

38 NORTH

STIMSON

October 2025

North Korea Briefing

July-September 2025



About 38 North

38 North is an authoritative source of policy and technical analysis regarding North Korea's internal and external affairs. It aims to facilitate an informed public policy debate about peace and security on the Korean Peninsula and provide policymakers, practitioners, and other stakeholders with data and insights that may enhance understanding of one of the world's most complex security dilemmas.

About North Korea Briefing

The Stimson Center's 38 North is pleased to launch ***North Korea Briefing***, a quarterly report analyzing North Korea's internal dynamics.

The impact of North Korea's actions is increasingly felt far beyond its borders, as it defies political and economic norms and challenges regional and global security. However, the opaque nature of the country and regime makes it one of the most difficult intelligence targets to assess. Perhaps for this reason, discussions about North Korea often center around its foreign relations and prospects for engagement, without delving deeper into key factors that shape the leadership's current and future intentions on such issues.

This new report aims to fill in some of that void by analyzing North Korean state-run media's rhetoric and signaling across five key issue areas: politics, leadership, the economy, weapons of mass destruction, and foreign policy (including inter-Korean relations).

We hope this provides useful insights into the various domestic factors that reflect or feed into the regime's strategic calculus to enhance public discourse on this important intelligence challenge.

For comments or feedback on this product, contact us at 38north@stimson.org.

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Scope and Methodology

This volume covers events and developments in North Korea during the third quarter of 2025 (July 1 to September 30) across five issue areas: politics, leadership, the economy, missiles and weapons of mass destruction (WMD), and foreign policy. Each issue area, or chapter, is scoped out as follows:

Politics: Broader leadership trends, domestic political developments, and shifts in rhetoric on key ideological or domestic policy issues

Leadership: Roles and functions of Party, government, and military institutions, power dynamics within the leadership, and personnel changes

Economy: Domestic economic indicators, economic policy, and external economic relations

Missiles and WMD: Missile, nuclear and other WMD-related activities, key technological advancements, and related policy

Foreign policy: Positions on key international and foreign policy issues and foreign relations, including inter-Korean ties

All chapters use North Korean state media as their primary source, aided by secondary sources such as reporting from third-country media outlets and think tank analyses.

Executive Summary

Politics: Kim Jong Un (KJU) visited China from September 2 to 4 to attend the 80th anniversary of China's victory in the Second World War. Kim Ju Ae accompanied her father, expanding the types of public activities in which she participates and adding another credential to her list of public engagements. This suggests she is being positioned as the next supreme leader or a top party official.

Leadership: Kim Jong Un's (KJU) apparent last-minute decision to visit Beijing probably caused some drama for the Chinese hosts but showed unusual efficiency for travel on Kims part, suggesting a possible shift in his foreign travel style. The presence of Ju Chang Il, head of the Party's propaganda department, alongside KJU in Beijing highlights Ju's growing influence and involvement in strategic decision-making. Kim Jae Ryong, head of the Party's discipline department, also accompanied Kim Jong Un to China, becoming the second Party official involved in personnel affairs to make an overseas trip this year. Deploying party personnel managers abroad appears aimed at ensuring effective execution of agreements with China and Russia and may suggest Pyongyang is adjusting its network of overseas managers to ensure effective bilateral ties with these countries.

Economy: During the third quarter, North Korea's selection of "top 10 outstanding companies" indicated tighter state controls and pro-market practices continue to coexist despite the trend of greater centralization in recent years. The North Korean parliament enacted new grain management and intellectual property laws, seeking to ensure stable grain distribution in local provinces and establishing a legal framework to defend North Korea against outside influence as it expands exchanges and cooperation with foreign countries. Meanwhile, visits by Japan-based Korean students to high-profile tourist sites appear to reflect Pyongyang's efforts to cultivate diaspora ties with an eye toward potential future investment.

Missiles and Weapons of Mass Destruction (WMD): Developments during the third quarter reflected ongoing efforts to support future ballistic missile and space-launch systems as well as the achievements of North Korea's WMD efforts over many years. A new solid-propellant strategic missile was presaged, and Pyongyang may be furthering preparation for a new, large space-launch vehicle. Russia deemed the North's nuclear weapons program an "understandable" method of protecting national security as the North signals ramped-up weapons production. New alleged references to the North's chemical weapons program also surfaced.

Foreign Policy: During the third quarter, Kim Jong Un held his first summit with Chinese President Xi Jinping in more than six years, while North Korea issued a series of high-level statements on its relations with the United States and South Korea. Coverage of the Kim-Xi summit and subsequent bilateral developments indicate the relationship has not yet been fully restored. Kim Yo Jong and Kim Jong Un extended diplomatic overtures to Trump, hinting that Kim-Trump talks may be possible if Trump removes denuclearization from the meeting agenda. At the same time, they reaffirmed that Pyongyang has no desire to improve ties or pursue unification with South Korea despite the new Lee government's appeasement measures, all the while nudging Seoul to take further conciliatory measures.

