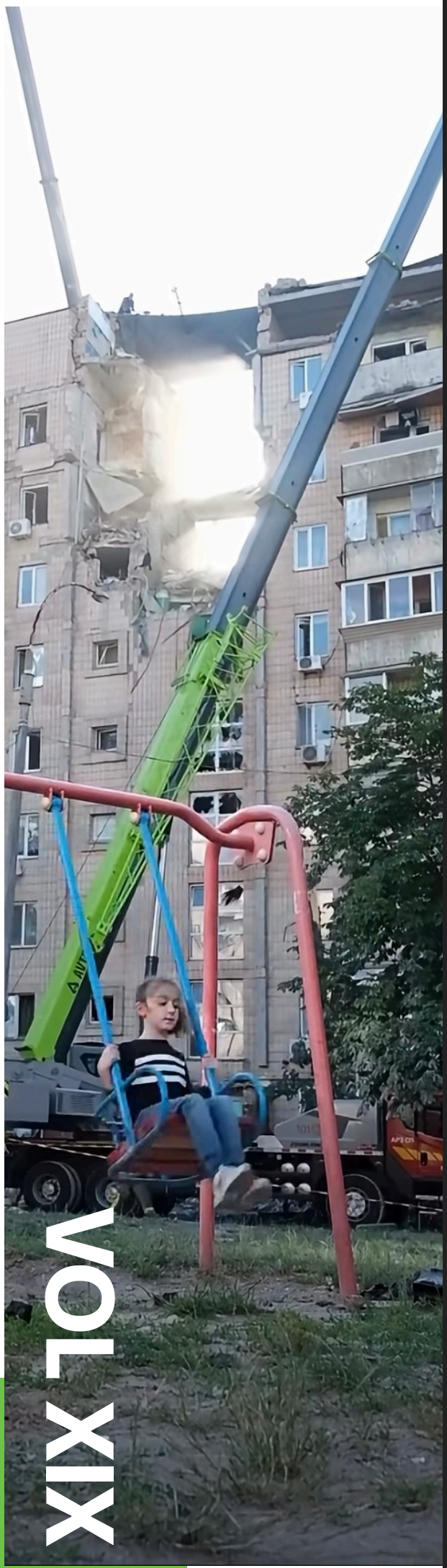


Kyiv Dialogue

KONRAD ADENAUER STIFTUNG

# UKRAINE AIR WAR MONITOR

Analyses for the Protection of Ukrainian Cities and Infrastructure

VOL XIX

IN THIS ISSUE:

CRUISE MISSILE STRIKES SURGE —
BLACK SEA PORTS UNDER ATTACK —
RUSSIA'S NEW STRIKE STRATEGY

**Data and Analysis:**
Marcus Welsch

12 August 2026

# SUMMARY

Russia's air war against Ukraine intensified sharply in July. Ukraine's regions recorded more attack days than ever before.

The total volume of unintercepted explosive charges reached an exceptionally high level in July. Destructive power more than doubled compared with the previous month. Cities and civilian infrastructure were hit on a large scale. At least 377 civilians were killed in Russian attacks in July, and 2,129 were injured.

Russia has significantly changed its *strike composition*. Unlike in previous months, the escalation was no longer driven by a further increase in long-range drone use. The shift to jet-powered long-range drones remains a technological challenge for Ukrainian air defense. What matters now, however, is the massive increase in cruise missile attacks, combined with a persistently high number of ballistic missile attacks.

Such a development is unusual for this time of year. It could indicate that, faced with limited territorial gains and growing Ukrainian air strikes on military and economic targets inside Russia, Moscow is seeking short-term military and psychological effects by expanding its strategic air campaign.

Damage to Ukraine's export infrastructure is especially severe.

Russia may begin its “winter campaign”—intensified air strikes on energy infrastructure—in as early as August. This would undermine Ukraine’s ongoing efforts to strengthen protections for critical infrastructure, while also exploiting the acute shortage of air-defense interceptors.

