

Larry Johnson: Bridges, Ports, Energy Infrastructure & Kiev Under Attack

Larry Johnson is a former CIA intelligence analyst who also worked at the U.S. State Department's Office of Counterterrorism. Read Larry Johnson's Sonar21: <https://sonar21.com/> Follow Prof. Glenn Diesen: Substack: <https://glenndiesen.substack.com/> X/Twitter: https://x.com/Glenn_Diesen Patreon: <https://www.patreon.com/glenndiesen> Support the research by Prof. Glenn Diesen: PayPal: <https://www.paypal.com/paypalme/glenndiesen> Buy me a Coffee: buymeacoffee.com/gdieseng Go Fund Me: <https://gofund.me/09ea012f> Buy Diesen merchandise: <https://diesen-shop.fourthwall.com/en-nok> Books by Prof. Glenn Diesen: <https://www.amazon.com/stores/author/B09FPQ4MDL>

#Glenn

Hi, everyone, and welcome back. We are joined today by Larry Johnson, a former CIA analyst who also worked at the U.S. State Department's Office of Counterterrorism. And many of you probably know him for his excellent writing on Sonar 21, and I've left a link in the description. Good to see you again, Larry. How have you been? Good.

#Larry Johnson

Glenn, always appreciate the invitation. Enjoy our chats. Too bad I couldn't be with you when you were in Moscow. We crossed, I guess, crossed in the air.

#Glenn

Yeah, that's a shame. I think you left about the same time I arrived. But there you go. We see some very powerful new developments, though. That is, as we know, Ukraine, backed obviously by NATO in terms of carrying out these strikes, had this 40-day campaign of striking deep inside Russia, with Western leaders applauding it quite openly, from the president of Finland to Marco Rubio, arguing how this was changing the battlefield. We see now that, yes, this has been extended, but it didn't have that great of an impact.

Primarily, Ukraine and NATO went after these e-commerce warehouses, Wildberries, in Russia, but now, of course, and also the ships, civilian vessels in the Sea of Azov and Black Sea. And the Russians have been responding quite fiercely. And rather than toning it down, they seem to only go up the escalation ladder now. So it appears some decision has been made in Moscow that enough is enough. And we see ports, bridges being hit, long queues of people now leaving the capital, Kyiv. How are you seeing this?

#Larry Johnson

Now, this is something that, frankly, Russia should have done two years ago. You know, when the history of this war is written, I think one of the things the general staff will have to answer is, why the hell did you delay so long in knocking out the logistics? The strategy now, and it started really about eight weeks ago, when they shut down the Black Sea ports, so no imports, no exports, that is in effect an economic strangulation of Ukraine. That was accompanied by these ferocious, seemingly unending attacks on the logistics centers in Kyiv and in other key cities, but principally in Kyiv: both warehouses and factories, manufacturing facilities, communication centers, electrical power nodes, data centers. Russia is just methodically destroying those.

And then just this week, they started going after the bridges. Now, I remember interviewing General Evgeny Buzhinsky, I guess a couple of years ago, and I asked him, I said, you know, why has the general staff left all these bridges standing? And he laughed, and he goes, "Oh, I've been asking that myself." I thought, "Oh, that's an interesting insight." But then he went on to explain, well, perhaps one reason was at the time, since the goal, the objective of the Russian military, was to demilitarize the Ukrainian military, that they didn't want to leave them on the west side of the Dnieper River. They wanted them on the east side so that they could destroy them. So I thought, okay, perhaps, you know, and that may have been the reason.

You know, it can be argued from both the strategic level and the tactical level about the wisdom of that, but it is what it is. But now they're going after those bridges, and they're cutting off sort of west Kyiv from east Kyiv, for starters. But this also affects the flow of resupplies going to the east. So, and, you know, apparently it's having the desired effect. They're emptying out the city of Kyiv, and in emptying it out, it's going to be easier for the Russians to take it, militarily take it, which I think is one of their objectives. They're not advertising it, but I think that that is clearly, again, part of the strategy: make the city at this point uninhabitable so that when they do hit it, they minimize the chance of civilian casualties.

