

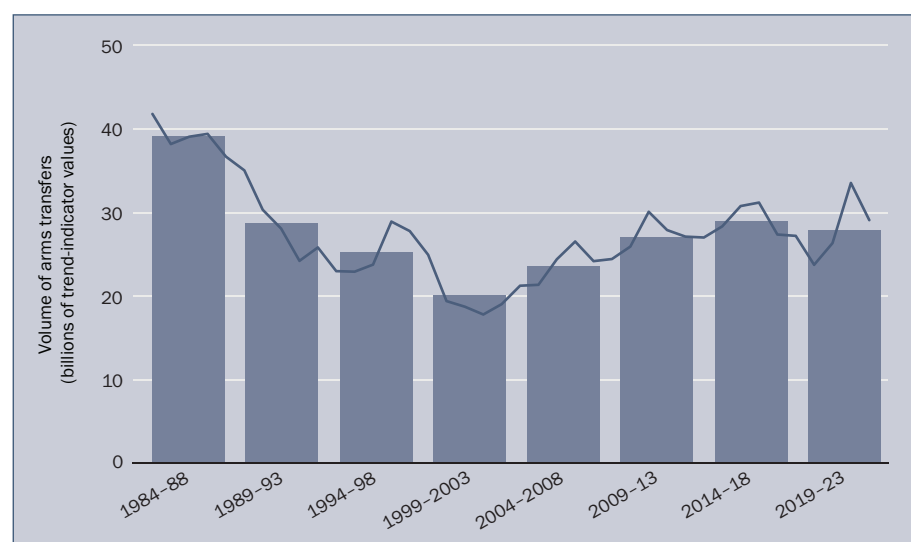
# TRENDS IN INTERNATIONAL ARMS TRANSFERS, 2023

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Imports of major arms by states in Europe increased by 94 per cent between 2014–18 and 2019–23, while the global volume of international arms transfers decreased marginally, by 3.3 per cent (see figure 1).<sup>1</sup> There were overall decreases in arms transfers to all other regions, but states in Asia and Oceania and the Middle East continued to import arms in much larger volumes than those in Europe. Nine of the 10 biggest arms importers in 2019–23, including the top 3 of India, Saudi Arabia and Qatar, were in Asia and Oceania or the Middle East. Ukraine became the fourth biggest arms importer globally after it received transfers of major arms from over 30 states in 2022–23.

Arms exports by the United States, the world's largest arms supplier, rose by 17 per cent between 2014–18 and 2019–23, while those by Russia fell by more than half (–53 per cent). France's arms exports grew by 47 per cent and it moved just ahead of Russia to become the world's second largest arms supplier.

From 11 March 2024 the freely available SIPRI Arms Transfers Database includes updated data on transfers of major arms for 1950–2023, which replaces all previous data on arms transfers published by SIPRI. Based on



**Figure 1.** The trend in international transfers of major arms, 1984–2023

*Note:* The bar graph shows the average annual volume of arms transfers for 5-year periods and the line graph shows the annual totals. The SIPRI trend-indicator value (TIV) is a measure of the volume of international transfers of major arms. The method used for the SIPRI TIV is described on the Arms Transfers Database web page.

*Source:* SIPRI Arms Transfers Database, Mar. 2024.

<sup>1</sup> In this fact sheet the terms ‘arms exports’ and ‘arms imports’ are used to refer to international transfers of major arms, as defined by SIPRI.

## KEY FACTS

- The volume of international transfers of major arms in 2019–23 was 3.3 per cent lower than in 2014–18 and 3.3 per cent higher than in 2009–13.
- The five largest exporters were the United States, France, Russia, China and Germany.
- Arms exports by the USA went up by 17 per cent between 2014–18 and 2019–23, while those by Russia went down by 53 per cent. France's exports rose by 47 per cent and it moved just ahead of Russia to become the world's second largest arms exporter.
- The five largest arms importers in 2019–23 were India, Saudi Arabia, Qatar, Ukraine and Pakistan.
- States in Asia and Oceania accounted for 37 per cent of all arms imports in 2019–23, followed by states in the Middle East (30 per cent), Europe (21 per cent), the Americas (5.7 per cent) and Africa (4.3 per cent).
- Arms imports by states in Europe were 94 per cent higher in 2019–23 than in 2014–18. A total of 55 per cent of European arms imports came from the USA in 2019–23, compared with 35 per cent in 2014–18.
- The largest importer in Europe was Ukraine, which received 23 per cent of the region's total arms imports in 2019–23.

**Table 1.** The 25 largest exporters of major arms and their main recipients, 2019–23

Percentages below 10 are rounded to 1 decimal place; percentages over 10 are rounded to whole numbers.

