SIPRI Fact Sheet

March 2023

TRENDS IN INTERNATIONAL ARMS TRANSFERS, 2022

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Imports of major arms by European states rose by 47 per cent between 2013–17 and 2018–22, while the global volume of international arms transfers fell by 5.1 per cent (see figure 1).[1] There were decreases in arms transfers to Africa (–40 per cent), the Americas (–21 per cent), Asia and Oceania (–7.5 per cent) and the Middle East (–8.8 per cent) between the two periods. The five largest arms importers in 2018–22 were India, Saudi Arabia, Qatar, Australia and China. The five largest arms exporters were the United States, Russia, France, China and Germany.

The war in Ukraine had only a limited impact on the total volume of arms transfers in 2018–22, but Ukraine did become a major importer of arms in 2022. In addition, most European states substantially increased their arms import orders and the war will have significant ramifications for future supplier–recipient arms trade relations globally.

From 13 March 2023 the freely accessible SIPRI Arms Transfers Database includes updated data on transfers of major arms for 1950–2022, which replaces all previous data on arms transfers published by SIPRI. Based on 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.

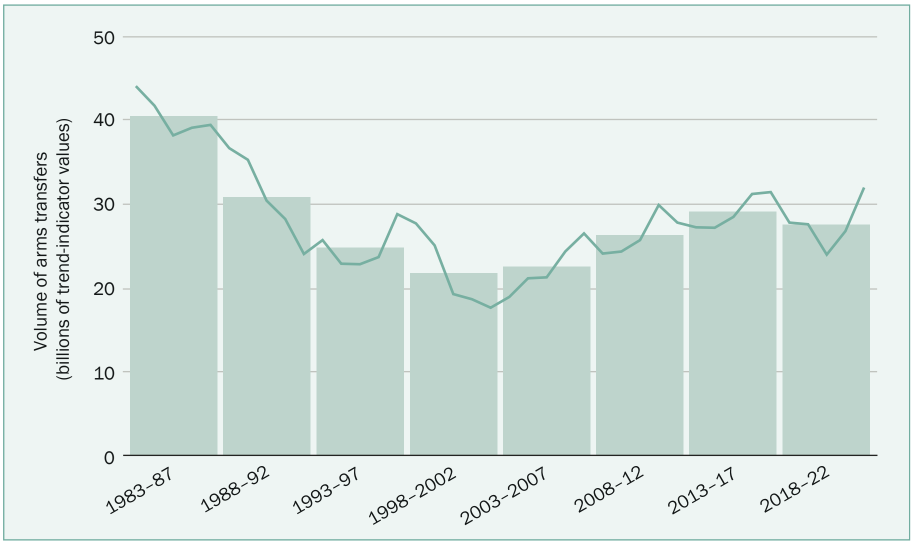

Figure 1. The trend in international transfers of major arms, 1983–2022

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. 2023.

[1] 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 2018–22 was 5.1 per cent lower than in 2013–17 and 4.8 per cent higher than in 2008–12.
- The five largest arms exporters in 2018–22 were the United States, Russia, France, China and Germany. Together, they supplied 76 per cent of the world's arms exports in 2018–22.
- US arms exports accounted for 40 per cent of the global total in 2018–22 and were 14 per cent higher than in 2013–17.
- French arms exports increased by 44 per cent between 2013–17 and 2018–22, while Russian (–31 per cent), Chinese (–23 per cent) and German (–35 per cent) arms exports decreased.
- The five largest arms importers in 2018–22, India, Saudi Arabia, Qatar, Australia and China, together received 36 per cent of the world's arms imports.
- The main recipient region in 2018–22 was Asia and Oceania (accounting for 41 per cent of global arms imports), followed by the Middle East (31 per cent), Europe (16 per cent), the Americas (5.8 per cent) and Africa (5.0 per cent).
- Arms imports by European states were 47 per cent higher in 2018–22 than in 2013–17. Those by European NATO states were 65 per cent higher.
- Ukraine became a major importer of arms in 2018–22. It was the 14th largest arms importer globally in the period and the 3rd largest in 2022.

Table 1. The 25 largest exporters of major arms and their main recipients, 2018–22

