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TRENDS IN INTERNATIONAL ARMS TRANSFERS, 2021

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The volume of international transfers of major arms in 2017–21 was 4.6 per cent lower than in 2012–16, but was 3.9 per cent higher than in 2007–11 (see figure 1).[1] The five largest arms exporters in 2017–21 were the United States, Russia, France, China and Germany (see table 1). The five largest arms importers were India, Saudi Arabia, Egypt, Australia and China (see table 2). Between 2012–16 and 2017–21 there were increases in arms transfers to Europe (19 per cent) and to the Middle East (2.8 per cent), while there were decreases in the transfers to the Americas (–36 per cent), Africa (–34 per cent), and Asia and Oceania (–4.7 per cent).

From 14 March 2022 SIPRI's open-access Arms Transfers Database includes updated data on transfers of major arms for 1950–2021, 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.

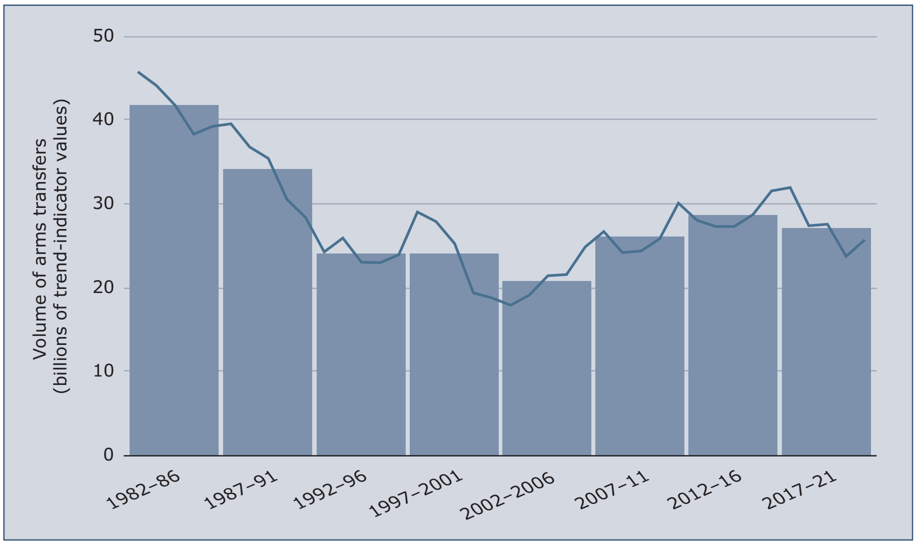

Figure 1. The trend in international transfers of major arms, 1982–2021

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. 2022.

[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 2017–21 was 4.6 per cent lower than in 2012–16, but was 3.9 per cent higher than in 2007–11.
- The five largest arms exporters in 2017–21 were the United States, Russia, France, China and Germany. Together, they accounted for 77 per cent of all arms exports in 2017–21.
- In 2017–21 US arms exports accounted for 39 per cent of the global total and were 14 per cent higher than in 2012–16.
- French arms exports increased by 59 per cent between 2012–16 and 2017–21, while Chinese (–31 per cent), Russian (–26 per cent) and German (–19 per cent) arms exports decreased.
- The five largest arms importers in 2017–21, India, Saudi Arabia, Egypt, Australia and China, together received 38 per cent of all imports of major arms.
- The main recipient region in 2017–21 was Asia and Oceania (accounting for 43 per cent of global arms imports), followed by the Middle East (32 per cent), Europe (13 per cent), Africa (5.8 per cent) and the Americas (5.5 per cent).
- Arms imports by states in South America in 2017–21 were at their lowest level for any 5-year period in the past 50 years.

Table 1. The 25 largest exporters of major arms and their main recipients, 2017–21

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

	Exporter	Share of global arms exports (%) 2017–21	Share of global arms exports (%) 2012–16	Per cent change from 2012–16 to 2017–21[a]	Main recipients (share of exporter's total exports, %), 2017–21: 1st		2nd		3rd	
1	United States	39	32	14	Saudi Arabia	(23)	Australia	(9.4)	South Korea	(6.8)
2	Russia	19	24	–26	India	(28)	China	(21)	Egypt	(13)
3	France	11	6.4	59	India	(29)	Qatar	(16)	Egypt	(11)
4	China	4.6	6.4	–31	Pakistan	(47)	Bangladesh	(16)	Thailand	(5.0)
5	Germany	4.5	5.4	–19	South Korea	(25)	Egypt	(14)	USA	(6.1)
6	Italy	3.1	2.5	16	Egypt	(28)	Turkey	(15)	Qatar	(9.0)
7	United Kingdom	2.9	4.7	–41	Oman	(19)	Saudi Arabia	(19)	USA	(19)
8	South Korea	2.8	1.0	177	Philippines	(16)	Indonesia	(14)	UK	(14)
9	Spain	2.5	2.2	10	Australia	(51)	Turkey	(13)	Belgium	(8.6)
10	Israel	2.4	2.5	–5.6	India	(37)	Azerbaijan	(13)	Viet Nam	(11)
11	Netherlands	1.9	2.0	–12	Indonesia	(18)	USA	(16)	Mexico	(10)
12	Turkey	0.9	0.7	31	Turkmenistan	(16)	Oman	(16)	Qatar	(14)
13	Sweden	0.8	1.2	–35	Pakistan	(24)	USA	(24)	Brazil	(15)
14	Ukraine	0.7	2.5	–72	China	(39)	Thailand	(15)	Russia[b]	(13)
15	Switzerland	0.7	1.0	–35	Australia	(25)	Denmark	(12)	France	(8.7)
16	Australia	0.6	0.3	98	Canada	(33)	Chile	(29)	USA	(18)
17	Canada	0.5	0.8	–41	Saudi Arabia	(47)	UAE	(22)	Australia	(6.8)
18	UAE	0.4	0.3	17	Egypt	(31)	Jordan	(24)	Algeria	(15)
19	South Africa	0.3	0.3	–5.8	UAE	(26)	USA	(21)	India	(12)
20	Belarus	0.3	0.5	–42	Serbia	(34)	Viet Nam	(25)	Uganda	(14)
21	Brazil	0.3	0.2	48	France	(23)	Nigeria	(13)	Chile	(11)
22	Norway	0.3	0.6	–57	Oman	(27)	USA	(21)	Lithuania	(14)
23	India	0.2	0.1	119	Myanmar	(50)	Sri Lanka	(25)	Armenia	(11)
24	Czechia	0.2	0.3	–36	USA	(28)	Ukraine	(26)	Uganda	(13)
25	Jordan	0.2	0.1	5.0	USA	(40)	Egypt	(36)	Armenia	(10)