#Glenn

It seems almost like they're engineering a perfect storm in Ukraine, though, because just at this moment in time, when there's this manpower shortage and missile interceptor shortage and shortage of overall weapons and money, we see that winter is coming. And at this point, they're striking the factories, as you said, the data centers, the mobile communications. You have this naval blockade. I think today they hit four cargo ships alone. Yeah, all these energy facilities, from the refineries all the way down to actual gas stations, the logistics, all these warehouses. As you said, the bridges connecting east and west of the Dnieper, making the cities function, as most of these—you know, all the cities, the big ones—are located on the Dnieper, with half the city on each side.

You see the military cracking, you see the economy cracking, you see growing social upheaval as people are getting more, well, unhappy, and I would say even rebellious, especially because of these

new recruitment tactics. And also there's less ability by the Western handlers to supply the weapons and money that Ukraine needs. So it just seems like all of this is happening at once. Again, you're the CIA analyst. I'm not much into war planning. Is this common, to try to put, like, all the pressures on at one time so there will be less possibility to essentially, yeah, have that resilience to recover?

#Larry Johnson

Yeah, yeah, no, absolutely. I mean, this is actually what war is supposed to look like. Now, maybe the Russian General Staff explanation was before, well, it was a special military operation, and we weren't going to go full-court press. But now they are. Now, one of the things, again, that I'm struck by is with all of the attacks, with all of the missiles and the Geran drones striking in Kyiv, the very, very small number of civilian casualties. So Russia continues to conduct attacks in a way to minimize civilian casualties.

And that has been, you could argue, that has been one of the things holding them up all along in terms of the criticism in the West for why they haven't moved more rapidly, which is getting criticism like that from the United States pundits is really rich, given the fact that after 21 years we've failed, utterly failed, to defeat the Taliban. And we had more military advantages than Russia did by enormous margins in terms of sophistication of weaponry, control of the air, control, ability to exert technological control. But we still lost. And same thing in Iraq, candidly. So, you know, the United States, before it sits down and wants to criticize Russia's, quote, lack of progress, should just look in the damn mirror and shut up.

You know, we've got no room to criticize whatsoever. Meanwhile, the Russians are— they continue to move forward despite Russia— many in the West, I guess the Financial Times is the most recent example, pushing the narrative that, oh, it's a stalemate. Oh, Ukraine is making progress, pushing back. No, it's not. Stop. You know, this constant lying to ourselves that, you know, it's like 20 pounds ago, I could say, "Well, I'm not fat." Yeah, but you go onto the BMI scale. I was fat, so I had to lose some weight. The West needs to recognize it's not some fit young football player. It's a big fat slob who sits in their BarcaLounge eating Cheetos. They are nowhere in a position to judge what Russia is doing.

What Russia is doing now is, imagine, you know, you're driving in the city. The speed limit's 25 miles an hour. You're limited how fast you can go. Well, now they've hit the open road, and they're going 120 kilometers per hour and faster. They've kicked it into high gear, and we're seeing the results of that in terms of attacks from north to south. So from, you know, Sumy, Kharkiv, Donetsk, Dnipropetrovsk, Zaporizhzhia, Kherson. All along that line of contact, Russia is moving. And this comes in tandem with the assaults on Kyiv, on the infrastructure. The government is going to have to move to Lviv. It is not going to be able to stay and continue to operate in Kyiv. And, you know, I think this is opening the road that Odesa also will be taken under Russian control.

#Glenn

I don't know. I've been trying to figure out why all of this at the same time. Again, one of my theses is that this is simply going for the knockout blow as Ukraine is in control. But again, I just got back from Moscow as well, and I got to ask Lavrov as well about how they see this new pressure coming, especially in the Baltic Sea. And, you know, he went on a bit of a rant in which he was—well, he went for the diplomacy, which is why I'm wondering if they simply gave up on the diplomatic path, because he also spoke very openly about what happened in Alaska. So again, after he was making the point, we had Minsk.

