

TRENDS IN INTERNATIONAL ARMS TRANSFERS, 2017

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The volume of international transfers of major weapons in 2013–17 was 10 per cent higher than in 2008–12. This is a continuation of the upward trend that began in the early 2000s (see figure 1). The five largest exporters in 2013–17 were the United States, Russia, France, Germany and China (see table 1). The five largest importers were India, Saudi Arabia, Egypt, the United Arab Emirates (UAE) and China (see table 2 on page 6).

The flow of arms to the Middle East and Asia and Oceania increased between 2008–12 and 2013–17, while there was a decrease in the flow to the Americas, Africa and Europe.

From 12 March 2018 the freely accessible SIPRI Arms Transfers Database includes data on arms transfers in 2017 and updated information for 1950–2016. This Fact Sheet highlights some of the key global and regional trends and issues in arms transfers based on the new data.

THE EXPORTERS, 2013–17

SIPRI has identified 67 countries as exporters of major weapons in 2013–17 (the top 25 are listed in table 1). The five largest suppliers of arms during

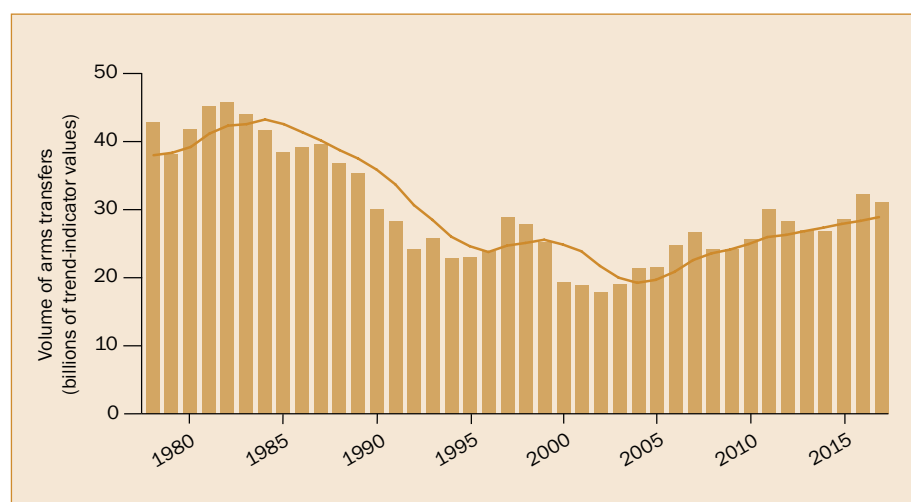


Figure 1. The trend in international transfers of major weapons, 1978–2017

Note: The bar graph shows annual totals and the line graph shows the 5-year moving average (each data point in the line graph represents an average for the preceding 5-year period). The SIPRI trend-indicator value (TIV) is a measure of the volume of international transfers of major weapons. The method used to calculate the SIPRI TIV is described at the SIPRI website at <<https://www.sipri.org/databases/armstransfers/sources-and-methods>>.

KEY FACTS

- The volume of international transfers of major weapons has grown steadily since 2003. In 2013–17 the volume was 10 per cent higher than in 2008–12.
- The five largest exporters in 2013–17 were the USA, Russia, France, Germany and China. Together, they accounted for 74 per cent of the total volume of arms exports.
- US exports accounted for 34 per cent of the global total in 2013–17. US arms exports in 2013–17 grew by 25 per cent compared with 2008–12.
- French and Chinese arms exports in 2013–17 were higher than in 2008–12, with respective increases of 27 and 38 per cent.
- Russian arms exports decreased by 7.1 per cent between 2008–12 and 2013–17, and German exports fell by 14 per cent.
- The five largest importers in 2013–17 were India, Saudi Arabia, Egypt, the UAE and China. Together, they received 35 per cent of all arms imports.
- The main recipient region in 2013–17 was Asia and Oceania (accounting for 42 per cent of global imports), followed by the Middle East (32 per cent), Europe (11 per cent), Africa (7.2 per cent) and the Americas (7.1 per cent).
- Between 2008–12 and 2013–17 arms imports by states in the Middle East and Asia and Oceania increased by 103 and 1.8 per cent, respectively. By contrast, overall imports decreased in the Americas (–29 per cent), Africa (–22 per cent) and Europe (–22 per cent).

Table 1. The 25 largest exporters of major arms and their main clients, 2013–17

Note: Percentage of total is rounded to 1 decimal place (except for percentages over 10 which are rounded to whole numbers).