UAE = United Arab Emirates.

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

[b] This involved transport aircraft produced in Russia until 2018 under licences granted before Ukraine banned arms sales to Russia in 2014. For further detail see Wezeman, S. T., 'Monitoring international arms transfers: The difficult case of production under licence', SIPRI WritePeace Blog, 31 Mar. 2021.

Source: SIPRI Arms Transfers Database, Mar. 2022.

THE EXPORTERS, 2017–21

SIPRI has identified 60 states as exporters of major arms in 2017–21. The five largest suppliers of arms during that period—the USA, Russia, France, China and Germany—accounted for 77 per cent of all arms exports (see figure 2 and table 1). French and US arms exports increased between 2012–16 and 2017–21, while Chinese, Russian and German arms exports fell (see figure 3). The top 25 arms exporters supplied 99 per cent of the world's arms exports in 2017–21 (see table 1). States in North America and Europe together accounted for 87 per cent of all arms exports in 2017–21. The top five West European arms exporters—France, Germany, Italy, the United Kingdom and Spain—supplied 24 per cent of total global arms exports in 2017–21 (see figure 2), compared with 21 per cent in 2012–16. Three states outside Europe and North America were among the top 10 arms exporters in 2017–21: China, South Korea and Israel. While the Covid-19 pandemic caused some disruption to arms transfers in 2020–21, it had a very limited overall impact on arms exports in 2017–21.

The United States

The USA's arms exports grew by 14 per cent between 2012–16 and 2017–21, increasing its global share from 32 per cent to 39 per cent. The gap between the USA and the second largest arms exporter, Russia, widened significantly: US arms exports were 108 per cent higher than Russia's in 2017–21, compared with 34 per cent higher in 2012–16. The USA delivered major arms to 103 states in 2017–21, far more recipients than any other supplier. Aircraft were the USA's main arms export in 2017–21, making up 62 per cent of its total arms exports, followed by missiles (17 per cent) and armoured vehicles (10 per cent).

The Middle East accounted for 43 per cent of total US arms exports in 2017–21, a slight drop on the 47 per cent share in 2012–16. A total of 33 per cent of US arms exports went to states in Asia and Oceania in 2017–21, compared with 35 per cent in 2012–16. US arms exports to Europe increased by 105 per cent, with European states receiving 18 per cent of total US arms exports in 2017–21.

The growth in US arms exports between 2012–16 and 2017–21 was largely due to increases in arms exports to Saudi Arabia, Australia, South Korea and Japan—the four main recipients of US arms exports in 2017–21. US arms exports to Saudi Arabia rose by 106 per cent and it alone accounted for 23 per cent of total US arms exports in 2017–21. US arms exports to Australia increased by 78 per cent, while those to South Korea and Japan rose by 66 per cent and 173 per cent respectively.

