's difficulties and continue to systematically knock out the enemy's materiel and manpower. Units in the railway area are especially captured, and the enemy's rear areas are not deprived of attention, forcing the latter to keep reserves at a greater distance from the LBS.

The enemy has a certain margin of safety, but it is not infinite, and

resources are burning faster than they can replenish them, at a certain point the consequences will affect the overall situation, we suspect that this will happen quite abruptly.

Elsewhere, Russia has been advancing pretty much on every front. This includes taking back territory in Zaporozhye, such as Verbove and Priyutne just east of there. The only one area where the AFU continues to have some minor success anymore is in the Klescheyevka area south of Bakhmut, particularly in recent days in Andreevka, where they've crossed the railroad tracks.

However, this is made up for by Russian counter-advances in the northwest of Bakhmut, Berkhovka area.

Advances were reported in the Kupyansk direction by Ukrainian accounts themselves:



Rumors continue to swirl of huge Ukrainian losses in the general Kharkov-Kupyansk region, at least 60-100 dead per day. That may not sound like a lot, but that's just for that one front. If you add Avdeevka, Rabotino, Bakhmut, and Kherson, it's likely 300-500 per day once again, at the minimum, if not more.

💣!! 💣They've disappeared

The Kupyansk direction is rapidly becoming a "black hole" for Ukrainian soldiers. Once there, after some time they stop contacting each other - and then their relatives start bombarding the

command of their units with questions.

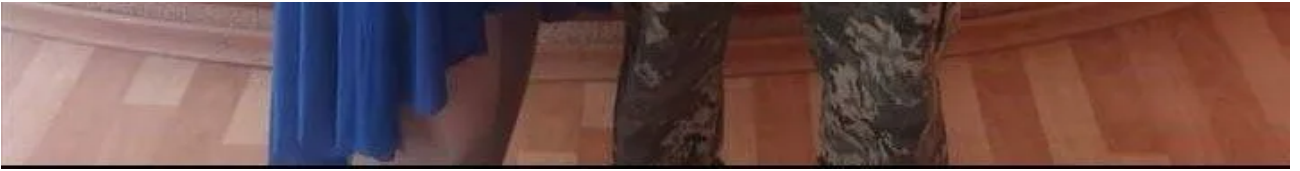
The command does not report their deaths - their relatives simply receive the dry wording "missing in action". 💣!! 💣

Everyday there are new posts on internal Ukrainian boards about missing relatives in this direction:

Galya Kereksha • Tue at 13: 50 • 🌐

Please help me find Kerekesh's husband
Victor last connection 16.10.2023...14
brigade direction, Kupyansky district village
Sinkovka any information is very important
my number is 0962589436





← Post



+N.E.O.N|+
@DimonchikIR

Follow

Remember we raised money for a wheelbarrow for the 82nd Brigade, and for Starling? For my godson !!!

They thanked us and @NAFO for their help, shot a video for us with gratitude!!!!

Their group is no longer alive !!
They almost all died yesterday !!!

And now I 'm breaking down all the doors to have their bodies evacuated !!!!

These children are no longer alive !!!

They 're on the shield !!!

We will avenge each of them !!! We will take revenge very cruelly !!! I personally will tear your throats of rusotvari . with mv

teeth !!!! And believe me , I am trained in this !

Post your reply



← Post

with my teeth !!!! And believe me , I am trained in this !

I carried this kid in my arms !!!!

And you Khazar bastards killed them !!!

Until my last breath , I will find
you and eliminate you !!! Slaves
are weak - willed !!!!

Sleep well , brothers !! For each of
your lives , I 'll take a hundred !!!!

And the only thing that makes me
vomit!! Why not me ????? Why are you our children
dying !!!!

Out of 30 people , there are five left !!!!

Rusnya ~~... ..~~ , pasha
goals!

Go to sleep with this and wake up! We
will eliminate all of you absolutely !!!

Fortress carrion !!!!!

Post your reply



In fact there've been more and more citizen's protests. I posted a video of one last time, now there's another one in Odessa from family members and wives of soldiers who haven't gotten a rotation since the start of the SMO:





The rotation problem is confirmed by a new post from the Avdeevka garrison of the AFU. They congratulate their soldiers on their heroism, but in doing so acknowledge they haven't been rotated once since the beginning of the war:

3/4

There are no words to describe the heroism of the soldiers of the 110th mechanized brigade. This brigade has been defending Avdiivka without any rotations at all for one and a half years! A significant number of soldiers constantly live in their positions - without any exits from Avdiivka, which is fired at from all types of weapons. More so, they live and continuously fight in the positions. It is even hard to imagine. Since September 30, the 110th brigade and attached units have been fighting continuously. These men of steel fight in conditions that no army in the world can withstand, the Russians simply run away in such conditions.

Our soldiers are tired from long battles. The Russians also hope that the Ukrainians will get tired of killing them. The defenders of Avdiivka need to be replenished and strengthened in order to be able to gradually give rest to the soldiers during 23 days of continuous combat.

It's gotten so bad that today the NYTimes was even forced to finally [cover it with an article](#):

Their Sons Went Missing Fighting for Ukraine. They Want Answers.

In a rare show of public criticism in wartime, families of missing Ukrainian soldiers are pressing the government for information on their status.

Share full article



<https://archive.ph/jEP9E>

This piece revolves around the mass amounts of missing soldiers from the 81st brigade, which happens to be fighting in Belgorovka, right next to Kremennaya, and is therefore part of the larger Kharkov-Kupyansk front.

The one interesting admission in the article is what appears to be the first ever, public and Western acknowledgment of the vast amount of Ukrainian prisoners that Russia holds:

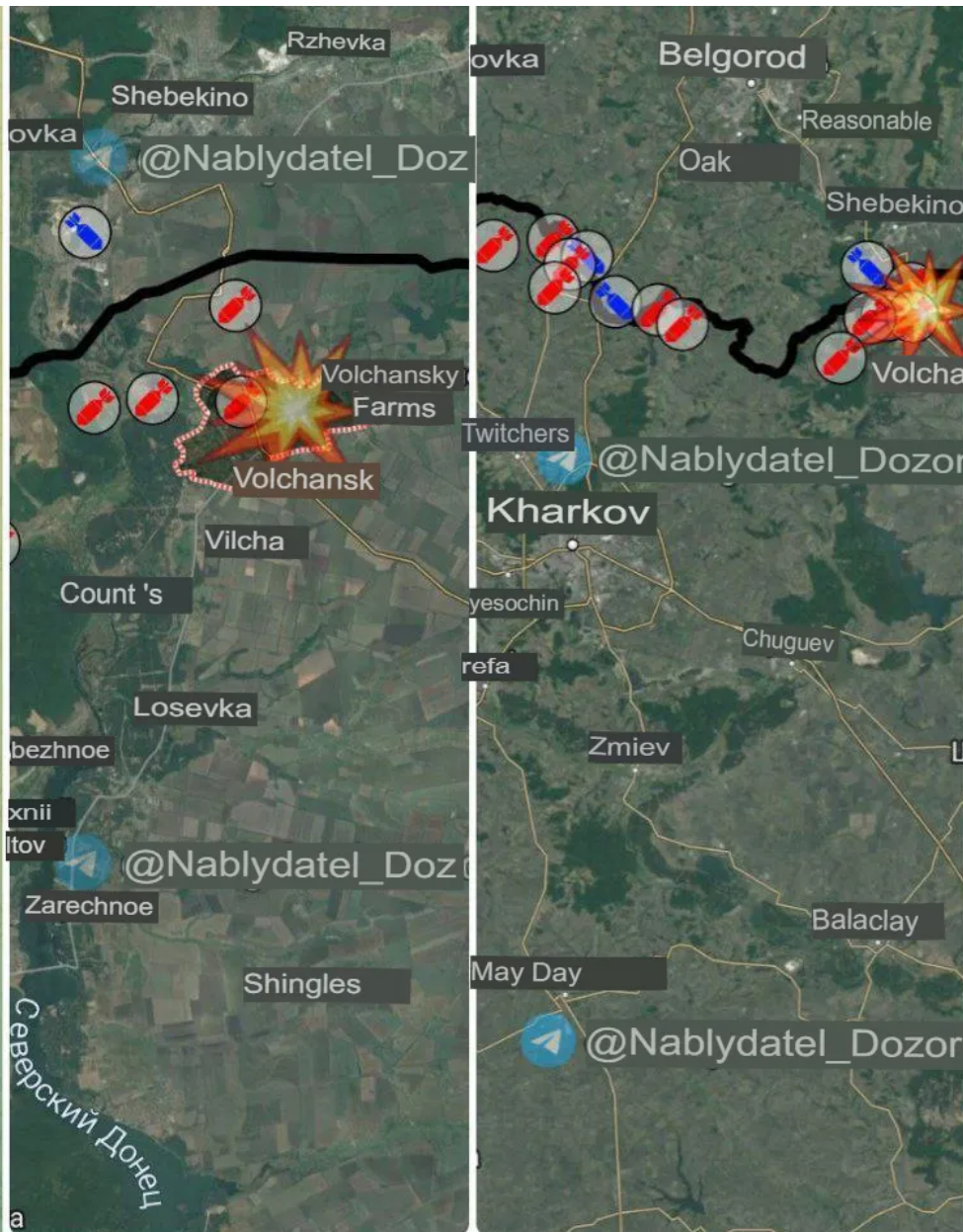
About 10,000 Ukrainians are being held by Russia as prisoners of war, according to human rights organizations, yet their names are unknown. Russia has refused to provide complete records of those being held. But to the frustration of many families, Ukraine also has declined to release the names of those it has confirmed are being held in Russian detention as it tries to negotiate prisoner exchanges.

Recall that when Russian sources reported figures from 10-19k, pro-Ukrainian accounts laughed at the “absurdity” of it while simultaneously, several Ukrainian officials released videos admitting that the amount of Russian POWs they hold is so low as to preclude proper exchanges from even being made, with Ukraine often requesting 20 of theirs for a single Russian soldier.

Now we have the first ever “official” and authoritative Western confirmation that Russia holds over 10,000. Recall what I wrote about POW ratios; they scale to other types of casualties/losses. So now that we have confirmation of the vast disparity of POWs between Russia-Ukraine, we can safely conclude that the KIA/casualty disparities are likewise massive.

A last note:

There continue to be reports of clashes in the north of Kharkov. If you’ll recall, Volchansk is the exact route I gave in the last writeup as a potential for Russian incursion for a second front. Now Russia has been shelling it:



Kharkiv region.
Volchansk is under [redacted]
fire previously from artillery.

[@rezervsvo](#)

- Border areas be in shelter

Such 'softening up' shelling often precedes some type of advance or incursion. It's interesting given all the rumors of mass Russian troop buildups there. I don't think we should expect anything quite yet, but it continues to be slightly eyebrow-raising, and we'll have to keep a close watch on that sector.

As of this writing, Israel appears to be launching their Gaza invasion, though I suspect it's going to be another "raid" rather than full blown invasion. The reason is there's clearly still a lot of trepidation and uncertainty from Israel's camp and they appear to be inclined to 'test the waters' first with a few recon-by-fire type maneuvers into the outskirts of Gaza, just to see if they can cope and how many losses they suffer.

As of now there are various reports that Israeli troops have already suffered casualties—I've seen at least one photo of a flipped Merkava tank, but nothing convincing as of yet.

What is clear however is that they are launching the operation from the north, in the direction of the Erez crossing with the clear intention of driving all Gaza inhabitants southward. This is once more backed by a trove of evidence, not least of which are their own statements.

Here the Israeli minister Israel Katz states "we're moving them south":

