

January 2026

North Korea Briefing

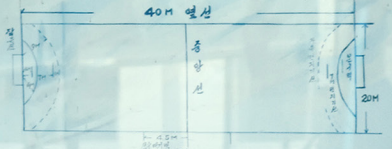
October - December 2025

Edited by
Rachel Minyoung Lee



체육경기규칙

송구장구경 및 규칙



- 송구장 규격: 길이 2M x 너비 9M
- 선수인원: 한 팀에 12명 (보유자 1명, 일반선수 11명)
- 관중석의 선수 7명 (모든 보유자 1명)
- 경기자들은 1번 ~ 20번까지 번호
- 경기시간: 성인용 (18살 이상) 전후반 각각 30분, 중간휴식 10분, 초중반 휴식 25분, 20분.
- 보유자는 1번, 12번, 16번을 맡수 있다.
- 경기부에는 등번호 20cm, 앞번호 10cm 로기로 한다.
- 주심은 너비 4cm 되는 흰색으로 관중에 두른다.

체육상시

배구를 위한 관할발달운동

- 연드러 관용적 퍼기 - 하루에 50번 이상.
- 평평봉에이 관용적 퍼기 - 30번 이상.
- 팔봉에 매달려 현수 - 20번 이상.
- 자기 몸에 알맞는 구간(중량)을 가지고 멀리올리기, 추켜올리기, 끌어올리기.
※ 기본은 속도를 빨라주는 것이다.
- 바닥에 배를 대고 엎드려 팔과 다리를 동시에 위로 들면서 몸을 뒤로 젖히기.
- 무거운 아령을 들고 팔을 근육 전상태에서 팔목 굽혔다 퍼기 - 50번 이상.

신문소개



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 publish the third volume of *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 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.

Table of Contents

About 38 North.....	2
About North Korea Briefing.....	2
Scope and Methodology	4
Executive Summary	5
Authors.....	6

Chapters

Politics	9
Leadership	12
Economy	16
Missiles and Weapons of Mass Destruction (WMD).....	20
Foreign Policy	23

Scope and Methodology

This volume covers events and developments in North Korea during the fourth quarter of 2025 (October 1 to December 31) 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

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: During the fourth quarter of 2025, North Korea commemorated the 80th anniversary of the Workers' Party of Korea (WPK), declared completion of the five-year plan put forward at the Eighth Party Congress in 2021, and laid the groundwork for the Ninth Party Congress scheduled for 2026. During the Party's anniversary celebrations, Kim unveiled a new vision for governance and nation-building over the next decade, aimed at achieving economic development through self-reliance and mass mobilization. This vision effectively continues the “spirit of Kangwon Province” that North Korea has been promoting since late November to drive increased economic production. While the 13th Plenary Meeting of the Eighth WPK Central Committee (CC) did not provide a time frame for the Ninth Party Congress, it offered hints about potential policies and Politburo personnel changes that may emerge at that event.

Leadership: The final quarter of 2025 found that North Korean political culture was preparing for a major transition via the Ninth Party Congress during early 2026 or muddling through a significant upheaval in elite cohesion.

Economy: During the fourth quarter, North Korea held a national light industry products exhibition and completed major hospital construction projects. Both initiatives, aimed at improving people's livelihoods, reflect the Kim regime's push to maximize economic achievements before year-end and the Ninth Party Congress. However, North Korean media coverage of light industry in recent years—reinforced by reporting on the exhibition—suggests the country has made little progress in this sector and regional disparities remain. At the December Party plenary meeting, Kim Jong Un declared that the current five-year plan had been fulfilled and that 2025 economic development goals had been attained. The meeting readout also suggests that the next five-year economic plan will present more concrete development targets and that Kim's “pragmatism” remains alive.

Missiles and Weapons of Mass Destruction (WMD): During the fourth quarter of 2025, North Korea unveiled a new solid-propellant intercontinental ballistic missile (ICBM), a new version of the KN-23 short-range ballistic missile (SRBM), and a new probably-conventional air-launched cruise missile (ALCM). However, the year 2025 featured fewer total ballistic missile launches than for each year from 2022-2024—and no ICBM launches, deepening North Korea's prior emphasis on theater missile activities. Pyongyang revealed for the first time most of the hull of the nuclear-powered ballistic missile submarine (SSBN) under construction. And Kim Jong Un announced the Air Force would be assigned a nuclear deterrent mission, which at least initially appears to entail operating road-mobile launchers for dual-capable land-attack cruise missiles (LACMs).

Foreign Policy: During the last quarter of 2025, North Korea quietly rejected US President Donald Trump's overtures for dialogue and resumed criticism of Washington, yet carefully calibrated its rhetoric to avoid foreclosing future negotiations. At the same time, North Korea-China exchanges appear to have accelerated across the political, diplomatic, military and economic spectrums since September, when Kim Jong Un held his first summit with Chinese President Xi Jinping in more than six years. For the foreseeable future, North Korea will likely seek to expand ties with China while promoting greater Pyongyang-Beijing-Moscow alignment.

Authors

In the order of authored chapters

GYEONG SEOB OH is a Senior Research Fellow at the Korea Institute for National Unification (KINU). Oh previously served as a Research Fellow at the Sejong Institute (2009–2015) and as a policy advisory member to the South Korean Ministry of Unification (2024–2025). His areas of expertise include North Korean politics, human rights, inter-Korean relations, and unification issues. Oh received his PhD in North Korean Studies from Korea University.

MICHAEL MADDEN is a nonresident fellow in the 38 North Program at the Henry L. Stimson Center and founder and director of NK Leadership Watch.

MITSUHIRO MIMURA is a Professor at the Economic and Social Research Institute for Northeast Asia, University of Niigata Prefecture, Japan (ERINA-UNP). He graduated from the Department of Korean Language and Literature, Faculty of Foreign Studies, Osaka University of Foreign Studies, in 1993; and completed his Master's and Doctoral courses at the Graduate School of Law, Osaka University, earning a PhD in jurisprudence in 2001. He joined the Research Division of the Economic Research Institute for Northeast Asia (ERINA) in 2001 as a researcher, where he worked as a senior researcher before taking up his current position in 2023. His areas of specialization are the North Korean economy, economic exchange between the two Koreas, and economic cooperation in Eurasia. He has visited the DPRK nearly 40 times since 1996, mainly for academic exchange.