Exporter	Share of arms exports (%)		Per cent change from 2008–12 to 2013–17 ^a	Main clients (share of exporter's total exports, %), 2013–17		
	2013–17	2008–12		1st	2nd	3rd
1 United States	34	30	25	Saudi Arabia (18)	UAE (7.4)	Australia (6.7)
2 Russia	22	26	-7.1	India (35)	China (12)	Viet Nam (10)
3 France	6.7	5.8	27	Egypt (25)	China (8.6)	India (8.5)
4 Germany	5.8	7.4	-14	South Korea (14)	Greece (11)	Israel (8.7)
5 China	5.7	4.6	38	Pakistan (35)	Bangladesh (19)	Algeria (10)
6 United Kingdom	4.8	3.8	37	Saudi Arabia (49)	Oman (14)	Indonesia (9.9)
7 Spain	2.9	2.9	12	Australia (34)	Turkey (14)	Saudi Arabia (8.3)
8 Israel	2.9	2.1	55	India (49)	Azerbaijan (13)	Viet Nam (6.3)
9 Italy	2.5	2.4	13	UAE (12)	Turkey (10)	Algeria (9.9)
10 Netherlands	2.1	2.1	14	Jordan (15)	Indonesia (15)	USA (11)
11 Ukraine	1.7	2.5	-26	Russia (23)	China (20)	Thailand (12)
12 South Korea	1.2	0.8	65	Indonesia (26)	Iraq (24)	Philippines (11)
13 Switzerland	0.9	1.1	-11	Saudi Arabia (20)	China (17)	USA (11)
14 Sweden	0.9	2.0	-53	UAE (17)	Thailand (16)	Saudi Arabia (13)
15 Turkey	0.8	0.4	145	Turkmenistan (31)	UAE (24)	Saudi Arabia (16)
16 Canada	0.8	1.0	-18	Saudi Arabia (19)	India (11)	USA (9.4)
17 Norway	0.6	0.6	14	Finland (29)	Oman (23)	USA (18)
18 Belarus	0.4	0.4	12	Viet Nam (26)	China (26)	Sudan (23)
19 Australia	0.3	0.3	15	USA (51)	Indonesia (28)	Oman (8.5)
20 Czech Republic	0.3	0.1	467	Iraq (44)	USA (19)	Viet Nam (11)
21 South Africa	0.2	0.6	-51	UAE (22)	India (8.7)	Nigeria (7.0)
22 UAE	0.2	0.1	320	Egypt (52)	Jordan (26)	Kuwait (6.9)
23 Finland	0.2	0.3	-5.7	Poland (59)	Sweden (11)	Saudi Arabia (5.8)
24 Brazil	0.2	0.3	-20	Afghanistan (32)	Indonesia (31)	Angola (9.3)
25 Portugal	0.2	0.1	74	Romania (90)	Belgium (7.1)	Uruguay (2.8)

UAE = United Arab Emirates.

^aFigures show the change in volume of the total arms exports per exporter between the 2 periods.

that period—the USA, Russia, France, Germany and China—accounted for 74 per cent of all arms exports (see figure 2). The largest arms exporters in 2008–12 were the USA, Russia, Germany, France and China. The top five in 2013–17 exported 11 per cent more arms than the countries comprising the top five in 2008–12. The rise was due to increased exports by the USA, France and China (see figure 3). The SIPRI Arms Transfers Database shows that all the main arms suppliers are exporting advanced weapons, including air-launched guided missiles (see box 1 on page 11). It also clearly indicates that countries outside North America and Europe play only a small role in the global export of arms (see table 1).



The United States

The USA was the top arms exporter in 2013–17 and 2008–12. Its share of total arms exports rose from 30 per cent to 34 per cent between those periods. The USA's exports of major arms grew by 25 per cent between 2008–12 and 2013–17, further widening the gap between it and all other arms exporters (see figure 3). In 2013–17 US arms exports were 58 per cent higher than those of Russia—the second largest arms exporter for that period. In 2008–12 its arms exports were 17 per cent higher than Russia's. US arms exports in 2017 were the highest for a single year since 1998. It should be noted that contracts for most of these deliveries were agreed up to 10 years ago.

States in the Middle East accounted for 49 per cent of US arms exports in 2013–17, followed by states in Asia and Oceania (33 per cent), Europe (11 per cent), the Americas (4.8 per cent) and Africa (2.2 per cent).

The USA delivered major weapons to at least 98 states in 2013–17, a significantly higher number of export destinations than any other supplier. Of the world's 50 largest arms importers in 2013–17, only 7 did not receive or place orders for major arms from the USA during that period.

By far the largest recipient of US arms in 2013–17 was Saudi Arabia, accounting for 18 per cent of US arms exports (see figure 4). The USA's arms exports to Saudi Arabia increased by 448 per cent between 2008–12 and 2013–17.

Arms transfers are often used as a US foreign policy tool to forge new strategic partnerships. As part of its efforts to offset China's growing influence in Asia and Oceania, for example, the USA has been strengthening its ties with India: its arms deliveries to India rose by 557 per cent between 2008–12 and 2013–17. The USA has also started to increase its security cooperation with Viet Nam in recent years. In 2017 it delivered one large patrol ship to Viet Nam—the first US transfer of major arms to that country.