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

	Exporter	Share of global arms exports (%) 2018–22	2013–17	Per cent change from 2013–17 to 2018–22[a]	Main recipients and their share of exporter's total exports (%), 2018–22: 1st		2nd		3rd	
1	United States	40	33	14	Saudi Arabia	19	Japan	8.6	Australia	8.4
2	Russia	16	22	−31	India	31	China	23	Egypt	9.3
3	France	11	7.1	44	India	30	Qatar	17	Egypt	8.0
4	China	5.2	6.3	−23	Pakistan	54	Bangladesh	12	Serbia	4.5
5	Germany	4.2	6.1	−35	Egypt	18	South Korea	17	Israel	9.5
6	Italy	3.8	2.5	45	Qatar	24	Egypt	23	Türkiye	12
7	United Kingdom	3.2	4.7	−35	USA	20	Qatar	16	Saudi Arabia	7.7
8	Spain	2.6	2.5	−4.4	Australia	35	Saudi Arabia	19	Belgium	12
9	South Korea	2.4	1.3	74	Philippines	16	India	13	Thailand	13
10	Israel	2.3	2.6	−15	India	37	Azerbaijan	9.1	Philippines	8.5
11	Netherlands	1.4	2.1	−39	USA	27	Mexico	11	Tunisia	7.4
12	Türkiye	1.1	0.6	69	Qatar	20	UAE	17	Oman	13
13	Sweden	0.8	0.9	−16	USA	25	Pakistan	24	Brazil	15
14	Switzerland	0.7	1.0	−34	Australia	21	Denmark	14	Spain	13
15	Australia	0.6	0.3	64	Canada	35	Chile	31	USA	13
16	Canada	0.5	0.6	−9.4	Saudi Arabia	49	UAE	22	USA	4.9
17	Ukraine	0.5	1.7	−70	China	48	Saudi Arabia	13	Thailand	7.5
18	UAE	0.4	0.4	−5.8	Egypt	28	Jordan	27	Algeria	15
19	Poland	0.4	0.1	168	Ukraine	95	Nepal	1.2	Ecuador	0.6
20	Belarus	0.3	0.5	−37	Serbia	33	Viet Nam	25	Uganda	14
21	South Africa	0.3	0.3	6.7	UAE	27	USA	21	India	15
22	Norway	0.3	0.6	−55	USA	27	Ukraine	15	Lithuania	14
23	Brazil	0.3	0.2	35	France	25	Nigeria	15	Chile	12
24	Belgium	0.2	0.1	212	Saudi Arabia	35	Canada	28	Pakistan	21
25	Jordan	0.2	0.2	14	USA	61	Egypt	26	Armenia	7.0

UAE = United Arab Emirates.

[a] Figures show the change in volume of the total arms exports per exporter between the two periods.

Source: SIPRI Arms Transfers Database, Mar. 2023.

THE EXPORTERS, 2018–22

SIPRI has identified 63 states as exporters of major arms in 2018–22. The five largest exporters of arms during that period—the USA, Russia, France, China and Germany—accounted for over three quarters (76 per cent) of all arms exports (see figure 2 and table 1). US and French arms exports rose between 2013–17 and 2018–22, while Russian, Chinese and German arms exports fell (see figure 3). The top 25 arms exporters accounted for 98 per cent of the world's arms exports in 2018–22 (see table 1). States in North America and Europe together accounted for 87 per cent of all arms exports in the period. The five largest exporters in Western Europe—France, Germany, Italy, the United Kingdom and Spain—supplied around one quarter (24 per cent) of total global arms exports in 2018–22 (see figure 2).

The United States

The USA's arms exports grew by 14 per cent between 2013–17 and 2018–22 and its share of total global arms exports rose from 33 per cent to 40 per cent. The USA delivered major arms to 103 states in 2018–22, almost as many as the next two biggest exporters combined. Its total arms exports in 2018–22 were 148 per cent higher than those of Russia—the second largest exporter—compared with 50 per cent higher in 2013–17.

A total of 41 per cent of US arms exports went to the Middle East in 2018–22, down from 49 per cent in 2013–17. Partly related to its policies aimed at containing Iranian influence, the USA exports large volumes of advanced major arms to states in the region. Four Middle Eastern states were among the top 10 importers of US arms in 2018–22: Saudi Arabia accounted for 19 per cent of US arms exports, Qatar for 6.7 per cent, Kuwait for 4.8 per cent and the United Arab Emirates (UAE) for 4.4 per cent.

States in Asia and Oceania received 32 per cent of total US arms exports in 2018–22, roughly the same proportion as in 2013–17 (33 per cent). Three major US allies in the region were among the 10 largest importers of US arms in 2018–22: Japan accounted for 8.6 per cent of total US arms exports, Australia for 8.4 per cent and South Korea for 6.5 per cent. Taiwan was the 4th largest importer of US arms in 2013–17, but only the 19th largest in 2018–22. However, by the end of 2022, it had several large orders in place for major arms from the USA, including for 66 combat aircraft.

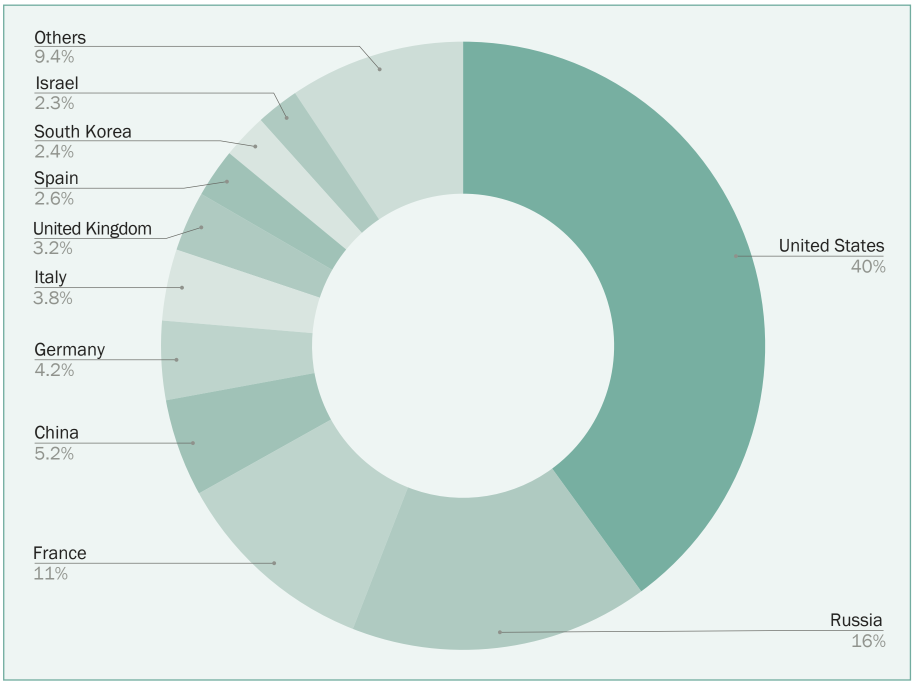

Figure 2. Global share of exports of major arms by the 10 largest exporters, 2018–22

Source: SIPRI Arms Transfers Database, Mar. 2023.