VANN H. VAN DIEPEN is an Independent Consultant, and frequent contributor on North Korea missile issues to 38 North. He was Principal Deputy Assistant Secretary of State for International Security and Nonproliferation (ISN) from June 2009 to December 2016, including over two years as Acting Assistant Secretary. From February 2006 to June 2009, he was National Intelligence Officer for Weapons of Mass Destruction and Proliferation in the Office of the Director of National Intelligence. From July 1991 to February 2006, he was an Office Director in ISN and its predecessor bureaus, overseeing policy for the nonproliferation of missiles and/or chemical/biological weapons. From December 1989 to July 1991 he analyzed East-West arms control issues in State's Political-Military Bureau. He served in State's Bureau of Intelligence and Research analyzing Soviet and other non-US strategic forces and missile proliferation from November 1982 to December 1989. He received a BA in International Studies from The American University's School of International Service in 1981, and an SM from MIT's Defense and Arms Controls Studies program in 1983. In the fall of 2016 he received the Senior Executive Service (SES) Presidential Rank Award of Distinguished Career Executive.

KIBUM HAN is a political scientist with a PhD who worked for more than two decades as a North Korea analyst in the South Korean government, including as first deputy director of the National Intelligence Service (NIS) from 2013 to 2016. He is currently a distinguished research fellow at the Institute for North Korean Studies and a visiting senior research fellow at the Asan Institute for Policy Studies. Previously, Han served as an adjunct professor at Korea University and as a distinguished research fellow at the Korea Institute for National Unification (KINU). He received his doctorate from Kyungnam University with a dissertation titled “Organizational Behavior and Bureaucratic Politics in North Korea’s Policy-Making Process.” In 2023, he published the book *Why Does North Korea’s Economic Reform Fail?*

EDITOR

RACHEL MINYOUNG LEE is a Senior Fellow for the Stimson Center’s Korea Program and 38 North. She is also Co-Chair of the North Korea Economic Forum, which is part of the policy program at the George Washington University’s Institute for Korean Studies. Lee was a North Korea collection expert and analyst with Open Source Enterprise in the US government from 2000 to 2019. During that time, she wrote on the gamut of North Korean issues, from leadership, domestic politics and economy, and foreign policy, to social and cultural developments. As Analysis Team Lead, Lee led a team of collection officers and analysts to track and analyze North and South Korean issues with implications for Pyongyang’s regime stability and regional security. From 2022 to 2024, Lee headed engagement and network-building efforts at the Vienna-based Open Nuclear Network (ONN). Lee is a former POSCO Visiting Fellow with the East-West Center in Hawaii. She earned her BA in English literature and her MA in international law, both at Korea University in Seoul.

Politics

Gyeong Seob Oh

North Korea Touts Kim's Decade of Leadership, Charts Course for Ninth Party Congress

During the fourth quarter of 2025, North Korea commemorated the 80th anniversary of the Workers' Party of Korea (WPK), declared completion of the five-year plan put forward at the Eighth Party Congress in 2021, and laid the groundwork for the Ninth Party Congress scheduled for 2026. During the Party's anniversary celebrations, Kim unveiled a new vision for governance and nation-building over the next decade, aimed at achieving economic development through self-reliance and mass mobilization. This vision effectively continues the "spirit of Kangwon Province" that North Korea has been promoting since late November to drive increased economic production. While the 13th Plenary Meeting of the Eighth WPK Central Committee (CC) did not provide a time frame for the Ninth Party Congress, it offered hints about potential policies and Politburo personnel changes that may emerge at that event.

Kim's Speeches on Party Founding

The North Korean leader delivered two important speeches marking the WPK's founding anniversary— at the Party Founding Museum on October 8, and at a national meeting the next day. The speeches looked back on the WPK's achievements and highlighted Kim's leadership from 2016 to 2025. Significantly, they reviewed the five-year economic and defense plans since the Eighth Party Congress in 2021, and, building on that assessment, unveiled Kim's new governance and nation-building vision for the next decade.

Context and Implications

At the 2016 Seventh Party Congress, Kim set the construction of a powerful socialist state as a medium-to long-term goal, presenting the "people-first principle," the *byungjin* line (parallel economic and nuclear development), and a five-year economic strategy (2016-2020) as the means of achieving it. At the 2021 Eighth Party Congress, Kim touted nuclear, missile, and conventional weapons advancements but acknowledged that "the attainment of the goals for the growth of the national economy was seriously delayed and the people's living standard failed to be improved remarkably." The new five-year economic plan (2021-2025) prioritized strengthening self-reliance capable of withstanding external shocks by reinforcing equipment, processes, and infrastructure and comprehensively improving the economic system and order rather than pursuing forward-leaning policies, given UN Security Council (UNSC) sanctions and the pandemic border closures.

Kim's post-Ninth Party Congress vision for governance and nation-building targets "comprehensive development of socialism" over the next decade (2026-2035)—a "second era of nation-building"—

culminating in the establishment of a powerful socialist state by 2035. At the Party Founding Museum, Kim declared the need to “innovate at a much faster pace” and “adopt a bolder approach” across all sectors over the next decade. Despite this rhetoric, Kim’s model of building a powerful socialist state ultimately relies on self-reliance and mass mobilization under UNSC sanctions.

“Spirit of Kangwon Province”

North Korea has launched a “spirit of Kangwon Province” propaganda campaign since November 21, when state media reported on Kim Jong Un’s attendance at the Hoeyang Army-People Power Station completion ceremony in Kangwon Province. Related articles have encouraged North Koreans to achieve five-year plan goals through self-reliance, following Kangwon’s example. North Korean media first used this formulation on December 13, 2016, during Kim Jong Un’s field guidance of the Wonsan Army-People Power Station in Kangwon, after a seven-year construction period. Kim praised the province’s officials and workers as “creators of the spirit of Kangwon Province” and called the power station proof that self-reliance and the self-development-first principle are the only path to survival. North Korea has touted Kangwon as exemplary for building small- and medium-sized hydroelectric power plants in Wonsan (2016), Ichon and Munchon (2020), Sepho and Phyonggang (2023), Kosong (2024), and Hoeyang (2025) without central government support.