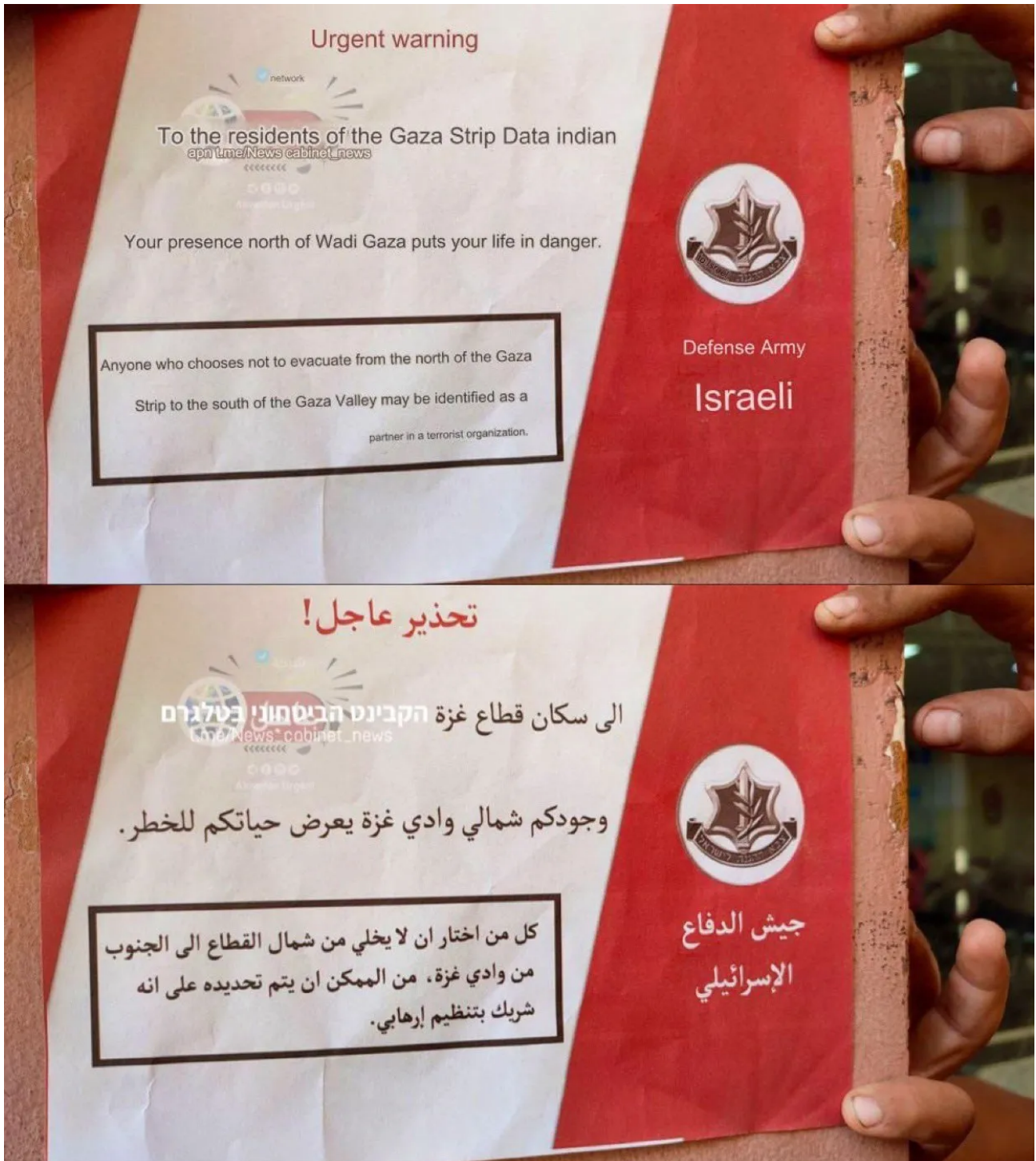


And Israel began to distribute leaflets all over northern Gaza that states the following:

PSIL 🇮🇱!!Israel dropped leaflets over Northern Gaza:

"Urgent Warning!"

Anyone who chooses not to Evacuate from the North of the Gaza Strip to the South of the Gaza Strip may be Identified as a Partner in a Terrorist Organization.”



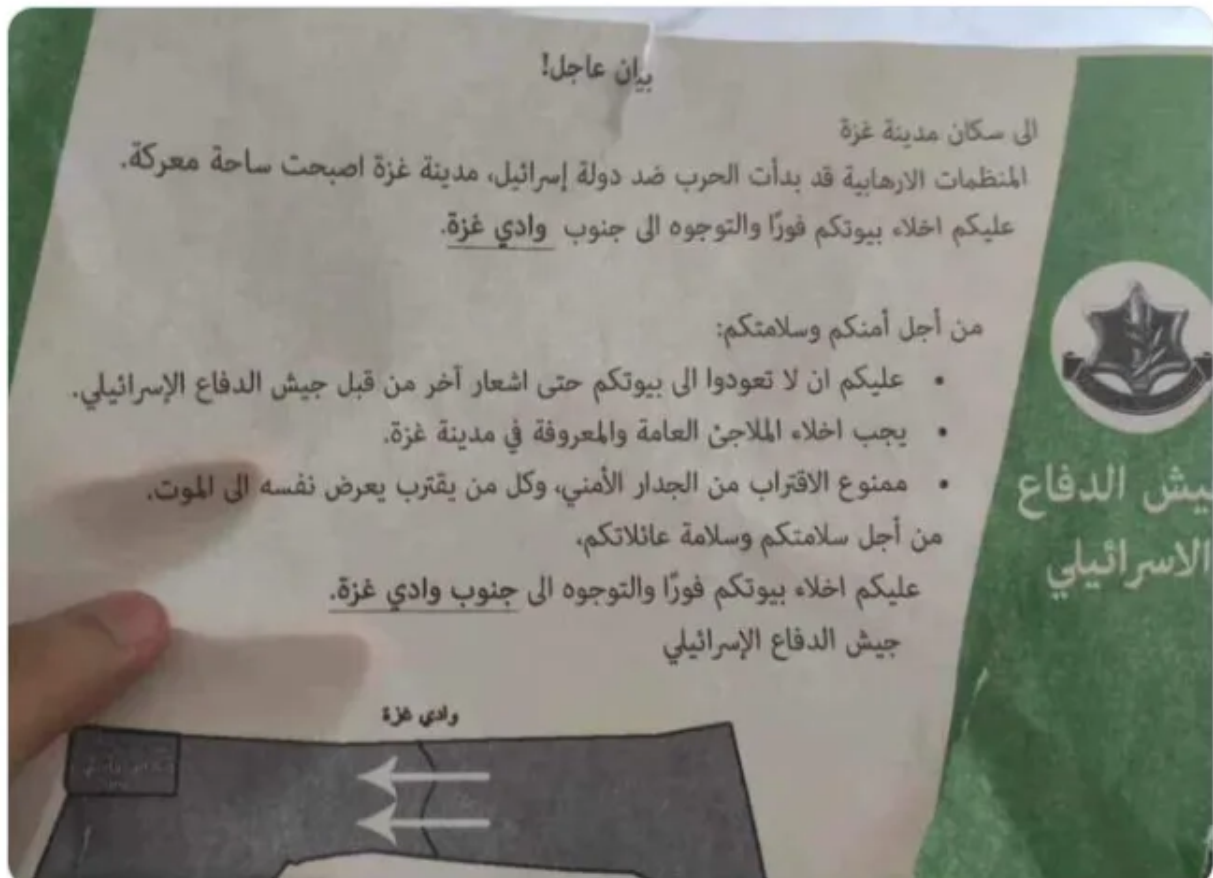


Sameh Habeeb

@Samehahabeeb · Follow



Flyers dropped from Israeli warplanes, Just received this from #Gaza. #Israel literally asked more than 1.1 million from north and central #Gaza city to leave towards the south. This is illegal and absurd. People of Gaza refuse to leave. #GazaUnderAttack #StopIsraeliAggression... Show more



In short: if you don't evacuate, you are considered a "terrorist" and can be killed without any accountability or remorse, be you man, woman, or child.