The USA exports a wide variety of major weapons, and combat and transport aircraft account for a large proportion of these exports. The

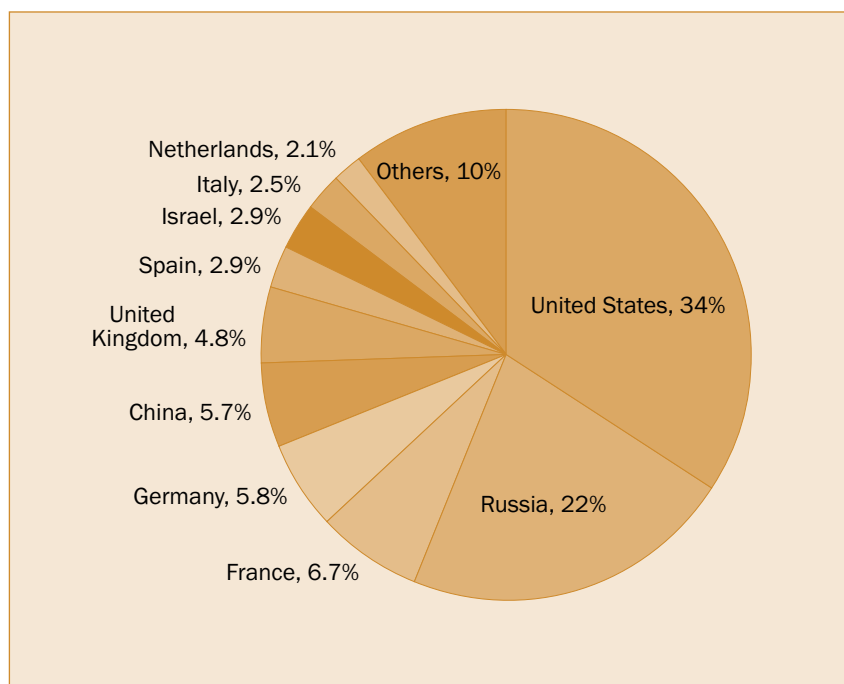


Figure 2. Global share of major arms exports by the 10 largest exporters, 2013–17



Figure 3. Changes in volume of major arms exports since 2008–12 by the 10 largest exporters in 2013–17

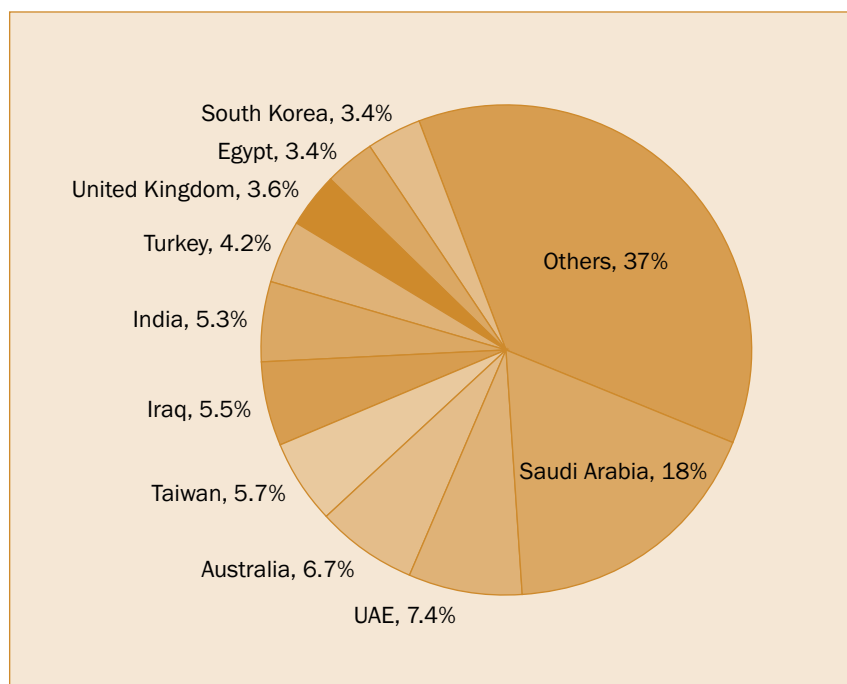


Figure 4. The 10 largest importers of US arms in 2013–17 and their share of US arms exports

USA delivered 200 combat aircraft in 2013–17. These deliveries included a total of 50 F-35 combat aircraft, of which 12 were delivered to the United Kingdom, 10 to Norway, 9 each to Israel and Italy, 6 to Japan, and 2 each to Australia and the Netherlands. The USA also delivered 30 F-15SG combat aircraft to Saudi Arabia and 16 to Singapore. By contrast, the volume of US exports of military ships is relatively modest. In 2013–17, for example, the USA's volume of exports of military ships was smaller than the volumes exported by Germany, Spain or the Netherlands.

Russia

Russian exports of major weapons decreased by 7.1 per cent between 2008–12 and 2013–17. The fall was largely due to reductions in deliveries to some of its main recipients. Deliveries to Algeria and China, for example, continued throughout 2013–17 but were at lower levels than the previous five-year period. Weapons remain on order from Russia for both countries. In addition, while Russia made significant deliveries to Venezuela in 2013, deliveries dropped to nil for the period 2015–17 (see below).

Russia has fewer arms export destinations than the USA. In 2013–17 Russia delivered major weapons to 47 states and to rebel forces in Ukraine. A total of 58 per cent of Russia's arms exports went to its top three recipients in 2013–17: India, China and Vietnam accounted for 35, 12 and 10 per cent, respectively (see table 1). At the regional level, Asia and Oceania accounted for 66 per cent of Russian arms exports in 2013–17, Africa for 13 per cent, the Middle East for 11 per cent, Europe for 6.2 per cent and the Americas for 4.2 per cent.

West European countries and the European Union

The five largest West European suppliers—France, Germany, the UK, Spain and Italy—together accounted for 23 per cent of global arms transfers in 2013–17.