Context and Implications

North Korea emphasizes the “spirit of Kangwon Province” for two reasons. First, the core of this principle is unconditional implementation of Party policies without central government support; in short, forging one’s own path to survival. It is Kim’s economic development model through self-reliance and mass mobilization under UNSC sanctions. Kim must develop the economy under sanctions while also improving the economies of 20 localities annually under the “20x10 policy for regional development,” which was launched in January 2024 and mandates building industrial factories in 20 cities and counties per year over a decade. This necessitates promoting the “spirit of Kangwon Province.”

Second, this spirit reinforces Kim Jong Un’s personality cult by encouraging loyalty that implements the Party Center’s plans at all costs. Wonsan is Kim Jong Un’s second hometown, where he reportedly lived for several years until Kim Jong Il’s 2008 stroke. Against this backdrop, North Korea has positioned Kangwon Province to embody Kim Jong Un’s policies of regional development and economic construction based on self-reliance and mass mobilization. Since Kim took power, North Korea has built the Masikryong Ski Resort, Wonsan Kalma Coastal Tourist Area, Sepho Tableland stockbreeding base, and, since 2016, army-people power stations in seven counties in Kangwon Province.

13th Party Plenary Meeting of the Eighth WPK CC

During its December 9-11 plenary meeting, the WPK addressed five agenda items. Beyond reviewing the implementation of 2025 Party and state policies, the meeting assessed the final year of the five-year economic and defense plans from the 2021 Eighth Party Congress and discussed Ninth Party Congress preparations, including a second-stage five-year economic plan (2026-2030).

The meeting report did not mention foreign policy issues, focusing instead on domestic messaging by addressing economic, defense, and regional development. The meeting declared that “the five-year plan was carried out” without offering statistics. The Ninth Party Congress likely will not introduce any fundamentally new economic strategies, but will reinforce the need for self-reliance and mass mobilization. On defense, Kim has already stated the Party Congress will present a “policy of simultaneously pushing forward the building of nuclear forces and conventional armed forces.”

Context and Implications

Three aspects of this meeting merit attention.

First, the North positively assessed the implementation of 2025 Party and state policies as having “accelerated speed of advance and redoubled self-sustenance.” North Korea announced it had achieved the 2025 economic objectives and five-year plan but provided no statistics. On defense, it noted “significant achievements” in modernization and said the country was “advance[ing] along the exact direction,” signaling the continuation of such efforts. It also cited the troop deployment to the Russia-Ukraine war as demonstrating national prestige.

Second, Kim criticized Party officials for “wrong ideological viewpoint and inactive and irresponsible work attitude.” Since early 2025, North Korea has punished officials for idolization, exceptionalism, self-centeredness, and corruption—behaviors that it says undermine Supreme Leader and Party authority and fuel public discontent. Examples include the corruption cases in Onchon and Usi Counties in January and the failed destroyer launch in May. The Ninth Party Congress will likely conduct Political Bureau personnel changes related to these incidents. The WPK Discipline Inspection Department may also intensify inspections of Party cadres and strengthen punishments.

Third, one full member and five alternate members of the WPK CC—all unidentified—were recalled. Leadership rostrum analysis suggests the Ninth Party Congress will conduct modest personnel changes in the Political Bureau, including presidium members, and in Party CC departments and the Central Military Commission. One or two new presidium members are likely: WPK Secretary Ri Il Hwan, who returned to the front row, where presidium members typically sit, after an 11-month absence; and WPK Secretary Pak Jong Chon, who accompanied Kim Jong Un on 19 field inspections in 2025. It appears that Ri Pyong Chol, who accompanied Kim only twice in 2025, will lose his presidium seat.¹ North Korea may also replace Party economic officials due to unresolved exchange rate volatility, rice price increases, and food shortages.

This chapter was originally drafted in Korean. The initial translation was produced using AI tools and subsequently reviewed word-for-word and refined by a bilingual subject-matter expert to ensure accuracy and readability.

¹ Ri Il Hwan is WPK secretary for propaganda. Pak Jong Chon is the WPK secretary who oversees the Party’s leadership over military affairs. Ri Pyong Chol is the Party’s general advisor for munitions policy.

Leadership

Michael Madden

Waiting for the Party Congress?

The final quarter of 2025 found that North Korean political culture was preparing for a major transition via the Ninth Party Congress during early 2026 or muddling through a significant upheaval in elite cohesion.

Mr. Ri's Return

Following an 11-month public absence, Workers' Party of Korea (WPK) Secretary Ri Il Hwan returned to the core leadership ranks at the WPK Central Committee's 13th plenary session in December. Ri's questionable status was affirmed when he did not attend a rarely publicized meeting of the Central Committee Secretariat in January 2025, despite being a member.

Ri's public absence was somewhat unprecedented for the Kim Jong Un era. In contrast to some other core elites, Ri was not replaced, nor did he migrate to another position and continue to attend public events. Despite not being replaced on the Secretariat, Ri Il Hwan's status as a regime elite remained questionable when his name did not appear on former Supreme People's Assembly (SPA) Presidium President Kim Yong Nam's November funeral committee.



WPK Secretary Ri Il Hwan (annotated) attends the second day of the 13th plenary session of the Eighth WPK Central Committee on December 10, 2025. (Source: Korean Central News Agency)

Context and Implications

Ri Il Hwan's return to leadership and public life following a nearly year-long absence was tied to job performance and/or personal disciplinary issues. His prolonged absence, lack of personnel movement, and exclusion from a state funeral committee rule out any innocuous explanations. Had Kim Jong Un assigned him a special project precluding public activity, the duration would have been shorter. If on medical leave and deemed in good standing, the regime would have moved him to another post while he recuperated. Had he been merely unwell, Ri would have been listed on Kim Yong Nam's funeral committee—such funeral committees in the past included retired elites and even terminally ill active officials like Jo Myong Rok and Kang Sok Ju.