## KEY FIGURES ON RUSSIAN ATTACKS – JULY 2026

### LAUNCHED LONG-RANGE DRONES

July 2026

**4,861**

PREVIOUS MONTH
5,744
▼ -15%

MONTHLY AVERAGE 2026
5,966

INTERCEPTION RATE
**86.8%**

PREVIOUS MONTH
90.1%

### LAUNCHED CRUISE MISSILES

July 2026

**253**

PREVIOUS MONTH
82
▲ +209%

MONTHLY AVERAGE 2026
105

INTERCEPTION RATE
**68%**

PREVIOUS MONTH
79%

### LAUNCHED BALLISTIC MISSILES

July 2026

**123**

PREVIOUS MONTH
94
▲ +31%

MONTHLY AVERAGE 2026
78

INTERCEPTION RATE
**28%**

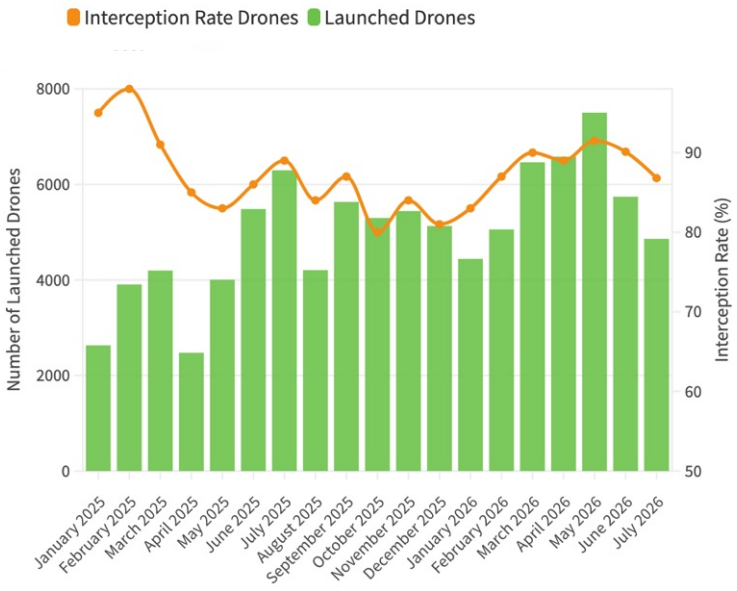
PREVIOUS MONTH
41%

# SITUATION IN JULY

## FEWER DRONES — MORE CRUISE MISSILES

In July, Russia launched 5,237 long-range drones and missiles against civilian targets in Ukraine (previous month: 5,920). This decline in the overall number of strategic air strikes is due to fewer drone attacks. Russia struck civilian targets with 4,861 long-range drones in July (previous month: 5,744, -15%). The number of hits achieved in drone attacks also kept falling (↗ Monitor Vol. XVIII). At the same time, cruise missile use rose sharply, and the number of ballistic missiles employed increased further. This shows that Russia has **adjusted its *strike composition*.**

**Number of launched Russian long-range drones continues to decline in July**




*Data: Perspectus Analytics, KPSZSU*

### SHARP RISE IN LOCATIONS STRUCK

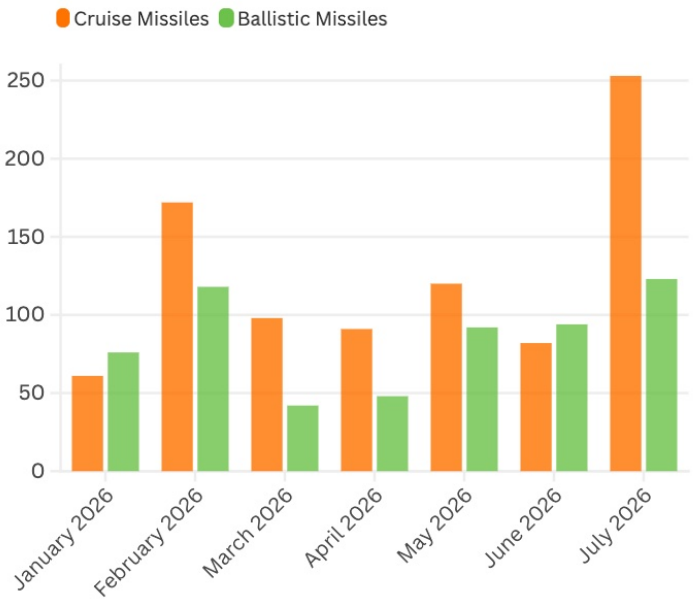
In July, Russia used more cruise missiles than at any point since November 2024: 253 (previous month: 82; 2026 monthly average: 105). Ballistic missile attacks also rose to 123 (previous month: 94; 2026 monthly average: 78). With a combined total of 376 missiles deployed, July marked the highest monthly figure in the Russian air war against Ukraine since 2022 (second-highest: 295 attacks in November 2024). This coincided with a **rapid rise in the number of locations struck** by these missiles, which climbed to 428 in July (June: 353)—the highest figure in over a year.

Factoring in the declining interception rates (28% for ballistic missiles, 68% for cruise missiles) and the explosive payload per missile, the resulting **destructive power doubled within a single month**, reaching roughly 87,000 kg of unintercepted explosive charge —the second-highest figure of the entire air war (record: approximately 94,000 kg in October 2025).

In 2025, drones accounted for around 40% of total destruction; by July 2026, that share had fallen to just 28%. The sharp rise in overall destruction in July is due mainly to **cruise missiles**, which—owing to higher deployment numbers and lower interception rates—struck locations **four times** as often as in previous months. The **greatest destructive power,**

**however, still comes from unintercepted ballistic** missiles. Only in March 2024, so far the most critical month for Ukrainian air defense, was the number of unintercepted ballistic and cruise missiles higher—though back then without the added burden of drones.