	Exporter	Share of global arms exports (%)		Per cent change from 2014–18 to 2019–23 <sup>a</sup>	Main recipients and their share of exporter's total exports (%), 2019–23					
		2019–23	2014–18		1st	2nd	3rd			
1	United States	42	34	17	Saudi Arabia	15	Japan	9.5	Qatar	8.2
2	France	11	7.2	47	India	29	Qatar	17	Egypt	6.4
3	Russia	11	21	–53	India	34	China	21	Egypt	7.5
4	China	5.8	5.9	–5.3	Pakistan	61	Bangladesh	11	Thailand	6.0
5	Germany	5.6	6.3	–14	Egypt	20	Ukraine	12	Israel	12
6	Italy	4.3	2.2	86	Qatar	27	Egypt	21	Kuwait	13
7	United Kingdom	3.7	4.1	–14	Qatar	23	USA	20	Ukraine	8.5
8	Spain	2.7	2.7	–3.3	Saudi Arabia	21	Australia	20	Türkiye	18
9	Israel	2.4	3.1	–25	India	37	Philippines	12	USA	8.7
10	South Korea	2.0	1.7	12	Poland	27	Philippines	19	India	15
11	Türkiye	1.6	0.7	106	UAE	15	Qatar	13	Pakistan	11
12	Netherlands	1.2	2.2	–46	USA	28	Mexico	12	Pakistan	8.6
13	Sweden	0.8	0.7	15	Brazil	22	USA	20	Pakistan	20
14	Poland	0.7	0.1	1 138	Ukraine	96	Sweden	2.1	India	0.6
15	Canada	0.6	0.5	20	Saudi Arabia	37	Ukraine	22	UAE	15
16	Australia	0.6	0.3	88	Canada	32	Chile	28	USA	11
17	Switzerland	0.5	1.0	–47	Denmark	17	Spain	16	Australia	16
18	Ukraine	0.4	1.4	–73	China	59	Saudi Arabia	12	India	11
19	Norway	0.4	0.4	–16	USA	26	Ukraine	20	Lithuania	9.9
20	UAE	0.3	0.4	–24	Jordan	33	Egypt	26	Algeria	10
21	South Africa	0.3	0.3	3.0	USA	24	UAE	23	India	13
22	Belgium	0.3	<0.05	430	Saudi Arabia	38	Canada	25	Pakistan	22
23	Belarus	0.2	0.4	–34	Viet Nam	30	Serbia	22	Uganda	17
24	Brazil	0.2	0.2	–3.5	France	28	Nigeria	16	Portugal	16
25	Iran	0.2	0.1	276	Russia	75	Venezuela	16	Houthis <sup>b</sup>	7.4

UAE = United Arab Emirates.

<sup>a</sup> Figures show the change in volume of the total arms exports per exporter between the two periods.

<sup>b</sup> These exports went to the Houthi non-state armed group based in Yemen.

Source: SIPRI Arms Transfers Database, Mar. 2024.

the new data, this fact sheet presents global trends in arms exports and arms imports, and highlights selected issues related to transfers of major arms.

## THE EXPORTERS, 2019–23

SIPRI has identified 66 states as exporters of major arms in 2019–23. The five largest exporters of arms during that period—the USA, France, Russia, China and Germany—accounted for 75 per cent of all arms exports (see figure 2 and table 1). US and French arms exports rose between 2014–18 and 2019–23, while Russian, Chinese and German arms exports fell (see figure 3). The USA and states in Western Europe together accounted for 72 per cent of all arms exports in 2019–23, compared with 62 per cent in 2014–18.



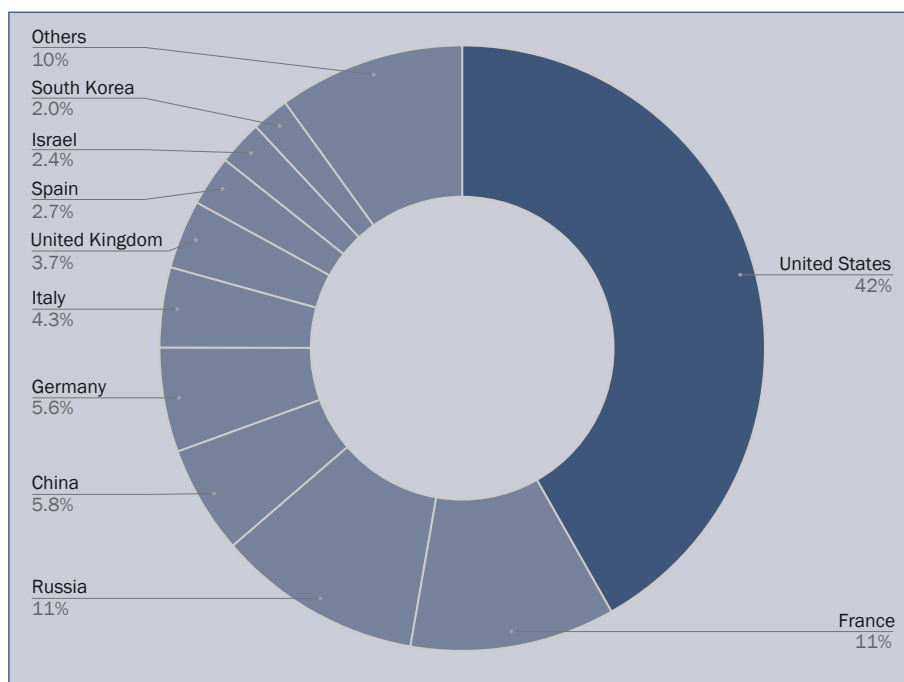
## The United States

The USA's arms exports grew by 17 per cent between 2014–18 and 2019–23 and its share of total global arms exports rose from 34 per cent to 42 per cent. The USA delivered major arms to 107 states in 2019–23, which was more than the next two biggest exporters combined. The volume of arms exported by the USA in 2019–23 was 282 per cent higher than that of France, the second biggest arms exporter globally.

In 2019–23 the largest share of US arms exports went to states in the Middle East (38 per cent). This was a much smaller proportion than in 2014–18 (50 per cent), after an 11 per cent decrease in US arms exports to the region between the two periods. Four Middle Eastern states were among the top 10 recipients of US arms in 2019–23: Saudi Arabia accounted for 15 per cent of US arms exports, Qatar for 8.2 per cent, Kuwait for 4.5 per cent and Israel for 3.6 per cent.