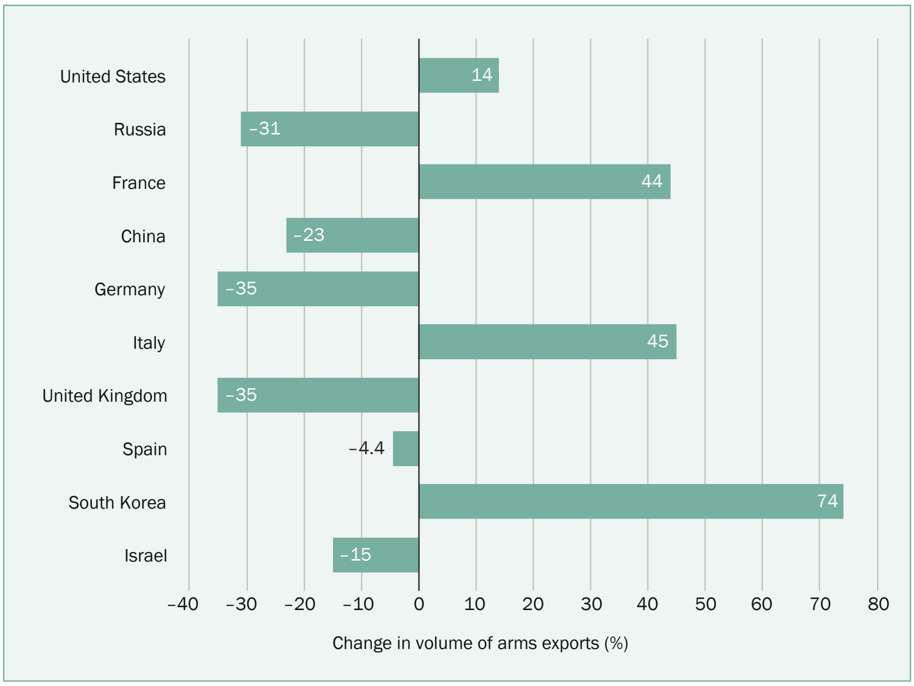

Figure 3. Changes in volume of exports of major arms since 2013–17 by the 10 largest exporters in 2018–22

Source: SIPRI Arms Transfers Database, Mar. 2023.

A total of 23 per cent of US arms exports went to states in Europe in 2018–22, up from 11 per cent in 2013–17. Three of the USA's North Atlantic

Box 1. Selected major arms on order or preselected for future orders from the 10 largest arms exporters, for delivery after 2022

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 almost certainly continue to be by far the largest exporter of major arms beyond 2022, especially as around 60 per cent of all combat aircraft currently on order will be supplied by the USA. Russia, which was the second largest arms exporter in the world in 2018–22, has a relatively low number of pending deliveries.

	United States	Russia	France	China	Germany	Italy	United Kingdom	Spain	South Korea	Israel
Combat aircraft[a]	1 371	84	210	94	–	115	20	–	136	18
Major warships[b]	5	5	21	22	29	9	26	2	6	–
SAM systems[c]	40	13	6	1	25	1	–	–	. .	26
Tanks	634	444	–	717	85	–	14	. .	990	19
Other armoured vehicles	2 658	55	552	–	1 389	1 703	2	608	23	69
Artillery	401	–	176	128	137	–	30	10	1 232	87

. . = data not available or not applicable; – nil or a negligible figure; SAM = surface-to-air missile.

[a] Combat aircraft here include combat helicopters, combat/trainer aircraft and anti-submarine warfare aircraft.
[b] Major warships here include aircraft carriers, corvettes, destroyers, frigates and submarines.
[c] SAM systems here include only land-based systems and exclude systems for portable/very short-range SAMs.

Source: SIPRI Arms Transfers Database, Mar. 2023.

Treaty Organization (NATO) partners in the region were among the 10 largest importers of US arms in 2018–22: the UK accounted for 4.6 per cent of US arms exports, the Netherlands for 4.4 per cent and Norway for 4.2 per cent. The volume of US exports of major arms to Ukraine increased sharply in 2022. Nevertheless, as the supplies to Ukraine involved relatively less advanced and mainly second-hand military equipment from US stocks, the level of US exports to Ukraine in 2022 was still below the levels sent to four other states that year—Kuwait, Saudi Arabia, Qatar and Japan—because they received advanced new weapons, such as combat aircraft and air defence systems. US arms exports to many NATO states rose between 2013–17 and 2018–22 as they rearmed due to growing tensions with Russia. However, the USA's arms exports to its NATO ally Türkiye were at a low level in 2018–22 as a result of increasingly strained bilateral relations. Türkiye was the 27th largest recipient of US arms in 2018–22, down from 7th largest in 2013–17.