Authors

In the order of authored chapters

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Politics

Michael Madden

The Respected Daughter Goes to China

Kim Jong Un (KJU) visited China from September 2 to 4, 2025 to attend the 80th anniversary of China's victory in the Second World War. Kim Ju Ae accompanied her father, expanding the types of public activities in which she participates.

Kim Ju Ae was the first child of a North Korean leader to openly go on an official foreign visit since her grandfather, Kim Jong Il (KJI), accompanied Kim Il Sung on a 1965 visit to Indonesia. There were rumors that KJU and his brother Jong Chol joined their father KJI on his 2007 visit to China and rumors KJU went to China in 2010. Neither rumor has ever been substantiated. Kim Ju Ae was not observed participating in any public engagements and according to the ROK government, she did not leave her accommodation at the DPRK Embassy in Beijing during the entire visit.¹

We might contrast Kim Ju Ae against Nikolai Lukashenko, the third son of Belarusian leader Alexander Lukashenko. The younger Lukashenko was first brought out in public when he was 4 years old and greeted foreign leadership.



(Left) Kim Jong Un and his daughter stepping off the train in Beijing (Photo: Korean Central Television); (right) Nikolai Lukashenko, aged 8, meeting then Cuban leader Raul Castro in 2012 (Photo: Cubadebate).

Context and Implications

Kim Ju Ae's visit to China fits the pattern of her activities in the DPRK—she is along for the ride and has few interactions outside of those with her father and his close aides. Going on a foreign visit adds another

¹ Two members of KJU's travel party to China also did not make any observed public appearances—Ju Chang Il, head of the Party's Propaganda and Agitation Department, and Kim Jae Ryong, director of the Party's Disciplinary Investigation Department.

credential to her list of public engagements, which suggests she is being prepared to become a core North Korean elite, either the next supreme leader or a top party official.

Currently, based on the type of events in which Ju Ae participates and the senior DPRK officials with whom she interacts, she is the odds-on favorite as leadership successor. And yet, hereditary succession is still in early innings, and nothing is known of KJU's other children. Ju Ae may not become supreme leader, but her presence in DPRK public life in the early 2020s indicates that some thought is being paid to next-generation political leadership.

KJU's own succession to the supreme leadership has probably motivated him to begin some degree of planning. After all, his succession drive was somewhat hurried and improvised, driven by his father's flagging health and a lack of a systemized framework for KJU to acquire the experience and skills commensurate to the supreme leadership. When he became leader, KJU had some loose ends to tie up: he had to reclaim all the six keys of the North Korean leadership and win over some of his father's close aides. What KJU might envision for his successor, of which he was largely deprived, is a co-leadership period in similar fashion to KJI and Kim Il Sung.

The Six Keys

Based on past DPRK practices in succession and transition, there are about six keys of the North Korean supreme leadership. The keys refer to the bare minimal number of organizations, processes, and personnel that the supreme leader or a fledgling Kim leader needs to monopolize and control to lay claim to stable leadership. The keys are derived from prior analytic assessments by the author that focused on KJI's succession in the years 1974 to 1976 and 1987 to 1992, transition planning from 2007 to 2009, and KJU's succession and transition from 2009 to 2014. The keys are:

- Command and control of North Korea's armed forces and strategic weapons;
- Control over Office No. 39 and the WPK Finance and Accounting Department;
- Control of paperwork traffic across the regime;
- Control of personnel appointments and status in the Military Security Command, State Security Department, and the Ministry of Public Security;
- Control over press, media, and broadcasting; and
- Control of the Guard Command and Personal Secretariat.

KJU knows that none of his or his sister's children will be able to assume office for at least 10 years without regency. KJI began working at the WPK Central Committee when he was 23 years old. KJU himself became the leader of the DPRK when he was 27.

Until Kim Ju Ae, her siblings and/or cousins reach their 20s, KJU and his advisers will most likely focus on strategic policies to shape the domestic and regional landscape his successor will have to traverse. He will have to tweak the DPRK political and decision-making culture to accommodate a potential co-leadership and create the process and organizational interface to ensure a smooth transition. Part of this will involve publicity and indoctrination efforts justifying fourth-generation succession. If Ju Ae is selected as successor, then part of these publicity and indoctrination efforts will attempt to create conditions to support North Korea's first female supreme leader.

Hereditary succession is an existential concern of the North Korean leadership, like its WMD program. Fortunately, as with nuclear negotiations, KJU has time on his side.