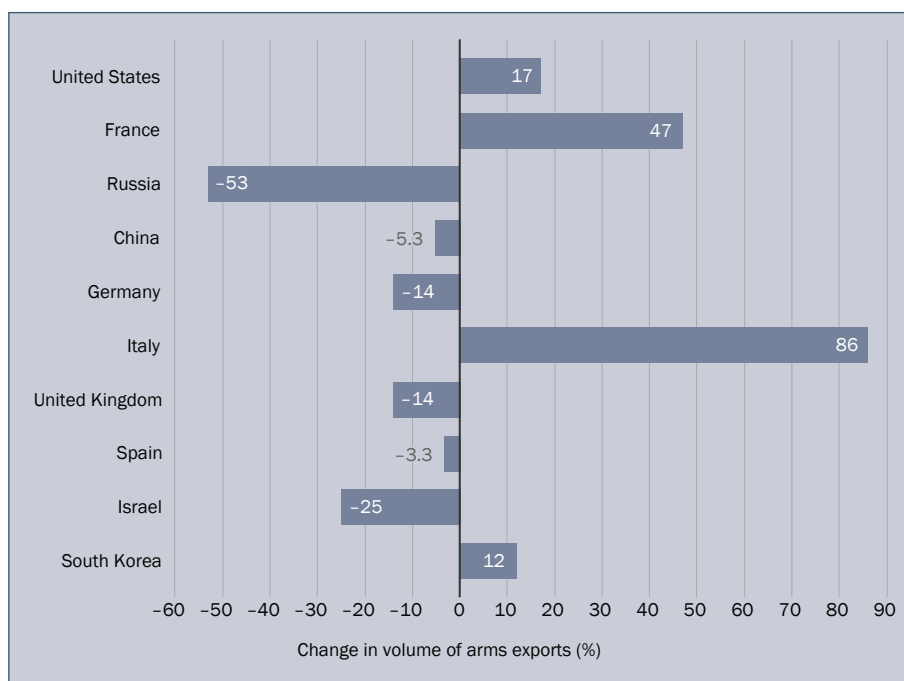
US arms exports to states in Asia and Oceania increased by 14 per cent overall between 2014–18 and 2019–23, with the region accounting for 31 per cent of all US arms exports in 2019–23, roughly the same proportion as in 2014–18.

Three states in the region were among the 10 largest recipients of US arms in 2019–23: Japan accounted for 9.5 per cent of all US arms exports, Australia for 7.1 per cent and South Korea for 5.3 per cent. There were increases in US arms exports to Japan (+161 per cent), South Korea (+35 per cent) and Australia (+9.2 per cent) between 2014–18 and 2019–23, which were mainly driven by a perception of a growing threat from China shared by all three recipients and the USA.



**Figure 2.** Global share of exports of major arms by the 10 largest exporters, 2019–23

Source: SIPRI Arms Transfers Database, Mar. 2024.



**Figure 3.** Changes in volume of exports of major arms since 2014–18 by the 10 largest exporters in 2019–23

Source: SIPRI Arms Transfers Database, Mar. 2024.

**Box 1. Selected major arms on order or preselected for future orders from the 10 largest arms exporters, for delivery after 2023**

It is very difficult to make predictions about future trends in arms transfers. Nevertheless, data on orders and final negotiations of orders can give a rough indication of which states will be among the largest exporters in coming years. The data on combat aircraft and major warships, which have a notably high military value, is particularly telling. As the table below shows, the United States will continue to be by far the largest exporter of major arms beyond 2023. What the future holds for other top suppliers is less certain, but France, which became the second largest arms exporter in the world in 2019–23, also has relatively high numbers of pending deliveries of combat aircraft and major warships compared with most other suppliers.

	United States	France	Russia	China	Germany	Italy	United Kingdom	Spain	Israel	South Korea
Combat aircraft <sup>a</sup>	1 071	223	78	94	–	52	8	–	18	142
Combat helicopters	390	1	–	–	–	31	–	–	–	–
Major warships <sup>b</sup>	8	20	5	8	25	8	32	1	–	6
SAM systems <sup>c</sup>	35	2	16+	2	37+	–	–	–	30+	10+
Tanks	561	–	464	566	241	98	–	–	19	972
Other armoured vehicles	2 848+	498	8	1	1 314	1 757	20	558	45+	609+
Artillery	718	141	–	126+	31	–	–	12	95+	1 233+

– nil; SAM = surface-to-air missile.

<sup>a</sup> Combat aircraft here include combat/trainer aircraft and anti-submarine warfare aircraft.

<sup>b</sup> Major warships here include aircraft carriers, corvettes, destroyers, frigates and submarines.

<sup>c</sup> SAM systems here include only land-based systems and exclude systems for portable/very short-range SAMs.

Source: SIPRI Arms Transfers Database, Mar. 2024.

A total of 28 per cent of US arms exports went to states in Europe in 2019–23, which was up from 11 per cent in 2014–18. US arms exports to the region increased by just over 200 per cent between the two periods. Ukraine accounted for 4.7 per cent of all US arms exports and 17 per cent of those to Europe.

Deliveries of combat aircraft typically make up a significant part of the USA's total arms exports. It delivered 420 combat aircraft in 2019–23. Of these, 249 were advanced F-35 aircraft, which were delivered to a total of 10 states and accounted for 24 per cent of all US arms exports. The USA has many pending arms export deliveries, including a total of 1071 combat aircraft (see box 1), of which 785 are F-35s.