They didn't want it. We did Istanbul. They also sabotaged it. And then, of course, Alaska. You know, he was making the same point, even Putin as well, who showed up and made the same point, that they had a deal with the Americans, the American proposal. They said, "Here's the deal." And it entails some compromises on the Russian side. The Russians decided to accept and take it. And then the Americans essentially thought, yeah, went back and then tried to renegotiate something else. Of course, why? I don't know. Perhaps it was European pressure or Zelensky resisting it. I'm not sure.

But again, is it a knockout blow? Is it diplomacy? Or is it, again, something else that Lavrov pointed out to me? He said that he got goosebumps when he saw how the Europeans were talking about putting pressure, as they say, on Kaliningrad, or the openness with which they now talk about these deep strikes against civilian targets deep inside Russia, how this is a goal now of the Western states. I mean, it becomes so brazen. I just have a—again, as you said, maybe the war planners would say that this is something that they should have done a long time ago to win, but I'm not sure. How do you see how this decision was made?

#Larry Johnson

Well, there's a failure to understand Russia's advantages in this war by the West. And it's exemplified by Professor Pape of, I think he's at the University of Chicago. I'm not here to bust him up, but the argument he's making, and he does have ties to the defense industry, to the Pentagon, is my understanding, reflects the kind of thinking you've seen not just in the United States at the Pentagon, but also in Europe. And the thinking is this: that Europe on paper is so much bigger and stronger. It's got more people, and it's got collectively a higher GDP than Russia, and that Putin has painted himself into a corner. He's caught in what they call an escalation trap.

And it's all premised upon this fable, this fantasy that's been touted repeatedly, that Putin—well, Russia—expected to capture Ukraine in the first two weeks, and they failed. No, they didn't. I mean, that's just utter nonsense. They only went in with 125,000 to 150,000 soldiers, which is, you know, that's such a small force going up against what at the time was about a 650,000-man Ukrainian army. I mean, hello, the attacking force under conventional military doctrine should have a three-to-one advantage. Hell, the Russians flipped that on its head. They had a one-to-three disadvantage, and yet they succeeded in surrounding Kyiv.

They succeeded in getting the Ukrainians to the negotiating table and getting a tentative deal that was then canceled because of the intervention of Boris Johnson and Joe Biden. So now, when you look at it on paper, the reality is Russia is the fourth-largest economy in the world. It's not the economy the size of Spain, as the Europeans are prone to say. But in terms of purchasing power parity—what does the Russian dollar actually buy for the average person?—fourth-largest economy, number one. Number two, I think it ranks in the top five of countries that produce steel. I think it's even in the top three. Nobody in Europe is even in that category.

So Europe doesn't produce steel. How about gas, oil? Europe doesn't really produce that in any quantity that it's self-sustaining. They're dependent upon imports now from the United States. Previously, they were dependent upon imports from Russia. And then, you know, they are supposedly trying to devote more attention to a military-industrial complex. But they're doing that at the same time they're deindustrializing. And right now, one of the critical measures is, how about their artillery production? Back in April of 2022, Russia was producing about 450,000 155-millimeter shells per year. Europe as a whole was producing around 300,000. So let's just say they're roughly comparable.

#Larry Johnson

But now, today, Russia produces 4.2 million a year. And as Mark Rutte has said, Russia is producing more in three months than Europe and the United States combined are producing in a year. So this notion that Russia's at a disadvantage vis-à-vis Europe, it's just nonsense. But the Europeans believe that, which has been why they continue with this belligerent rhetoric, the belligerent threats directed at Russia, talking about taking Kaliningrad. Now, the Russians have, I think, pretty effectively pushed back on that in the last week, where they've sent letters directly to all the governments warning them, basically saying, "You know, you mess around with us in Kaliningrad and you're going to face every weapon we have in our arsenal. And we mean every weapon." You know, that's a subtle way of saying we're going to nuke the hell out of you.

And it appears to have had the desired effect. The previous chest-thumping and threats that were coming out of the Baltic countries—Latvia, Lithuania, and Estonia—they've now calmed down. They sort of shut up. The ones that haven't are Germany, Finland, France, and the U.K. They still seem sort of hell-bent on confronting Russia. And as I think I mentioned to you during one of our recent conversations, when Pepe Escobar and I talked with General Aпти Alaudinov, General Alaudinov just was matter-of-fact, like, yeah, we're going to be going to war with Europe. Not that they wanted to, not that as part of some Russian plan to take over Europe, but he was just acknowledging the threats that are coming from them, the actions that they're taking. He said, "I don't see how we avoid it." So Russia is prepared for that contingency.