Palestinians are well aware of this:



Sprinter ✓
@Sprinter99800

...

Ismail Haniyeh: We are at the beginning of political victory

◆ Head of the office of the Hamas movement: We warned everyone that if this war continues, it may lead to a regional war.

The goal of the Zionist regime is to move the residents of Gaza to Egypt and the residents of the West Bank to Jordan.



4:59 PM · Oct 19, 2023 · 16.2K Views

Kit Klarenberg popped the lid on the plan days ago with his new exposé on the [Israeli thinktank-generated plan](#) to completely cleanse Gaza:

Zionist think tank publishes blueprint for Palestinian genocide

 KIT KLARENBERG · OCTOBER 24, 2023

In a [white paper](#) released over a week after the Hamas-led surprise attack on Israeli military bases and kibbutzes, *The Institute for National Security and Zionist Strategy* outlined “a plan for resettlement and final rehabilitation in Egypt of the entire population of Gaza,” based on the “unique and rare opportunity to evacuate the entire Gaza Strip” that Israel’s latest assault on the besieged coastal enclave provided.

I recommend [Kit's article](#) for anyone interested in the details of these ongoing and long-planned devices.

For the time being though, the situation continues to highlight major Western munitions deficiencies, putting Ukraine's calamitous future in relief.

New reports cast a very troubled light on all the supposed massive arms manufacturing ramp-ups for Ukraine.

First came the huge gut-punching [Reuters report](#) that NATO prices for critical 155mm shells manufacturing has skyrocketed from 2000 Euros to a massive 8000:

"The manufacturer will not get rich because of the printers that they make, but because of the ink," Bauer told Reuters in an interview published on Tuesday.

"If you make an artillery round that only fits in the gun that you make, then you force the users to buy your ammunition."

According to Bauer, the price for one artillery shell has gone up to 8,000 euros (\$8,489.60) from 2,000 euros before Russia's attack on Ukraine.

Western countries have been scrambling to boost the output of artillery shells as Kyiv, firing thousands of rounds a day, has been burning through supplies much faster than the allies can produce them.

While there is a NATO standard for artillery ammunition, its implementation is voluntary and a lack of adherence by various countries has led to a fragmentation of the market and hampered the flow of supplies.

Followed by Germany's Rheinmetall's announcement that their own production costs have skyrocketed for the same shell:

How does German manufacturer Rheinmetall profit off the Ukraine conflict?

▼ Kiev needs some 1.5 million artillery shells annually, according to Europe's largest arms maker, Rheinmetall.

▼ Rheinmetall has raised the price of 155 mm caliber ammunition from €2,000 (\$2,120) to €3,600 (\$3,816) per piece, according to the newspaper, Welt Am Sonntag.

▼ Rheinmetall has received an additional order for more artillery shells for Ukraine. The framework agreement for 155mm artillery ammunition concluded in July runs until 2029 and represents a gross potential order volume of around €1.2 billion.

▼ German arms manufacturer Rheinmetall announced it had set up a joint venture with Ukraine.

Then came Ukrainian reports that Europe is failing to even come close to their commitment of shell deliveries to Ukraine. The goal was 1 million shells delivered in one year's time, and reports state that after 6 months, they have only delivered 30% of the total thus far, which would mean they're on track to deliver 60% total.

Now let's crunch some numbers. 60% total of 1M would be 600,000. However, keep in mind I personally believe their pace will drop even further and ultimately deliver 40-50%, but let's go with 60% for now. The previous Rheinmetall snippet said Ukraine requires 1.5M shells per year. $1,500,000 / 365 = \sim 4,100$ shells per day. Thus, that's likely a very bare minimum as Ukraine would prefer to shoot far more than that—at least double if not triple.

So we know EU is on pace to deliver 600,000 total. The U.S. we know for a fact has currently ramped up its production to 40k shells per month, which is 480,000 per year. Together this would give Ukraine 1,080,000 shells per year, which would allow them to fire $1,080,000 / 365 = \sim 3,000$ per day.

Recall that the lowest *Western* estimates for Russian production is 2M per year, though realistically they are at 3.5 - 4.5M per year owing to the fact we have paperwork showing Russia was confidently producing 2.5M even in lax interwar years.

But the biggest kicker is that it's now confirmed 100% that Russia is receiving 152mm shells from North Korea as part of the deal inked recently, as North Korean shells have already been recorded in photos on the Russian front. And the amount said to be purchased is upwards of 10M.

We can only assume that North Korea will continue manufacturing them at a given pace, and Russia will continue ordering more even past the 10M mark. North Korea is a manufacturing powerhouse when it comes to munitions like that and can likely do at least 50-100k per month if not much, much more. Which means that if Russia manufactures 3-4M per year, North Korea can likely add at least another 2-3M if not more yearly on top of that—and that's not counting the 10M already in storage that's now being transported to Russia on trains.

The Ukrainian article I just quoted gives us an inkling on that when it quotes Lithuania's foreign minister with the statement that North Korea has *already* provided more shells to Russia in just the past 2 or 3 months than the EU has given Ukraine in the past 6 months:

Lithuania's Foreign Minister says North Korea has given more ammunition to Russia than EU to Ukraine

EUROPEAN PRAVDA, UKRAINSKA PRAVDA — THURSDAY, 26 OCTOBER 2023, 16:18

Quote: "The EU promised Ukraine 1,000,000 artillery rounds. So far, we have delivered only 300,000. Meanwhile, North Korea delivered 350,000 to Russia."

This was also [covered by Bloomberg](#) two days ago:

Politics

EU Is Falling Short on Pledge to Supply Ukraine With Ammunition

- Kyiv had been promised 1 million artillery rounds by March
- The US has urged EU to ramp up its efforts to supply Ukraine



The European Union is falling behind on plans to provide Ukraine with a million artillery shells by March, people familiar with the matter said, potentially giving Russian forces an advantage in the supply of ammunition.

Under plans made earlier this year, the EU pledged to provide the artillery ammunition rounds to Ukraine over a 12-month period, first by dipping into existing stocks and then through joint procurement contracts and increasing industrial capacity.

With more than half of that time now gone, the initiative has so far delivered about 30% of the target and, based on the volume of contracts signed to date, risks missing its goal, according to people and documents seen by Bloomberg News. Several member states have privately asked the bloc's foreign policy arm to extend their deadline, the people added.