## France

France narrowly overtook Russia to become the world's second largest exporter of major arms in 2019–23. French arms exports represented 11 per cent of all arms transfers in this period, having increased by 47 per cent between 2014–18 and 2019–23. France delivered major arms to 64 states in 2019–23, but India was by far the largest recipient, accounting for 29 per cent of French arms exports.

The bulk of France's arms exports in 2019–23 went to states in Asia and Oceania (42 per cent of arms exports) and the Middle East (34 per cent). France has been trying to expand its arms sales to other European states for many years; however, its exports to states in Europe in 2019–23 accounted for only 9.1 per cent of its total arms exports. More than half of its European arms exports (53 per cent) went to Greece, mostly made up of transfers of 17 Rafale combat aircraft.



A sharp rise in deliveries of Rafale combat aircraft accounted for most of the growth in French arms exports in 2019–23. France exported 23 Rafales in 2014–18. This increased to 94 in 2019–23, representing just under one third (31 per cent) of French arms exports in the period. A further 193 Rafales were on order for export as at the end of 2023. However, most of the aircraft France has already delivered (96 out of 117) and those on order (178 out of 193) are for states outside Europe—Egypt, India, Indonesia, Qatar and the United Arab Emirates. This highlights the challenge France still faces in selling its major arms to European states, especially in the context of the strong competition from the USA. Notably, 8 out of the 10 European states that preselected or ordered combat aircraft in 2019–23 opted for US F-16s or F-35s, with only Croatia and Greece opting for the Rafale.

In addition to building up its sales of combat aircraft, France increased its exports of military ships (and the weapons to arm them) by 14 per cent between 2014–18 and 2019–23.

## Russia

Russia's arms exports fell by 53 per cent between 2014–18 and 2019–23 and it accounted for 11 per cent of total global arms exports. It delivered major arms to 41 states and 1 non-state armed group in 2019–23.

In 2019 the annual volume of Russian arms exports was at a similar level to that in each of the preceding 20 years. However, the export volumes in 2020, 2021 and 2022 were at much lower levels than in 2019, and in 2023 the volume was 52 per cent lower than in 2022. Another indication of the decline of Russia as a global supplier of arms is that whereas 31 states received major arms from Russia in 2019, only 14 did in 2022 and that number fell to 12 in 2023.

States in Asia and Oceania received 68 per cent of total Russian arms exports in 2019–23, while Middle Eastern and African states received 13 per cent and 10 per cent respectively. Just under two thirds of Russian arms exports went to three states in 2019–23: India (34 per cent), China (21 per cent) and Egypt (7.5 per cent). India was also the largest recipient of Russian arms in 2014–18, but exports to India decreased by 34 per cent between 2014–18 and 2019–23, while exports to China decreased by 39 per cent and to Egypt by 54 per cent. Algeria and Viet Nam were the third and fourth largest recipients of Russian arms in 2014–18; however, exports to Algeria (–83 per cent) and Viet Nam (–91 per cent) dropped significantly between the two periods.

The low volume of pending deliveries of major arms from Russia (see box 1) suggests that Russian arms exports are likely to remain well below the level reached in 2014–18, for at least the short term.

## Other major exporters

China accounted for 5.8 per cent of total global arms exports in 2019–23. Its arms exports decreased by 5.3 per cent between 2014–18 and 2019–23. The bulk of Chinese arms exports (85 per cent) went to states in Asia and Oceania, followed by states in Africa (9.9 per cent). China delivered major arms to 40 states in 2019–23, but well over half of its arms exports (61 per cent) went to just one state—Pakistan.


**Table 2.** The 40 largest importers of major arms and their main suppliers, 2019–23

Percentages below 10 are rounded to 1 decimal place; percentages over 10 are rounded to whole numbers.

Rank	Importer	Share of global arms imports (%)		Per cent change from 2014–18 to 2019–23 <sup>a</sup>	Main suppliers and their share of importer's total imports (%), 2019–23					
		2019–23	2014–18		1st	2nd	3rd			
1	India	9.8	9.1	4.7	Russia	36	France	33	USA	13
2	Saudi Arabia	8.4	11	–28	USA	75	France	7.6	Spain	7.0
3	Qatar	7.6	1.5	396	USA	45	France	25	Italy	15
4	Ukraine	4.9	0.1	6 633	USA	39	Germany	14	Poland	13
5	Pakistan	4.3	2.9	43	China	82	Sweden	4.0	Türkiye	3.8
6	Japan	4.1	1.5	155	USA	97	UK	1.8	Germany	0.4
7	Egypt	4.0	5.3	–26	Germany	27	Italy	22	Russia	20
8	Australia	3.7	4.6	–21	USA	80	Spain	15	Switzerland	2.3
9	South Korea	3.1	2.8	6.5	USA	72	Germany	15	France	9.3
10	China	2.9	4.9	–44	Russia	77	France	13	Ukraine	8.2
11	United States	2.8	1.6	67	UK	25	Netherlands	12	France	10
12	Kuwait	2.7	1.0	169	USA	70	Italy	20	France	8.6
13	United Kingdom	2.4	1.6	41	USA	89	South Korea	4.0	Israel	2.7
14	UAE	2.4	3.3	–31	USA	57	Türkiye	9.9	France	9.2
15	Israel	2.1	2.0	5.1	USA	69	Germany	30	Italy	0.9
16	Netherlands	1.9	0.2	751	USA	99	Finland	0.6	Germany	0.6
17	Türkiye	1.6	2.2	–29	Spain	31	Italy	23	Russia	15
18	Norway	1.6	0.8	92	USA	89	South Korea	4.8	Italy	3.6
19	Poland	1.6	0.4	253	USA	45	South Korea	34	UK	4.4
20	Singapore	1.5	1.3	17	Germany	32	France	27	USA	26
21	Algeria	1.1	4.8	–77	Russia	48	Germany	15	China	14
22	Philippines	1.0	0.5	105	South Korea	37	Israel	28	USA	14
23	Indonesia	1.0	2.4	–60	USA	27	South Korea	18	France	17
24	Italy	0.9	1.4	–37	USA	95	Germany	1.8	France	1.4
25	Greece	0.9	0.9	–4.2	France	58	USA	21	UK	11
26	Bangladesh	0.9	1.2	–31	China	72	Türkiye	9.7	UK	5.5
27	Brazil	0.8	0.6	26	France	40	Sweden	23	Italy	13
28	Thailand	0.8	1.1	–30	China	44	South Korea	13	USA	9.9
29	Morocco	0.8	1.4	–46	USA	69	France	14	Israel	11
30	NATO <sup>b</sup>	0.7	<0.05	1 638	France	68	USA	17	UK	15
31	Bahrain	0.7	0.1	562	USA	93	Türkiye	3.0	Italy	1.9
32	Romania	0.6	0.2	180	USA	71	Switzerland	11	Portugal	6.3
33	Kazakhstan	0.6	0.9	–30	Russia	94	France	1.4	Spain	1.4
34	Germany	0.6	0.2	188	USA	63	Israel	16	UK	5.7
35	Canada	0.6	1.1	–44	Australia	32	USA	27	Spain	22
36	France	0.6	0.3	112	UK	38	USA	20	Italy	18
37	Denmark	0.6	0.3	99	USA	70	Switzerland	16	Germany	10
38	Myanmar	0.6	0.7	–20	Russia	38	China	26	India	18
39	New Zealand	0.5	0.1	338	USA	69	South Korea	12	UK	11
40	Belarus	0.5	0.4	30	Russia	100	..	..	..	..