#Glenn

The economic argument you made is quite important to note because these GDP numbers, you know, they're not—well, first of all, they don't reflect what you can actually build in your own country. There's been a lot of work on this done in terms of what it would cost to make one ship in the U.S., how many ships you can build in China for that same money, for example. So if you assess it by purchasing power parity, the Chinese overtook the U.S. in 2014 already. And while the U.S. will be at 31 trillion or something, the Chinese are at least 44 now. So they're getting big. And then you have the Russian Federation in fourth place, with Japan following. So, you know, the Germans are already down at six, and the French and U.K. are further down. So they do ignore this.

And, you know, there's other problems with its GDP measuring. Like in the UK, they also put, for example, a lot of money which is from criminal activity. They kind of factor that in. So they put prostitution into their GDP, which the Russians wouldn't do. And, again, it's just massaging the numbers, making you look bigger and stronger than you actually are. But even if you look aside this, you forget about the poor measuring of the GDP as opposed to purchasing power parity. It's also what kind of economy do you have. If you have a big financial market or if you have the heavy industries. And as you said, the Europeans are slowly realizing you can't just put on the printing presses and make missiles and tanks anymore. Those factories, that infrastructure, the know-how, the skills, it takes some time to acquire.

Anyways, yeah, I didn't want to say that. I had one last thesis on why Russia might be coming out swinging now. That is, my thought is, when, you know, usually how you fight a proxy war, it would be, you know, you put in your proxy and make your proxy and your opponent bleed each other white. And then, if required, you can come in towards the end. But, so in other words, my thought was, when Ukraine begins to fall, there's always this high risk that especially Europeans will start to send their troops to Odessa or something, just to make sure that this is where the Russians will stop. If this happens, I mean, the Russians have been saying, if you send in your troops now, then we're at war.

And I'm wondering if the reason why they may have waited to engineer this perfect storm is because they need to be ready in case the Europeans go to war. And I'm wondering how many Oreshniks they now have, because they don't even need the nuclear weapons. And so every month the European weapons stores are depleting themselves, while the Russians have been building up a lot of, you know, armored vehicles and Oreshniks in the rear, which makes me wonder if those are meant for us in case we decide to try to ride in and rescue the situation. I'm not sure if you have any numbers or any overview at all—well, they're not sharing these numbers—but how prepared the Russians would be in case Europe would enter the fight.

#Larry Johnson

Well, that's why I think that has been another one of the reasons why, prior to, let's say, two months ago, Russia still had not gone forward with this full—I'll call it a full-court press—where

they're running every part of their offense that you can imagine. And that was, they were still building up reserves, right? Because the military planners were saying—and I'm just giving an opinion here—that they were assessing an 80% probability that Europe would enter the war and Russia would be required to fight Europe. And so, to that extent, they were holding back, not committing all of their troops, which they could commit. They could get an easy, quick victory over Ukraine.

But it would leave them—they could possibly deplete their force in the process and then have to face Europe in a weaker position. And they were saying, "No, we've got a plan to deal with Europe." So they're thinking ahead in that regard. You know, we saw, it was about two months ago, that both Lavrov and the Foreign Ministry issued direct warnings to foreign missions in Kiev: get out, and we recommend you not stick around because it's going to get pretty dicey here. A lot of the foreign missions ignored that. Well, the Russians reiterated that call two days ago, and I think now we're seeing a number of the foreign missions, they're heeding that.

If they're not, at least the population of Kiev is. Many of them are heeding it. They're getting out of town. So, and I think that part of that is also Russia's intent. They're going to go hard after these targets. Just the other day, one of the targets they hit was within spitting distance of the German embassy. And, you know, some said that perhaps that was a message being sent to the Germans. Perhaps. But what the Russians—the Russian leadership, but particularly Putin—he's made it clear, particularly in his answer to questions at Valdai, was, you know, once it's done, we've got to do this quicker. We've got to bring an end to this quicker. So the pressure's on now to get a quick end to this and not to drag it out.