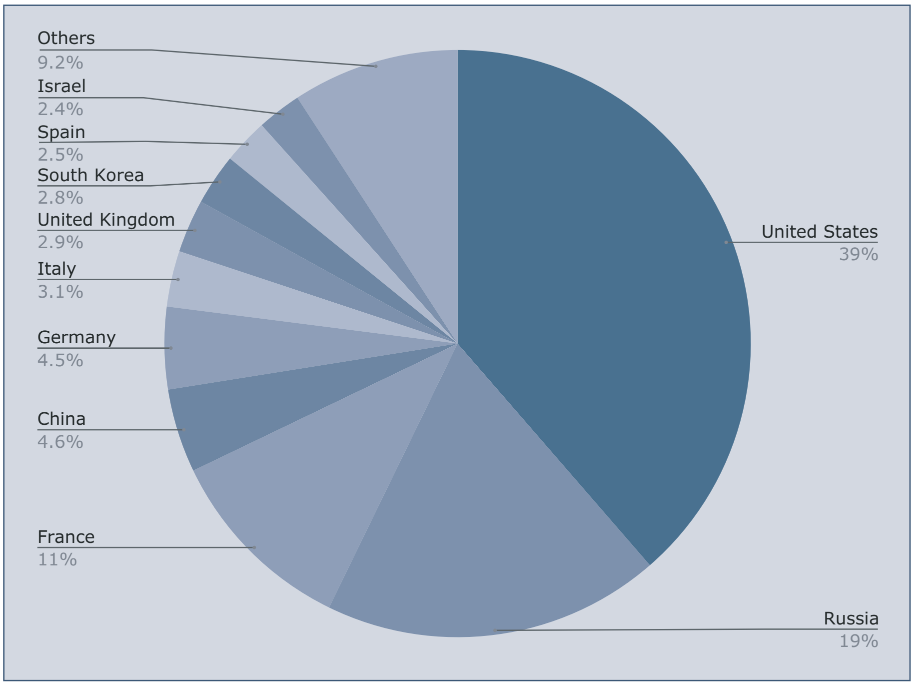

Figure 2. Global share of exports of major arms by the 10 largest exporters, 2017–21

Source: SIPRI Arms Transfers Database, Mar. 2022.

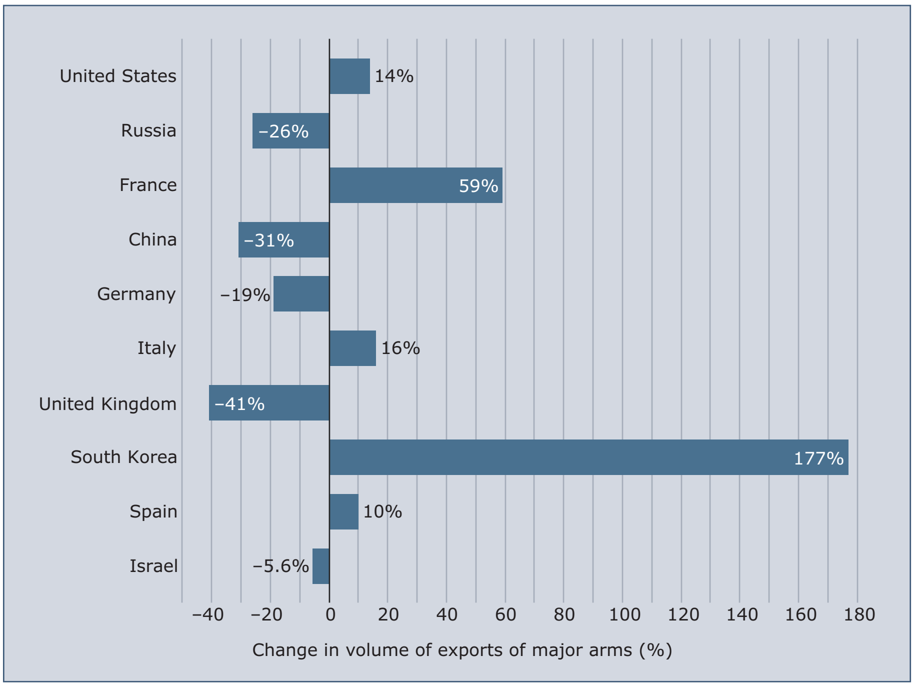

Figure 3. Changes in volume of exports of major arms since 2012–16 by the 10 largest exporters in 2017–21

Source: SIPRI Arms Transfers Database, Mar. 2022.

These large increases were partly offset by decreases in exports to several states. The United Arab Emirates (UAE), for example, was the 2nd largest recipient of US arms in 2012–16 but was the 8th largest in 2017–21. Similarly, Turkey dropped from 3rd to 21st largest and Taiwan from 4th to 15th largest.

The USA has many large ongoing arms export orders, with deliveries scheduled to take place over the next decade and beyond. Of these, the planned deliveries of a total of 600 F-35 combat aircraft and 278 other new combat aircraft to 23 states are among the most significant.

Russia

Russia's arms exports fell by 26 per cent between 2012–16 and 2017–21, and its share of global arms exports decreased from 24 per cent to 19 per cent. Russia delivered major arms to 45 states in 2017–21. In contrast to the USA, Russia's exports in 2017–21 were more concentrated as four states—India, China, Egypt and Algeria—together received 73 per cent of total Russian arms exports. A total of 61 per cent of Russian arms exports went to Asia and Oceania, while 20 per cent went to the Middle East and 14 per cent to Africa. Aircraft were Russia's main arms export in 2017–21. They accounted for 48 per cent of its total arms exports, followed by engines, mainly for aircraft (16 per cent), and missiles (12 per cent).

The overall drop in Russian arms exports between 2012–16 and 2017–21 was almost entirely due to decreases in arms exports to India (–47 per cent) and Viet Nam (–71 per cent). While a number of arms export contracts signed over the past 10 years had been completed by the end of 2021, several large Russian arms deliveries are still pending and include eight air defence systems, four frigates and one nuclear-powered submarine to India.

Substantial increases in Russia's arms exports to China (60 per cent) and Egypt (723 per cent)—the second and third largest recipients of Russian arms respectively—did not offset the overall decrease in its arms exports. In 2017–21 both China and Egypt received air defence systems and combat aircraft from Russia.

France

In 2017–21 French arms exports accounted for 11 per cent of the global total after increasing by 59 per cent between 2012–16 and 2017–21. At the regional level, 47 per cent of French arms exports went to Asia and Oceania in 2017–21 and 37 per cent went to the Middle East. Aircraft were France's main arms export in 2017–21, making up 56 per cent of its total arms exports, followed by ships, accounting for 15 per cent.