France's arms exports rose by 27 per cent between 2008–12 and 2013–17. A total of 42 per cent of French arms exports went to states in the Middle East, 31 per cent to Asia and Oceania, 10 per cent to other states in Europe, 9.1 per cent to the Americas and 7.5 per cent to Africa. France delivered major arms to 81 states in 2013–17. Egypt (25 per cent) was by far the largest recipient of French arms during that period (see table 1). This was due to the French Government's aggressive arms sales policy under which it made combat aircraft and warships that were in production for its own forces



available for export and swift delivery to Egypt instead. Several major deals were signed in 2013–17, including 36 combat aircraft each for India and Qatar, and 12 submarines for Australia.

Germany's exports of major arms decreased by 14 per cent between 2008–12 and 2013–17. In 2013–17 a total of 29 per cent of German arms exports went to other states in Europe, 24 per cent to Asia and Oceania, 13 per cent to the Americas and 8.4 per cent to Africa. Arms exports to the Middle East, which were the subject of significant political debate in Germany throughout the period, accounted for 26 per cent of German arms exports.

Between 2008–12 and 2013–17 British arms exports increased by 37 per cent. Deliveries of combat aircraft to Saudi Arabia and Oman accounted for a large share of these exports. The exports to Saudi Arabia were the subject of heated debate in the UK in the context of the Saudi Arabian military intervention in Yemen.

The combined arms exports by European Union (EU) member states accounted for 27 per cent of the global total in 2013–17.

China

China's exports of major arms increased by 38 per cent between 2008–12 and 2013–17. In 2013–17 Asia and Oceania accounted for 72 per cent of Chinese arms exports, Africa for 21 per cent, the Americas for 4.9 per cent and the Middle East for 2 per cent (a notably smaller share than any of the other top five arms exporters).

China delivered major arms to 48 countries in 2013–17. Pakistan was the main recipient (35 per cent), as it has been for all five-year periods since 1991. Large increases in arms supplies to Bangladesh and Algeria accounted for much of the growth in total Chinese arms exports in 2013–17.

Other arms exporters

The new data in the SIPRI Arms Transfers Database highlights important developments in several other arms-exporting countries outside North America and Europe. There were, for example, large increases in arms exports by Israel (55 per cent), South Korea (65 per cent) and Turkey (145 per cent). Israel has been among the top 15 arms exporters for decades. Israel's exports, which went to countries all over the world in 2013–17, included missiles, radars (and other sensors) and unmanned aerial vehicles. In 2013–17 South Korea, which has a rapidly developing arms industry, exported arms to European states for the first time. Turkey notably increased its arms exports (specifically armoured vehicles) to other states in the Middle East in 2013–17.

THE IMPORTERS, 2013–17

In 2013–17 the top five arms importers—India, Saudi Arabia, Egypt, the UAE and China—accounted for 35 per cent of total arms imports (see table 2 and figure 5). Of these, India and China were among the top five importers in both 2008–12 and 2013–17. At the regional level, Asia and Oceania accounted for 42 per cent of imports in 2013–17, followed by the Middle East, Europe, Africa and the Americas (see figure 6 on page 8).

Table 2. The 40 largest importers of major arms and their main suppliers, 2013–17

Note: Percentage of total is rounded to 1 decimal place (except for percentages over 10 which are rounded to whole numbers).

