

## I. Global trends in arms transfers, 2018<sup>1</sup>

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The volume of international transfers of major arms in the five-year period 2014–18 was 7.8 per cent higher than in the period 2009–13.<sup>2</sup> This is a continuation of the steady upward trend that began in the early 2000s (see figure 5.1).

The highest volume of transfers in any five-year period covered by SIPRI data occurred in 1980–84. The volume of transfers declined after 1980–84 until by 2000–2004 it was 56 per cent lower than the peak. The total for the latest five-year period, 2014–18, was 52 per cent higher than 2000–2004 and the highest total since 1989–93, the five-year period during which the cold war ended. However, the total volume for 2014–18 was still 33 per cent lower than the total for 1980–84.

The flow of arms to the Middle East increased by 87 per cent between 2009–13 and 2014–18, and the region's share of the global total rose from 20 per cent to 35 per cent. This was a higher share than in any of the eight five-year periods from 1979–83 to 2014–18 (see table 5.1). The flows to all other regions (Africa, the Americas, Asia and Oceania, and Europe) decreased between 2009–13 and 2014–18, and their respective shares of the global total also decreased. In 2014–18 Asia and Oceania remained the region with the highest volume of imports (40 per cent).

The five largest exporters in 2014–18 were the United States, Russia, France, Germany and China (see section II). The five largest importers were Saudi Arabia, India, Egypt, Australia and Algeria (see section III).

The composition of the group of largest exporters has remained fairly stable over time. Since 1950, the first year covered by the Arms Transfers Database, SIPRI has identified 131 'actors' (128 states, two non-state armed groups and one international organization) that have delivered major arms in at least one year. However, only nine had a percentage share of 1.0 per cent or

<sup>1</sup> Except where indicated, the information on the arms deliveries and orders referred to in this chapter is taken from the SIPRI Arms Transfers Database, Mar. 2019. The database contains data on transfers of major arms between 1950 and 2018. The SIPRI data on arms transfers refers to actual deliveries of major arms, which comprise sales, production under licence, aid, gifts and leases. SIPRI uses a trend-indicator value (TIV) to compare the data on deliveries of different types of arms and identify general trends. TIVs give a better indication of the volume of international arms transfers—based on an assessment of an armament's capabilities rather than its financial value. For a definition of major arms and a description of the TIV and its calculation see box 5.1. The figures in this chapter may differ from those in previous editions of the SIPRI Yearbook because the Arms Transfers Database is updated annually.

<sup>2</sup> Since year-on-year deliveries can fluctuate, SIPRI compares consecutive multi-year periods—normally 5-year periods. This provides a more stable measure of trends in transfers of major arms. A 5-year moving average is also used to measure trends in transfers over a longer period.

**Table 5.1. Imports of major arms, percentage of global share, by region and subregion, 1979–2018**

Percentages above 10 per cent have been rounded to the nearest whole number; those below 10 per cent to 1 decimal place. Percentage shares may not add up to stated totals or subtotals due to the conventions of rounding.