**Sharp increase in cruise missile launches in July**




*Data: Perspectus Analytics, KPSZSU, ISW daily reports*

## BALLISTIC MISSILES HARDER TO INTERCEPT

For a long time, the low interception rate of anti-ballistic interceptors was attributed to the modified flight paths—known as suppressed trajectory—of Iskander-M and Kinzhal missiles, designed to make course corrections harder for Patriot systems. Despite these evasive maneuvers, Ukrainian forces still managed to intercept a remarkably high number of missiles (↗ Monitor Vol. XVIII) and to jam Putin's "wonder weapon" (Kinzhal) electronically with the "Lima" EW system, causing it to miss its targets by a wide margin (↗ Monitor Vol. XI). Russia has since steepened the terminal approach considerably, making interception harder. In the short term, destroying production components remains the most effective way to reduce the ballistic missile threat (↗ Donald Hill, 4.8.2026).

## GROWING PROBLEMS IN DRONE DEFENSE

Russia is now using fewer drones against Ukraine and has adjusted its attack pattern. There are still three to four major strike waves per month, marked mainly by heavy use of missiles (↗ Monitor Vol. XVIII), though these waves now involve significantly fewer drones.

After Ukrainian drone defenses steadily improved their interception rates through spring 2026 (↗ Monitor Vol. XVII), the monthly average of intercepted drones fell sharply: from 90.1% in June to 86.8% in July, resulting in 160 additional drone hits on infrastructure.

## USE OF GERAN-4 DRONES ON THE RISE

This is mainly because Russian forces are increasingly deploying faster, newer-generation long-range drones (mostly Geran-4) and hybrid missile-drones (half drone, half cruise missile) of the S8000 Banderol type. Starting with the Geran-3 series, successor models of the Shahed 136 (Geran-2) have been equipped with jet engines instead of two-stroke boxer engines. Reports of regular **Geran-4** use are mounting; the model has been in serial production since January 2026 (↗ HUR, 25.5.2026). First sightings date back to summer 2025 (↗ Kyiv Post, 12.6.2025). Geran-4 drones are roughly **three times faster** than Geran-2 drones and can fly much higher than earlier models. **Electro-optical sensors** with 180-degree camera lenses (sourced from China) enable **better target selection**. Thanks to **autonomous terminal guidance**, Geran-4 drones can also continue tracking their target

even if communication with the operator is lost during the terminal approach (↗ Militarnyi, 1.8.2026). Russian forces have so far deployed the jet-powered models only sporadically. In early August, however, attacks on the Odesa region used almost exclusively Geran-4 models. According to HUR, Russia currently manufactures around 3,000 jet-powered attack drones of the Geran-4 and Geran-5 types per month. Satellite imagery showing construction activity in the special economic zone (SEZ) since May 2026 suggests production capacity will increase further (↗ Militarnyi, 12.8.2026).

## LOW-COST HYBRID MISSILE-DRONE: BANDEROL

The **S8000 Banderol** hybrid missile-drone is powered by a Chinese-made jet turbine. Should Russia manage to produce it in large numbers, it would pose a new and even greater threat to Ukraine: the S8000 Banderol is **more maneuverable than other cruise missiles** and can carry twice the explosive payload of a conventional Russian long-range drone (↗ HUR, 12.5.2025), while costing only a fifth as much as a Russian cruise missile—or a tenth the price of a US Patriot interceptor.

Hybrid missile-drones of this type have so far been used mainly in attacks on the Odesa region and now account for roughly 80% of attacks on port facilities (↗ Bloomberg, 31.7.2026). It remains unclear whether the number of available carrier platforms could limit its use, as the Banderol is air-launched. In the first days of August, Ukrainian air defenses managed to intercept more than 80% of Banderol attacks.