The USA has many pending arms export deliveries (see box 1). In 2022 alone 13 states ordered a total of 376 combat aircraft and combat helicopters from the USA. The largest order that year came from Canada for 88 combat aircraft.

Russia

In 2018–22 Russia delivered major arms to 47 states and accounted for 16 per cent of total global arms exports. Russian arms exports remained stable between 2008–12 and 2013–17, but fell by 31 per cent between 2013–17 and 2018–22. The annual volumes of arms exports in 2018 and 2019 were at similar levels to or higher than those in each of the previous 20 years, but were at significantly lower levels in 2020, 2021 and 2022.

States in Asia and Oceania received 65 per cent of total Russian arms exports in 2018–22, while Middle Eastern and African states received 17 per cent and 12 per cent respectively. Just under two thirds of Russian arms exports went to three states in 2018–22: India (31 per cent), China (23 per cent) and Egypt (9.3 per cent). India was also the largest recipient of Russian arms in 2013–17, but exports to India decreased by 37 per cent between the two periods. In contrast, exports to China (+39 per cent) and Egypt (+44 per cent) increased within the same time frame. However, Russia made no deliveries to Egypt in 2021–22 and the volume of deliveries to China in 2020–22 was at a much lower level than in 2018–19. It is likely that order volumes from these two states will reduce in the coming years. Egypt, for example, cancelled a large order for combat aircraft in 2022, probably due to pressure from the USA, and China is becoming less reliant on Russian imports as it ramps up domestic production of advanced major arms. Exports to the other 7 of the 10 largest recipients of Russian arms in 2018–22 decreased, by 59 per cent on average.

The low volume of pending deliveries of major arms from Russia (see box 1) indicates that its arms exports are likely to continue to drop in the coming years. Combat aircraft and combat helicopters have been among Russia's main arms exports since 1992. It delivered a total of 328 of these in 2018–22, which accounted for 40 per cent of Russian arms exports in the period. However, by the end of 2022, it had pending deliveries for only 84 combat aircraft and combat helicopters. Russia's invasion of Ukraine will probably put additional constraints on Russia's ability to export arms, as it is likely to prioritize the production of arms for its own military over those for export. The multilateral sanctions, including wide-ranging trade restrictions, imposed on Russia, coupled with pressure from the USA and its allies on states not to acquire Russian arms, will also hamper its efforts to export arms.

France

French arms exports accounted for 11 per cent of the global total in 2018–22 and were 44 per cent higher than in 2013–17. Most of France's arms exports in 2018–22 went to states in Asia and Oceania (44 per cent) and the Middle East (34 per cent). It delivered major arms to 62 states in 2018–22, but the three largest recipients—India, Qatar and Egypt—together received 55 per cent of French arms exports in that period. With a 30 per cent share of exports, India was by far the largest recipient of French arms in 2018–22 (see below).

The most notable French arms export agreement signed in 2022 was with Indonesia, for 42 combat aircraft. By the end of that year, France had far more major arms on order for export than Russia (see box 1).

Other major exporters

China accounted for 5.2 per cent of total global arms exports in 2018–22. Its arms exports decreased by 23 per cent between 2013–17 and 2018–22. The vast majority of Chinese arms exports (80 per cent) went to states in Asia and Oceania. China delivered major arms to 46 states in 2018–22, but over half of its arms exports (54 per cent) went to just one state—Pakistan.

Arms exports by Germany made up 4.2 per cent of the global total in 2018–22. They were 35 per cent lower than in 2013–17. States in the Middle

Table 2. The 40 largest importers of major arms and their main suppliers, 2018–22