This raises questions about Ri Il Hwan's absence and return. It is likely linked to his job performance or patronage ties. The January Secretariat meeting which Ri missed dealt with two lower-level elites accused of abusing their power and excessive partying—groups possibly connected to Ri, making him accountable. On the other hand, Ri may have been deemed simply ineffective, and his return to office involves intensive scrutiny and heightened supervision. As a Party secretary, Ri's primary role is advising Kim Jong Un and submitting policies, but he neither formulates nor implements them.¹ However, Ri may have been held responsible for problems in media and culture, including insufficient enforcement of North Korea's language expression and culture laws or dysfunction within the WPK Propaganda and Agitation Department (PAD).²

Ri Il Hwan's return, taken with other recent events (see below), suggests a major change affecting the wider core leadership.

Internal Security Photo Ops

On November 18, Kim Jong Un visited the headquarters (HQ) of the Ministry of State Security (MSS; State Security Department), the Ministry of Public Security (MPS), and the Central Public Prosecutors Office and the Supreme Court. Visiting the bulk of Democratic People's Republic of Korea (DPRK) internal security, law enforcement, and judicial organizations in sequence was extraordinary—almost unprecedented—for North Korean political culture.

Applying some events analysis to this sequence, we will consider the venues, the participants, and the stated reason and circumstances for these events.

¹ Michael Madden, "Rating Elite Access and Influence in North Korean Strategic Decisionmaking," Restricted Distribution Report, 2019.

² Lee Ju-yeon, "The women are the problem" (in Korean), *Sand Times*, May 10, 2025, <https://www.sandtimes.co.kr/news/articleView.html?idxno=918>; Seulkee Jang, "Kim Jong Un launches sweeping purge following Beijing trip," *Daily NK*, September 23, 2025, <https://www.dailynk.com/english/kim-jong-un-launches-sweeping-purge-following-beijing-trip/>.



*Kim Jong Un arrives at the Ministry of State Security headquarters on November 18, 2025.
(Source: Korean Central Television)*

Context and Implications

Historical precedent suggests that “#1 Events,” those involving the supreme leader, at internal security institutions occur before or after major decisions or activity.

These were HQ events involving the organizations’ leadership and HQ staff. The venues and participants establish them as discrete photo ops conveying individual ideological themes: political security (MSS), public security (MPS), the legal process (prosecutors), and adjudication (the Supreme Court). Taken as a sequence, they convey an overall theme: regime security and stability. This contrasts with sectoral national meetings and conferences, which are more anonymized and collectivized, drawing larger populations of lower- and working-level officials focused on broad ideological themes. This sequence involving organizational managers and senior personnel suggests other business—a major policy change or power struggle—is at work.

Except for MPS, these events marked the organizations’ 80th anniversaries.³ At the MSS photo op, Kim Jong Un said MSS was stood up in November 1945, alluding to when Kim Il Sung consolidated Party control over vigilante groups and village elders.⁴ Yet, MSS was formally established in 1973 after splitting the Ministry of Interior Affairs. The prosecutor-court system’s historical record begins with the DPRK’s 1948 establishment.⁵ By consolidating these foundation anniversaries, Kim Jong Un and his public relations advisers have taken creative license aligning them with the Party’s founding anniversary and emphasizing the Party’s (and the Suryong’s) control over how these institutions relate to citizens.

³ Colin Zwirko, “Kim Jong Un praises secret police for defending his rule during visit to HQ,” NK News, November 19, 2025, <https://www.nknews.org/2025/11/kim-jong-un-praises-secret-police-for-defending-his-rule-during-visit-to-hq/>.

⁴ Ken Gause, *Coercion, Control, Surveillance and Punishment: An Examination of the North Korean Police State* (Washington DC: HRNK, 2012).

⁵ Suh Dae-sook, *Korean Communism: 1945-1980* (Honolulu, HI: University Press of Hawaii, 1981).

This raises the question of why now: why revise these anniversaries in 2025, not during the Party's 70th (2015) or 75th (2020) founding anniversary? Previous engagements occurred at significant historical moments: Kim Jong Un's 2012-2013 visits to MPS and MSS during his transition; his second 2013 MSS visit before Jang Song Thaek's ouster; Kim Jong Il's 2009 MPS visit before the December 2009 currency swap; his 2010 Supreme Court visit after that policy's implementation; and his November 2010 photo op with the MPS-affiliated Internal Security Forces days before the shelling of Yeonpyeong-do. This precedent, combined with the revised anniversaries, gives these events a deeper subtext than photo ops suggest. It is highly probable that a fundamental change to the function of the Party's central leadership, the role of Party organs, or a major initiative in the macro-policy space is in the offing for the Ninth Party Congress. The photo-op events with internal security and law enforcement foreshadow such a change.

Economy

Mitsuhiro Mimura

North Korea Steps up Reporting on People's Livelihoods, Hints Party Congress To Provide More Detailed Economic Plan

During the fourth quarter, North Korea held a national light industry products exhibition and completed major hospital construction projects. Both initiatives, aimed at improving people's livelihoods, reflect the Kim regime's push to maximize economic achievements before year-end and the Ninth Party Congress. However, North Korean media coverage of light industry in recent years—reinforced by reporting on the exhibition—suggests the country has made little progress in this sector, and regional disparities remain. At the December Party plenary meeting, Kim Jong Un declared that the current five-year plan had been fulfilled and that 2025 economic development goals had been attained. The meeting readout also suggests that the next five-year economic plan will present more concrete development targets and that Kim's "pragmatism" remains alive.

Light Industry Products Exhibition Held

North Korea held a light industrial goods exhibition, "Development of Light Industry-2025," in Pyongyang from October 9-24 to commemorate the Party's 80th founding anniversary. According to North Korean media, the exhibition featured more than 68,000 daily necessity products, including shoes, cosmetics, and foodstuffs, produced by more than 580 units across the country. North Korea held the same light industry exhibition in 2023 to mark the 75th state founding anniversary.

In an opening ceremony, Party Secretary and Cabinet Premier Kim Tok Hun noted that production had been "revitalized to bring about a radical change in the material and cultural life of the regional people," and expressed confidence that this exhibition would encourage sharing best practices and give momentum to further development of light industry.