Leadership

Michael Madden

Kim Jong Un's Apparent Last-Minute Beijing Visit

Kim Jong Un's (KJU) apparent last-minute decision to visit Beijing probably caused some drama for the Chinese hosts, but showed unusual efficiency for travel on KJU's part, suggesting a possible shift in his foreign travel style. The presence of Ju Chang Il, head of the Party's Propaganda and Agitation Department, alongside KJU in Beijing highlights Ju's growing influence and involvement in strategic decision-making. Kim Jae Ryong, head of the Party's discipline department, also accompanied Kim Jong Un to China, becoming the second Party official involved in personnel affairs to make an overseas trip this year. Deploying party personnel managers abroad appears aimed at ensuring effective execution of agreements with China and Russia and may suggest Pyongyang is adjusting its network of overseas managers to ensure effective bilateral ties with these countries.

Was Kim Jong Un a Last-Minute Guest in Beijing?

Kim Jong Un was treated like a star attraction at the 80th Victory Day celebrations in Beijing. Circumstantial evidence, such as his accommodation and meeting arrangements with President Putin in Beijing, suggests KJU decided to visit China at the last possible minute. North Korea's official Korean Central News Agency (KCNA) announced the trip on August 28, five days before he arrived.

Instead of staying at Diaoyutai or another state guesthouse or hotel, KJU stayed at the DPRK Embassy in Beijing. This could have been due to privacy concerns for him and his daughter Kim Ju Ae. On the other hand, if KJU was a last-minute guest, the North Koreans may have decided not to trouble their Chinese hosts by compelling them to find KJU and his travel party last-minute accommodations.

KJU's meeting with Putin following the Victory Day parade was scheduled only after the North Korean delegation arrived in China. After KJU's trip was announced, a Putin adviser told Russian media on August 29 that KJU had been invited for a bilateral meeting with Putin. After KJU arrived, the Russian delegation was still waiting on a reply. North Korea typically likes to keep foreign leadership in suspense about meeting the leader, but this dynamic has only been evident in Pyongyang, not a foreign visit. KJU and the delegation also may have been waiting on Xi Jinping's availability before finalizing details for the bilateral meeting with Putin.

Context and Implications

This strongly suggests that, aside from some Victory Day events, KJU's decision to visit Beijing was made last-minute and he left Pyongyang with an open-ended itinerary. KJU's late RSVP to China was a subtle power flex which foreshadows increased flexibility in how the leader travels outside North Korea.

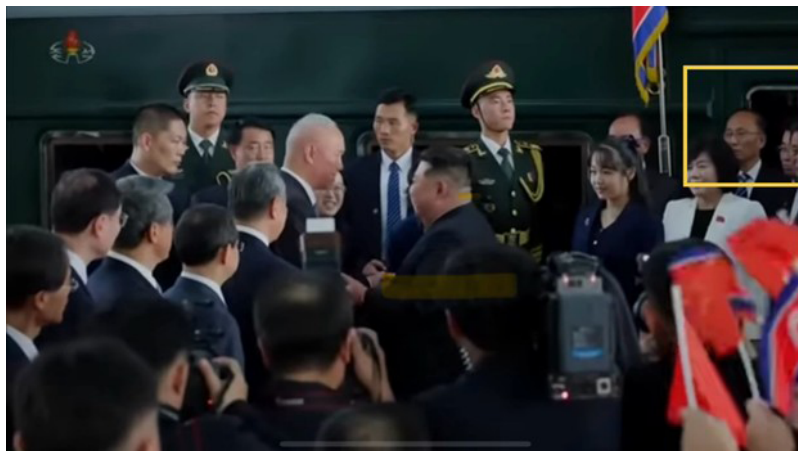
KJU and his advisers may have slow-walked the decision to go on the trip, perhaps deliberating on

messaging, the geopolitical landscape, and impact. KJU's last-minute decision probably created a degree of charming drama in Beijing (a surprise VIP guest) and disruption (scheduling last-minute meetings). Whatever the reason KJU delayed the Beijing visit decision, a short turnaround time on his arrival and staying in the embassy shows an unusual amount of efficiency and flexibility for foreign travel on KJU's part. This could be a new precedent for how he conducts foreign engagements.

PAD Director Ju Chang Il Rises With China Trip

This year has not been particularly kind to North Korean elites. KJU began the year by publicizing a series of scandals in regional party organizations.¹ During events and engagements, he has become more remote and inaccessible to the wider leadership.² He disappeared and did not replace one senior party secretary and demoted the head of the military's political officers.

Amid these tensions with party elites, Ju Chang Il, the Workers Party of Korea (WPK) Propaganda and Agitation Department (PAD) Director, has risen to the ranks of KJU's close aides by accompanying KJU to Beijing.³ Despite being on the trip, Ju was one of two members of KJU's travel party that did not attend the Xi meeting.



Ju Chang Il (annotated) with other senior North Korean officials arriving in Beijing on September 2, 2025. (Photo: Korean Central Television, Annotation by author)

Context and Implications

PAD Director Ju Chang Il has become a core elite in the WPK in a year of headwinds for North Korean elites.