Importer	Share of arms imports (%)		Per cent change from 2008–12 to 2013–17 ^a	Main suppliers (share of importer's total imports, %), 2013–17		
	2013–17	2008–12		1st	2nd	3rd
1 India	12	11	24	Russia (62)	USA (15)	Israel (11)
2 Saudi Arabia	10	3.4	225	USA (61)	UK (23)	France (3.6)
3 Egypt	4.5	1.6	215	France (37)	USA (26)	Russia (21)
4 UAE	4.4	3.2	51	USA (58)	France (13)	Italy (6.6)
5 China	4.0	5.4	–19	Russia (65)	France (14)	Ukraine (8.4)
6 Australia	3.8	4.0	7.5	USA (61)	Spain (26)	France (6.9)
7 Algeria	3.7	4.1	0.8	Russia (59)	China (15)	Germany (13)
8 Iraq	3.4	1.7	118	USA (56)	Russia (22)	South Korea (8.7)
9 Pakistan	2.8	4.9	–36	China (70)	USA (12)	Russia (5.7)
10 Indonesia	2.8	1.0	193	UK (17)	USA (16)	South Korea (12)
11 Viet Nam	2.7	1.7	81	Russia (82)	Israel (6.7)	Belarus (4.3)
12 Turkey	2.4	3.1	–14	USA (59)	Spain (16)	Italy (10)
13 South Korea	2.2	4.8	–50	USA (53)	Germany (36)	Israel (4.6)
14 United States	2.0	3.9	–44	Germany (22)	Netherlands (12)	France (12)
15 Taiwan	2.0	0.6	261	USA (100)	Germany (0.1)	Italy (0.1)
16 Oman	1.7	0.3	655	UK (38)	USA (28)	Norway (7.9)
17 Israel	1.7	0.8	125	USA (60)	Germany (30)	Italy (10)
18 United Kingdom	1.6	1.7	–1.5	USA (80)	South Korea (5.9)	Israel (4.3)
19 Bangladesh	1.5	0.3	542	China (71)	Russia (16)	USA (4.9)
20 Qatar	1.5	0.6	166	USA (67)	Germany (20)	Switzerland (5.3)
21 Singapore	1.5	4.0	–60	USA (70)	France (12)	Italy (4.1)
22 Italy	1.4	0.7	111	USA (55)	Germany (28)	Israel (8.4)
23 Azerbaijan	1.3	0.9	55	Russia (65)	Israel (29)	Turkey (2.5)
24 Japan	1.2	1.7	–19	USA (93)	UK (4.8)	Sweden (1.8)
25 Venezuela	1.1	1.9	–40	Russia (66)	China (23)	Ukraine (9.5)
26 Canada	1.0	1.0	14	USA (70)	Netherlands (18)	Sweden (3.7)
27 Kuwait	1.0	0.2	488	USA (88)	Russia (3.3)	France (1.8)
28 Greece	1.0	1.9	–44	Germany (68)	USA (17)	France (10)
29 Thailand	0.9	0.5	93	Ukraine (23)	China (18)	Sweden (16)
30 Morocco	0.9	2.0	–52	USA (54)	France (44)	Italy (1.4)
31 Kazakhstan	0.8	0.2	308	Russia (78)	Spain (8.5)	Ukraine (5.0)
32 Finland	0.8	0.3	208	USA (34)	Norway (22)	France (15)
33 Jordan	0.8	0.7	26	Netherlands (43)	USA (32)	UAE (7.6)
34 Afghanistan	0.7	1.6	–48	USA (59)	Russia (27)	Brazil (8.3)
35 Mexico	0.7	0.5	53	USA (64)	France (9.9)	Netherlands (8.6)
36 Myanmar	0.7	1.0	–20	China (68)	Russia (15)	Belarus (5.6)
37 Brazil	0.6	1.0	–31	France (25)	USA (19)	Germany (15)
38 Poland	0.6	0.9	–30	Germany (26)	Finland (21)	Italy (19)
39 Turkmenistan	0.6	0.3	96	Turkey (43)	China (28)	Russia (14)
40 Norway	0.5	1.6	–65	USA (81)	Sweden (7.9)	Italy (5.3)

UAE = United Arab Emirates.

^a Figures show the change in volume of the total arms imports per importer between the 2 periods.



Africa

Between 2008–12 and 2013–17 arms imports by African states decreased by 22 per cent. The three largest importers in Africa in 2013–17 were Algeria (52 per cent of African arms imports), Morocco (12 per cent) and Nigeria (5.1 per cent).

States in sub-Saharan Africa received 32 per cent of total African imports in 2013–17. The top five arms importers in sub-Saharan Africa were Nigeria, Sudan, Angola, Cameroon and Ethiopia. Together, they accounted for 56 per cent of arms imports to the subregion. Nigeria's arms imports grew by 42 per cent between 2008–12 and 2013–17.

The main arms suppliers to Africa

In 2013–17 Russian arms exports to Africa fell by 32 per cent compared with 2008–12. Despite the decrease, Russia accounted for 39 per cent of total imports to the region. Algeria received 78 per cent of Russia's arms transfers to Africa in 2013–17.

China's arms exports to Africa rose by 55 per cent between 2008–12 and 2013–17, and its share of total African arms imports increased from 8.4 per cent to 17 per cent. A total of 22 sub-Saharan African countries procured major arms from China in 2013–17, and China accounted for 27 per cent of sub-Saharan African arms imports in that period (compared with 16 per cent in 2008–12). In North Africa, China became an important supplier to Algeria in 2013–17, with deliveries including three frigates and artillery.

The USA accounted for 11 per cent of arms exports to Africa in 2013–17. The transfers were mainly small batches of weapons and included eight helicopters for Kenya and five for Uganda, which were supplied as US military aid.

Kenya

Major arms play an important role in the military operations by sub-Saharan African states, although, due to lack of resources, procurement typically involves small numbers of mainly relatively low-end weapons. In 2013–17 Kenya—which is fighting al-Shabab on its own territory and in Somalia—acquired 13 transport helicopters, 2 second-hand combat helicopters, 65 light armoured vehicles and a small number of self-propelled howitzers.

The Americas

Imports of major weapons by states in the Americas decreased by 29 per cent between 2008–12 and 2013–17. The USA was the largest importer of major