France delivered major arms to 65 states in 2017–21, but the three largest recipients—India, Qatar and Egypt—together accounted for 56 per cent of French arms exports in that period (see table 1). With a 29 per cent share of French arms exports, India was by far the largest recipient. France's arms exports to India in 2017–21 were almost 11 times higher than in 2012–16 and reached their highest level for any five-year period since 1950. France's arms export relations with Qatar and Egypt have not been as consistent as those with India. French arms exports to Qatar were more than 25 times higher in 2017–21 than in 2012–16. After a break of 11 years, French arms exports to Egypt resumed in 2012–16 and remained at a similar level in 2017–21. India (54), Qatar (30) and Egypt (18) received a total of 102 combat aircraft and associated equipment from France in 2017–21. In 2021 France concluded export agreements for a total of 188 combat aircraft with Croatia (12), Egypt (30), Greece (24), Indonesia (42) and the UAE (80).

Other major suppliers

In 2017–21 China accounted for 4.6 per cent of total global arms exports. Chinese arms exports decreased by 31 per cent between 2012–16 and 2017–21. A total of 79 per cent of Chinese arms exports went to Asia and Oceania in 2017–21. China delivered major arms to 48 states in 2017–21, but 47 per cent of its arms exports went to just one state, Pakistan, which is China's closest ally. Pakistan has become increasingly reliant on Chinese arms exports, partly because of the recent deterioration in its relations with other suppliers, most notably the USA.

German arms exports made up 4.5 per cent of the global total in 2017–21. They were 19 per cent lower than in 2012–16 and 49 per cent lower than in 2007–11. Germany delivered major arms to 53 states in 2017–21. A total of 40 per cent of German arms exports went to states in Asia and Oceania, 29 per cent went to states in the Middle East and 18 per cent went to states in Europe. South Korea was by far the largest recipient of German exports of major arms in 2017–21, with Egypt becoming the second largest. South Korea and Egypt each received four submarines, which accounted for the vast bulk of their arms exports from Germany.

Italy's arms exports in 2017–21 were 16 per cent higher than in 2012–16 and 33 per cent higher than in 2007–11. Italian arms exports amounted to 3.1 per cent of the global total in 2017–21. A total of 63 per cent of Italian arms exports went to the Middle East. The delivery of two frigates to Egypt in 2020–21 accounted for 23 per cent of total Italian arms exports in 2017–21.

The UK was the world's seventh largest arms exporter in 2017–21 and supplied 2.9 per cent of total global arms exports. Deliveries related to a large deal with Saudi Arabia for combat aircraft ended in 2017, leading to a 41 per cent fall in British arms exports between 2012–16 and 2017–21.

South Korea was the eighth largest arms exporter in 2017–21 with a 2.8 per cent share of the global total. Its arms exports were 177 per cent higher than in 2012–16. Asia and Oceania accounted for 63 per cent of South Korean arms exports in 2017–21 and Europe for 24 per cent. South Korea also further developed its arms export relations in other regions, especially the Middle East. In 2021, for example, Egypt selected artillery and the UAE selected air defence systems from South Korea for major military procurement projects.

THE IMPORTERS, 2017–21

SIPRI has identified 163 states as importers of major arms in 2017–21. The top 5 arms importers—India, Saudi Arabia, Egypt, Australia and China—together received 38 per cent of total global arms imports in 2017–21 and the top 10 received 55 per cent (see figure 4 and table 2). At the regional level, Asia and Oceania accounted for 43 per cent of arms imports in 2017–21 (see

Table 2. The 40 largest importers of major arms and their main suppliers, 2017–21