Shoigu visited North Korea in the end of July with a Russian military delegation, which is when the final deals were said to have been ironed out and inked. That means we can say the pace of deliveries appears to be roughly 350k shells per 2-3 months.



The results of the North Korean leader's visit to Russia are emerging in the public sphere. Shells produced by the DPRK were seen in service with Russian artillerymen.

Ammunition supplies aren't everything?

Railway traffic between the Russian Federation and the DPRK has intensified significantly. An unprecedented number of cars have accumulated at the Tumangan station - more than 70 units, which exceeds the pre-pandemic level. But Western observers from CSIS noted one feature - the trains are covered with tarpaulin. Military equipment and ammunition are often camouflaged in this way.

At the same time, there is no corresponding activity at the Russian Khasan facility - supplies come from the DPRK to Russia. Insiders report that in the next few months, eleven new rapid assembly plants will be launched in the Russian Federation together with the DPRK. Additional capacity will be used to produce in-demand shells - 155 mm ammunition, missiles for MLRS and howitzers for self-propelled guns.

Furthermore, Shoigu recently visited Russia's 152mm shell manufacturing enterprises just last week and announced a new regimen of lowering various thresholds in order to vastly increase production:



Shoigu said that military-industrial complex enterprises were allowed to use all available reserves and mobilization capacities to increase the production of artillery systems. In the interests of production growth, the procedures for concluding contracts with enterprises have been simplified, the requirements for components have been lowered and the testing time has been shortened while maintaining the required quality.

But this isn't even the biggest gut punch of all yet. This week came a report from Matt Stoller which sheds a very pessimistic light on U.S.'s manufacturing capabilities and any

hope that they could actually successfully “ramp up” the shell production:



BIG by Matt Stoller

Why America Is Out of Ammunition

Welcome to BIG, a newsletter on the politics of monopoly power. If you're already signed up, great! If you'd like to sign up and receive issues over email, you can do so here. Today, as the U.S. is drawn into wars in Israel and Ukraine, as well as the defense of now-peaceful Taiwan, I'm writing about war. Not the policy choices, or whether U.S. military ...

Read more

8 days ago · 408 likes · 36 comments · Matt Stoller

I recommend for everyone to read the very detailed piece. However, I'll pull from this [good Twitter thread](#) on the article which summarizes the best points:

No matter how bad you might think the situation is with the United States and key munitions for the US, Israel and Ukraine... it is actually worse. Much worse. Stock valuations trump national defense. It isn't even close. And it is not being fixed.

As explored in the linked analysis - which is very much worth reading - in the fat and happy days since the fall of the Soviet Union, the Pentagon and US government have allowed Wall Street and Wall Street practices to take over defense manufacturing.

And why not? It isn't as if the US was ever going to fight a peer war again, right? In the meantime, money talks. Wall Street does not maximize wealth by maximizing economic output, or quality, or innovation, or any of those quaint factors. The real money is made through oligopolies and "moat" construction. Limit competition. Get down to one or two big players. Have a "moat" which prevents the entry of new competitors. Then gouge the customers to create a high and growing cash flow, that never stops, because of lack of competition

Unfortunately, if the customer is US National Security, that means we are all in very bad shape - as we are. The Pentagon is talking about increasing arms production. They haven't yet, not even 1.5 years after the invasion of Ukraine. It's a complicated process - because genuinely boosting national security conflicts with cash flow maximization for Wall Street. High profits

mean ruthless cost cutting. Shut down all production lines that don't have a current contract. Make no effort to maintain machinery or labor - that would waste money.

Through monopoly or oligopoly pricing make the US pay through the nose if any more ammunition or vital missiles are to be made. And a non-trivial point - the entire US defense industry is in the hands of multinational oligopolies. They have defense interests on multiple continents. They have to consider all factors. And the Pentagon and Congress, the MIC, have absolutely no problem with this situation. The MIC was never set up to maximize national security - what a quaint and naive idea! If you've been doing this your whole career - what's the big rush to change things?

The world is on fire. That is irrelevant from a Wall Street and MIC viewpoint. It simply doesn't matter - until the entire world changes because of it.

In short, the U.S. economy has been parasitized by Wall Street, and it's nearly impossible to be competitive or get anything done anymore, between the vast financializations and endless capitalizations of everything, and the impenetrable bureaucracies that have sprouted up as guardians of this esoteric science.

Ironically enough, several MSM majors have noted this week that Biden's team is looking for a big 'rebrand' on Ukraine aid, particularly now that the House has gotten a new Speaker and things could potentially move forward prior to end of the year shut downs.

POLITICO

WHITE HOUSE

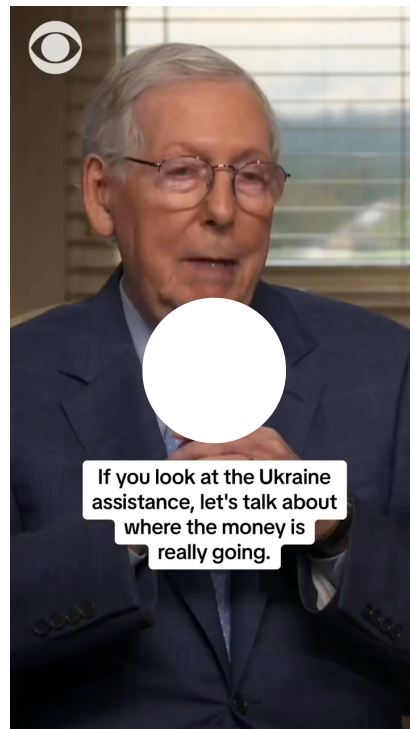
The White House is losing the messaging war on Ukraine. Now it's changing the message.

The president's team is privately urging lawmakers to focus on the jobs that can be created by money spent on the war.

<https://www.politico.com/news/2023/10/25/biden-ukraine-aid-messaging-00123466>

Read the sub-headline above. The new narrative shift will be to push the angle that continuing the Ukraine war will be a boost to U.S. jobs, manufacturing, and the economy as a whole.

And like clockwork, as soon as this narrative shift was sussed out, the talking heads on Capitol Hill have already begun monotoning it out, like Mitch the Glitch McConnell here:



The Politico article from yesterday writes:

The White House has been quietly urging lawmakers in both parties to sell the war efforts abroad as a potential economic boom at home.

Aides have been distributing talking points to Democrats and Republicans who have been supportive of continued efforts to fund Ukraine's resistance to make the case that doing so is good for American jobs, according to five White House aides and lawmakers familiar with the effort and granted anonymity to speak freely.