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

		Share of global arms imports (%)		Per cent change from 2013–17 to	Main suppliers and their share of importer's total imports (%), 2018–22					
Rank	Importer	2018–22	2013–17	2018–22[a]	1st		2nd		3rd	
1	India	11	12	–11	Russia	45	France	29	USA	11
2	Saudi Arabia	9.6	10	–8.7	USA	78	France	6.4	Spain	4.9
3	Qatar	6.4	1.5	311	USA	42	France	29	Italy	14
4	Australia	4.7	3.6	23	USA	73	Spain	19	Switzerland	3.0
5	China	4.6	4.2	4.1	Russia	83	France	8.1	Ukraine	5.6
6	Egypt	4.5	4.5	–5.3	Russia	34	Italy	19	France	19
7	South Korea	3.7	2.2	61	USA	71	Germany	19	France	7.9
8	Pakistan	3.7	3.0	14	China	77	Sweden	5.1	Russia	3.6
9	Japan	3.5	1.2	171	USA	97	UK	1.9	Sweden	0.3
10	United States	2.7	2.0	31	UK	24	Netherlands	13	France	11
11	UAE	2.7	4.1	–38	USA	66	Türkiye	7.4	Russia	5.4
12	Kuwait	2.4	0.9	146	USA	78	Italy	10	France	9.0
13	United Kingdom	2.3	1.7	31	USA	81	South Korea	13	Israel	2.8
14	Ukraine	2.0	<0.05	8 631	USA	34	Poland	17	Germany	11
15	Norway	2.0	0.5	285	USA	86	South Korea	8.2	Italy	3.5
16	Israel	1.9	1.8	2.9	USA	79	Germany	20	Italy	0.2
17	Netherlands	1.9	0.4	307	USA	95	Germany	3.9	Finland	0.6
18	Algeria	1.8	4.1	–58	Russia	73	Germany	10	France	5.2
19	Türkiye	1.3	2.4	–49	Italy	35	Spain	20	Russia	19
20	Singapore	1.3	1.4	–14	France	52	USA	26	UK	7.6
21	Thailand	1.0	0.9	–1.1	South Korea	33	China	14	USA	10
22	Brazil	0.9	0.6	48	France	39	UK	14	Sweden	13
23	Philippines	0.9	0.5	64	South Korea	42	Israel	22	USA	15
24	Indonesia	0.9	2.7	–69	South Korea	32	USA	26	France	12
25	Bangladesh	0.9	1.6	–48	China	74	UK	5.8	Türkiye	4.5
26	Poland	0.9	0.5	64	USA	56	South Korea	17	Germany	6.5
27	Viet Nam	0.8	2.8	–72	Russia	55	Israel	16	Belarus	10
28	Italy	0.8	1.3	–41	USA	92	Israel	4.4	France	2.0
29	Morocco	0.8	1.1	–30	USA	76	France	15	China	6.8
30	Myanmar	0.8	0.8	–3.0	Russia	42	China	29	India	14
31	NATO[b]	0.7	<0.05	2 700	France	66	USA	18	UK	15
32	Afghanistan	0.7	0.8	–11	USA	96	Brazil	2.6	Belarus	1.4
33	Canada	0.7	1.1	–36	USA	32	Australia	27	Spain	15
34	Greece	0.7	0.9	–26	France	48	USA	29	UK	12
35	Kazakhstan	0.6	0.8	–22	Russia	94	China	2.6	South Africa	1.8
36	Belarus	0.6	0.3	55	Russia	100	China	0.1	. .	. .
37	Serbia	0.5	0.1	743	China	43	Russia	31	Belarus	20
38	Chile	0.5	0.3	56	UK	38	Australia	36	USA	10
39	Jordan	0.5	0.8	–39	USA	40	UAE	20	Russia	17
40	Bahrain	0.5	0.1	380	USA	83	UK	7.0	Italy	4.1

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

[a] Figures show the change in volume of the total arms imports per importer between the two periods.

[b] The data is for imports by the organization itself, not the total imports by NATO member states.

Source: SIPRI Arms Transfers Database, Mar. 2023.

East received the largest share of total German arms exports in 2018–22 (36 per cent), followed by states in Asia and Oceania (32 per cent) and Europe (20 per cent).

Italy accounted for 3.8 per cent of the world's arms exports in 2018–22. Its arms exports were 45 per cent higher in 2018–22 than in 2013–17. Around two thirds (67 per cent) of Italian arms exports went to the Middle East.

The 4 other suppliers making up the top 10 arms exporters in 2018–22 were the UK, Spain, South Korea and Israel. Arms exports by the UK (–35 per cent), Spain (–4.4 per cent) and Israel (–15 per cent) all decreased between 2013–17 and 2018–22. In contrast, arms exports by South Korea increased by 74 per cent, giving it a 2.4 per cent share of the global total. Most of its arms exports (63 per cent) went to states in Asia and Oceania but international demand for South Korean arms is growing, as demonstrated, for example, by the large orders that Poland placed in 2022 (see below).

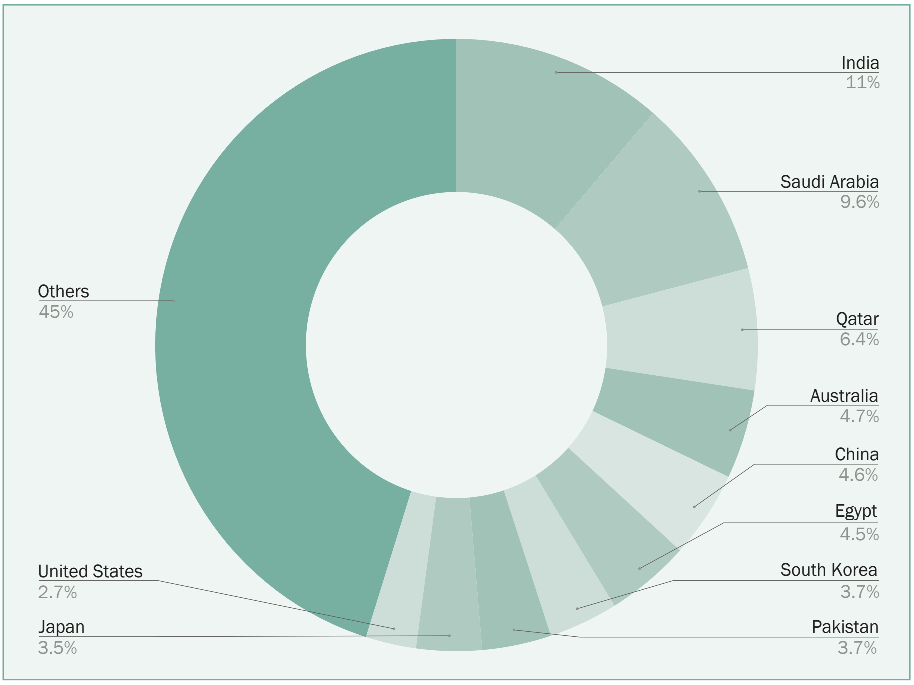

Figure 4. Global share of imports of major arms by the 10 largest importers, 2018–22

Source: SIPRI Arms Transfers Database, Mar. 2023.