.. = data not available or not applicable; NATO = North Atlantic Treaty Organization; UAE = United Arab Emirates.

<sup>a</sup> Figures show the change in volume of the total arms imports per importer between the two periods.

<sup>b</sup> The data is for imports by the organization itself, not the total imports by NATO member states.

Source: SIPRI Arms Transfers Database, Mar. 2024.

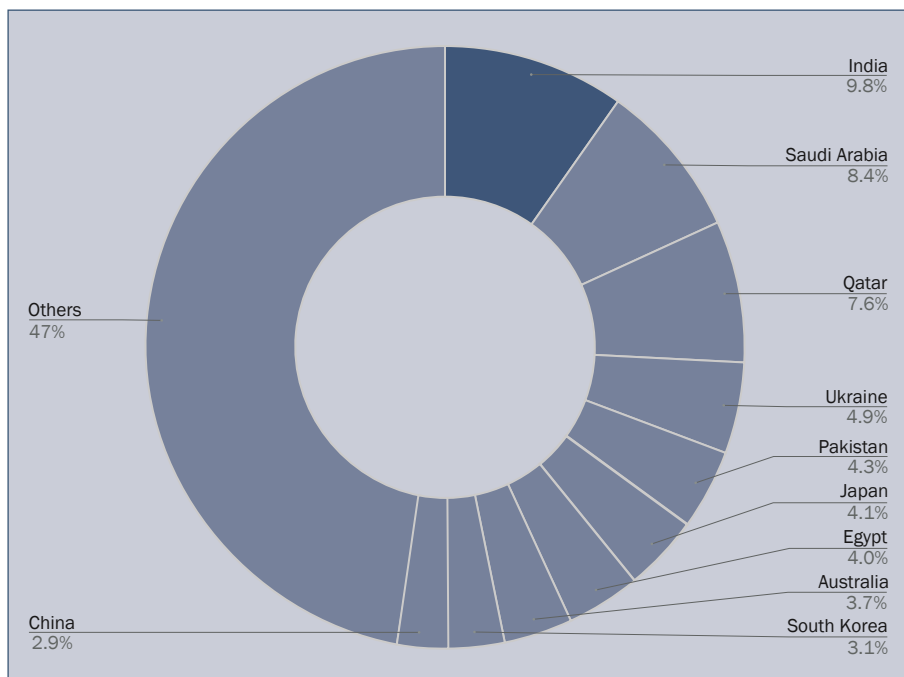




Arms exports by Germany made up 5.6 per cent of the global total in 2019–23. They were 14 per cent lower than in 2014–18. States in the Middle East received the largest share of all German arms exports in 2019–23 (39 per cent), followed by states in Asia and Oceania (28 per cent) and Europe (25 per cent).

Italy accounted for 4.3 per cent of the world's arms exports in 2019–23. Its arms exports were 86 per cent higher in 2019–23 than in 2014–18. A total of 71 per cent of Italian arms exports went to the Middle East.

The 4 other suppliers making up the top 10 arms exporters in 2019–23 were the United Kingdom, Spain, Israel and South Korea. Arms exports by the UK (–14 per cent), Spain (–3.3 per cent) and Israel (–25 per cent) all decreased between 2014–18 and 2019–23, while arms exports by South Korea increased by 12 per cent.



**Figure 4.** Global share of imports of major arms by the 10 largest importers, 2019–23

Source: SIPRI Arms Transfers Database, Mar. 2024.