Note: 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 2012–16 to 2017–21[a]	Main suppliers (share of importer's total imports, %), 2017–21					
	Importer	2017–21	2012–16		1st		2nd		3rd	
1	India	11	14	–21	Russia	(46)	France	(27)	USA	(12)
2	Saudi Arabia	11	8.2	27	USA	(82)	France	(5.1)	UK	(5.0)
3	Egypt	5.7	3.2	73	Russia	(41)	France	(21)	Italy	(15)
4	Australia	5.4	3.2	62	USA	(67)	Spain	(24)	Switzerland	(3.3)
5	China	4.8	4.4	4.1	Russia	(81)	France	(9.1)	Ukraine	(5.9)
6	Qatar	4.6	1.3	227	USA	(46)	France	(36)	Italy	(6.1)
7	South Korea	4.1	2.3	71	USA	(63)	Germany	(27)	France	(7.8)
8	Pakistan	3.0	3.2	–11	China	(72)	Sweden	(6.4)	Russia	(5.6)
9	UAE	2.8	4.5	–41	USA	(61)	France	(6.2)	Russia	(5.3)
10	Japan	2.6	1.0	152	USA	(98)	UK	(1.7)	Sweden	(0.7)
11	Algeria	2.6	3.9	–37	Russia	(81)	Germany	(6.4)	France	(3.7)
12	United Kingdom	2.5	1.4	74	USA	(77)	South Korea	(16)	Germany	(3.2)
13	United States	2.4	2.5	–9.6	UK	(23)	Netherlands	(13)	France	(12)
14	Israel	1.9	1.5	19	USA	(92)	Germany	(6.9)	Italy	(1.0)
15	Indonesia	1.7	2.1	–24	South Korea	(23)	USA	(23)	Netherlands	(19)
16	Norway	1.6	0.3	343	USA	(83)	South Korea	(10)	Italy	(3.5)
17	Turkey	1.5	3.2	–56	Italy	(30)	USA	(22)	Spain	(21)
18	Singapore	1.4	1.6	–20	France	(54)	USA	(22)	Germany	(7.9)
19	Netherlands	1.3	0.6	116	USA	(94)	Germany	(5.0)	Australia	(0.3)
20	Viet Nam	1.3	2.9	–56	Russia	(56)	Israel	(19)	South Korea	(6.6)
21	Iraq	1.2	3.4	–66	Russia	(44)	USA	(35)	Italy	(10)
22	Italy	1.2	1.0	15	USA	(72)	Germany	(17)	Israel	(5.8)
23	Thailand	1.1	0.9	20	South Korea	(28)	China	(20)	Ukraine	(9.9)
24	Bangladesh	1.0	1.5	–35	China	(71)	Russia	(9.2)	UK	(5.2)
25	Morocco	1.0	1.3	–27	USA	(76)	China	(14)	France	(8.4)
26	Afghanistan	0.9	0.9	–4.1	USA	(97)	Brazil	(2.0)	Belarus	(1.1)
27	Oman	0.9	1.3	–34	UK	(63)	Turkey	(16)	Norway	(8.1)
28	Kuwait	0.9	0.9	–6.3	USA	(56)	France	(26)	Italy	(9.4)
29	Philippines	0.9	0.3	142	South Korea	(53)	USA	(16)	Israel	(8.7)
30	Canada	0.9	1.0	–14	USA	(43)	Australia	(23)	Israel	(12)
31	Kazakhstan	0.8	0.7	8.1	Russia	(91)	Spain	(2.2)	China	(2.1)
32	Jordan	0.7	0.6	11	USA	(37)	Netherlands	(17)	UAE	(14)
33	Brazil	0.7	0.8	–17	UK	(19)	Sweden	(18)	France	(17)
34	Taiwan	0.7	1.9	–68	USA	(99)	Germany	(0.4)	Italy	(0.3)
35	Myanmar	0.6	0.9	–32	China	(36)	Russia	(27)	India	(17)
36	Poland	0.6	0.6	3.4	USA	(35)	Italy	(12)	South Korea	(12)
37	Azerbaijan	0.5	1.4	–63	Israel	(61)	Russia	(22)	Belarus	(6.6)
38	NATO[b]	0.5	0.0	1991	France	(69)	USA	(26)	Spain	(3.7)
39	Belarus	0.5	0.3	62	Russia	(100)	China	(0.1)	–	–
40	France	0.5	0.2	97	USA	(42)	UK	(16)	Brazil	(15)

– = nil; 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. 2022.

figure 5), followed by the Middle East (32 per cent), Europe (13 per cent), Africa (5.8 per cent) and the Americas (5.5 per cent).

Africa

Between 2012–16 and 2017–21 imports of major arms by African states decreased by 34 per cent. Russia was the largest supplier to Africa in 2017–21, accounting for 44 per cent of imports of major arms to the region, followed by the USA (17 per cent), China (10 per cent) and France (6.1 per cent).

The overall drop in African arms imports was mainly due to decreases in imports by Algeria and Morocco—the two largest arms importers in the region. In 2017–21 Algeria accounted for 44 per cent of total African arms imports and for 2.6 per cent of the global total. Arms imports by Algeria decreased by 37 per cent between 2012–16 and 2017–21. Arms imports by Algeria's regional rival Morocco fell by 27 per cent in the same period. Both states, however, have substantial pending deliveries of major arms.

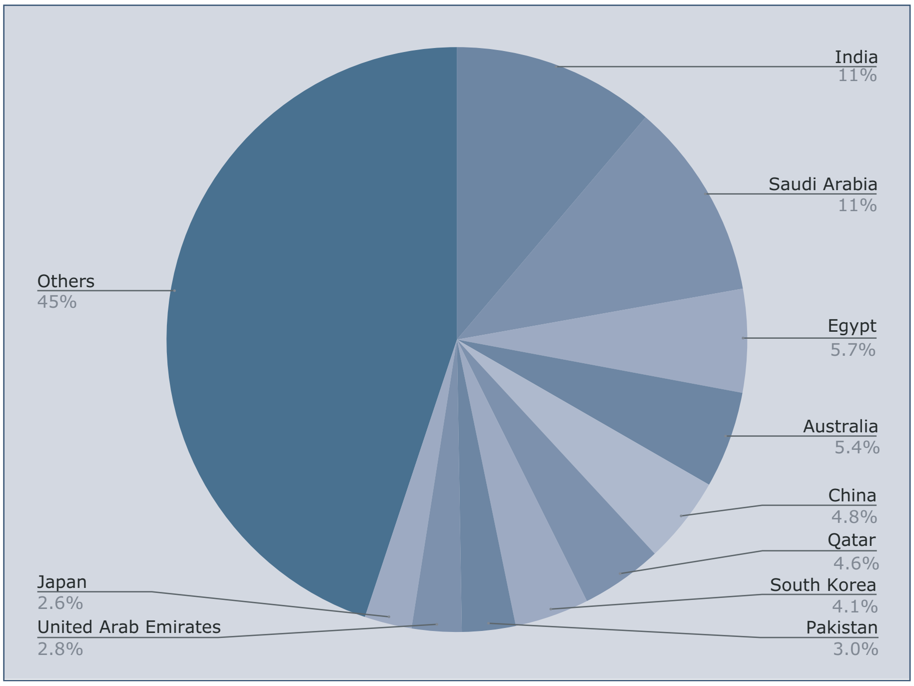

Figure 4. Global share of imports of major arms by the 10 largest importers, 2017–21

Source: SIPRI Arms Transfers Database, Mar. 2022.