All in all, as you can see, the prospects for Ukraine look quite dim in this aspect, while those of Russia look increasingly positive. However, we must recall that even at the lowest end of the estimates, Ukraine will never completely “run dry” and will still have several thousand shells to fire on a daily basis.

Moving on to the final section, and segueing from the topic of shells, one thing that needs to be noted is there has been an absolute unprecedented spate of Ukrainian artillery system destructions. Last week, in a span of mere days there were something like 5-7 Polish Krabs, 7-10 M777s, and 4-5 French Caesars destroyed, as well as various other systems like a Czech Dana and many Soviet systems. Most of these were even verified on video.

I'm not sure what changed exactly but Ukraine's artillery is quickly going extinct at this pace, and it's something you will never hear from the Ukrainian side because one of their most sacred narratives is that they're "winning the artillery war".

One potential culprit is that we've been seeing a new variant of the Lancet drone recently—not only ones that now have IR capabilities and strike at night—but also a new green AI targeting reticle that clearly appears to be tracking and identifying targets automatically.



This is seen on a number of new videos like the following, where it destroys a Wisent engineering vehicle:



The point is that we've learned long ago that Lancets were developing an AI capability but there was no real hard data on how widespread those more advanced options/variants were. And while there is no real proof yet, we can only speculate that perhaps this is enabling the automated identification of more hidden artillery systems which is causing a huge uptick in Russia's counter-battery dominance against the AFU.

Meanwhile, the HIMARS has disappeared again, as has the Storm Shadow/Scalp. ATACMS has been found in Lugansk, with Russia claiming for the first time having destroyed 2 of them, but without any evidence. The shell that was found appears to be the element which separates to release the cluster munitions.

Ukrainian accounts claim that the ATACMS hit several S-400 systems in Lugansk without any evidence whatsoever. In fact, a well-respected NAFO expert account—one of the ones that has been exasperated by the nonstop fakes and exaggerations from his own compatriots—refuted it by stating there's no proof for these claims:



Radio & Nukes 🇺🇦 🟢 @Ham... · 9h · ⋮

Replying to @JayinKyiv and @ned_christie

FWIW we have geolocated the missile body's landing location. If this hit an S-300/400 site we have no evidence of that yet. This is very preliminary we are still investigating.



After every other hit or near hit on Russian systems of any kind a satellite photo BDA is typically widely dispersed. In this case there's nothing of the sort. In actuality, it's said that the "S-400 destruction" claim was made by the discredited pro-Ukrainian VChK-OGPU Telegram channel, which is known as the sort of Perez Hilton or "TMZ" of the Ukraine conflict, as it posts nothing but absurd rumors, hearsay, etc., which can on rare occasion turn out true.

Ultimately, it's a fairly meager showing for the vaunted ATACMS thus far. Already several weeks, or even months, in Ukraine, and they've yet to live up to any "game changer" status. In fact [a new article](#) by the infamous Galeotti decries the idea of the ATACMS being some sort of wunderwaffe:



Mark Galeotti

ATACMS missiles alone won't change the game in Ukraine

📅 21 October 2023, 6:30am

In the article he even concedes that most of the ATACMS were shot down in the Berdiansk attack:

However, this is not the fabled ‘game changing moment’ in this war. As is, most of the ATACMS appear to have been intercepted, decoyed or otherwise not hit the target: only three definitely got through. In practice, although the Russians have proven surprisingly poor at pre-emptive preparation – knowing that Ukraine was likely to be receiving these missiles, optimised for hitting airfields, why were they still parking helicopters out in the open? – they have demonstrated a rough and ready capacity to adapt to each new capability Kyiv acquires, from long-range missiles to naval drones.

He concludes that the war will be a hard, bloody slog that will depend on munitions and consumables manufacturing—exactly where the West has already failed.

Now that the ATACMS has proved mediocre, they’re already beginning to talk about the “next big thing”, in this case the U.S.’s vaunted stealth JASSM cruise missile:

ATACMS WAR IN UKRAINE KERCH BRIDGE

OPINION: Send JASSMs Air-Launch Cruise Missiles to Ukraine

The author, a renowned aerospace and nuclear engineer, believes it would just take few JASSMs to destroy the Kerch Strait Bridge and isolate the Crimea Peninsula.



By Robert Zubrin

October 22, 2023, 9:46 am | Comments (2)



“It would take just a few JASSMs to destroy the Kerch Bridge” the article says. Sure, *this one* will DEFINITELY do the trick!

Lockheed, it was said, could one day produce “500 JASSMs per year. (if it ramped up production)” That’s a whopping 40 per month, or 10 per week, enough to fire about one per day. Game changing.

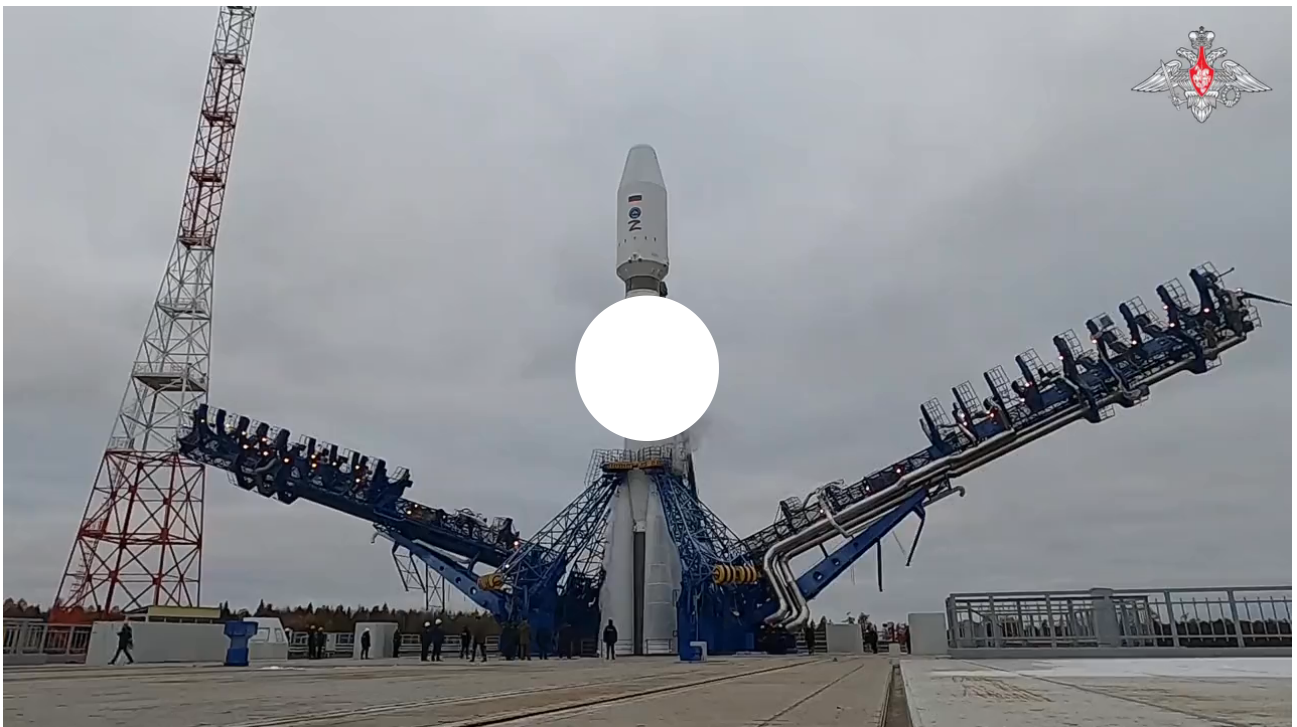
The real game changer are Russia’s numerous, mass-produceable weapons. The FAB-500M62 UMPK ‘Orthodox JDAM’ glide-bomb for instance, has now for the first time unveiled a new capability: terminal TV-guidance:



Another game changer: in light of all the Ukrainian artillery exterminations going on, Russia has now fully rolled out and began supplying troops with its latest 2S43 Malva 152mm self-propelled howitzer, a sort of analog of the French Caesar:



Not to mention that Russia has just launched a new set of military satellites from the Plesetsk cosmodrome near Arkhangelsk:



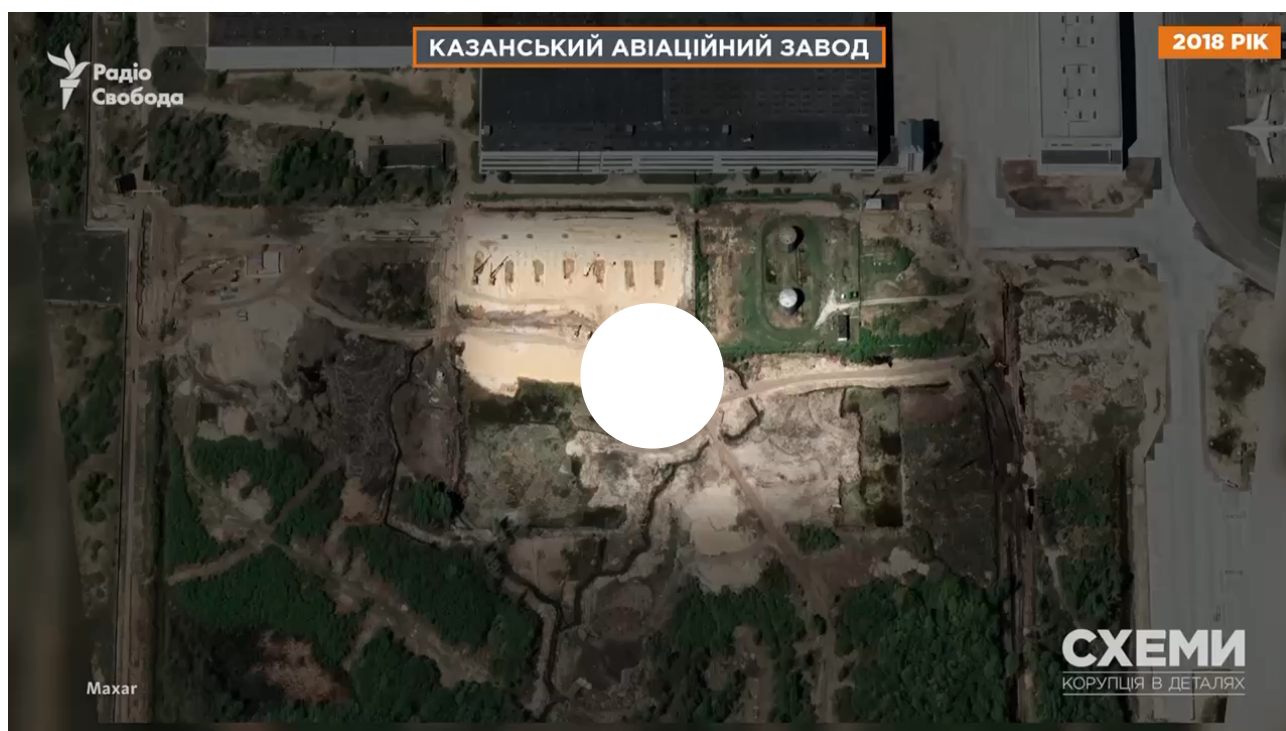
⚡ The Aerospace Forces launched the Soyuz-2.1b launch vehicle from the Plesetsk cosmodrome. On October 27, 2023, from the Plesetsk cosmodrome (Arkhangelsk region), the combat crew of the Space Forces of the Aerospace Forces launched the Soyuz-2.1b medium-class launch vehicle. 2.1b" with spacecraft in the interests of the Russian Ministry of Defense.