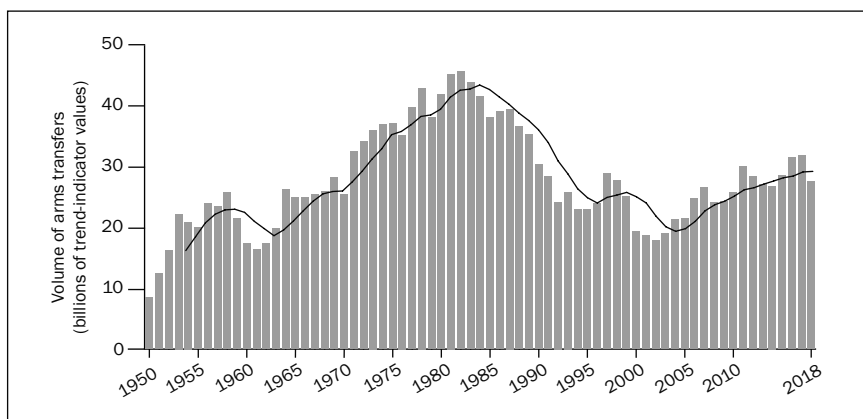
| Recipient region                  | 1979–83 | 1984–88 | 1989–93 | 1994–98 | 1999–2003 | 2004–2008 | 2009–13 | 2014–18 |
|-----------------------------------|---------|---------|---------|---------|-----------|-----------|---------|---------|
| <i>Africa</i>                     | 15      | 7.0     | 3.7     | 2.8     | 5.1       | 6.9       | 9.0     | 7.8     |
| North Africa                      | 11      | 2.3     | 2.1     | 1.1     | 2.2       | 2.7       | 5.3     | 5.9     |
| Sub-Saharan Africa                | 4.4     | 4.7     | 1.6     | 1.7     | 2.9       | 4.1       | 3.8     | 1.9     |
| <i>Americas</i>                   | 9.7     | 9.9     | 7.5     | 8.5     | 8.8       | 11        | 10      | 6.2     |
| North America                     | 1.7     | 4.6     | 4.0     | 4.0     | 4.0       | 4.1       | 4.5     | –       |
| Central America and the Caribbean | 2.2     | 1.4     | 0.7     | 0.6     | 0.7       | 0.5       | –       | –       |
| South America                     | 5.8     | 3.8     | 2.8     | 3.9     | 4.0       | 6.1       | 5.3     | 2.4     |
| <i>Asia and Oceania</i>           | 21      | 29      | 38      | 41      | 46        | 40        | 47      | 40      |
| Central Asia                      | –       | –       | –       | 0.2     | 0.4       | 0.3       | 0.7     | 1.6     |
| East Asia                         | 7.8     | 11      | 18      | 23      | 24        | 20        | 11      | 10      |
| Oceania                           | 0.9     | 1.8     | 1.6     | 1.5     | 4.0       | 2.5       | 3.8     | 4.8     |
| South Asia                        | 7.2     | 12      | 14      | 7.5     | 12        | 11        | 21      | 14      |
| South East Asia                   | 5.4     | 3.5     | 3.8     | 8.1     | 5.2       | 5.9       | 11      | 9.4     |
| <i>Europe</i>                     | 25      | 24      | 26      | 18      | 20        | 21        | 14      | 11      |
| Central Europe                    | 10      | 10      | 5.6     | 1.5     | 1.9       | 4.6       | 1.4     | –       |
| Eastern Europe                    | 1.8     | 3.3     | 1.5     | 0.3     | 0.3       | 1.1       | 1.7     | –       |
| Western Europe                    | 13      | 11      | 19      | 16      | 18        | 15        | 10      | –       |
| <i>Middle East</i>                | 27      | 2.9     | 25      | 30      | 20        | 21        | 20      | 35      |
| <i>Other</i>                      | 1.2     | 1.3     | 0.1     | 0.1     | 0.1       | 0.1       | 0.4     | 0.1     |

– = no deliveries.

Notes: Since year-on-year deliveries can fluctuate, the table compares consecutive 5-year periods. This provides a more stable measure of trends in transfers of major arms.

‘Other’ refers to international organizations (or some non-state actors) that are not based in a single region, as well as unidentified recipients that cannot be linked to a specific region.

Source: SIPRI Arms Transfers Database, Mar. 2019.



**Figure 5.1.** The trend in international transfers of major arms, 1950–2018

*Note:* The bar graph shows annual totals and the line graph shows a 5-year moving average (each data point in the line graph represents an average for the preceding 5-year period). See box 5.1 for an explanation of the SIPRI trend-indicator value.

*Source:* SIPRI Arms Transfers Database, Mar. 2019.

more of the global total between 1950 and 2018: the USA, the Soviet Union (or Russia), the United Kingdom, France, Germany, China, Italy, Czechoslovakia and the Netherlands. Only 27 had a percentage share of 0.1 per cent or more of the global total in the period.

Only 16 states have been among the top 10 exporters for at least one of the 13 five-year periods from 1954–58 to 2014–18. Of these, nine have been a top 10 exporter for over half of the five-year periods. Just six—the USA, the Soviet Union (or Russia), the UK, France, China and Italy—have been among the top 10 exporters in all 13 five-year periods, while Germany has been consistently among the top 10 since 1959–63.