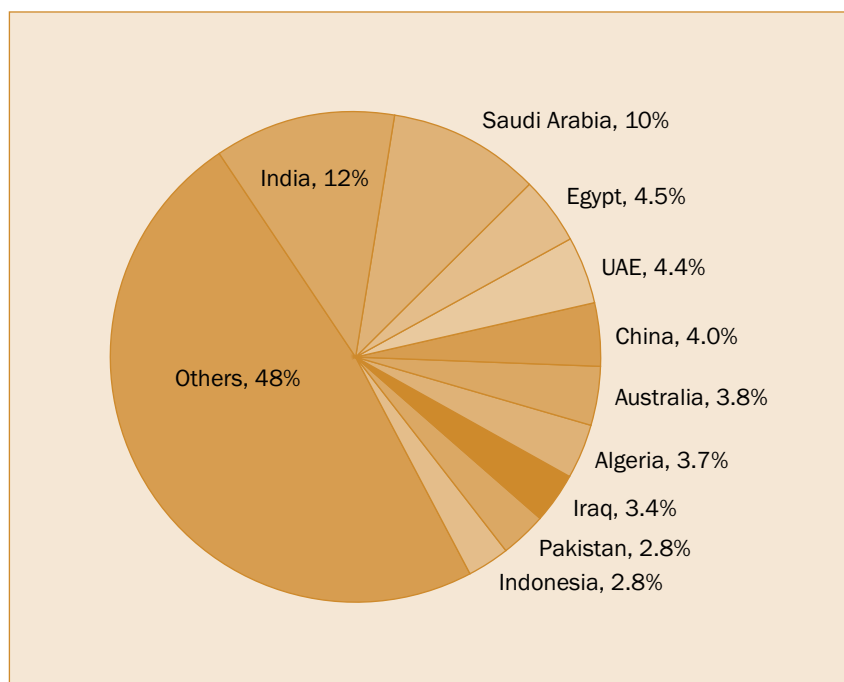


Figure 5. Global share of major arms imports by the 10 largest importers, 2013–17

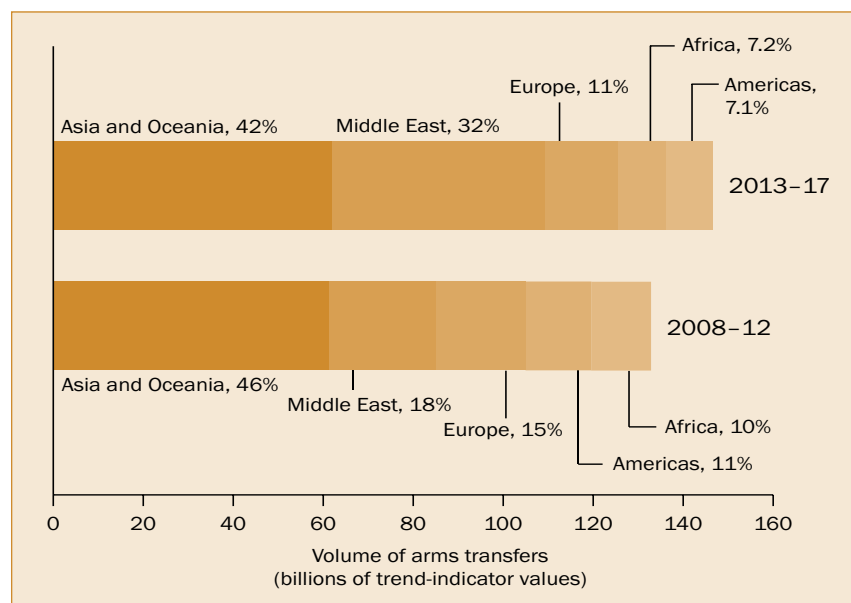


Figure 6. The importers of major arms, by region, 2013–17 and 2008–12, per cent of global share

Note: The SIPRI trend-indicator value (TIV) is a measure of the volume of international transfers of major weapons. The method used to calculate the SIPRI TIV is described at the SIPRI website at <<https://www.sipri.org/databases/armstransfers/sources-and-methods>>.

weapons in the region in 2013–17 (with a 2.0 per cent share of global imports). Arms imports by South American states fell by 38 per cent between 2008–12 and 2013–17. In 2013–17 arms imports by South American states accounted for 43 per cent of transfers to the Americas. Russia accounted for 27 per cent of deliveries to South America, followed by the USA (15 per cent) and France (9.8 per cent).

Armament developments in a region with few conflicts

The overall fall in arms imports by South American states coincides with a generally low level of interstate tensions in the region in recent years and a decline in intrastate conflict. Nevertheless, demand for major arms varies significantly between states.

In the years after the change of political leadership in Venezuela in 1999, the country's relationships with its main

arms suppliers at that time, the USA and several European states, essentially came to an end. Venezuela rebuilt its armed forces with weapons from Russia and China, and it was the largest importer in South America for the 10-year period 2008–17. However, following the economic crisis in Venezuela, which began in 2014, its imports of major arms fell to nil by 2017.

Arms imports by Brazil decreased by 31 per cent between 2008–12 and 2013–17. However, between 2008 and 2017 Brazil signed contracts for major arms that will be delivered in 2018–25. These deliveries include 5 submarines from France and 36 combat aircraft from Sweden.

Asia and Oceania

Arms imports by states in Asia and Oceania increased by 1.8 per cent between 2008–12 and 2013–17. States in the region received 42 per cent of global arms imports in 2013–17, compared with 46 per cent in 2008–12. Of the 10 largest importers in 2013–17, half were in Asia and Oceania: India, China, Australia, Pakistan and Indonesia. Russia accounted for 34 per cent of arms exports to the region, the USA for 27 per cent and China for 9.7 per cent.