Sub-Saharan Africa

States in sub-Saharan Africa accounted for 2.0 per cent of total global imports of major arms in 2017–21. Taken together, their arms imports were 35 per cent lower in 2017–21 than in 2012–16. In 2017–21 the five largest arms importers in the subregion were Angola, Nigeria, Ethiopia, Mali and Botswana. Recently imported arms played a role in the current armed conflicts in three of these states: Nigeria, Ethiopia and Mali. In 2017–21 these three states each had a diversified supplier base and received no more than 49 per cent of their major arms from a single supplier.

Nigeria received major arms from 13 suppliers in 2017–21. Deliveries included 272 armoured vehicles from China, 7 combat helicopters from Russia, 3 combat aircraft from Pakistan, 12 light combat aircraft from Brazil (via the USA) and 9 patrol craft from France.

Ethiopia received air-defence equipment from Russia and Ukraine during the first three years of the period 2017–21. While no transfers of major arms to war-torn Ethiopia from these two states have been identified for 2020–21, several deliveries by other suppliers are known to have taken place in that period, but the numbers of arms involved are highly uncertain. These arms deliveries included multiple rocket launchers from China and unmanned aerial vehicles from Turkey and an unidentified supplier.

The largest arms supplier to Mali in 2017–21 was Russia, which delivered 4 armed transport helicopters and 4 combat helicopters. In the same period,

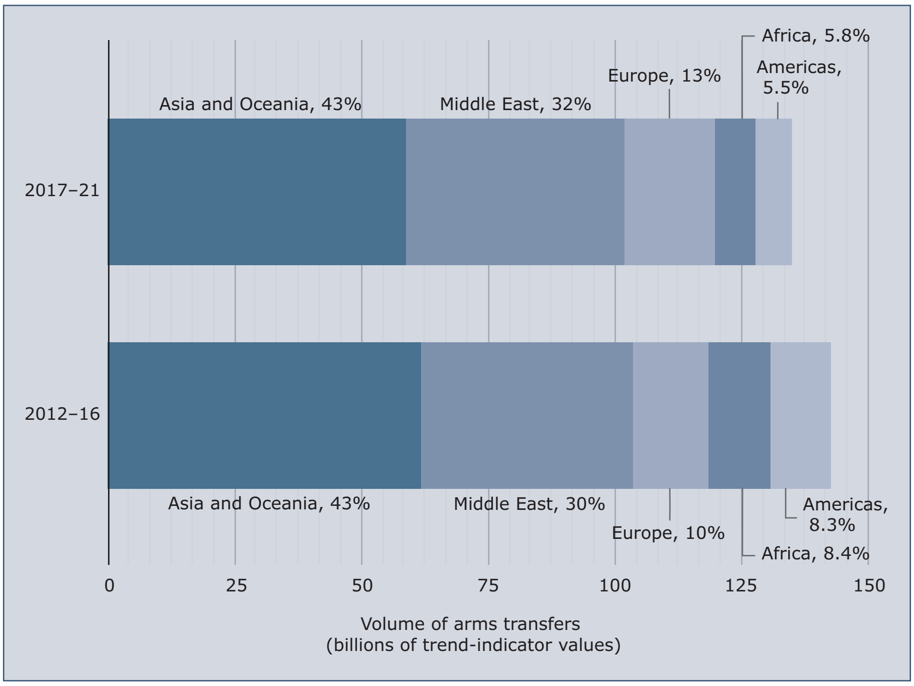

Figure 5. The importers of major arms, by region, 2017–21 and 2012–16, per cent of global share

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. 2022.

Mali received 130 armoured vehicles from the UAE and 4 light combat aircraft from Brazil. South Africa also supplied 102 armoured vehicles, of which at least 70 were paid for by Germany as military aid.

The Americas

Arms imports by states in the Americas decreased by 36 per cent between 2012–16 and 2017–21. This followed a decrease of 21 per cent between 2007–11 and 2012–16. The USA and Canada were the largest importers of major arms in the Americas in 2017–21, accounting respectively for 43 per cent and 15 per cent of the regional total.

The fall in arms imports to the Americas was largely due to a 55 per cent reduction in arms imports by South American states between 2012–16 and 2017–21. In 2017–21 arms imports by South American states were at a lower level than in any 5-year period in the past 50 years. Brazil and Chile were the largest arms importers in South America in 2017–21, accounting respectively for 37 per cent and for 21 per cent of arms imports to the subregion. Chile's arms imports increased by 15 per cent between 2012–16 and 2017–21, while Brazil's decreased by 17 per cent. Brazil, however, is the only state in South America with substantial deliveries of arms pending. These include orders for over 1100 armoured vehicles, 5 submarines, 4 frigates and 31 combat aircraft.