Context and Implications

Over the past few years, North Korean media reports on Party plenary meetings and Supreme People's Assembly (SPA) sessions have made relatively few references to light industry except in connection to the 20x10 policy for regional development, an initiative launched by Kim Jong Un in January 2024 to build industrial factories in 20 cities and counties per year over the next decade. Similarly, South Korea's Bank of Korea estimates of North Korea's gross domestic product indicate growth in light industry has been lackluster, with the exception of a rebound in 2022 following a previous sharp decline. Despite the North Korean cabinet premier's claim of revitalized regional production, many of the factories featured at this exhibition include not only long-established enterprises, but also businesses in Pyongyang and major provincial cities, central government-owned enterprises, and food factories operated by major

state-owned trading companies.¹ This suggests that factories built during the first two years of the 20x10 policy were concentrated in economically sound regions with greater central control, highlighting continued disparities in economic conditions between regions.

Since 2016, the tightening of international sanctions has made the import of production goods and raw materials more difficult, forcing North Korea to focus its efforts on research and development using domestic resources and technology. In light industry, limited access to raw materials and manufacturing equipment has likely also hindered new market entrants. However, reports from this exhibition suggest that further opening of the borders and increased trade and personnel exchanges are now necessary.

Opening of Hospitals

The Pyongyang General Hospital opened on November 3, 2025, after more than five years since the groundbreaking ceremony was held in March 2020. In a speech at the hospital's inauguration ceremony the previous month, Kim Jong Un severely criticized the Ministry of Public Health and other relevant agencies for a lack of medical services for the people and said: "This is really one of the strongest wishes I have wanted to fulfil, something that has always been in the forefront of my mind.... Modern medical facilities are indispensable in ensuring that the working people enjoy the rights granted by the state." According to Kim, the Party's public health modernization strategy pursues simultaneous development across multiple fronts: constructing central hospitals and regional hospitals, building healthcare facilities and medical service infrastructures nationwide, and integrating medical treatment with personnel training and scientific research.

In a speech at Kangdong County Hospital's inauguration ceremony in November, Kim Jong Un said: "This hospital has helped completely reversing the existing conception of a regional hospital; the course of its construction was exemplary and its operation will serve as an ideal model for the development of public health in the regions." He added that two more regional hospitals and Wonsan-Kalma Coastal Tourist Area first-aid posts would be built in 2025. If all are completed, this would bring the total number of hospitals finished in 2025 to six. In the meantime, the cabinet daily reported that Pyongyang Medical University Hospital is vigorously imparting technical skills to local hospitals across the country.²

Context and Implications

North Korea has long-cited free compulsory education and free medical care as evidence of the superiority of its socialist system over capitalism, particularly that of the United States. However, as Kim Jong Un's statements over the years have revealed, while schools remain tuition-free, the state has failed to adequately provide uniforms, school bags, and supplies—hardly a system showcase internationally.³

¹ Those that participated in this year's exhibition included the Wonsan Leather Shoes Factory, Pyongyang Hosiery Factory, Pyongyang Cosmetics Factory, Taedonggang Kumok Instant Boiled Rice Factory, Pyongyang Automation Appliances Factory, the Pyongyang Kim Jong Suk Textile Mill, and the Amnokgang General Foodstuff Factory.

² Kim Ryong Hun, "지방병원들에 대한 기술전습 힘있게 추진 [Vigorously Imparting Technical Skills to Regional Hospitals]," *Minju Joson*, October 29, 2025.

³ "Kim Jong Un Gives Field Guidance to Newly-Built Pyongyang Bag Factory," *Korean Central News Agency (KCNA)*, January 5, 2017, <http://www.kcna.co.jp/item/2017/201701/news05/20170105-01ee.html>; "Respected Comrade Kim Jong Un Visits April 25 Hostel to Learn about Preparations for Education," *KCNA*, August 17, 2024, <http://www.kcna.co.jp/item/2024/202408/news17/20240817-02ee.html>.

Following improvements in educational content and standards, the regime seems to be now prioritizing the supply of school materials nationwide, not just for Pyongyang residents.

The 20x10 policy's inclusion of rural hospital construction follows the same logic. For North Korean citizens, ensuring a baseline standard of medical services nationwide is essential to raising living standards. Kim Jong Un saw this when he formally incorporated hospitals into the 20x10 policy in December 2024 as one of the “three essential projects,” the other two being sci-tech dissemination centers and grain management facilities.⁴

Efforts to improve medical standards, even if initially driven by the COVID-19 pandemic, will likely strengthen the regime if sustained long term. Therefore, healthcare improvements should be viewed not only as public health measures but also as tools for enhancing North Korea's resilience in inter-Korean competition.

Party Plenary Meeting Held

During the 13th Plenary Meeting of the Eighth Workers' Party of Korea Central Committee's enlarged meeting in December, Kim Jong Un concluded that “the five-year plan was carried out along with the achievement of the objectives of this year's economic development,” citing major industrial sectors had carried out their production plans, the agricultural sector had recorded “higher grain yields over last year,” and “a lot” of major construction projects had been “successfully completed.” Kim also said the modernization of major sectors and the reinforcement of technical infrastructure had “reached the final stage” and “provided possibility and guarantee for more confidently entering into the fulfillment of the long-term goals for the next stage.”

On the other hand, Kim Jong Un outlined major tasks facing the Party, government, and state organs, including boosting agricultural production and accelerating rural development, such as enlarging wheat cultivation areas, reforming the distribution system, and strengthening the education sector's material foundation.

Context and Implications

Kim declared the 2021-2025 five-year plan had been achieved without citing specific accomplishments. This reflects the plan's primary objective of strengthening existing industrial infrastructure and restoring domestic supply chains. His comment that economic modernization and reinforcement provided the possibility of fulfilling long-term goals at the next stage suggests the next five-year plan (2026-2030) will present more concrete development goals.