## THE IMPORTERS, 2019–23

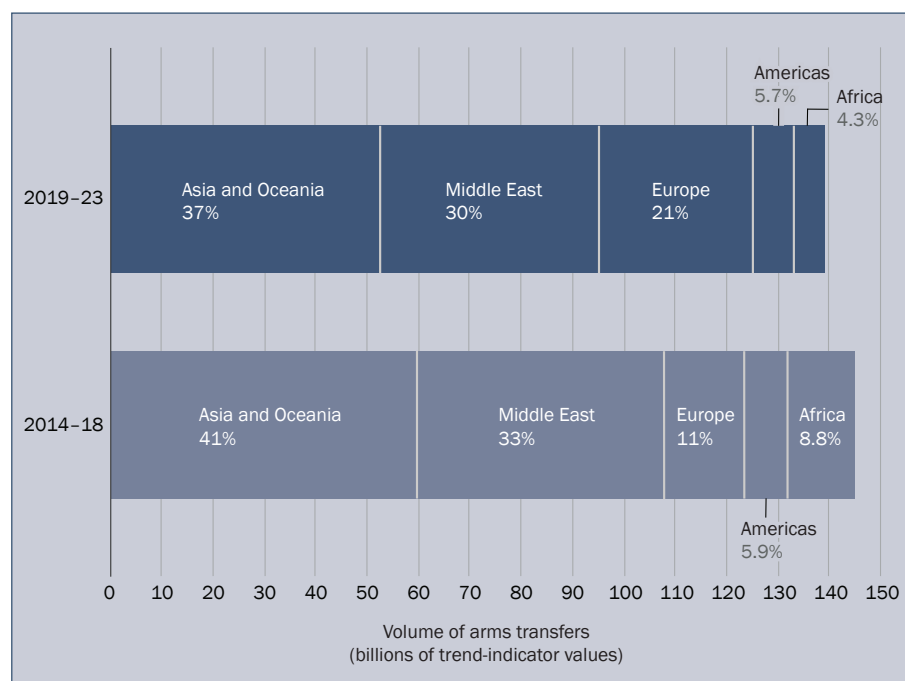
SIPRI has identified 170 states as importers of major arms in 2019–23. The top five arms importers—India, Saudi Arabia, Qatar, Ukraine and Pakistan—received 35 per cent of all arms imports in the period (see figure 4 and table 2). States in Asia and Oceania accounted for 37 per cent of all arms imports in 2019–23 (see figure 5), followed by states in the Middle East (30 per cent), Europe (21 per cent), the Americas (5.7 per cent) and Africa (4.3 per cent).

### Africa

Imports of major arms by African states fell by 52 per cent between 2014–18 and 2019–23, which was mainly due to decreases in the arms imports of the two largest importers in the region, Algeria (–77 per cent) and Morocco (–46 per cent). The main suppliers to Africa in 2019–23 were Russia, accounting for 24 per cent of African imports of major arms, the USA (16 per cent), China (13 per cent) and France (10 per cent).

#### Sub-Saharan Africa

States in sub-Saharan Africa accounted for 2.2 per cent of all imports of major arms in 2019–23. Their combined arms imports were 9.0 per cent lower than in 2014–18. The three largest arms importers in the subregion in 2019–23 were Nigeria (with 16 per cent of sub-Saharan imports), Angola (9.2 per cent) and Senegal (9.2 per cent).



**Figure 5.** The importers of major arms, by region, 2019–23 and 2014–18, per cent of global share

*Note:* The SIPRI trend-indicator value (TIV) is a measure of the volume of international transfers of major arms. The method used for the SIPRI TIV is described on the Arms Transfers Database web page.

*Source:* SIPRI Arms Transfers Database, Mar. 2024.

Sub-Saharan Africa receives major arms from a diverse set of suppliers vying to build up influence in the subregion. With a 19 per cent share of subregional arms imports, China narrowly overtook Russia, which had a 17 per cent share, to become the largest supplier of major arms to sub-Saharan Africa in 2019–23. There were, however, notable decreases in imports of arms from both China (–23 per cent) and Russia (–44 per cent) between 2014–18 and 2019–23.

France was the third largest supplier to sub-Saharan Africa in 2019–23 and had an 11 per cent share of subregional arms imports. Türkiye was the fourth largest supplier, with a share of 6.3 per cent, mostly due to its deliveries of combat helicopters to Nigeria and trainer/combat aircraft and uncrewed aerial vehicles (UAVs) to several states.

## The Americas

Arms imports by states in the Americas decreased by 7.2 per cent between 2014–18 and 2019–23. The USA (accounting for 50 per cent of the regional total), Brazil (15 per cent) and Canada (11 per cent) were the top three importers of major arms in the region in 2019–23. Canada's arms imports decreased by 44 per cent between the two periods, but it has large volumes of arms on order, including 102 combat aircraft from the USA and 15 frigates from the UK.

Arms imports by states in South America decreased by 19 per cent between 2014–18 and 2019–23. Brazil's arms imports were 26 per cent higher than in 2014–18 and accounted for 44 per cent of the subregional total in 2019–23. The main suppliers to South America in 2019–23 were France, providing 23 per cent of subregional imports, the USA (14 per cent) and the UK (12 per cent). Russia did not deliver any major arms to South America in 2019–23.

## Asia and Oceania

Arms imports by states in Asia and Oceania decreased by 12 per cent between 2014–18 and 2019–23, mainly because of a sharp drop in Chinese arms imports. However, it remained the region with the highest volume of arms imports and 6 of the world's 10 largest arms importers in 2019–23 were in Asia and Oceania: India, Pakistan, Japan, Australia, South Korea and China. The main suppliers to the region were the USA, with a 34 per cent share of regional imports, Russia (19 per cent) and China (13 per cent).