#Glenn

Yeah, I noticed that thing from Valdai, how Putin answered the questions about the different conflicts around the world. He was cautious not to be too critical of the U.S. and Trump. Well, he's more now than he was last year. But nonetheless, he doesn't want to burn any bridges there in case there is some—you know, you still have to work with the Americans. Even Israel, because, you know, the Russians and Israelis have a complicated relationship. So he looked like his criticism was kind of limited to U.N. resolutions and, of course, expressing his sympathies for the Israelis and the bravery of Iranians. But he didn't go that hard after the Israelis. The one exception was the Europeans, especially the Germans. I thought this is where, you know, the main criticism and the contempt was.

And I'm not sure why Germany. I think it's something personal for him, to be honest. You know, they say that, you know, if you have resentment, it must come from somewhere. If it's something you didn't care about, you won't have those strong feelings. But, you know, he lived there. His daughter was born there. He speaks German. I think also because the Russians backed the unification of Germany, and then they saw the Germans later on kind of stab them in the back. And then, you know, they let Germany unify, but Russia could not be a part of the European unification.

They were pushed out. And then, you know, even their closest state friend, Ukraine, was toppled and destroyed, weaponized against them. So I think the anger towards Germany, you can't really underestimate at the moment.

#Larry Johnson

Well, and the Germans were responsible for the death of his brother during the siege of Leningrad in World War II. So, yeah, there's no warm, fuzzy feeling there. And whatever hopes that Putin may have once held about the prospects of Germany turning over a new leaf and being a different country, partner, those are completely dashed. Friedrich Merz, good God, he's like somebody out of central casting that, you know, all you do is put the Nazi uniform on him and you've got déjà vu all over again. And in fact, his, I guess, his grandfather was a senior Nazi officer.

#Glenn

It's a real shame, though, because if Europe and Russia are to walk away from the brink, from going to war, what would need to happen is—because all the Europeans have locked themselves in consensus, no one can stray from the consensus because that's appeasement, essentially. So the only way it can be done now is not through consensus, but through Germany and Russia. If those politicians could sit down and talk, if they could start to get the diplomacy going, something—that German gravitational thing—it would pull along many of the other Europeans. Because many people now across Europe, they know that this is headed for disaster, but no one seems to be able to, again, make this tanker change course. So, you know, in my opinion at least, it would have to be the Germans and Russians sitting down, which would then pull the rest of the Europeans towards some diplomacy. But again, Germany is led by Chancellor BlackRock Merz, of all people. So it's like the worst situation we could possibly be at, though.

#Larry Johnson

Yeah, I think the bubonic plague is more popular than he is. But did you happen to see Tucker Carlson's conversation with this British elite, Rees-Mogg—is that his last name? Yeah, Jacob Rees-Mogg, yeah. God, oh my. Well, but it was instructive because it shows the delusional mindset of the leadership class in Britain. Because Rees-Mogg was saying just outright ridiculous, provably false things. As an example, that, you know, he claimed that the UK GDP was bigger than that of Russia. And Tucker's going, "What?" You know, that, you know, again, any measure, like with steel production, Russia's in the top three, three or four in the world. And Britain's not even—you know, Britain at one point was, but it's no longer.

It's not even in the top ten. But the insistence on this narrative that Russia is evil, that Russia is ruled by a dictatorship—and here's the real irony—that it's an authoritarian state. Yet, as we learned this week with our friend Ian Proud, he's a British citizen, served the British Foreign Ministry as a diplomat, and he makes a trip to attend the Valdai Discussion Club, which is committed to peace,

comes back, and the British authorities treat him like a criminal. They confiscate his phone. They confiscate his laptop. They interrogate him for three hours, you know, clear of threatening behavior. They've done the same to George Galloway, former member of Parliament, and George's wife, Gayatri.