THE IMPORTERS, 2018–22

SIPRI has identified 167 states as importers of major arms in 2018–22. The top five arms importers—India, Saudi Arabia, Qatar, Australia and China—received 36 per cent of total global arms imports in the period (see figure 4 and table 2). States in Asia and Oceania accounted for 41 per cent of all arms imports in 2018–22 (see figure 5), followed by the Middle East (31 per cent), Europe (16 per cent), the Americas (5.8 per cent) and Africa (5.0 per cent).

Africa

Imports of major arms by African states fell by 40 per cent between 2013–17 and 2018–22, which was mainly due to decreases in the arms imports of the two largest importers in the region, Algeria (–58 per cent) and Morocco (–30 per cent). The main suppliers to Africa in 2018–22 were Russia, accounting for 40 per cent of African imports of major arms, the USA (16 per cent), China (9.8 per cent) and France (7.6 per cent).

Sub-Saharan Africa

States in sub-Saharan Africa accounted for 2.0 per cent of total global imports of major arms in 2018–22. Their combined arms imports were 23 per cent lower than in 2013–17. The three largest arms importers in the subregion in 2018–22 were Angola, Nigeria and Mali.

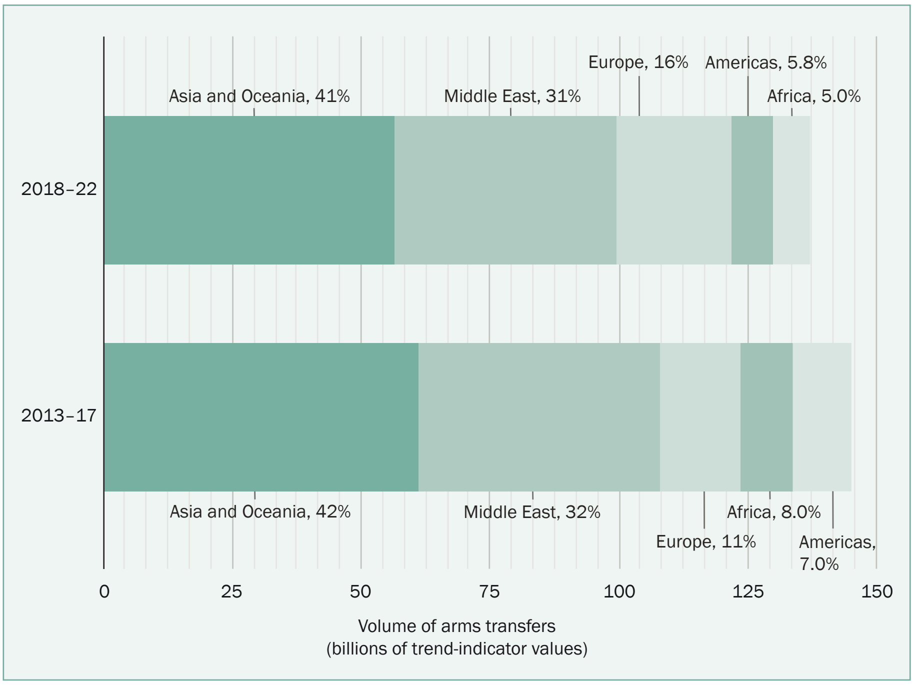

Figure 5. The importers of major arms, by region, 2018–22 and 2013–17, per cent of global share

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. 2023.

Several arms-exporting states are competing for influence in sub-Saharan Africa. Russia overtook China to become the largest supplier to the subregion in 2018–22. Its share of arms imports to sub-Saharan Africa rose from 21 per cent in 2013–17 to 26 per cent in 2018–22, while China's fell from 29 per cent to 18 per cent. France increased its share from 4.8 per cent to 8.3 per cent, making it the third largest arms supplier to sub-Saharan Africa in 2018–22.

Arms import volumes vary significantly over time for most states in sub-Saharan Africa and these states often have a diverse range of suppliers. For example, Mali's imports increased by 210 per cent between 2013–17 and 2018–22. Russia was its main supplier in both periods, but Mali also received major arms from Brazil, China, France, South Africa, Spain, Türkiye, the UAE and the USA. After the coups in Mali in 2020 and 2021, France and the USA became far more reluctant to supply it with arms. Russia, in contrast, increased its arms exports to Mali in 2021–22.

The Americas

Arms imports by states in the Americas decreased by 21 per cent between 2013–17 and 2018–22. The USA and Brazil were the largest importers of major arms in the region in 2018–22, accounting for 47 per cent and 16 per cent of the regional total respectively.

Arms imports by South American states decreased by 34 per cent between 2013–17 and 2018–22. Despite the fact that there are few interstate tensions in South America, some states, including Brazil and Chile, have significant ongoing arms import programmes. Brazil's arms imports were 48 per cent higher than in 2013–17 and accounted for 44 per cent of the subregional total in 2018–22. Chile's arms imports rose by 56 per cent between the two periods, giving it a 24 per cent share of total South American arms imports.