Asia and Oceania

Arms imports by states in Asia and Oceania decreased by 4.7 per cent between 2012–16 and 2017–21. This followed a 25 per cent increase between 2002–2006 and 2007–11, and a further 9.3 per cent increase between 2007–11 and 2012–16.

Asia and Oceania remained the largest recipient region, accounting for 43 per cent of global arms imports. Of the 10 largest importers in 2017–21, 6 are in Asia and Oceania: India, Australia, China, South Korea, Pakistan and Japan. A total of 30 per cent of arms imports by states in the region came from the USA, 26 per cent from Russia and 12 per cent from France.

For many states in Asia and Oceania, a growing perception of China as a threat is the main driver of arms imports. This partly explains why Asia and Oceania has been the region with the highest level of arms imports for the past 30 years and the particularly large volumes of arms imported by states in Oceania, South Asia and South East Asia in the past 15 years. Current known orders indicate that arms imports by states in Asia and Oceania will remain at a high overall level for at least the coming five years.

India

Between 2012–16 and 2017–21 Indian arms imports decreased by 21 per cent. Despite this, India was the world's largest importer of major arms in 2017–21 and accounted for 11 per cent of total global arms imports in the period.

Russia was the largest supplier of major arms to India in both 2012–16 and 2017–21, but India's imports of Russian arms dropped by 47 per cent between the two periods as several large programmes for Russian arms wound down. This, combined with India's increased efforts to diversify its arms supplier base, meant that Russia's share of total Indian arms imports fell from 69 per cent to 46 per cent. In contrast, India's arms imports from France increased more than tenfold, making it India's second largest arms supplier in 2017–21.

Because of perceived growing threats from China and Pakistan and because of significant delays in the production of its own major arms, India has large-scale plans for arms imports. The drop in India's arms imports is, therefore, probably a temporary result of its slow and complex procurement process as well as its shift in suppliers.

Australia

Arms imports by Australia rose by 62 per cent between 2012–16 and 2017–21, making it the fourth largest arms importer globally in 2017–21. The USA accounted for 67 per cent of Australia's imports of major arms, followed by Spain with 24 per cent. The most significant imports were 50 combat aircraft and 11 anti-submarine aircraft from the USA and 3 destroyers from Spain. Australia also has several large orders with pending deliveries, mostly from the UK and the USA. In 2021 Australia cancelled an order of up to 12 submarines from France as it expanded its security cooperation with the UK and the USA (AUKUS), directed mainly against China. As part of the AUKUS agreement, the UK and the USA offered to supply 8 nuclear-powered submarines to Australia. If the proposed deal is agreed, deliveries would probably start in the 2030s or even the 2040s.

East Asia

East Asia accounted for 12 per cent of global imports of major arms in 2017–21. Arms imports by East Asian states rose by 20 per cent between 2012–16 and 2017–21, reflecting the increasing tensions in the subregion. Of the 6 states in East Asia, 3 (China, South Korea and Japan) were among the 10 largest arms importers in 2017–21, despite all 3 having arms industries that can produce indigenous designs covering much or even most of their demands for major arms. Chinese arms imports remained stable between 2012–16 and 2017–21 and mainly came from Russia in both periods. However, China's arms imports are likely to decrease in the next few years as its industry is now capable of producing most types of major arms. Arms imports by South Korea and Japan increased significantly (by 71 per cent and 152 per cent respectively) and consisted of advanced arms such as F-35 combat aircraft and long-range air defence systems. Arms imports by Taiwan decreased by

68 per cent but are scheduled to increase significantly in the coming years. The USA was the main supplier to all three states in 2017–21.

Myanmar

Compared with some other arms-importing states in Asia and Oceania, Myanmar's arms imports have been at a relatively low level during the past decade. Its arms imports decreased by 32 per cent between 2012–16 and 2017–21. Nevertheless, Myanmar accounted for 0.6 per cent of total global arms imports in 2017–21, despite the widespread criticism of its violent military campaign against the Rohingya minority since 2016 and the repression of citizens by the military after the coup in February 2021. Imported major arms were employed by the military in both cases and continue to be used for such purposes. China, Russia and India were Myanmar's main arms suppliers in 2017–21. Deliveries included 30 combat-capable aircraft, with 20 coming from Russia and 10 from China. India delivered 1 submarine and its armaments.

Europe

In 2017–21 arms imports by European states were 19 per cent higher than in 2012–16. The USA accounted for 54 per cent of the region's arms imports in 2017–21, Russia for 7.9 per cent and Germany for 6.2 per cent. The growth in European demand for imports of major arms was at least partly driven by the severe deterioration in relations between most European states and Russia. While some larger European states can turn to their national arms industries to meet most of their requirements, for many states in the region imports are the main source of major arms.

The three largest importers of major arms in Europe in 2017–21 were the UK, Norway and the Netherlands. The UK, which increased its arms imports by 74 per cent between 2012–16 and 2017–21, was the 12th largest arms importer globally in 2017–21. Arms imports by Norway rose by 343 per cent while those by the Netherlands were up by 116 per cent, making them the 16th and 19th largest arms importers respectively. These three states imported a total of 71 F-35 combat aircraft from the USA in 2017–21, which accounted for the bulk of their respective arms imports in the period. Other European states are also expected to make large increases in their arms

Box 1. Arms transfers to Ukraine, 2017–21

Since 2014, Ukraine has been fighting rebels in the east of the country using its inventory of mainly Soviet-era arms. However, in 2017–21 its imports of major arms remained very limited and accounted for only 0.1 per cent of total global arms imports.