⁴ The 20x10 policy involves only constructing facilities, leaving operations to local governments. It is likely that fewer than half of the regions where such facilities are built will successfully commercialize local products or align with market trends for profitable nationwide sales. Within a few years, the regime will likely launch a nationwide campaign to boost local economies, criticizing and dismissing ineffective local leaders while promoting successful regions as models. Through such trial and error, the regime likely intends to transform North Korea's local political culture, which relies entirely on the central government and lacks initiative, by forcing leaders to overcome “unrealistic methods of management and old-fashioned laws” (from Kim Jong Un's speech at the October 2025 Pyongyang General Hospital inaugural ceremony) through market mechanisms.

Kim's emphasis on regional development and wheat cultivation reflects the regime's dual priorities: solidifying its power base by restoring livelihoods and restarting factories in post-pandemic North Korea, while addressing urban-rural disparities through locally driven economic revitalization.

Notably, Kim emphasized "the socialist principle of distribution" in rural areas, signaling that material incentives for labor, rather than communist distribution detached from reality, are key to boosting agricultural production. This suggests the "pragmatic" aspect of the Kim Jong Un regime is not yet completely dead.

Missiles and Weapons of Mass Destruction (WMD)

Vann H. Van Diepen

New Missiles But Fewer Launches, A Missile Sub Reveal, and a Nuclear-Armed Air Force

During the fourth quarter of 2025, North Korea unveiled a new solid-propellant intercontinental ballistic missile (ICBM), a new version of the KN-23 short-range ballistic missile (SRBM), and a new probably conventional air-launched cruise missile (ALCM). However, the year 2025 featured fewer total ballistic missile launches than for each year from 2022-2024—and no ICBM launches, deepening North Korea’s prior emphasis on theater missile activities. Pyongyang revealed for the first time most of the hull of the nuclear-powered ballistic missile submarine (SSBN) under construction. And Kim Jong Un announced the Air Force would be assigned a nuclear deterrent mission, which at least initially appears to entail operating road-mobile launchers for dual-capable land-attack cruise missiles (LACMs).

New and Modified Missiles at Arms Expo and Parade

The North unveiled what it termed the “new” Hwasong-20 (HS-20) solid-propellant road-mobile ICBM and a new version of the KN-23 solid SRBM carrying a hypersonic glide vehicle (HGV) at the early October “military hardware exhibition Defense Development-2025” and October 10 military parade in Pyongyang. These and other revelations at the arms expo and parade were reported extensively on 38 North on November 4.

Context and Implications

The exhibition and parade did not reveal any dramatically new ballistic missiles. The “new” HS-20 appeared to offer little more than the previous HS-19 ICBM, and the addition of an HGV to the KN-23 SRBM will likely make a marginal improvement to missile defense penetration, assuming it is deployed. This should not be surprising given prior improvements to the large variety of missile systems the North has unveiled since 2019, providing Pyongyang updated, mature missile systems across the entire spectrum of ranges. Therefore, aside from multiple warheads if they are successfully developed, future improvements are much more likely to be incremental—although the North probably will continue to increase the overall number of missiles and launchers deployed.

Fewer Missile Launches in 2025, but It’s Not Just the Numbers

The October 23 Wall Street Journal reported that North Korea “sharply reduced” the number of missile launches conducted in 2025 compared to each year between 2022 and 2024. It attributed the reduction to Pyongyang’s increased confidence (which reduced its need to “seek attention” with launches) and a shift from launches to factory visits and declarations by Kim Jong Un as a means to “convey North Korea’s military strength.”

Context and Implications

North Korea has reportedly conducted some 15 ballistic missile launches in 2025, compared to 41 in 2024, 31 in 2023, and 69 in 2022. More interesting than the numbers is the fact that all but one of the 2025 launches were SRBMs (an intermediate-range ballistic missile was launched in January), deepening 2024's emphasis on theater missile activities. This also means no ICBMs or submarine-launched ballistic missiles (SLBMs) were launched in 2025. Only one ICBM—the first and only HS-19—was launched in 2024, and the North has not launched a purpose-built SLBM (as opposed to a sub-fired KN-23 SRBM) since 2019. The recent emphasis on theater missiles is underscored by adding in LACM launches: at least 10 or so were reportedly launched in 2024 and 12 in 2025, including two reportedly observed by Kim Jong Un on December 28.

It is highly debatable whether the North really cared about “seeking attention” with missile launches, especially after its apparent rejection of improved relations with the West in the wake of the failed 2019 Hanoi summit. That said, it would not be surprising if political motivations played an important role in the decision to launch fewer missiles and no strategic systems in 2025, since in Pyongyang political motivations for missile launches are probably more important than technical and operational ones. However, other factors probably contributed as well, including the completion of several missile development programs, a likely priority on exporting KN-23 and possibly KN-24 SRBMs to Russia for use against Ukraine, a possible desire to supersede the HS-19 ICBM with an announced new version incorporating the same more powerful first stage that is being developed for the HS-20, and the lack of an available missile submarine large enough to deploy the newer SLBMs North Korea has displayed but not yet flight-tested.

More of the New “Nuclear-Powered” Submarine Hull Revealed

North Korean press on December 25 reported on a recent visit by Kim Jong Un to the construction site for a “8,700-tonnage nuclear-powered strategic guided missile submarine.” Associated photos looking up from below showed most of the submarine inside its construction hall.

Context and Implications

The previous images of the sub this March only showed the lower portion of part of the hull. Although possibly retouched, the new photos appear credible. In addition to six torpedo tubes in the bow, the new photos reveal an extended-length sail containing 5-10 probable ballistic missile launch tubes akin to the former Soviet Golf-III/Project 601 diesel/electric missile sub. (As the new sub is not seen from above, the number of missile tubes cannot be confirmed.) Housing the missile tubes in the tall sail instead of a shorter “turtleback” section aft of the sail, like most of the world’s missile subs do, suggests the new sub is intended to accommodate SLBMs that are much longer in size—at least 14 meters and even 18 meters long. (The longest SLBM displayed by the North to date, in April 2022, was some 13.5 meters long.) A longer missile may be needed to reach intercontinental range, an objective set out by Kim in January 2021.