Asia and Oceania

Arms imports by states in Asia and Oceania decreased by 7.5 per cent between 2013–17 and 2018–22. Six of the world's 10 largest arms importers in 2018–22 were in Asia and Oceania: India, Australia, China, South Korea, Pakistan and Japan. The USA (31 per cent) accounted for the largest share of arms imports to states in the region, followed by Russia (26 per cent) and France (12 per cent).

India and Pakistan

India's tensions with Pakistan and China largely drive its demand for arms imports. With an 11 per cent share of total global arms imports, India was the world's biggest importer of major arms in 2018–22, a position it has held for the period 1993–2022. It retained this position even though its arms imports dropped by 11 per cent between 2013–17 and 2018–22. The decrease can be attributed to several factors including India's slow and complex arms procurement process, efforts to diversify its arms suppliers, and attempts to replace imports with major arms that are designed and produced domestically.

Russia was the largest supplier of arms to India in both 2013–17 and 2018–22, but its share of total Indian arms imports fell from 64 per cent to 45 per cent. Russia's position as India's main arms supplier is under pressure due to strong competition from other supplier states, increased Indian arms production and, since 2022, the above-mentioned constraints on Russia's arms exports related to its invasion of Ukraine.

India's arms imports from France, which included 62 combat aircraft and 4 submarines, increased by 489 per cent between 2013–17 and 2018–22. France therefore displaced the USA to become the second largest supplier to India in 2018–22.

Arms imports by Pakistan increased by 14 per cent between 2013–17 and 2018–22 and accounted for 3.7 per cent of the global total. China supplied over three quarters (77 per cent) of Pakistan's arms imports in 2018–22.

East Asia, Oceania and South East Asia

Arms imports by states in East Asia (+21 per cent) and Oceania (+25 per cent) increased between 2013–17 and 2018–22, while those by states in South East Asia (–42 per cent) decreased.

China's arms imports grew by 4.1 per cent and accounted for 4.6 per cent of the global total in 2018–22. The vast majority of Chinese arms imports (83 per cent) came from Russia. Russian deliveries in the last three years of the period (2020–22) consisted almost entirely of helicopters and engines for aircraft, which are the last few types of major arms that China has had difficulties in developing.

Both Japan (+171 per cent) and South Korea (+61 per cent) increased their arms imports between 2013–17 and 2018–22. The USA is a treaty ally of both states and has been their largest arms supplier since 1950. Japan and South Korea are expanding their military capabilities in a move that is largely driven by tensions with North Korea and, in the case of Japan, with China. Both Japan and South Korea have well-developed arms industries, but they remain reliant on arms imports in some key categories, especially long-range strike capabilities such as advanced combat aircraft and missiles. The USA delivered 40 combat aircraft to South Korea in 2018–22, which accounted for 43 per cent of South Korean arms imports in the period. It also delivered 29 combat aircraft to Japan, amounting to one third (33 per cent) of Japanese arms imports. Both countries have pending deliveries of combat aircraft from

Box 2. The war in Ukraine as a driver of arms transfers in 2022

Ukraine imported very few major arms in the period from its independence in 1991 until the end of 2021. This changed after the Russian invasion of Ukraine in February 2022, as the United States and many European states began to send large quantities of military aid to Ukraine. As a result, it became the 3rd largest importer of major arms in 2022, after Qatar and India, and the 14th largest for the five-year period 2018–22, accounting for 2.0 per cent of total global arms imports. Of the 29 states that supplied major arms to Ukraine in 2022, the main suppliers were the USA, which accounted for 35 per cent of total Ukrainian arms imports during the year, Poland (17 per cent), Germany (11 per cent), the United Kingdom (10 per cent) and Czechia (4.4 per cent). Many of the arms supplied in 2022 were second-hand items from existing stocks, including 228 artillery pieces and an estimated 5000 guided artillery rockets from the USA, 280 tanks from Poland and over 7000 anti-tank missiles from the UK. Some newly produced arms were also supplied, such as air defence systems from Germany, Poland, the UK and the USA. In many cases, the supply of arms by one state was financed by other states or by the European Union (EU) through the European Peace Facility. For example, by the end of 2022, the EU had made €3.1 billion available for military equipment for Ukraine.

Ukraine did not receive all the types of arms it asked its supporters to provide and, at different stages during 2022, there was divergence between states about what they were willing to supply. For example, while Poland and Czechia delivered tanks to Ukraine in the first half of 2022, Germany, the UK and the USA decided to do so only in late 2022 or early 2023. Despite a growing willingness among states to send a wider variety of arms to Ukraine, as of the end of 2022, suppliers were still not prepared to deliver arms with a long-range strike capability, such as combat aircraft and long-range land-attack missiles.

The arms supplies to Ukraine in 2022 were vital for the Ukrainian effort to halt the Russian offensive. Russia, in contrast, relied almost exclusively on domestically produced arms—although it did import uncrewed aerial vehicles (UAVs) and flying bombs from Iran in 2022.

the USA, and Japan ordered long-range land-attack missiles from the USA in 2022.

Australia, by far the largest arms importer in Oceania, is another key ally of the USA and is also building up its long-range strike capabilities based on a perceived heightened threat from China. Australia increased its arms imports by 23 per cent between 2013–17 and 2018–22. With a 4.7 per cent share of total global arms imports, it was the fourth largest arms importer in the world in 2018–22. The delivery of 64 combat aircraft from the USA accounted for 62 per cent of Australian arms imports in the period.