China, Japan and South Korea

Arms imports by South Korea and Japan decreased by 50 and 19 per cent, respectively, between 2008–12 and 2013–17. However, tensions between Japan and China and between North and South Korea have been drivers for major contracts for new weapons that started to be delivered or were ordered in 2013–17. Japan and South Korea have large arms industries, but remain partly dependent on arms imports. Both countries have turned to the



USA for several types of advanced weapons. In 2013–17, for example, Japan started to receive the first batches of 42 combat aircraft from the USA, while South Korea placed orders for 40 combat aircraft. In the same period both countries ordered advanced air and missile defence systems from the USA.

China is becoming increasingly capable of producing its own advanced weapons, and its arms imports decreased by 19 per cent between 2008–12 and 2013–17. Despite this fall in imports, it was the world's fifth largest arms importer in 2013–17. Imports included high-end combat aircraft and air defence systems from Russia.

South Asia

The trend in arms imports in South Asia is dominated by the long-standing conflict between India and Pakistan. Both countries were among the top 10 arms importers in 2013–17.

India was the largest importer of major arms in 2013–17 and accounted for 12 per cent of the global total. Its imports increased by 24 per cent between 2008–12 and 2013–17. Russia accounted for 62 per cent of India's arms imports in 2013–17, and the volume of Russian arms exports to India in that period was almost the same as in 2008–12. India is seeking to diversify the sources of its arms imports. Between 2008–12 and 2013–17 arms imports from the USA increased by 557 per cent, making it India's second largest arms supplier. This development is part of the growing strategic partnership between the two countries under which the USA has begun to supply India with advanced military equipment. In 2013–17 such supplies included long-range maritime patrol aircraft, strategic transport aircraft and combat helicopters. India's arms imports from Israel also increased (by 285 per cent) between 2008–12 and 2013–17, making Israel the third largest supplier to India.

Despite its continuing tensions with India and ongoing internal conflicts, Pakistan's arms imports decreased by 36 per cent between 2008–12 and 2013–17. Pakistan accounted for 2.8 per cent of global arms imports in 2013–17.

China was the largest arms supplier to Pakistan in 2008–12 and 2013–17. Although the volume of China's arms exports to Pakistan remained roughly the same in both periods, its share of Pakistan's arms imports rose from 45 per cent in 2008–12 to 70 per cent in 2013–17 due to the overall decrease in Pakistan's arms imports between those periods.

In 2008–12 Pakistan received substantial military aid from the USA, including 28 combat aircraft and 5 maritime patrol aircraft. As relations between the two countries deteriorated in 2013–17 (due to US perceptions that Pakistan was not fully committed to combatting the Taliban), the USA reduced its military aid, and US arms exports to Pakistan fell by 76 per cent compared with 2008–12.

Myanmar

The use of force by the military of Myanmar against the Rohingya people, which intensified in August 2017, received widespread international condemnation. Some countries, including all EU member states and the USA, had already imposed arms embargoes on Myanmar. However, other countries supply Myanmar with arms. In 2013–17 China accounted for 68 per cent

of Myanmar's arms imports, followed by Russia with 15 per cent. Major ongoing arms deals in 2017 included the delivery of combat aircraft from China and Russia.

Europe

Imports by states in Europe decreased by 22 per cent between 2008–12 and 2013–17. Europe accounted for 11 per cent of total global imports in 2013–17. In the wake of the economic crisis that started around 2008, several states were forced to scale down orders for arms imports, which led to reductions in arms deliveries several years later. However, rising tensions between Russia and other European states in 2013–17 became a driver for increased arms procurement in that period and several significant arms import contracts were concluded. These procurement decisions are not reflected in the trend for 2013–17 as the majority of deliveries are planned to take place after 2017. In 2017, for example, Poland, Romania and Sweden each decided to acquire long-range air and missile defence systems from the USA, and Lithuania ordered medium-range air defence systems with components from Norway and the USA. There was also a notable rise in the demand in Europe for long-range ground attack missiles (see box 1).

Deals with the USA, which were agreed around 2007, for combat aircraft for Italy (90), the Netherlands (37), Norway (52) and the UK (138) are also likely to counteract the downward trend for imports in Europe. A total of 37 of these aircraft were supplied in 2013–17 and the pace of delivery is planned to increase in the coming years.

Arms imports and armed conflict in Europe

Despite the ongoing armed conflict in Ukraine, which started in 2014, arms imports by the Ukrainian Government remained very small for the period 2013–17. Rebels in eastern Ukraine received tanks, armoured vehicles and portable anti-tank and surface-to-air missiles from Russia. However, the lack of reliable sources makes it impossible to provide accurate estimates of the volumes involved.

As in previous years, military clashes occurred between Armenia and Azerbaijan in 2017. The volume of major arms imported by Armenia in 2013–17 was relatively small, and all its imports came from Russia. Azerbaijan's volume of arms imports was much larger (1.3 per cent of the global total) and increased by 55 per cent between 2008–12 and 2013–17. Its main arms suppliers in 2013–17 were Russia (65 per cent) and Israel (29 per cent).

The Middle East

Most countries in the Middle East were directly involved in violent conflict in 2013–17, and arms imports by states in the region increased by 103 per cent between 2008–12 and 2013–17. During 2013–17, 31 per cent of arms transfers to the region went to Saudi Arabia, 14 per cent to Egypt and 13 per cent to the UAE. Iran, the second most populous state in the Middle East, accounted for 1 per cent of arms imports to the region. The USA supplied 52 per cent of total arms transfers to the region, followed by the UK (9.4 per cent) and France (8.6 per cent).