Deliveries of arms to Ukraine generally had more of a political than military significance, which grew in importance as the tensions between Russia and Ukraine worsened at the end of 2021. In 2017–21 the arms transfer to Ukraine with probably the largest military impact was Turkey's delivery of 12 armed unmanned aerial vehicles.

Czechia was the main supplier of major arms to Ukraine in 2017–21, accounting for 41 per cent of total Ukrainian arms imports and delivering 87 armoured vehicles and 56 pieces of artillery. The United States was the second largest supplier, accounting for 31 per cent. US deliveries, as aid, included 540 light anti-tank missiles. France, Lithuania, Poland and Turkey were Ukraine's only other suppliers of major arms.

The low level of arms transfers to Ukraine in 2017–21 is partly explained by its limited financial resources and by the fact that it has its own arms-production capabilities and a large existing arsenal of major arms. In addition, up until February 2022, several of the largest arms-exporting states had been restricting arms exports to Ukraine due to concerns that such transfers could contribute to conflict escalation.

imports in the coming decade based on recent orders for major arms. For example, in 2020–21 Finland (64), Switzerland (36) and Poland (32) ordered a total of 132 F-35s while Germany ordered 5 P-8A anti-submarine aircraft; all of these will be supplied by the USA.

Despite the conflict in Ukraine in 2017–21, its arms imports remained at a very low level in that period (see box 1).

The Middle East

Arms imports by Middle Eastern states were 2.8 per cent higher in 2017–21 than in 2012–16. This followed an 86 per cent increase between 2007–11 and 2012–16. Four of the top 10 arms-importing states in 2017–21 are in the Middle East: Saudi Arabia, Egypt, Qatar and the UAE. A total of 53 per cent of arms imports by states in the region came from the USA, while 12 per cent came from France and 11 per cent from Russia.

The Gulf region

As the conflict in Yemen continued and tensions between Iran and other states in the region remained high, arms imports played an important role in security developments in the Gulf in 2017–21.

Saudi Arabia increased its arms imports by 27 per cent between 2012–16 and 2017–21. It received 11 per cent of total global arms imports, making it the second largest arms importer in the world, just behind India. The USA accounted for 82 per cent of Saudi Arabian arms imports in 2017–21. US arms deliveries included 97 F-15SA combat aircraft, a type used by Saudi Arabia in the ongoing war in Yemen, and 8 Patriot air defence systems, a type used against missiles fired by Houthi rebels in Yemen. The USA also supplied thousands of guided bombs, although further deliveries of such bombs were reportedly suspended in 2021 by the Administration of President Joe Biden.

During 2017–21, the UAE was active in the war in Yemen and in the war in Libya. Despite this, its arms imports dropped by 41 per cent between 2012–16 and 2017–21, taking it from the third largest to the ninth largest arms importer globally. Based on pending deliveries under current contracts, however, the volume of arms imports by the UAE is likely to remain at a high level in the coming years. The largest of these deals, for 80 combat aircraft from France, was signed in 2021.

Qatar's arms imports grew by 227 per cent between 2012–16 and 2017–21, propelling it from being the 22nd largest arms importer to the 6th largest. For the large-scale expansion of its armed forces, Qatar has turned to several of the world's major arms suppliers. In 2017–21 Qatar received 46 per cent of its arms imports from the USA and 36 per cent from France. Qatar has large deliveries of major arms pending from the USA, France, Italy and the UK.

Kuwait was outside the top 25 arms importers in 2017–21. It will probably be among this group in future years, however, as it has deliveries scheduled for 2021–23 for 28 combat aircraft and 109 tanks from the USA and 26 combat aircraft from Italy.

Iran's arms imports were at a very low level in 2017–21. Although the United Nations lifted its decade-long arms embargo on Iran in 2020, there is no public evidence that Iran has since received or ordered notable volumes of major arms from abroad.

Egypt

Egypt was the third largest arms importer in the world in 2017–21. Its arms imports accounted for 5.7 per cent of the global total and were 73 per cent higher than in 2012–16. The USA, which has been giving military aid to Egypt since 1978, was the largest arms supplier to Egypt in every five-year period between 1977 and 2016. However, arms imports from the USA fell by 70 per cent between 2012–16 and 2017–21. The USA accounted for only 6.5 per cent of Egyptian arms imports in 2017–21, making it the fifth largest supplier of major arms to Egypt.

Partly because of frictions with the USA following Egypt's military coup in 2013, Egypt has intensified efforts to diversify its arms supplier base. In 2017–21 Russia accounted for 41 per cent of Egyptian arms imports, followed by France (21 per cent), Italy (15 per cent) and Germany (11 per cent).

Israel

Israeli arms imports increased by 19 per cent between 2012–16 and 2017–21. The USA accounted for 92 per cent of Israeli arms imports in 2017–21, which included 31 F-35 combat aircraft and thousands of guided bombs supplied as military aid. The F-35, Israel's most advanced combat aircraft, has since 2018 been used in air strikes on targets in Gaza, Lebanon and Syria. It is also widely considered to be a key component of Israel's capacity to attack targets in Iran. Pending arms imports by Israel include 17 F-35 and 2 tanker aircraft from the USA and 4 submarines 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 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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