Although most South East Asian states continued to be affected by tensions in the South China Sea, mainly with China, arms imports by states in the subregion fell by 42 per cent between 2013–17 and 2018–22. The decrease is at least partly because many arms-importing states are still in the process of incorporating equipment delivered before 2018 into their armed forces. Nevertheless, states in the subregion are continuing to build up their military capabilities. The Philippines, for example, increased its arms imports by 64 per cent between 2013–17 and 2018–22, and Singapore expects to take delivery of 4 submarines from Germany within the next few years. During the period 2018–22, Indonesia placed orders for 42 combat aircraft from France, doubling its current inventory, as well as for 3 submarines from South Korea and for 6 frigates from Italy and 2 from the UK.

Europe

Arms imports by European states were 47 per cent higher in 2018–22 than in 2013–17. The biggest European arms importer in 2018–22 was the UK, which was the 13th largest arms importer in the world, followed by Ukraine (see box 2) and Norway, ranking 14th and 15th respectively. The USA accounted for 56 per cent of the region's arms imports in 2018–22, Russia for 5.8 per cent (mainly to Belarus) and Germany for 5.1 per cent.

European NATO states

Largely in response to the deteriorating security environment in the region, NATO states in Europe increased their arms imports by 65 per cent between 2013–17 and 2018–22. The USA accounted for 65 per cent of total arms imports by European NATO states and the NATO organization itself (see table 2) in 2018–22. The next biggest suppliers were France (8.6 per cent) and South Korea (4.9 per cent). The arms imports of European NATO states are expected to continue to rise in the coming years, based on existing programmes for arms imports. These include orders placed before the February 2022 Russian invasion of Ukraine and several large orders announced afterwards. Some of the orders placed in 2022 were the result of accelerated procurement processes implemented in response to the war in Ukraine. For example, in the first four years of the period (2018–21), Poland's most notable arms import orders included 32 combat aircraft and 4 missile and air defence systems from the USA; however, in 2022 Poland announced new orders for 394 tanks, 96 combat helicopters and 12 missile and air defence systems from the USA; 48 combat aircraft, 1000 tanks, 672 self-propelled guns and 288 multiple rocket launchers from South Korea; and 3 frigates from the UK. After an accelerated procurement process, Germany ordered 35 combat aircraft from the USA in late 2022. These are specifically for carrying nuclear weapons owned by the USA and will replace existing aircraft that have this task.

The Middle East

Arms imports by states in the Middle East were 8.8 per cent lower in 2018–22 than in 2013–17. Three of the top 10 arms-importing states in 2018–22 were in the Middle East: Saudi Arabia, Qatar and Egypt. The USA accounted for 54 per cent of Middle Eastern arms imports. The next largest suppliers were France (12 per cent), Russia (8.6 per cent) and Italy (8.4 per cent).

The Gulf region

Against the backdrop of various tensions in the region, arms transfers continued to play a major role in security developments in the Gulf in 2018–22.

Saudi Arabia was the world's second largest arms importer in 2018–22 and received 9.6 per cent of all arms imports. The USA supplied 78 per cent of Saudi Arabian arms imports in the period, which included the delivery of 91 combat aircraft with hundreds of land-attack missiles and over 20 000 guided bombs.

Qatar became the third largest arms importer in the world as its arms imports increased by 311 per cent between 2013–17 and 2018–22. Its main suppliers in 2018–22 were the USA, which accounted for 42 per cent of Qatari arms imports, France (29 per cent) and Italy (14 per cent). Qatar's arms imports in 2018–22 included 36 combat aircraft from France, 36 from the USA and 8 from the UK, as well as 3 frigates from Italy.

The UAE's arms imports in 2018–22 were 38 per cent lower than in 2013–17, and it was the 11th largest arms importer globally. Notable arms imports in 2018–22 included hundreds of air defence missiles and over 20 000 guided bombs from the USA.

Kuwait's arms imports increased by 146 per cent between 2013–17 and 2018–22, mainly due to the delivery of 28 combat aircraft and 218 tanks from the USA and 6 combat aircraft 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. Its imports of major arms in 2018–22 were close to zero. In 2022 Iran placed an order for 24 combat aircraft from Russia, its first significant procurement of combat aircraft since the early 1990s. By the end of 2022, Saudi Arabia had 41 combat aircraft on order from the USA, while Qatar had 22 on order from the USA and 16 from the UK, the UAE had 80 on order from France, and Kuwait had 22 on order from Italy.

Arms imports and naval build-ups in the eastern Mediterranean

Amid ongoing maritime disputes in the eastern Mediterranean, several states in the region continued to increase their naval capabilities in 2018–22. For example, Egypt received four submarines and the first of four frigates on order from Germany; two of three frigates on order from France; and two frigates from Italy. In 2022 Israel received the first two of four frigates on order from Germany. Israel is to receive one submarine from Germany in 2023 and placed an order for three more in 2022. Greece ordered three frigates from France in 2022. Türkiye is able to produce most types of warships, but has six submarines on order from Germany for delivery in 2023–27 and an amphibious assault ship on order from Spain for delivery in 2023.

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. 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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