### *India and Pakistan*

India's tensions with Pakistan and China largely drive its arms imports. India's arms imports increased by 4.7 per cent between 2014–18 and 2019–23, making it the world's biggest arms importer in 2019–23 with a 9.8 per cent share of all arms imports. Russia remained India's main supplier, but its share of Indian arms imports has shrunk from 76 per cent in 2009–13 to 58 per cent in 2014–18 and then to 36 per cent in 2019–23. India has instead looked to Western suppliers, most notably France and the USA, and its own arms industry to meet its demand for major arms. This shift is also visible in India's new orders, many of which are placed with Western suppliers, and its arms procurement plans, which seemingly do not include any Russian options.

Arms imports by Pakistan grew by 43 per cent between 2014–18 and 2019–23 and accounted for 4.3 per cent of the world total, making it the fifth largest arms importer globally. Pakistan continued to strengthen its arms procurement relations with China: 82 per cent of its arms imports came from China in 2019–23, as against 69 per cent in 2014–18, and 51 per cent in 2009–13.

### *East Asia, Oceania and South East Asia*

Arms imports by states in East Asia (–6.1 per cent), Oceania (–10 per cent) and South East Asia (–43 per cent) decreased between 2014–18 and 2019–23.

China's arms imports fell by 44 per cent and accounted for 2.9 per cent of the global total in 2019–23. The vast majority of Chinese arms imports (77 per cent) came from Russia. The drop in Chinese imports is due to China's growing ability to design and produce its own major arms. Its arms imports will probably decrease further as it develops this capacity.

Japan and South Korea are expanding their military capabilities, mainly because of tensions with China and North Korea. Japan (+155 per cent) and South Korea (+6.5 per cent) increased their arms imports between 2014–18 and 2019–23. The USA is the main supplier to both states, accounting for 97 per cent of Japan's arms imports and 72 per cent of South Korea's. The two states are investing heavily in long-range strike capabilities. The USA supplied 29 combat aircraft to Japan and 34 to South Korea in 2019–23. Japan also ordered 400 long-range land-attack missiles from the USA in 2023 (see box 2). These will, for the first time, give Japan the capability to reach targets deep inside China or North Korea.

Taiwan's arms imports dropped by 69 per cent between 2014–18 and 2019–23 despite heightened tensions with China. However, major deliveries are planned to take place over the next five years, including deliveries of 66 combat aircraft, 108 tanks and 460 anti-ship missiles. All these planned deliveries are from the USA, which supplied over 99 per cent of Taiwanese arms imports in 2019–23.

Australia was the eighth largest arms importer in 2019–23 after its arms imports dropped by 21 per cent. However, in 2023 it reached an agreement with the UK and the USA to import at least six nuclear-powered submarines.

Arms imports by South East Asian states fell by 43 per cent between 2014–18 and 2019–23. However, tensions, mainly with China, continue to drive arms acquisitions by many states in the subregion. For example, arms imports by the Philippines (+105 per cent) and by Singapore (+17 per cent) increased between the two periods. In addition, Indonesia, Malaysia and

## Box 2. Transfers of long-range missiles

Long-range missiles, which here refer to those with a range of over 250 kilometres, are regularly used in combat and are widely perceived as valuable components of long-range land-attack capabilities and conventional deterrence. At the same time, there are concerns about the impact of missile proliferation on international stability. Despite these concerns, the numbers of recipients and suppliers of such missiles have grown notably during the past decade, which is particularly visible in trends in deliveries of land-attack missiles with a range of 250–999 km. Twelve states received such missiles from 7 supplier states in 2004–13, whereas 21 states and 1 non-state group received them from 12 supplier states in 2014–23. Data on the total numbers supplied is uncertain, but SIPRI estimates that in each period around 2200 missiles were delivered.

In the category of land-attack missiles with a range of 1000 km or more, an increase in demand is visible when comparing the numbers of orders between the two decades. The only order identified by SIPRI for such missiles in 2004–13 was placed by the United Kingdom, for 68 missiles from the United States. In 2014–23 eight states ordered or preselected such missiles, all from the USA. The UK ordered another 20 missiles in 2014 and Poland ordered 60 in 2016. In 2023 Japan ordered 400 and planned to order 50 more, while Australia ordered over 300, Finland 200 and Germany 75. Canada and the Netherlands have also decided to acquire them.

Singapore all placed substantial orders for combat aircraft and ships in 2019–23. Myanmar, which accounted for 10 per cent of all South East Asian imports, used imported major arms in internal conflicts in 2019–23. Its arms imports in the period mainly came from Russia (38 per cent), China (26 per cent) and India (18 per cent).

## Europe

Arms imports by states in Europe were 94 per cent higher in 2019–23 than in 2014–18. Ukraine received 23 per cent of the region's arms imports in 2019–23. It was, by far, the largest arms importer in Europe and the fourth largest in the world. The UK, which accounted for 11 per cent of European arms imports, and the Netherlands (9.0 per cent) were the next biggest arms importers in the region. A total of 55 per cent of European arms imports came from the USA in 2019–23, compared with 35 per cent in 2014–18. The next largest suppliers to the region were Germany and France, which accounted for 6.4 per cent and 4.6 per cent of European arms imports respectively.

### *Arms imports and the war in Ukraine*

At least 30 states supplied major arms to Ukraine after the full-scale Russian invasion in February 2022, mostly as military aid, meaning that Ukraine was by some distance the world's largest arms importer in the year 2023. The USA supplied 39 per cent of Ukrainian arms imports in 2019–23, followed by Germany (14 per cent) and Poland (13 per cent). To broaden Ukraine's military capabilities, suppliers began to deliver long-range systems in 2023. For example, Poland and Slovakia donated 27 surplus combat aircraft, and France and the UK supplied missiles with a range of 300 kilometres. During the year, Belgium, Denmark, the Netherlands and Norway also started to prepare the delivery of over 50 surplus combat aircraft.