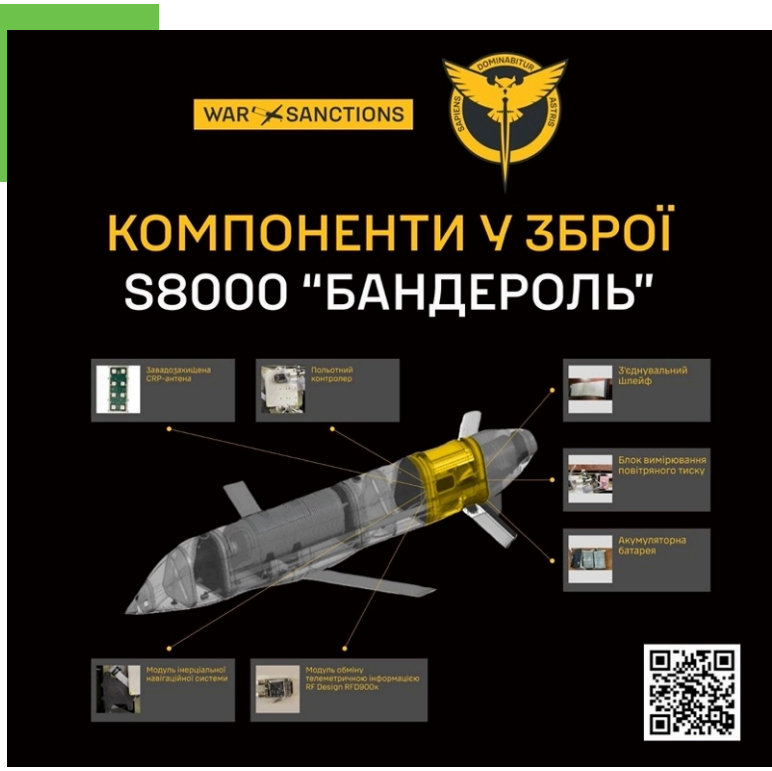



*Image: Visualization of the Russian S8000 Banderol cruise missile (↗ Defence Intelligence of Ukraine, 12.5.2025).*

## PORT DAMAGE WITH CONSEQUENCES FOR EXPORTS

Russia continues to attack gas stations and other infrastructure (Nova Poshta sorting centers, railways) in front-line areas, while increasingly shifting its air strikes toward the Black Sea. This confirms our forecast from early this year (↗ Monitor Vol. XIII) that 2026 would see Russia primarily targeting Ukraine's export base. In July, attacks hit 67 seaport facilities, 35 civilian ships in port, and 22 ships in the maritime corridor; in the first three days of August alone, five port facilities, three ships in port, and two ships at sea were hit (↗ Ministry of Infrastructure of Ukraine, 3.8.2026).

According to a forecast by Ukraine's Ministry of Agrarian Policy, **agricultural exports** could fall well short of expectations in the 2026/27 marketing year—by up to 53% for wheat exports. Storage capacity could reach its limits as early as November. Ukraine is therefore

trying to export more grain via Romania, Slovakia, and Hungary (↗ Bloomberg, 7.8.2026). Since roughly 90% of Ukraine's grain and oilseed exports pass through the ports of Odesa Oblast, further attacks could have significant economic consequences (↗ The Economist, 30.7.2026).

Alongside port facilities, Russian forces have also intensified attacks on rail lines and locomotives since April 2026 (↗ Monitor Vol. XVI), aiming to cut off Ukraine's export routes. As a result, steel plants in Kryvyi Rih and Poltava had to scale back production for 20 days in August (↗ Dnipropetrovsk Oblast Council, 29.7.2026).

## TARGET: ENERGY INFRASTRUCTURE

Russian forces also continue trying to destroy Ukraine's energy infrastructure. This repeatedly caused power outages in Kharkiv, Sumy, Zaporizhzhia, Odesa, and Dnipropetrovsk in July. Energy Minister Denys Shmyhal warned that these attacks could influence the outcome of the war and any future peace negotiations: Putin, he said, wants to cripple the economy and arms production and break the population's morale over the winter.

Before 2014, Ukraine's power generation capacity stood at around 54.5 GW. After the full-scale invasion, capacity fell to 32 GW; today it stands at just around 12 GW—only 22% of the original capacity. Most of the energy infrastructure remains permanently destroyed or damaged, resulting in widespread power outages.

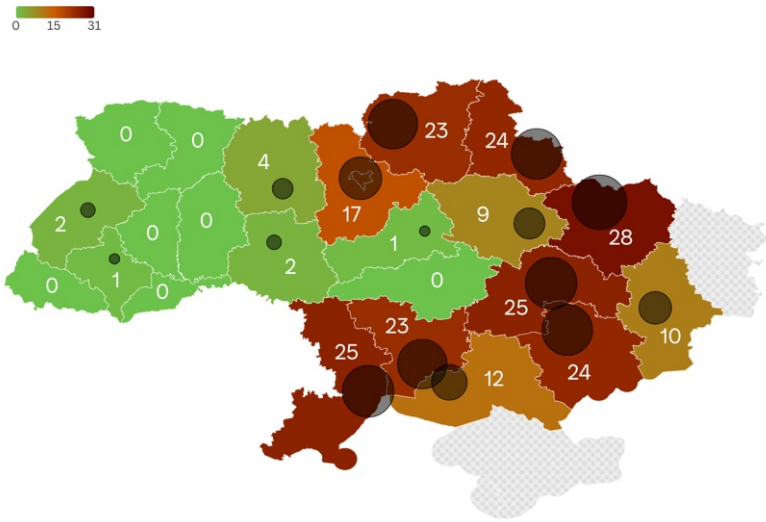
Shmyhal expects the situation to worsen further in winter: alongside the power grid, he said, Russia is preparing attacks on water and wastewater systems. "Without water and sewage, it is difficult to survive more than three days," the minister said. To prevent this, he added, Ukraine needs protective structures, decentralized modular heating plants and generators, and PAC-3 interceptor missiles.