When Ju's predecessor, PAD Director and WPK Secretary Ri Il Hwan, went missing in January 2025, Ju

¹ "DID Cracks Down on Cadres," *NK Leadership Watch*, February 10, 2025, <https://www.nkleadershipwatch.org/2025/02/10/did-cracks-down-on-cadres/>.

² "North Korean Leadership through Strategic Revolving Doors," *38 North*, April 24, 2025, <https://www.38north.org/2025/04/north-korean-leadership-transitions-a-strategic-revolving-door/>.

³ PAD director is a core leadership position, but Ju did not publicly evince the usual access and influence of his predecessors prior to KJU's recent Beijing visit.

assumed Ri's ceremonial role at public events.⁴ Initially, it appeared Ju was a temporary surrogate until Ri returned to office. However, going to China and being in the train meeting room with KJU shows Ju is involved in strategic advice and decision-making.

Ju Chang Il has not assumed Ri Il Hwan's slot on the Secretariat. Traditionally, the PAD director has concurrently held Secretariat status. However, Ri's portfolio on the Secretariat was divided between the PAD and workers' and social organizations. The PAD was added to Ri's portfolio in 2023. It is highly probable that the Secretariat-PAD divide will be resolved at the Ninth Party Congress.

Kim Jae Ryong Brings Personnel Discipline to Beijing

Kim Jae Ryong, WPK Disciplinary Investigation Departments Ddirector, traveled to China with KJU but did not make any observed public appearances. Kim's presence on the trip was publicized in a state media report on KJU's return to the DPRK.



Kim Jae Ryong (annotated) on KJU's train arriving in the DPRK on September 5, 2025. (Photo: Korean Central News Agency, Annotation by Author)

Kim Jae Ryong was the second WPK official involved in personnel affairs to go on a foreign trip in 2025, after Ri Hi Yong, WPK Secretary and Director of the WPK Cadres Affairs Department, led a delegation to Russia in February. While their overseas roles and position may diverge, it is notable that the Party's top two personnel managers went on foreign trips this year.

Context and Implications

Sending party personnel managers on foreign visits is probably a concerted effort to ensure effective implementation of any agreements North Korea makes with Russia and China. One way to do this is by having loyal and effective management to mitigate graft and malfeasance that have previously ailed North Korea's bilateral relationships. It indicates Pyongyang might be adjusting its network of overseas managers to ensure effective bilateral ties with Russia and China.

⁴ "Ri Il Hwan, where you at," NK Leadership Watch, February 12, 2025, <https://www.nkleadershipwatch.org/2025/02/12/ri-il-hwan-where-you-at/>.

Economy

Mitsuhiro Mimura

North Korea Emphasizes Corporate Management and Legal Regulations, Cultivates Japan-Based Korean Students

During the third quarter, North Korea's selection of its "top 10 outstanding companies" indicated tighter state controls and pro-market practices continue to coexist despite the trend of greater centralization in recent years. The North Korean parliament enacted new grain management and intellectual property laws, seeking to ensure stable grain distribution in local provinces and establishing a legal framework to defend North Korea against outside influence as it expands exchanges and cooperation with foreign countries. Meanwhile, visits by Japan-based Korean students to high-profile tourist sites appear to reflect Pyongyang's efforts to cultivate diaspora ties with an eye toward potential future investment.

"Top 10 Outstanding Companies of 2024" Selected

In early September, the North Korean Party daily reported on the selection of "top 10 Outstanding Companies of 2024."¹ These units are: Tanchon Smelter; Taean Heavy Machine Complex; Rason Hyesong Consolidated Development Corporation (also known as Rason Hyesong Trade Company); Pyongyang Electric Cable General Factory 326; Samchong Mine of the Sangwon Cement Complex; Kangso Sprayer Factory; Pyongyang Hosiery Factory; Pyongsong Bag Factory; Huichon Silk Mill; and Ryongchon Mine of the General Bureau of the Tanchon Area Mining Industry. This event, held annually since 2023, has promoted selection criteria that consider not only production scale and growth but also "corporate management."

Context and Implications

The general assessment among North Korea watchers is that the country has strengthened central control over the economy in recent years to overcome the economic downturn caused by international sanctions and North Korea's COVID-19 lockdown.² As evidence, they have commonly pointed to Pyongyang's emphasis on the execution of state economic plans and a rollback of state-run enterprises' operational autonomy and non-state sectors' freedoms.³

However, the criteria for selecting exemplary companies since 2023 shows that North Korea is not only

¹ Ri Chol Ok, "2024년 10대최우수기업이 선정되었다[Top 10 Outstanding Companies of 2024 Selected]," *Rodong Sinmun*, September 2, 2025.

² See, for example, Ruediger Frank, "Key Results of The Eighth Party Congress in North Korea (Part 1 of 2)," 38 North, January 15, 2021, <https://www.38north.org/2021/01/key-results-of-the-eighth-party-congress-in-north-korea-part-1-of-2/>; Sang Yong Lee, "Beyond State Control: The Struggle Over North Korea's Markets," 38 North, September 9, 2025, <https://www.38north.org/2025/09/beyond-state-control-the-struggle-over-north-koreas-markets/>.