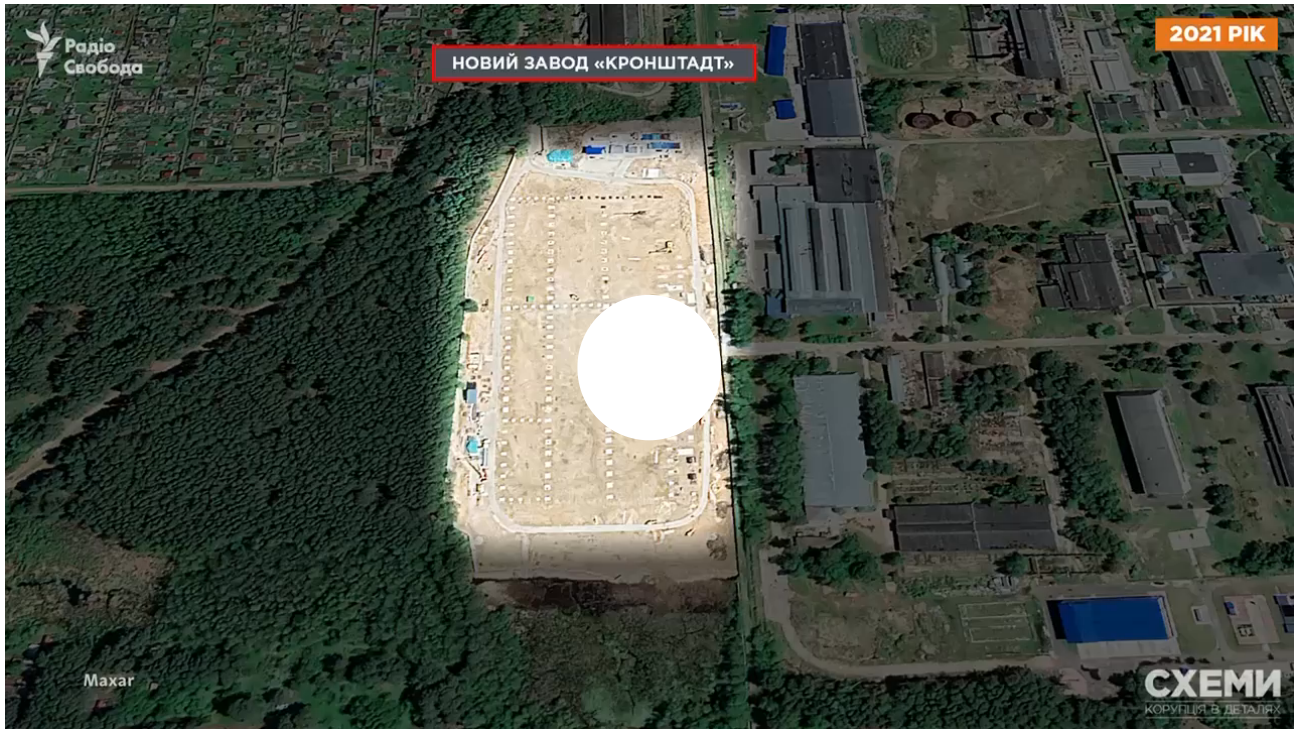
On top of all this advancement and production upscaling, Radio Liberty has published a “troubling” report detailing how Russia is opening up a slew of huge new factory complexes across the country for the production of weaponry:

CIA Radio Liberty publishes satellite images of military factories under construction and expanding in Russia

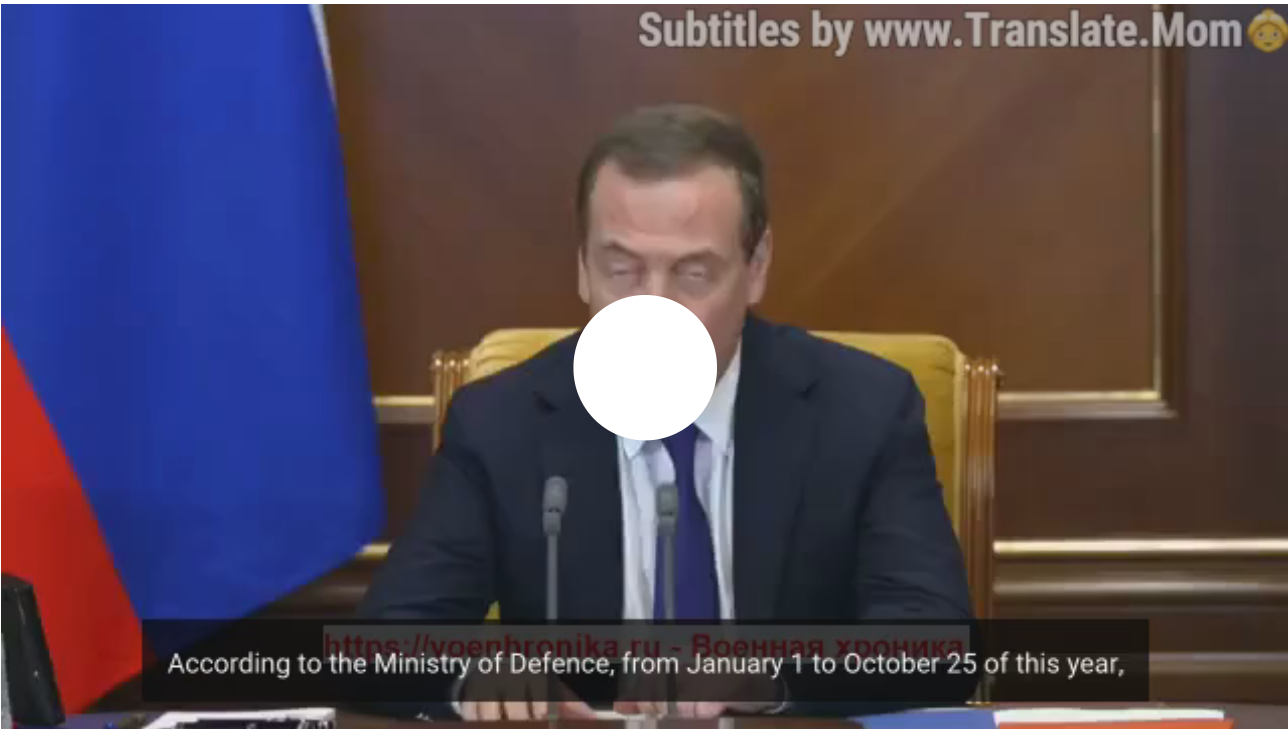
The Ukrainian branch of an enemy resource published material based on satellite reconnaissance data.

New infrastructure is being created at factories across the country from the Moscow region to Siberia, including the production and repair of military aircraft, UAVs and missiles.





Lastly, Medvedev gives an update as to Russia’s enlistment figures. We’re now up to 385,000 for the year, of the ~420k goal for the year’s end. 1,600 continue signing up each day, and Medvedev gives further details on the new army corps, divisions, and regiments, etc., to be formed as deterrence against NATO’s recent buildups:



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Yuri Bezmenov  Writes How To Subvert Subversion with ... 9 hrs ago

Can't beat a Friday night with Simplicius and scotch. What happened to Avdeevka after 2015? It is so close to Donetsk on the map, so it is baffling that it has been in Ukrainian hands for this long.

Mitch the glitch is a symbol of the crumbling gerentocracy. Most Americans are sick of the uniparty neocon regime that launders taxpayer money to enrich itself. The era of magical thinking unipolaritt is ending. They are running out of credibility, ammo, money, and men.

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...

2 replies



Cruising Economist Writes Economic Insights For All 9 hrs ago

Hopefully Ukraine's loss of Avdeevka will prevent Kiev's targeted slaughter of innocent civilians in Donetsk with artillery fire, or at least make it more difficult.

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