According to Shmyhal, restoring Ukraine's energy system before the start of winter will require around €500 million in total, plus another €400 million for repairs at the state energy company *Naftogaz* (↗ Politico, 3.8.2026).

## STRAIN ON THE REGIONS

Russian forces are significantly increasing pressure on Ukraine's regions. The combined number of attack days and nights with reported damage across individual administrative regions (oblasts) rose more sharply than ever before: from 177 in June to 233 in July—a level exceeded only during the winter of 2024/2025.

**Border and front-line regions faced unprecedented strain in July 2026**




*Data: Perspectus Analytics, diverse data sets*

Kharkiv remains the hardest-hit region. New record numbers of attack nights were recorded in Odesa, Mykolaiv, Sumy, and Chernihiv; Kyiv, too, came under heavier attack than in the first half of 2026. Attacks continue to be geographically widespread.

## ATTACKS ON CIVILIAN LOGISTICS, RELIEF SUPPLIES, AND CIVILIANS

Gas stations also continue to be targeted; more than 200 have already been destroyed, around 80 of them in the **Kharkiv** region. Regional council members, however, clearly deny any broader supply crisis (↗ Espresso, 28.7.2026).

Logistics centers and warehouses also remain regular targets. In July, this affected Ukrainian shipping and trading companies as well as a UNICEF warehouse near Bilohorodka. In August, **a WHO humanitarian warehouse in Dnipro** storing medical relief supplies for front-line healthcare facilities **was hit**.

Residential areas, hospitals, and emergency responders are also being attacked, along with occasional strikes on schools. At least 377 civilians were killed and 2,129 injured—the deadliest month since the air war began (↗ CNN, 26.7.2026). Large-scale strike waves on residential areas in Kyiv and other major cities caused especially high casualties.

## GLIDE BOMB ATTACKS CLAIM A GROWING TOLL

Glide bomb attacks remain a major problem; their number has risen sharply since March (↗ Monitor Vol. XVI). They target primarily the front line, but their growing range (↗ Monitor Vol. X) increasingly endangers civilians as well. Using upgrade kits on glide bombs and the rocket-boosted Grom-E1, Russia can reach targets up to 120 km behind the front; with UMPB-5R add-on kits, that range extends to as much as 150 km (↗ Militarnyi, 2.8.2026). The city of Pavlohrad, roughly 80 km behind the front, was hit repeatedly in July.

The focus of glide bomb attacks remains the Donbas "fortress belt" around Sloviansk, Kramatorsk, Kostiantynivka, and Druzhkivka, where glide bombs destroy buildings almost daily; the resulting rubble is then used as cover by infiltration units preparing ground offensives. Glide bomb use has also risen sharply in the city of Sumy since July. Sumy is among the hardest-hit areas of the Russian air war overall, having been struck around 12,000 times (by guided glide bombs, drones, cruise missiles, and ballistic missiles combined) between January and early July 2026 (↗ Fedorov, 8.7.2026). Russia is currently intensifying its *battlefield air interdiction* (BAI) campaign to prepare for offensive operations. As in 2025 (↗ ISW, 3.8.2026), attacks on front-line towns, supply roads, rail lines, and bridges are likely to keep increasing, especially within the Donbas "fortress belt."

# SPOTLIGHT

## RUSSIA'S NEW STRIKE STRATEGY

NEW STRIKE PATTERN

*The pattern of Russia's air war against strategic targets is shifting in 2026: after long-range drone use rose sharply through May, the number of daily strikes declined from June onward. At the same time, Russia is already deploying unusually large numbers of missiles this summer.*

*This could indicate that Russia is preparing—or has already launched—its next "winter campaign" (intensified air strikes on energy infrastructure during the winter months) considerably earlier than in previous years. This would let Moscow exploit the shortage of Ukrainian interceptors against ballistic missiles and pre-empt Ukraine's winter preparations.*

### 1. LONG-RANGE DRONES: RESTRUCTURING AND POSSIBLE STOCKPILING

Deployment numbers rose sharply through May 2026. By then, Russia had used around 7,500 long-range drones in one month, mostly Geran-2 models. Since June, long-range drones have been used noticeably less often in attacks on civilian targets and cities. For weeks, there have been signs that Russia is increasingly using older Geran-2 drones closer to the front line (↗ Monitor Vol. XVIII). Recent reports of regular Geran-2 use in Donbas (↗ Rob Lee, 10.8.2026), however, do not explain the sharp drop in drone deployment in June and July.