³ The non-state sector includes the retail of produce from agricultural workers' private plots, individual transactions, commerce in regional markets, and the wholesale and distribution businesses supplying them. It also encompasses factories and real estate developers that operate as state-owned enterprises or cooperatives but originated from private investment.

emphasizing contributions to national economic policy but is also encouraging corporate management expertise, which includes innovative approaches to business operations and the ability to achieve results despite challenging conditions. What this indicates is that, despite North Korea's post-COVID shift toward greater centralization, the regime continues to emphasize corporate management in line with on-the-ground conditions. This means that tighter state controls and pro-market tendencies, which defined Kim Jong Un's economic policy until 2016, continue to coexist.

Fall Parliamentary Session Held

During its two-day session on September 20 and 21, the Supreme People's Assembly (SPA) enacted grain management and intellectual property laws and approved the decision "On Thoroughly Executing the Law of the DPRK on Urban Management." According to the meeting report, Kim Jong Un designated the construction of city- and county-level grain management stations as one of three essential projects under the "20x10 Regional Development Policy," which calls for building industrial factories in 20 cities and counties each year over the next decade, with their construction to be carried out under state responsibility.

Context and Implications

The issues of grain administration in rural areas can be broadly divided into: a) purchasing grain from producers, and b) ensuring a stable supply to the non-agricultural population. The SPA's mention of the 20x10 policy likely stems from an assessment that consistent state grain management as mandated by the grain management law cannot be achieved without constructing facilities to ensure a stable grain supply as some cities and counties lack such infrastructure.

The new intellectual property law is notable for its potential connection to the expansion of foreign economic relations. Contrary to conventional wisdom, North Korea places importance on projecting itself as a responsible, law-adhering member of the international community. In his SPA speech, Kim remarked:

"With the promotion of our exchanges with other countries in recent years, law-enforcement organs should work out a better strategy for, and adopt an aggressive, comprehensive and rigorous approach towards, frustrating the enemy's moves to undermine our system and degenerate our citizens and combatting all manner of crimes that disturb social and political stability."

Kim was clearly stressing the importance of the law to defend the North Korean system against outside influence as the country expands exchanges and cooperation with foreign countries, while also recognizing the significant role the law plays in promoting external economic relations.

Japanese-Korean Students Visit Various Tourist Attractions in North Korea

According to Choson Sinbo, a newspaper operated by the pro-DPRK General Association of Korean Residents in Japan (GAKRJ; Chongryon), a first delegation of Korea University (Japan) students visited Wonsan, Kangwon Province and Yangdok County, South Pyongan Province from September 2 to 4 and visited various tourist sites, including the Wonsan-Kalma Coastal Tourist Area that opened on July 1, and the Yangdok Hot Spring Cultural Resort.

Context and Implications

The students' visit appears to reflect North Korea's new policy on the role of Chongryon organizations. Kim Jong Un did not send his customary New Year's message to the GAKRJ in 2025. Instead, he sent a letter in May to ethnic Koreans in Japan, including GAKRJ officials, to mark the 70th founding anniversary of Chongryon. Kim's letter emphasized the importance of Koreans in Japan visiting North Korea both to preserve their national identity and to ensure that "the rising generations can witness the development of their homeland with their own eyes."

Ethnic Korean-Japanese students' recent visits to new tourist sites prioritized by North Korea indicate these sites boast of high-quality facilities that can potentially open to more foreigners in the future. Furthermore, it seems North Korea's propaganda targeting younger generations of ethnic Koreans in Japan is at least partly aimed at shaping their future decisions on direct investments in the DPRK. We should note that overseas Chinese investments greatly contributed to China's economic development during the early stages of its reform and opening up. In this regard, we should continue to closely monitor North Korea's policy toward younger generations of the GAKRJ.

Missiles and Weapons of Mass Destruction (WMD)

Vann H. Van Diepen

Further Missile/Space Developments Presaged; WMD Possession Underscored

Developments during the third quarter reflected ongoing efforts to support future ballistic missile and space-launch systems as well as the achievements of North Korea's WMD efforts over many years. A new solid-propellant strategic missile was presaged, and Pyongyang may be furthering preparation for a new, large space-launch vehicle. Russia deemed the North's nuclear weapons program an "understandable" method of protecting national security. New alleged references to the North's chemical weapons (CW) program also surfaced.

New Hwasong-20 Solid ICBM Flagged Probable New Uranium

A September 2 North Korean press report noted for the first time the development of a Hwasongpho (Hwasong)-20 intercontinental ballistic missile (ICBM) that is to be the "next-generation" follow-on to the Hwasong-19 solid-propellant road-mobile ICBM flight-tested once in October 2024. Both missiles reportedly will have a "new-type solid-fuel engine using the composite carbon fiber material" that has been static (ground)-tested eight times over the past two years. A ninth such test, termed "the last one in the development process," reportedly occurred on September 8.