They've done it to academics, Richard Sakwa. They've done it to other journalists, such as Richard Medhurst. And then the Brits have the balls, the gall, to sit there and talk about how dangerous and unfair things are in Russia. Russia, you know, ridiculous. Absolutely ridiculous. But that mindset, what he was saying, it is reflected among the leadership—let's call it the leadership class—throughout many of the countries in Europe, particularly Germany, France, the UK, Finland, Poland to an extent, Romania. It's bad. And because of this unrelenting hostility directed at Russia, they're guaranteed they're going to have a collision, and Europe is not going to survive the collision.

#Glenn

What bothered me, though, in that interview with Jacob Rees-Mogg and Tucker Carlson, was the whole premise of the argument is, you know, we have to stand firm and show that we're willing to fight Russia if they're supposed to back down. But this is kind of the common thesis we have now. That was the same logic as NATO backing this 40-day campaign of deep strikes into Russia. That is, we have to put more pressure on Russia, then they will concede. But again, I always ask, to do what? What exactly do we think they're going to do? What does pressure on Russia do? Because the whole, it seems, you know, we keep saying, oh, they will end the war, but how?

They see this: if they move out of Ukraine, let's say they would just completely leave, NATO will walk in with its missiles, arming it, making Ukraine into a steel porcupine with all the security threats it entails for Russia. And then NATO could use them in the future if they want to do something like this. So the point is, I think the problem is they all genuinely bought into this argument that this is, again, they're fighting a new Hitler and we have to stand strong. Otherwise, if he's done there, he's going to move to the next country. I always make the point that, no, they see this as an existential threat. And we know this. We knew this for 30 years, that they saw NATO expanding as an existential threat. So any push for them, I think, will just make the Russians escalate further. And that's what you're seeing now.

#Larry Johnson

Well, I was just going to say the anti-Putin sentiment is the other thing that's off the charts. And I had a discussion with a friend here. She said, "We can't talk about Russia. Putin's just an evil man." And I'm like, I said, "Based on what? I'm not going to talk about it." So it's so deep and emotional. But so many in the West think, "Oh, if we just replace Putin, Russia will be different." Hello? Hello? You know, there are people with much less diplomatic restraint than Putin has demonstrated. You want to put Medvedev back in there?

Now, he's been playing bad cop all along. And maybe that is a bit of an act. But I don't put it past him. I mean, there is ample support in Russia for much stronger, tougher military action. Again, Aleppo, for example. There are enough Russians that say, "We've had enough of this crap. Level it." And so this is what Europe is pushing for, I think, without appreciating what they're going to get, that they want to dethrone Vladimir Putin. When the gloves fully come off on the Russian side, the West will get a beating that it just is not prepared to receive.

#Glenn

Well, on that topic, though, again, one shouldn't delve too much into speculation, as we don't know the facts. But there's something interesting that's been happening in Europe. That is, an awful lot of our weapons factories seem to be blowing up over the past few weeks. And again, I have to say, on one hand, it is possible if you have countries wanting to rearm in such a quick fashion, it is problematic around the skills, the equipment. I would assume some accidents would occur. But still, this is starting to look a bit suspicious to me. I was wondering, how do you see this? Is this plausible deniability to some extent?

#Larry Johnson

I would not be surprised to learn that the Russians have mounted an intelligence operation to destroy, sabotage these factories. But it also can be explained that, in the pressure to try to ramp up production at these factories, that pressure produces some sloppiness, some carelessness, which could also account for some of these fires and explosions. There have been a couple of cases where the prosecutors are going after people, accusing them of sabotage. But in the others, they're not sure. Well, the way I approached it, I just simply looked at what the damage has done. And despite all the European talk about ramping up production to confront Russia, the reality is the destruction of these factories and manufacturing plants has reduced Europe's ability to do anything in the short or medium term. So it's just—they're marching backwards. So the effect of it is, it is reducing Europe's ability to mount a threat to Russia, not increasing it.

#Glenn

Well, there's another issue happening now because of the war against Iran. We now see there's a shortage of diesel. Of course, the strikes on Russian refineries do not make this any better. There seems to be a little bit of blowback in Europe on this because Trump apparently threatened the Europeans to cut off exports, so they have agreed now to release a lot of diesel from their strategic reserves. What is happening with this? Well, I still need to run the numbers on this.