SIPRI has identified 77 states as exporters of major arms in the 10-year period 2009–18. Of these, 13 had a percentage share of 1.0 per cent or more of of the global total of arms exports in the period, and 30 had a percentage share of 0.1 per cent or more. Only 11 states were in the top 10 in either 2009–13 or 2014–18. Nine of these 11 were in the top 10 in both five-year periods. All nine have substantial arms industries or often export significant volumes of second-hand major arms. Eight of the nine have companies that appear in the SIPRI Top 100 list of arms-producing or military services companies and the ninth, China, is known to have companies that would be included in the Top 100 if consistent data were available (see section VI).<sup>3</sup>

<sup>3</sup> While at least 10 Chinese companies are estimated to have arms sales that would place them in the SIPRI Top 100, they are currently not included as the data is incomplete for the period covered by SIPRI's Arms Industry Database.

**Box 5.1. Methodology**

The SIPRI Arms Transfers Database contains information on deliveries of major arms to states, international organizations and non-state armed (rebel) groups from 1950 to 2018. A new set of data is published annually, replacing the data in earlier editions of the SIPRI Yearbook or other SIPRI publications.

SIPRI's definition of 'transfer' includes sales, manufacturing licences, aid, gifts, and most loans or leases. The item must have a military purpose: the recipient must be the armed forces or paramilitary forces or intelligence agency of another country, a non-state armed group, or an international organization.

The SIPRI Arms Transfers Database only includes 'major arms', which are defined as (a) most aircraft, including unmanned; (b) most armoured vehicles; (c) artillery over 100 millimetres in calibre; (d) sensors (radars, sonars and many passive electronic sensors); (e) air defence missile systems and larger air defence guns; (f) guided missiles, torpedoes, bombs and shells; (g) most ships; (h) engines for combat-capable aircraft and other larger aircraft, for combat ships and larger support ships, and for armoured vehicles; (i) most gun or missile-armed turrets for armoured vehicles; (j) reconnaissance satellites; (k) air refuelling systems; and (l) naval guns, missile launch systems and anti-submarine weapons.

In cases where a sensor, engine, turret, refuelling system or naval gun or other system (items d, h, i, k and l) is fitted on a platform (vehicle, aircraft or ship), the transfer only appears as a separate entry in the database if the item comes from a different supplier from that of the platform.

SIPRI has developed a unique system for measuring the volume of transfers of major arms using a common unit, the trend-indicator value (TIV). The TIV is intended to represent the transfer of military resources. Each weapon has its own specific TIV. Second-hand and second-hand but significantly modernized arms are given a reduced TIV. SIPRI calculates the volume of transfers by multiplying the weapon-specific TIV with the number of arms delivered in a given year. SIPRI TIV figures do not represent the financial values of arms transfers.

The USA and Russia (and before 1992, the Soviet Union) have been the top two exporters since 1950 by a wide margin, accounting, respectively, for 35 per cent and 31 per cent of the global total for the period 1950–2018. They have remained by far the largest exporters since the end of the cold war in 1991.

The group of largest importers is more diverse and has seen more changes over time than the group of largest exporters. Since 1950, SIPRI has identified 255 actors (202 states, 48 non-state armed groups and five international organizations) that received major arms in at least one year. Of these, 26 received arms in all the years between 1950 and 2018, and three other countries, which were established or gained independence after 1950, received major arms for all the years they existed. Thirty-three recipients had a percentage share of 1.0 per cent or more of the global total of arms imports between 1950 and 2018, and 84 had a percentage share of 0.1 per cent or more.

Thirty-four states have been among the top 10 importers for at least one of the 13 five-year periods from 1954–58 to 2014–18. Of these, only five have

been a top 10 importer for over half of the five-year periods. None has been among the top 10 importers in all the five-year periods.

SIPRI has identified 183 states as importers of major arms in the 10-year period 2009–18. Of these, 27 had a percentage share of 1.0 per cent or more of the global total of arms imports, and 77 had a percentage share of 0.1 per cent or more. Fourteen states were in the top 10 in either 2009–13 or 2014–18. Six of these 14 were in the top 10 in both five-year periods.