There is no open-source reporting that North Korea has yet built or tested a submarine nuclear reactor, and the new photos do not reveal whether one is installed in the new sub. At this point, the idea that the hull is equipped with an operable nuclear reactor should be regarded with great skepticism, although this

possibility cannot be ruled out—especially if Russia provided a reactor or extensive technical assistance (of which there is little evidence to date). Even if the sub is reactor-equipped, a year or two of fitting out probably would be required before it rolled out of the construction hall ready to begin sea trials, with additional time required to reach operational status.

Air Force to Add Nuclear Deterrent Mission

North Korean press reported a November 28 visit by Kim Jong Un to an airbase marking the 80th founding anniversary of the North Korean Air Force. Kim noted “that the Air Force will be given new strategic military assets and entrusted with a new important duty,” and “will play a role in the exercise of the nuclear war deterrent.” Accompanying photos of a weapons display at the airbase showed a road-mobile LACM launcher, three different Hwasal-class LACMs, and a new-type tactical ALCM on a Su-25 Frogfoot ground attack jet.

Context and Implications

Kim did not specify what the Air Force’s new nuclear role will entail, but the display implies at least some LACM launchers will be subordinated to the Air Force and equipped with all three known Hwasal missile variants. The Air Force LACMs probably will be in addition to those already under the Strategic Forces. This is probably the most sensible way to give the Air Force a nuclear role, as road-mobile LACMs are more survivable both pre-launch and in-flight than Pyongyang’s obsolescent combat aircraft, and have enough range (1,500-2,000 km) to cover all of South Korea from anywhere in the North.

The size and square cross-section of the new ALCM resemble the German-Swedish Taurus missile exported to South Korea and the Russian Kh-69. The missile’s range and payload capabilities are unknown but are probably much less than the Hwasal LACM. The new ALCM probably would be more suitable for conventional than nuclear strike missions. Future development of longer-range nuclear ALCMs cannot be ruled out, especially if the North can acquire more capable aircraft to carry them. However, air-delivered nukes will likely remain a minor player in a North Korean nuclear force dominated by road-mobile ballistic and cruise missile systems.

North Korea Resumes Criticism of the US While Moderating Rhetoric, Accelerates Exchanges With China

During the last quarter of 2025, North Korea quietly rejected US President Donald Trump’s overtures for dialogue and resumed criticism of Washington, yet carefully calibrated its rhetoric to avoid foreclosing future negotiations. At the same time, North Korea-China exchanges appear to have accelerated across the political, diplomatic, military and economic spectrums since September, when Kim Jong Un held his first summit with Chinese President Xi Jinping in more than six years. For the foreseeable future, North Korea will likely seek to expand ties with China while promoting greater Pyongyang-Beijing-Moscow alignment.

United States

In the lead-up to and during his October 26-30 Asia trip, Trump referred to North Korea as “sort of a nuclear power” and said he would “love to meet” Kim Jong Un. While North Korea did not directly respond to this overture, it effectively rejected it by carrying out its first missile launches (October 22 and 28) since May and sending its foreign minister to Moscow, where she met with Russian President Vladimir Putin (October 27)—all taking place around Trump’s Asia tour. On November 1, a vice foreign minister called denuclearization a “pipedream.”

In early November, immediately after Trump’s return to Washington, the United States held a joint air exercise with South Korea and imposed further sanctions on North Korea, and a US nuclear-power aircraft carrier entered a Busan port. In response, North Korea issued a vice foreign minister’s “press statement” criticizing US sanctions, launched a short-range ballistic missile, and released a defense minister’s “press statement” noting Pyongyang has “correctly understood the hostility of the U.S.”

A few days after the release of a joint fact sheet from the October 29 US-South Korea summit, Pyongyang issued a Korean Central News Agency (KCNA) “commentary” criticizing the document as a “confrontational declaration” of the alliance.¹

¹ The KCNA commentary criticized the US and South Korean presidents’ commitment to the “complete denuclearization of the Democratic People’s Republic of Korea,” asserted that Seoul’s pursuit of a nuclear submarine and uranium enrichment were “bound to cause a ‘nuclear domino phenomenon’ in the region,” and took China’s side by saying their discussion of ensuring peace and stability across the Taiwan Strait was an attempt to “deny territorial integrity and core interests of sovereign states in the region.”

Context and Implications

Kim Jong Un likely ignored Trump’s meeting offer because of the negative experience of the failed Hanoi summit and inconsistent US messaging that made Trump’s true intentions unclear. Moreover, having strengthened relations with Russia and begun rebuilding ties with China, Kim likely judged it more advantageous to pursue a North Korea-China-Russia alignment. A surprise summit with Trump also could have undermined Xi Jinping—which would have been awkward for Kim Jong Un, who had just begun restoring relations with China.²

Notably, North Korea modulated its anti-US rhetoric in response to the November joint military drill and joint fact sheet. It issued individual officials’ press statements and a KCNA commentary—formats Pyongyang tends to use when it wishes to comment on an issue while maintaining distance between the message and the top leadership. The KCNA commentary also avoided harsh language against efforts toward North Korea’s denuclearization, focusing instead on criticizing the strengthening of the US-South Korea alliance and Seoul’s quest for a nuclear submarine. Similarly, while guiding the construction of a nuclear-powered submarine in late December, Kim Jong Un appeared to shift the blame for South Korea’s nuclear submarine plan from Washington to Seoul, remarking that “Washington has agreed on [South Korea’s nuclear submarine] at the solicitation of Seoul.” These moves appear aimed at maintaining strategic ambiguity to avoid escalating tensions with the United States or foreclosing the possibility of US-North Korea dialogue.

However, significant obstacles would hinder meaningful progress even if US-North Korea dialogue were to resume. North Korea has not issued any high-level statements on foreign policy issues since November, and even its report on the December Party plenum made no mention of foreign policy or inter-Korean issues. The North will outline its foreign policy direction at the Ninth Party Congress, but its hardline stance is highly unlikely to change. This is reinforced by Kim Jong Un’s remark during his September weapons institute visits that the Party Congress will present a “policy of simultaneously pushing forward the building of nuclear forces and conventional armed forces.”

For its part, the United States would face significant challenges in meeting Pyongyang’s dialogue conditions—seemingly recognition as a “nuclear state,” sanctions relief, and a loosened US-South Korea alliance—due to the international nonproliferation regime, UN Security Council resolutions, and the strategic importance of the Washington-Seoul alliance. Even if the Trump administration attempts to sidestep denuclearization, Kim will likely prioritize maximizing immediate gains by continuing to deepen ties with Russia and restoring relations with China.