According to recent HUR reports, Russia is holding back around 6,200 Geran drones for larger strike waves in autumn and winter (↗ Militarnyi, 12.8.2026). An analysis of serial numbers on deployed drones argues against the existence of significant stockpiles through mid-2026. (↗ United24, 5.6.2026). Rising production volumes since August 2024 are assumed to have been deployed directly in increasingly large strike waves (↗ Monitor Vol. XVI).

The current decline in Geran-2 use is likely due mainly to Russia shifting production from two-stroke to jet-powered drones. Including decoy drones and similar models such as the Garpiya-A1, Russia could produce around 11,000 drones in August, according to Ukraine's HUR intelligence service. At the same time, bottlenecks reportedly persist in domestic production of the necessary jet engines, forcing Russia to rely on costly imports from China—which ultimately slows production (↗ RBC, 10.8.2026).

Once this transition is complete, Russia's long-range drones could once again inflict greater damage on energy infrastructure—as in previous years' winter campaigns. Russia attacks energy infrastructure year-round,

but the scale and geographic concentration of strikes shift during the winter campaign (↗ CSIS, 7.7.2026). This focus is not yet visible in the July 2026 oblast distribution data.

## 2. MISSILES: PRIORITIZING MORE EFFECTIVE WEAPON SYSTEMS

The picture is different for cruise and ballistic missiles. In each of the past four winters of the air war, Russia typically held back missiles over the summer before deploying them in larger strike waves, mainly against Ukraine's energy infrastructure. These waves began in December in 2023, in November in 2024, and as early as October in 2025.

So far in 2026, no comparable pause for stockpiling is evident. According to various intelligence assessments, Russian stocks may actually have fallen by roughly 300 to 500 missiles over the past six months. Even so, **Russia likely still holds at least 1,800 missiles and cruise missiles** with a range of more than 350 km. This is possible thanks to continued high production capacity (↗ Monitor Vol. XVII), which has been further increased for some models since spring.

According to recent reports from Ukraine's HUR military intelligence, Russia has been **reprioritizing production of ballistic missiles and cruise missiles** since spring in order to exploit Ukraine's shortage of Patriot interceptors. Some production lines are reportedly running above their regular capacity: 120% of the monthly target for certain missiles, 140% for the Kh-101, and 200% for the Kh-35. Monthly Iskander-M production has been raised to around 65 units (roughly +10%), according to HUR, partly by temporarily halting Kinzhal production. Kh-32 production has also been paused since April, freeing up components for other, more effective weapon systems (↗ RBC, 10.8.2026).

Additional supplies of **North Korean KN-23 and KN-24 ballistic missiles** may also be forthcoming. How large this shipment will be—HUR estimates up to 160 missiles—and whether the known accuracy problems (deviations of up to 15 km) persist remains to be seen (↗ RBC, 10.8.2026).

## 3. REASONS FOR THE CHANGED DEPLOYMENT PATTERN

There are several possible explanations for why Russia is departing from its usual seasonal deployment pattern this year.

The exceptional rise in attacks already this summer suggests that Russian leadership is **seeking short-term strategic effects**. These include, in particular, wearing down the Ukrainian population and limiting Ukraine's export revenues. Kyiv is a particular focus in this respect. This may be based on the assumption that pressure on the country's political and economic center could force Ukraine's leadership and population to abandon their resistance—mirroring Russia's own belief that political upheaval would primarily originate from the center, especially Moscow and St. Petersburg (↗ RBC, 10.8.2026).

The **lack of progress at the front**, together with mounting problems caused by Ukrainian air strikes (↗ Monitor Vol. XVIII), likely also contributes to the escalation. Russia appears intent on demonstrating that it remains the dominant force, at least in the air war—both externally and, with the Duma elections in September in mind, domestically.

At the same time, Russia is likely trying, in the short to medium term, to **weaken Western—particularly American—support for Ukraine**. The intensified air war may be intended to reinforce the impression that supporting Ukraine's defense is becoming increasingly

costly and difficult for Western partners to sustain.

The expanded attacks on infrastructure can also be read as "retaliation" for recent Ukrainian strikes on Russian infrastructure, particularly oil terminals, production facilities, and other logistically significant targets. According to SBU assessments, Ukraine has achieved at least 100 hits on especially **high-value strategic targets in Russia** since June 26, in a dedicated **40-day strike campaign**.

Far more than the 100 targets mentioned were actually hit. These include arms plants, air bases, air defense systems, command posts, warships, tankers, refineries, and transport and military logistics. Also hit were 200 Russian cargo and tanker ships and at least 24 oil and fuel facilities. The apparent goal is to sharply raise the cost to Russia—and thus the cost of continuing the war—by simultaneously straining military, economic, and logistical structures. President Zelensky has already announced a further SBU operation (↗ ISW, 4.8.2026).