Context and Implications

Finalizing ground testing may mean the first Hwasong-20 flight test will occur within a few months, although the status of its other subsystems is unknown. Photos of the September 8 test suggest the new motor is at least the same size as that flown on the Hwasong-19. It remains to be seen whether the Hwasong-20 will be longer, consistent with a longer road-mobile missile launcher chassis revealed in September 2024. The two press articles claimed the new motor has a maximum thrust of 1,960-1,971kN, akin to that of the first stage of the 1980s US Peacekeeper ICBM. Carbon fiber motor cases will permit the missile to have greater range and/or payload than equivalent-sized ICBMs using heavier steel, fiberglass, or kevlar cases. That greater boost capability probably would be most useful for lofting the multiple, independently targetable reentry vehicle (MIRV) payload the North is in the early stages of developing. MIRVs also would be consistent with the press claim that the new motor "heralds a significant change in expanding and strengthening the nuclear strategic forces."

New Jetty at Sohae Satellite Launching Station

Commercial satellite imagery from July 9 indicates a large jetty has been completed at the Sohae Satellite Launching Station after some 28 months of construction. Work on the pier-like structure picked up in April 2025, according to separate analysis in 38 North, and includes a docking slip for large vessels, what appear to be rails for a crane, and the surfacing of a dirt road from the dock area to the rest of the launching station.

Context and Implications

The addition of the jetty suggests that the North intends to send cargo to the launch facility that is larger than what can be accommodated by the existing rail link. Such cargo could be related to a new, large space-launch vehicle (SLV) for which the North probably has been preparing a launch pad at Sohae since March 2022. A larger SLV could be intended for future, larger low-orbit reconnaissance or weather satellites, multiple launches of low-orbit satellites on a single booster, or geostationary launches of communications satellites.

Russia “Understands” North Korea’s Nuclear Weapons Program

In a July 12 press conference after a “strategic dialogue” with North Korea, Russian Foreign Minister Sergei Lavrov said that “It is precisely because” the North Korean leadership’s conclusions regarding national defense “were made in a timely manner that no serious actor contemplates a military strike against the DPRK today.... The technologies applied by the Democratic People’s Republic of Korea are a result of efforts by North Korean scientists. We respect the DPRK’s actions and understand the reasons why they carry out their nuclear program.”

On September 26, Kim Jong Un “guided an important consultative meeting related to the production of nuclear materials and weapons” that reviewed “the plan for 2025 to increase the capacity of the nuclear-material production field” as well as next year’s plan according to North Korean state media. Kim stated that “steadily evolving the state’s nuclear response posture is an essential top priority task.”

Context and Implications

Lavrov’s “understanding” of North Korea’s nuclear weapons program is consistent with Russia’s vetoes of UN Security Council actions to ramp up sanctions against North Korea in May 2022 and to extend the mandate of the UN Panel of Experts on North Korea in March 2024. It also reflects Moscow’s many years of varied noncompliance with existing UN sanctions. These public remarks underscore that Russia will not be part of the solution to the North Korean nuclear problem, at least in the absence of Pyongyang’s own agreement to nuclear limitations, and the threat that Moscow might become, if it has not already, part of the problem by directly assisting North Korean nuclear weapons and delivery programs.

With or without Russian assistance, North Korea clearly intends to continue expanding production of fissile materials and nuclear weapons, consistent with Kim’s January 2023 call for “an exponential increase of the country’s nuclear arsenal.” The North’s development of tactical nuclear weapons and (if successful) MIRV missile payloads, and its ongoing increases in nuclear-armed ballistic and cruise missile deployments, will all drive demand for more fissile material and nuclear weapons.

A Reminder of North Korea’s CW

A July 9 media report claimed that, according to an unnamed “high-ranking” source in North Korea, Pyongyang “is elevating chemical weapons to serve as strategic weapons alongside nuclear weapons” and views “their importance [is] gradually increasing.” This source also said North Korea “considers

chemical weapons a strategic deterrent and has exponentially expanded research, development and production,” is “systematically developing them as battlefield weapons in preparation for a full-scale war,” and considers CW “the highest means to respond immediately before the use of nuclear weapons.”

Context and Implications

Although the sourcing and content of this report cannot be corroborated, it serves as a useful reminder in these nuclear-focused times that North Korea is widely assessed to have a longstanding, substantial, weaponized CW stockpile (as well as a biological weapons program). Such a stockpile likely has served, since at least the 1980s, as a “strategic deterrent” against population targets in South Korea and Japan, including US citizens and forces there—well before the North’s acquisition of nuclear weapons starting in the 1990s. North Korean CW also has substantial potential to facilitate a conventional attack against the South by impeding allied ground and air operations, and the flow of reinforcements and supplies.