China

Kim Jong Un’s early-September summit with Xi Jinping in Beijing has reinvigorated high-level exchanges between the two countries. Just three weeks later, Foreign Minister Choe Son Hui visited Beijing for talks and a meeting with the Chinese foreign minister and premier, respectively. The Chinese premier visited North Korea in October for the Workers’ Party of Korea’s 80th founding anniversary—the first

² At a press conference on his return journey on October 30, Trump told reporters: “We [Kim Jong Un and I] never were able to talk because... look I was so busy.” He added: “I think it would have been maybe disrespectful to the importance of this meeting (with Chinese leader Xi Jinping) if we did that. So I’d come back, with respect to Kim Jong Un.” This is interpreted to mean that the summit with Xi Jinping was the most important reason for visiting South Korea, and that meeting with Kim Jong Un could have been disrespectful to China.

visit by a Chinese premier in 16 years. Later that month, a Chinese military delegation visited North Korea for the first time in six years.³ On November 6, the director of the Chinese Communist Party (CCP) International Department met with the North Korean ambassador to China, possibly to brief him on the Lee-Xi summit—a sign of revitalized strategic communications.

Marking the 75th anniversary of Chinese People’s Volunteers (CPV) participation in the Korean War, Kim Jong Un paid tribute at the Cemetery of the Fallen Soldiers of the CPV, after which Chinese Ambassador to North Korea Wang Yajun hosted a reception showcasing friendship by inviting North Korean Defense Minister No Kwang Chol. Marking this same occasion, Wang contributed an article to the CCP daily *Renmin Ribao* on the importance of North Korea-China cooperation—the first time in six years that an article by a Chinese ambassador to North Korea appeared in the paper. At the Pyongyang International Trade Fair in October, Wang said he “expects Chinese companies to contribute to Korean socialist construction by helping with its national development strategy, including the ‘20x10 policy for regional development,’ that Korea is carrying out.”

In September 2025, for the first time since pandemic-related closures were lifted, large shipments of Chinese heavy machinery entered North Korea, and a relatively large number of North Korean workers were reportedly dispatched to Dandong.⁴ Once the New Yalu River Bridge becomes operational—it has remained unopened for over 10 years since its completion—material exchanges are expected to expand further.⁵ Connecting roads and customs facilities are expected to be completed by the end of December.

Context and Implications

North Korea-China exchanges and cooperation contracted sharply due to UN sanctions beginning in 2017 and North Korea’s border closures in early 2020 at the start of the global pandemic. Even after the pandemic ended, bilateral ties have been slow to recover. However, North Korea-China cooperation has been accelerating since the September Kim-Xi summit in Beijing.

³ Since an August 2019 visit to China by a military delegation led by Kim Su Gil, director of the Korean People’s Army General Political Bureau, followed by a October 2019 visit to North Korea by Miao Hua, director of the Chinese Central Military Commission’s Political Work Department, there have been no confirmed reports of North Korea-China military exchanges. The recent Chinese military delegation was led by Xia Zhihe, political commissar of the Chinese People’s Liberation Army National Defense University—a lower-ranking position than Miao Hua’s—but the visit is significant as it marks a resumption of military exchanges between the two countries.

⁴ Between August and September 2025, China supported the construction of North Korean local industrial factories by providing heavy machinery or by turning a blind eye to the large-scale smuggling of Chinese-made cars and used heavy equipment such as excavators and bulldozers. During the same period, North Korea reportedly dispatched approximately 100 information technology (IT) workers and 120-150 workers to garment and seafood processing factories in Dandong. See Jeong Seo-yeong, “N. Korea offers study opportunities for top Chinese language test scorers,” *Daily NK*, October 13, 2025, <https://www.dailynk.com/20251001-4/>; Seulkee Jang, “소규모로 중에 파견된 北 노동자들, 외진 공장들에 분산 배치 [North Korean Workers Dispatched to China in Small Groups Dispersed to Remote Factories],” *Daily NK*, December 3, 2025, <https://www.dailynk.com/20251203-1/>.

⁵ In 2009, North Korea and China agreed to build the New Yalu River Bridge, with China covering the entire construction cost. Construction began in December 2010, and the three-kilometer, four-lane bridge connecting Langtou, Dandong with southern Sinuiju was completed in October 2014. However, its opening has been delayed due to unfinished connecting roads and other issues.

North Korea is expected to call for the acceleration of “comprehensive prosperity” at the Ninth Party Congress in 2026, making expanded economic cooperation with China essential. Not only that, it will seek to learn from China’s best practices across multiple fronts, including party building, economic reconstruction, and welfare improvement. Accordingly, North Korea is expected to pursue a strategy of “security with Russia, economy with China” for the foreseeable future, focusing on expanding military cooperation with Russia and economic ties with China while promoting greater North Korea-China-Russia alignment.

Xi prioritizes North Korea-China relations over South Korea-China relations. This is evidenced by Xi’s remarks during his September summit with Kim, where he promised to place importance on China’s friendship with North Korea and consolidate bilateral ties “no matter how the international landscape may evolve.”⁶ China therefore appears likely to continue high-level exchanges and communication with North Korea while expanding economic cooperation, including provision of livelihood supplies.

This chapter was originally drafted in Korean. The initial translation was produced using AI tools and subsequently reviewed word-for-word and refined by a bilingual subject-matter expert to ensure accuracy and readability.

⁶ According to China’s official report on Xi’s November 1 summit with the South Korean president, Xi made a four-point proposal to enhance bilateral relations: strengthen strategic communication and consolidate the foundation of mutual trust; deepen mutually beneficial cooperation and tighten the bonds of interests; strengthen the friendship between the two peoples; and enhance coordination in multilateral fora to jointly promote peace and development. South Koreans generally agree that momentum has been created for restoring Seoul-Beijing relations, but have also noted that China’s official report omitted any mention of the North Korean nuclear issue. Skepticism also remains about when China will actually accelerate efforts to improve ties with Seoul.