## UKRAINE'S NEW STRIKE FOCUS HITS RUSSIAN SOCIETY

Ukraine's strike campaign is no longer causing only isolated damage. Fuel shortages, export losses, and rising insurance costs are **straining the Russian economy**. At the same time, Russia must tie down growing military resources to defend against attacks far behind the front. This is starting—so far only modestly—to erode confidence in Russian leadership (↗ Ukrajinska Prawda, 17.7.2026).

The attacks on one of Russia's most important e-commerce logistics and distribution networks are symptomatic of this new focus. Since July 18, **at least 20 *Wildberries* locations in Russia** have been hit. Ukraine is thereby increasingly targeting the "domestic costs of war" for Russia (↗ Reuters, 7.8.2026). The economic damage is substantial: goods destroyed by the end of July were worth more than €2 billion—more than the official annual budget of each of 53 individual Russian oblasts (↗ PAP, 29.7.2026).

The effect extends beyond immediate economic damage. OSW expert Filip Rudnik points to the psychological function of these strikes and their possible impact on the **personal equipment of Russian soldiers**, who source part of their gear themselves—including through *Wildberries* online shops (↗ PAP, 29.7.2026).

Ukraine's goal here is to make the war directly felt by Russian society. The *Wall Street Journal* summed up this logic as an effort to "**bring the war home to the middle class**"—a segment the Kremlin has so far managed to shield from the war's direct effects (↗ Wall Street Journal, 23.7.2026).

Ukraine's strike campaign therefore does more than cause material damage. It makes the war visible, shifts part of its cost into everyday Russian life, and thereby increases domestic political pressure on the Kremlin.


*Photo: Burning logistics hub of Russian e-commerce enterprise Wildberries (↗ Ukraine Defense, 18.7.2026).*

# OUR RECOMMENDATIONS

According to ISW analysts**, the Kremlin will not compromise on its maximalist demands** as long as Putin believes he can still achieve his war aims militarily. Ukraine's shortage of Patriot interceptors gives Russia the option of **raising pressure now**, rather than waiting until winter to inflict serious damage. Intelligence reports point to a heightened **risk of a massive attack around Ukraine's Independence Day on August 24** (↗ ISW, 8.8.2026).

Russia's current advantage in the air war reinforces the Kremlin's incentive to keep delaying negotiations (↗ ISW, 10.8.2026). It is therefore essential to deny Russia this military option and to enable Ukraine to withstand Russian pressure.

In the air war, both sides are locked in a war of attrition, whose dynamics are shaped by long-range strike capability and by the availability of air-defense systems and interceptor munitions. **How can support for Ukraine** gain new momentum?

## 1. SUPPORTING LAYERED AIR DEFENSE

**Strengthening Ukrainian air defense must remain a priority**. Most Russian cruise missiles are now intercepted by aircraft supplied by Western partners (**primarily F-16s and Mirage 2000-5s**). Further deliveries—and the correspondingly greater operational capacity this would give Ukraine—could reduce the threat that became evident in July.

The think tank RUSI, assessing four years of the air war, concludes that **Ukraine's strength** lies in its layered air defense. Mobile short-range air-defense systems (SHORAD), anti-aircraft guns, and man-portable air-defense systems (MANPADS) counter Shahed and Gerbera drones cost-effectively, easing the burden on expensive, complex systems such as Patriot, IRIS-T, or SAMP/T.

The decisive bottleneck, RUSI finds, is not additional defense systems but interceptors against fast targets, above all ballistic missiles (↗ RUSI, 28.7.2026). As Russia increasingly attacks with jet-powered drones and hybrid systems, Ukraine's requirements are **shifting toward longer-range, larger-caliber systems**. As Gustav Gressel argued as early as August 2025 (↗ Monitor Vol. VII), Western deliveries need to adapt accordingly. Deliveries of **Swedish Tridon Mk2 air-defense systems** (↗ Monitor Vol. XV) are already showing results and should be expanded quickly.

## 2. MORE AIR-LAUNCHED STAND OFF WEAPONS AGAINST RUSSIAN CARRIER AIRCRAFT

A key deficit remains the **longer range of Russian air-to-air stand-off weapons**. This lets Russian bombers keep attacking aircraft at a distance and fly close to the front with little risk. **Swedish Gripen C/D fighter jets equipped with Meteor** air-to-air missiles could engage Russian carrier aircraft before they release glide bombs (↗ RUSI, 28.7.2026). Weakening Russian air force capabilities and **destroying Russian air defenses**—as Ukraine already did last year (↗ Monitor Vol. XV) and successfully expanded on in 2026 (↗ Monitor Vol. XVIII)—would limit both glide bomb attacks and

Russian gains in key sections of the front (↗ ISW, 30.7.2026).

## 3. EXPANDED ACCESS TO SATELLITE COMMUNICATIONS — INCLUDING OVER RUSSIAN TERRITORY

A further problem is Russia's **build-out of a satellite-based communications infrastructure**, which could allow it to conduct precise, real-time drone operations even over Ukrainian territory.