Russia relies primarily on its own industry for its major arms. However, in 2022–23 it imported flying bombs from Iran and ballistic missiles from North Korea, the latter in violation of a United Nations arms embargo on North Korea.



### *West and Central European states*

Russia's initial invasion of Ukraine in 2014 increased the demand for arms in West and Central European states. For example, by the end of 2023 these states had a total of 791 combat aircraft and combat helicopters on order for import. After it launched the full-scale invasion in 2022, Russia began a campaign of missile attacks against Ukraine. In response, many West and Central European states supplied air defence systems to Ukraine and several placed new import orders for them or accelerated existing procurement processes. In 2023 Poland ordered 12 air defence systems from the USA, and Germany ordered a single but particularly high-value system from Israel. In 2022–23 Austria, Estonia, Latvia and Slovenia ordered air defence systems from Germany, while Finland and Slovakia ordered Israeli systems, and Lithuania and the Netherlands ordered Norwegian systems. In addition, some states ordered missiles for systems being produced domestically or to arm newly acquired imports or their existing systems. For example, in 2023 Poland and Norway ordered missiles from the UK and the USA, respectively, for their new systems, while Germany ordered 500 missiles and Romania 200, all from the USA, for their existing systems.

### **The Middle East**

Arms imports by states in the Middle East were 12 per cent lower in 2019–23 than in 2014–18. Three of the top 10 arms importers in 2019–23 were in the Middle East: Saudi Arabia, Qatar and Egypt. The USA accounted for 52 per cent of Middle Eastern arms imports. The next biggest suppliers were France (12 per cent), Italy (10 per cent) and Germany (7.1 per cent).

#### *The Gulf region*

Saudi Arabia was the world's second largest arms importer in 2019–23, with an 8.4 per cent share of all arms imports. Its arms imports fell by 28 per cent after peaking at their highest point ever in 2014–18. The USA supplied 75 per cent of Saudi Arabian arms imports in 2019–23, which included the delivery of 67 combat aircraft and hundreds of land-attack missiles.

Qatar was the third largest arms importer in the world, with a global share of 7.6 per cent, as its arms imports increased by 396 per cent between 2014–18 and 2019–23. Its main suppliers in 2019–23 were the USA, which accounted for 45 per cent of Qatari arms imports, France (25 per cent) and Italy (15 per cent). Qatar's arms imports in the period included 36 combat aircraft from France, 36 from the USA and 25 from the UK, as well as 4 frigates from Italy.

Iran's arms imports have been at a very low level relative to those of other arms importers in the Gulf region since around 1993. In 2023 Iran placed by far its largest import order for major arms in 20 years, for 24 combat aircraft from Russia.

#### *Israel*

Between 2014–18 and 2019–23, arms imports by Israel rose marginally (+5.1 per cent). The USA accounted for 69 per cent and Germany for 30 per cent of Israeli arms imports. Imported weapons, in particular combat aircraft received from the USA over several decades, have played a major role in Israel's military actions against Hamas and Hezbollah. At the end of 2023 the

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USA rapidly delivered thousands of guided bombs and missiles to Israel, but the total volume of Israeli arms imports from the USA in 2023 was almost the same as in 2022. By the end of 2023, pending deliveries of major arms to Israel included 61 combat aircraft from the USA and 4 submarines from Germany.

### *Egypt*

Egypt's arms imports decreased by 26 per cent between 2014–18 and 2019–23, having previously increased by 209 per cent between 2009–13 and 2014–18. It moved from being the third largest importer globally in 2014–18 to seventh in 2019–23. Its main supplier in 2019–23 was Germany, accounting for 27 per cent of Egyptian arms imports, followed by Italy (22 per cent), Russia (20 per cent), France (17 per cent) and the USA (6.5 per cent). Against the backdrop of Egypt's tensions with Ethiopia over water from the river Nile, its military presence in Sudan and maritime disputes in the eastern Mediterranean, Egypt has significantly strengthened its long-range military capabilities. In 2019–23 its imports included 3 frigates and 2 submarines from Germany; 2 frigates from Italy; 20 combat aircraft from Russia; and 3 frigates and long-range missiles from France. These added to imports in 2014–18 that included 23 combat aircraft and 2 frigates from France; 30 combat aircraft from Russia; 2 submarines from Germany; and 12 combat aircraft and 2 corvettes from the USA. By the end of 2023, Egypt's pending deliveries included 30 combat aircraft from France and 1 frigate from Germany.

### About SIPRI's data on arms transfers

SIPRI's statistical data on arms transfers relates to actual deliveries of major arms, as defined by SIPRI. SIPRI measures the volume of international transfers of major arms using a common unit—the trend-indicator value (TIV). The methodology for the SIPRI TIV is described on the Arms Transfers Database web page.

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. Percentage shares presented in this SIPRI Fact Sheet do not always add up to 100 per cent or to stated totals because of the conventions of rounding.

The SIPRI Arms Transfers Database, accessible on the SIPRI website, is the only public resource that provides consistent information, often estimates, on all international transfers of major arms (including sales, gifts and production under licence) to states, international organizations and non-state groups since 1950. For a list of states in each region see the 'Regional coverage' page of SIPRI's website. The database aims to contribute to an understanding of the effects of arms flows on peace, stability and violent conflict. This fact sheet is intended to encourage the use of the database for further research, investigations, policymaking and public debate.

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