Box 1. Transfers of missiles

Surface- or air-launched guided missiles for use against ground targets can significantly increase the combat potential of states and rebel forces. The demand for such arms and the willingness of states to export them are illustrated with examples of transfers of missiles with ranges between 200 and 1000 kilometres to areas of tension in 2013–17. The growing proliferation of air-launched cruise missiles (ALCMs) was particularly noticeable in certain regions during that period.

Asia and Oceania

South Korea procured ALCMs from Germany. These ALCMs were acquired partly to give South Korea the capability to destroy North Korean weapons. India procured ALCMs from France as well as surface- and submarine-launched cruise missiles from Russia, and loitering munitions, commonly known as ‘suicide drones’, from Israel. Pakistan procured ALCMs from China.

Europe

Azerbaijan procured loitering munitions from Israel, while Armenia procured ballistic missiles from Russia. Finland and Poland procured ALCMs from the United States.

The Middle East

Egypt procured ALCMs from France; Saudi Arabia procured ALCMs from the United Kingdom and the USA; Kuwait procured ALCMs from the UK; Qatar procured ALCMs from France and ballistic missiles from China; and the United Arab Emirates (UAE) procured ballistic missiles from the USA. Saudi Arabia and the UAE have used their missiles in Yemen. The Houthi rebels in Yemen received imprecise ballistic missiles from Iran, which were fired into Saudi Arabia in 2017.

Saudi Arabia

In 2013–17 Saudi Arabia was the world’s second largest arms importer, with arms imports increasing by 225 per cent compared with 2008–12. By the end of 2017 many more weapons were on order, indicating continuing high levels of arms transfers for at least five more years. The previous peak in Saudi Arabia’s arms imports occurred in 1995–99, when it was also the world’s second largest arms importer. However, its arms imports in 2013–17 were 48 per cent higher than those in 1995–99. Unlike in the late 1990s, Saudi Arabia now uses the weapons it has imported in large-scale combat, in particular in Yemen.

In 2013–17, 61 per cent of Saudi Arabia’s arms imports came from the USA and 23 per cent from the UK. Deliveries during this period included 78 combat aircraft, 72 combat helicopters, 328 tanks and about 4000 other armoured vehicles.

Qatar

From around 2011 Qatar started to become increasingly assertive in its foreign policy towards the Middle East and North Africa and initiated a rapid build-up of its armed forces. Arms imports by Qatar rose by 166 per cent between 2008–12 and 2013–17. The USA accounted for 67 per cent and Germany for 20 per cent of Qatari arms imports in 2013–17. Qatar signed several major deals in 2013–17, including 24 combat aircraft from France ordered in 2015; 2 frigates and 4 corvettes from Italy ordered in 2016; and 36 combat aircraft from the USA, 24 from the UK and a further 12 from France ordered in 2017. The 2017 deals were concluded soon after tensions surfaced between Qatar and several Arab states, led by Saudi Arabia and the UAE.

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Egypt

Arms imports by Egypt grew by 215 per cent between 2008–12 and 2013–17. The USA has been Egypt's main arms supplier since the late 1970s, and accounted for 45 per cent of Egypt's arms imports in 2008–12. However, between 2013 and 2015 the USA halted deliveries of certain arms, in particular combat aircraft, to Egypt. In 2014 Egypt signed major arms deals with France, and deliveries started in 2015. As a result, France accounted for 37 per cent of Egypt's arms imports in 2013–17 and overtook the USA to become the main arms supplier to Egypt for that period. This was despite the fact that the USA ended its restrictions in 2015 and increased its overall arms supplies to Egypt by 84 per cent between 2008–12 and 2013–17.

Israel

Israel's arms imports increased by 125 per cent between 2008–12 and 2013–17. The USA accounted for 60 per cent of these arms imports. Major deliveries in 2013–17 included 9 (of a total order of 50) F-35 combat aircraft. These aircraft significantly strengthen Israel's options to strike targets throughout the Middle East. Germany delivered two submarines to Israel in 2013–17, accounting for 30 per cent of Israel's arms imports in that period. In 2017 Germany agreed to supply a further three submarines to Israel.

About the SIPRI Arms Transfers Database

From 12 March 2018 the freely accessible SIPRI Arms Transfers Database includes data on arms transfers in 2017 and updated information for 1950–2016. The database aims to support efforts to better understand the effects of arms flows on peace, stability and violent conflict. This Fact Sheet uses the new data to summarize global, regional and national trends and patterns in arms transfers, and highlights selected related issues and concerns. It aims to encourage the use of the database for further research, investigations, policymaking and public debate.

The SIPRI Arms Transfers Database contains information, often estimates, on all international transfers of major weapons (including sales, gifts and production under licence) to states, international organizations and armed non-state groups since 1950. It is the only publicly available resource providing consistent data on arms transfers for this length of time. The database is accessible at <http://www.sipri.org/databases/armstransfers/>.

As the volume of deliveries can fluctuate significantly year-on-year, SIPRI presents data for five-year periods, giving a more stable measure of trends. Figures presented in this Fact Sheet do not always add up to stated totals because of the conventions of rounding.

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