After efforts to provide a replacement for disabled *Starlink* terminals fell short in February (↗ Monitor Vol. XIV), Russia has since made significant progress: by the end of July, twelve of 16 Russian **Rassvet satellites** had reached their designated orbital positions.

Russia currently has only two roughly 90-minute windows per day for satellite communications over Ukraine. Within a year, however, that coverage could rise to nearly 24 hours a day. According to HUR, Russia may have more than 292 satellites in orbit by 2027 and over 924 by 2035 (↗ RBC, 10.8.2026). Ukraine now faces strategic pressure to **expand its own access to satellite communication services**—especially *Starlink*—to reliably control its own weapon systems **deep inside Russian territory** (↗ Militarnyi, 31.7.2026).

## 4. INTENSIFY ATTACKS ON RUSSIAN MISSILE PRODUCTION

Ukraine's greatest risk remains the limited availability of interceptors against ballistic missiles: the Iskander-M in particular will remain a problem even if Ukraine gains access to **additional interceptors in the future**. Russia raised monthly Iskander-M production to 65 units in July. In the medium term, only an **expansion and diversification of attacks on Russian production sites** and missile supply chains is likely to contain this threat—a step that would also improve security across Europe as a whole (↗ Monitor Vol. XV).

Separately, an **ASAP emergency program for European air defense**, as proposed by CSIS, remains one of the most urgent steps toward addressing the threat from Russia's missile arsenal (↗ CSIS, 23.3.2026). The priority is rapidly scaling up proven interceptor systems such as the Franco-Italian SAMP/T or the German IRIS-T. **Modifications to the new SAMP/T system** are also intended to directly support Ukraine's missile defense (↗ Monitor Vol. XV).

## 5. TYING DOWN RUSSIAN RESOURCES THROUGH DEEP STRIKES

It can be assumed that Russia is unable to shield both the front and its vast rear territory at the same time—particularly against Ukrainian *Deep Precision Strikes* (*DPS*), which are putting Russia under growing pressure.

**Further investment in Ukraine's DPS capabilities** would raise this pressure and thereby weaken Russia's ability to continue the war. Funding and cooperation could help develop these systems faster and produce them at greater scale. This could increasingly force Russia to take on greater territorial risks in order to keep fighting. As military expert Gustav Gressel shows using **Crimea** as an example (↗ Focus online, 4.8.2026), the peninsula is so emotionally significant to Putin that increased Ukrainian pressure could force Russia to tie down substantial resources just to hold it.

# ABOUT THE MONITOR

The monthly newsletter **"Ukraine Air War Monitor—Analyses for the Protection of Ukrainian Cities and Infrastructure"** provides analyses on ongoing Russian air strike campaigns, identifies emerging trends, and enables assessments of Russia's evolving military strategy and capabilities.

The Monitor is based on a database of all Russian air strikes on cities and civilian infrastructure in Ukraine and currently records over 117,300 attacks since September 2022.

The **Ukraine Air War Monitor** is published by Kyiv Dialogue in cooperation with OSINT and data analyst Marcus Welsch and the Konrad Adenauer Foundation.

The current issue, as well as further information about the series and methodology, can be found on our website (↗ kyiv-dialogue.org).

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## ABOUT THE AUTHOR

Marcus Welsch is an independent analyst, documentary filmmaker, and publicist.

Since 2014, he has focused in particular on the Russian war against Ukraine, military and foreign policy issues, and the German public discourse surrounding them. He runs the data and analysis platform ↗ Perspectus Analytics.

## ABOUT KYIV DIALOGUE

Kyiv Dialogue is a civil society platform founded in 2005 to promote German-Ukrainian cooperation, and an international conference format.

Since February 2022, its work focuses on military support for Ukraine and Western sanctions policy.

Kyiv Dialogue is a program of the European Exchange gGmbH.

*Cover photo: Ukrainian children on a swing in front of a building damaged by a Russian attack (↗ Petrovp.photo, 6.7.2026).*



Kyiv Dialogue KONRAD ADENAUER STIFTUNG

## CONTACT

**Kyiv Dialogue**
c/o European Exchange gGmbH
Erkelenzdamm 59
D-10999 Berlin
+49 (0) 30 654 833 05
info@kyiv-dialogue.org

kyiv-dialogue.org

**Konrad Adenauer Foundation Ukraine**
Bogomoltsja St. 5, Wh. 1
01024 Kyiv / Ukraine

+38 044 4927443
office.kyiv@kas.de

kas.de/en/web/ukraine

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**Represented by:**
Stefanie Schiffer (European Exchange gGmbH)
Thomas Vogel (European Exchange gGmbH)

Dr. Jan-Philipp Wölbern (Konrad Adenauer Foundation)

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