#Larry Johnson

I can give you some broad numbers. Number one, Europe consumes about 5 million barrels of diesel per day. The United States produces 5 million barrels of diesel per day. The United States consumes

3.5 million barrels. So the United States would conceivably be able to offer Europe the other 1.5 million. Now, the reality is all of that diesel that the United States is producing, it's not going exclusively to Europe. Some of it's going to Israel. Some of it's going to Australia and New Zealand. Some of it has gone to Asia. So my point is that the amount the United States is providing Europe, at least on paper, it doesn't appear to be critical. However, it was the direct threat by the United States saying, look, you guys have these diesel reserves. You need to start drawing those down or else.

I've heard two different numbers, 100 million or 120 million over six months. Well, just do the math. If it's 100 million or it's 120 million, that's 24 days of supply in terms of what Europe uses on a daily basis, the 5 million. So that's not an enormous amount. The effort by Trump and others to blame the shortage on Russia's attacks on Russian refineries, it's just, it's nonsense. Previously, go back to December of '25, the global export of diesel per day was 8 million barrels per day. Of those 8 million barrels back in December of 2025, Russia accounted for about 13% of that total. Over the course of the last three months, Russia has reduced that to previously 155,000 barrels per day. So it's significantly lower, but the point is, it's still not the 700,000 barrels per day less that Russia was putting out doesn't cripple the global economy.

The reason we've got this global shortage of diesel is because of what's not coming out of the Persian Gulf. And this demand that the White House just made of Europe underscores how Trump is lying about how much oil is coming out of the Persian Gulf. He said, "Oh yeah, we got more now than ever before." No, that's a lie. If that was true, why are we putting the arm on Germany and France? "Hey, guys, you've got to cough up your strategic diesel reserves in the next six months, or else we're going to stop exporting to you." And we already had the UK, Burnham, reaching out to Trump saying, "Oh my God, please, please don't cut off the exports." And then within a day or two of that, Burnham was out saying, "Yeah, that attack at Fairford, at the RAF base, that was Iran."

Is that good enough, Don? Asking Trump, you know, saying what the Americans wanted to hear. The reality for the world is that the Strait of Hormuz is still—it's effectively closed. The damage that's been done to the oil petrochemical infrastructure in the Persian Gulf and in Iran is significant. I've written about it based on an analysis done by Carl Miller. At a minimum, the world is looking at a five-year process before things can get back to normal. Why? Because the damaged equipment is such that it's not a matter of buying generic replacement parts. You know, go to your local store, you know, Home Depot or Costco or Lowe's or, you know, whatever you use to buy, you know, hardware. This stuff is made to order. It is, if you will, bespoke.

And because it is bespoke, it has to be manufactured for each of those countries and the systems in each of those. In addition, the workers that do the repair—there aren't 5,000 guys sitting around waiting to do something. It's a very small number of skilled technicians. And if they get involved with one job, that means they can't go do the next one. I mean, they're going to be busy over the next five years. So just that alone is affecting supply. We've got a structural problem. Then in addition,

you've had a fire at a refinery in India, probably caused by lack of maintenance because they have been working overtime trying to refine diesel and aviation fuel out of this middle distillate. China has just jumped into the fray by saying, "We're cutting off our exports of diesel."

And Russia apparently has decided to do the same, not because they lack the diesel, but I think because both China and Russia now are acting in concert to really put pressure on the Western economies. So this is pretty complicated. And it's not just there is oil flowing out, but it's going to China. Iran is the major supplier of that. And despite U.S. claims that it has an iron, you know, steel wall blockade—nonsense. In fact, you just had the George H.W. Bush, the aircraft carrier with its three accompanying vessels, or destroyers and a cruiser. It's just departed the area. It's in Phuket, Thailand. And, you know, so that reduces at least about 11 ships in the Gulf of the Sea of Oman to try to interdict tankers, which is a very, very small number. The point of the matter of fact is the United States does not have enough ships on scene to run an effective blockade.