How the North would sequence or integrate conventional, chemical, and nuclear operations is unknown, but CW would clearly add to its military options and complicate alliance planning. While current open-source data on the size, type, and location of any North Korean CW stockpile is essentially nonexistent, alliance planning needs to take the CW threat fully into account.

North Korea-China Relations Not Yet Fully Restored; North Korea Hints Kim-Trump Talks Possible, Reaffirms Two Koreas Policy¹

During the third quarter, Kim Jong Un held his first summit with Chinese President Xi Jinping in more than six years, while North Korea issued a series of high-level statements on its relations with the United States and South Korea. Coverage of the Kim-Xi summit and subsequent bilateral developments indicates the relationship has not yet been fully restored. Kim Yo Jong and Kim Jong Un extended diplomatic overtures to Trump, hinting that Kim-Trump talks may be possible if Trump removes denuclearization from the meeting agenda. At the same time, they reaffirmed that Pyongyang has no desire to improve ties or pursue unification with South Korea despite the new Lee government's appeasement measures, all the while nudging Seoul to take further conciliatory measures.

China

Kim Jong Un stood to Xi Jinping's left during China's September "Victory Day" celebrations and held his first summit with Xi since June 2019. According to North Korea's official report of the meeting, Kim said: "Affirming that the friendly feelings between the DPRK and China can not change no matter how the international situation may change and it is the steadfast will of the WPK and the government of the DPRK to steadily develop the DPRK-China relations...." Since then, Kim has sent two letters to Xi, both reaffirming his commitment to improving ties with Beijing, with much of the cooperation language mirroring the summit readout.²

Foreign Minister Choe Son Hui paid a follow-up visit to China later in the month, meeting with the Chinese foreign minister and premier, though not with Xi. North Korea's readout of her talks with Foreign Minister Wang Yi stated that they had "reached a full consensus of views [완전한 견해일치]" on "international and regional issues," without elaboration.³ However, Choe's congratulatory letter to Wang on China's founding anniversary on October 1 showed a notable change. She wrote that she was pleased "an important consensus of views [중요한 견해일치] was reached to thoroughly implement the agreement made by the top leaders of the two countries and promote friendly visits and practical cooperation between the DPRK and China." Within days of the initial meeting readout, Pyongyang watered down the original "consensus" language from "full" to "important," and changed the scope of consensus from "international and regional issues" to implementing the leaders' "agreement" and

¹ This chapter covers the period from July 1 to October 2 to ensure continuity with events in late September.

² "Respected Comrade Kim Jong Un Sends Reply Message to Chinese President," *Korean Central News Agency* (KCNA), September 23, 2025, <http://www.kcna.kp/en/article/q/ac00b40bb83dd20eda0f11c718c095b4.kcmsf>; "Respected Comrade Kim Jong Un Sends Greetings to Chinese President," *KCNA*, October 1, 2025, <http://www.kcna.kp/en/article/q/006b3a1e937746cd768899eb1692f2ba.kcmsf>.

³ The Chinese report on the Choe-Wang talks did not say they had reached a "consensus" of any kind. See "Chinese FM holds talks with DPRK FM," *Xinhua*, September 29, 2025, <https://english.news.cn/asiapacific/20250929/443feb918ecf4d6fa2ec1ba8a58ece1b/c.html>.

promoting bilateral cooperation.

Context and Implications

North Korea's coverage of the Kim-Xi summit and its post-summit handling of China suggest the bilateral relationship has not yet been fully restored. Although the summit report included some positive references to the relationship, it lacked the alignment language found in previous Kim-Xi summit reports. It was also the shortest and vaguest of all six official North Korean accounts of past summits.

Pyongyang's post-summit handling of China—specifically reports on Choe Son Hui's meetings in Beijing and Kim Jong Un's two letters to Xi—followed a similar pattern. They reaffirmed Pyongyang's commitment to improve ties and even indicated some progress, but their lack of warmth suggests persisting distance despite Kim Jong Un's recent visit to Beijing.

Choe's letter to Wang Yi—the first since 2018—has somewhat complicated the picture. Pyongyang's Choe-Wang meeting readout, which stated they “reached a full consensus of views,” appeared to mark significant progress from the Kim-Xi summit, to which North Korea did not apply language suggesting alignment.⁴ However, the letter's softening of that characterization to “an important consensus of views” and its changed scope of consensus just days after the initial meeting readout raises questions about North Korea's thinking on China. It should be noted that Choe did not meet with Xi, in contrast to her predecessor Ri Yong Ho's meeting with Xi Jinping in December 2018, as well as her own meetings with Russian President Vladimir Putin in Russia in January and November 2024.