#Glenn

Well, as all of this is happening, we see the Strait of Hormuz is closed, right? The Bab al-Mandab Strait as well. It's being tightened. I saw they struck a Saudi ship there, I think it was yesterday. And Ansar Allah, or the Houthis in Yemen, they are now taking more strategic territory there. And it just seems like everything is going the wrong way. I guess just the last question: how do you see the United States, you know, how may it address this? Because, you know, Saudi Arabia is trapped. If they fall because of this, that's, you know, what is going to happen to Qatar, the UAE? I mean, this is going to be Bahrain. This is going to have a domino effect. You know, the U.S. can't allow this to fail. That's the petrodollar. That's the financing for its AI bubble. I mean, but what are the options of the U.S. here? What might it do? Because I know every answer sounds crazy now, but the situation is getting quite desperate.

#Larry Johnson

Well, the U.S. has no good options, and frankly, there's not a lot it can do to stop what's going to happen to Saudi Arabia. It doesn't have the ground forces to put in there to do anything to stop the Houthis. The naval force doesn't do a thing because the Houthis are land-based, and they're going to—you know, just today they've closed off the last escape route for the officially recognized Saudi-backed Yemeni military, and maybe Saudi mercenaries as well. They're now trapped around Taiz. And they're going to either have to surrender or they're going to be destroyed. But they're now fully surrounded.

Next stop will be Aden. Once Ansar Allah takes Aden, they're going to move up the coast into Jizan. They'll take control of this, I think it's an Aramco petrochemical plant that's the most sophisticated in the world. So there's nothing. The only thing the U.S. can offer is air power, and frankly, the air power is limited because it doesn't have unlimited supplies of weapons. The Saudis are in trouble. The only thing that could save the Saudis at this point is a negotiated settlement where they

concede to the Houthi demands, they lift the sanctions, they provide reparations, and they basically withdraw their forces from Yemen.

I don't see the Saudis yet doing that, but you've got growing opposition to MBS in Saudi Arabia. The capability of the Houthis to strike anywhere they want in Saudi Arabia has been demonstrated over the past week. They just hit a site in Dammam, which is out on the east, the far eastern shore of Saudi Arabia, just near Bahrain. So the Saudis don't have any good options, and it's not like there's something that Turkey and Pakistan could come militarily to their aid that would turn the tide. Pakistan's already told them, "We're not going to get involved with the fight with the Houthis." So the Saudis have been acting with some desperation.

They've been trying to create the notion that Mecca and Medina are going to fall into the hands of apostates. I would not rule out the possibility that we'll see, you know, maybe by next year this time, we'll be talking about Ansar Allah's control of Mecca and Medina. It could get that bad. You think they would go that far? Yes. Wow. Yeah, I think that is a potential that absolutely is on the table. I know that people working in the region who have a good sense of what's going on on the ground, they're putting that on the list of not necessarily likely, but certainly possible, and a better than 50% chance of possible.

#Glenn

So given this massive risk, you would think the Saudis would, well, not throw in the towel, but come to a deal with the Houthis. That is, to end the blockade on them. But that itself, I can understand, would be very deeply problematic, because if they end the blockade on Yemen, I guess two things would happen. One, the Saudis would look very weak, which is not great in a region where they are seen as a leader. But more importantly, Yemen, without the naval blockade, they will be able to grow very strong.

And they have a huge population, bigger than the Saudis. And if they are allowed to get very strong and powerful, you know, that would also impact Saudi Arabia's relationship with Iran because they can't afford to have this hostile relation with Iran. They would have to find a way of making peace, which means walking back the U.S.-led security arrangement, which means an anti-Iranian alliance. It just feels like no matter what the Saudis do now, the region will shape itself more in Iran's favor. Again, I don't see a good out here, though.

#Larry Johnson

The U.S. does not have a good escape route at all. That's what has been the story for the last 70 years of the U.S. role in the Middle East. That story has ended. We're writing a new book.

#Glenn

Well, Larry, it's always a pleasure. Interesting things, what's happening. It's kind of frightening that this is happening in the real world, but here we are. So thank you so much. All right, my friend.

#Larry Johnson

It's always a pleasure. Take care.