United States and South Korea

Between late July and late September, there was an unusual flurry of North Korean leadership pronouncements on the two countries, including “press statements [담화]” from Kim Yo Jong, the defense minister, and the Central Military Commission vice chairman.⁵ Kim Jong Un capped this period with a speech at the Supreme People's Assembly (SPA) fall session, reaffirming and reinforcing his sister's earlier comments.

The Kims accused both the United States and South Korea of continuing a “hostile” policy toward Pyongyang but differed significantly in their prescription for each. On the United States, they made their first direct overtures to Trump since his January 2025 inauguration. Kim Yo Jong was the first to hint at a possible Trump-Kim meeting if Washington dropped its denuclearization demand. Kim Jong Un's SPA speech echoed this but was more explicit. After emphasizing North Korea's irreversible “nuclear state” status, he said: “If the United States, freeing itself from its absurd pursuit of other's denuclearization and

⁴ Chinese reports have said Kim and Xi reached an “important consensus [중요한 공동인식]” during their latest summit. However, North Korea's Kim-Xi summit readout did not use this characterization, and its post-summit reports have been careful to avoid attributing this formulation to North Korea's own officials.

⁵ “Press Statement of Kim Yo Jong, Vice Department Director of C.C., WPK,” *KCNA*, July 28, 2025, <http://kcna.kp/en/article/q/8c4b1d1e8a32e3c00798c9612ac1682d.kcmsf>; “Press Statement of Kim Yo Jong, Vice Department Director of C.C., WPK,” *KCNA*, July 29, 2025, <http://kcna.kp/en/article/q/f09697cbd57fe50ca8b79a88ccfd9309.kcmsf>; “Press Statement by Kim Yo Jong, Vice Department Director of C.C., WPK,” *KCNA*, August 14, 2025, <http://kcna.kp/en/article/q/2ec8d342dc9823b2e99bee90fec206e9.kcmsf>; “Kim Yo Jong, Vice Department Director of C.C., WPK, Censures Seoul Authorities for Deceptive Attempt at ‘Appeasement Offensive,’” *KCNA*, August 20, 2025, <http://kcna.kp/en/article/q/1965dc98a212a5781a2b526185da4933.kcmsf>; “Press Statement of Kim Yo Jong, Vice Department Director of C.C., WPK,” *KCNA*, September 14, 2025, <http://kcna.kp/en/article/q/5ed01bb21c-0b1334a45b33fe01d39a2b.kcmsf>.

recognizing the reality, wants genuine peaceful coexistence with us, there is no reason for us not to come face to face with it. Personally, I still have a good memory of the current US President Trump.”

On South Korea, they dismissed Lee’s North Korea policy as a “copy” of previous governments and reiterated that improvement in relations or unification was not on the table. To that effect, Kim Jong Un said: “I make clear that we will not deal with it [South Korea] at all.” On unification, he stated: “Reunification is never needed. ... Why should we pursue a reunification which cannot be achieved unless one of them ceases to exist?” He further pledged: “We will enshrine in a national law that we and the ROK [Republic of Korea] are two states sharing the border, which are heterogeneous from each other and which can by no means become one.”

Context and Implications

These statements align with North Korea pattern of avoiding direct criticism of Trump and its disinterest in reconciliation with Seoul since Kim Jong Un’s December 2023 policy declaration defining South Korea as a “hostile” state and renouncing peaceful unification (two Koreas policy). The timing of Pyongyang’s dialogue overtures to Trump and renewed denunciations of Seoul’s North Korea policy suggests that Kim viewed the South Korean leadership transition (June) and the Lee government’s policy coordination with Washington—especially around the Lee-Trump summit (August)—as an opportunity to nudge both capitals to reconsider their approach. Given the consistency of North Korea’s stance on the two Koreas policy, its criticism of the Lee government’s “anti-DPRK policy” and “blind trust to the ROK-U.S. alliance” should be viewed more as pressure for further concessions from Seoul rather than any genuine intent to improve ties even if its demands are met. By sending mixed signals—overtures to Trump and hostility to Seoul—North Korea also seems to be strengthening its stance that South Korea, which it labels “a foreign country and the most hostile state,” should be excluded from any future US-North Korea dialogue.

In his SPA speech, Kim devoted the South Korea section entirely to reaffirming the two Koreas policy. Both his 2023 and 2025 speeches emphasized the “inevitable” nature of Kim’s decision to abandon the country’s decades-old unification policy, framing the shift as a response to South Korea’s actions. In his latest address, Kim focused on the history of Korean division and South Korea’s “hostility” going back to 1948 to emphasize that his decision was not made hastily but was instead a long-overdue acknowledgment of reality. Kim explained: “In fact, we and the ROK have existed in the international community as two states over the last scores of years.... We defined the ROK as a foreign country and the most hostile state, not based on the judgment formed abruptly in recent years. This is nothing new. We simply accepted the hard fact.” Revisiting this nearly two-year-old policy—likely targeting the domestic audience more than South Korea—suggests possible ongoing internal pushback to the policy shift.

