III. Recipient developments, 2018

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SIPRI has identified 155 countries as importers of major arms in 2014–18. In addition, three international organizations and six non-state rebel forces received arms in 2014–18. The five largest arms importers in 2014–18—Saudi Arabia, India, Egypt, Australia and Algeria—accounted for 35 per cent of total arms imports (see table 5.6). Of these, Saudi Arabia and India were among the top five importers in both 2009–13 and 2014–18. At the regional level, Asia and Oceania accounted for 40 per cent of imports in 2014–18, followed by the Middle East (35 per cent), Europe (11 per cent), Africa (7.8 per cent) and the Americas (6.2 per cent).

Africa

Arms imports by African states decreased by 6.5 per cent between 2009–13 and 2014–18. The region accounted for 7.8 per cent of total arms imported in 2014–18 (see table 5.1). Algeria accounted for 56 per cent of African arms imports, Morocco for 15 per cent and Nigeria for 4.8 per cent.

North Africa

The four countries in North Africa (Algeria, Libya, Morocco and Tunisia) accounted for 75 per cent of African arms imports.[1] Their arms imports increased by 20 per cent between 2009–13 and 2014–18.

In 2014–18 Russia accounted for 49 per cent of total arms imports to North Africa, the USA for 15 per cent, China for 10 per cent, France for 7.8 per cent and Germany for 7.7 per cent.

Algeria's imports of major arms increased by 55 per cent between 2009–13 and 2014–18. Russia accounted for most (66 per cent) of Algeria's imports in 2014–18, as it (and its predecessor, the Soviet Union) has done since Algeria became independent in 1962 (see table 5.7). For the period 1961–2013, 87 per cent of Algeria's arms imports came from Russia (or the Soviet Union). Russia's deliveries of major arms to Algeria increased by 14 per cent between 2009–13 and 2014–18 but imports from other suppliers have grown significantly faster. China and Germany emerged as important suppliers of arms to Algeria in 2014–18, accounting for 13 per cent and 10 per cent, respectively, of Algeria's total imports of major arms, while in 2009–13 they each accounted

[1] Since 2014, Libya has had 2 competing governments, controlling, respectively, the western and the eastern part of the country. Both import major arms. For further detail see chapter 2, section V, in this volume.

for less than 0.5 per cent (see table 5.8). Deliveries to Algeria in 2014–18 included 3 frigates from China, and 2 frigates and 269 armoured personnel carriers (APCs) from Germany. The APCs are part of an order for around 1000 to be assembled or produced under licence in Algeria by 2025. China also delivered 10 UCAVs, which are not currently among weapons Russia produces for export.

Morocco's imports of major arms decreased by 35 per cent between 2009–13 and 2014–18 as several major procurement programmes ended but remained much higher than deliveries in the two decades before 2009. The USA (62 per cent) and France (36 per cent) were the main suppliers of arms to Morocco in 2014–18. They have been by far the two largest suppliers to Morocco since the early 1960s.

Sub-Saharan Africa

States in sub-Saharan Africa received 25 per cent of total African imports of major arms in 2014–18. Their arms imports decreased by 45 per cent between 2009–13 and 2014–18. The top five arms importers in the region were Nigeria, Angola, Sudan, Cameroon and Senegal. Together, they accounted for 56 per cent of sub-Saharan African arms imports in 2014–18. In 2009–13 Uganda, Sudan, South Africa, Ethiopia and Nigeria were the five largest importers. Of these five, Uganda, South Africa and Ethiopia decreased (ranging from 88 per cent to 96 per cent) their arms imports in 2014–18 as several major procurement programmes ended.

Russia accounted for 28 per cent of arms exports to sub-Saharan Africa in 2014–18, China for 24 per cent, Ukraine for 8.3 per cent, the USA for 7.1 per cent and France for 6.1 per cent. In 2009–13 Ukraine was the largest supplier to sub-Saharan Africa; however, its arms exports to the region fell by 79 per cent between 2009–13 and 2014–18.

Although many states in sub-Saharan Africa are affected by armed conflict and some receive foreign military aid, the volume of major arms imported by those states is relatively small.[2] This is illustrated by the case of Burkina Faso, Chad, Mali, Mauritania and Niger, which as the Group of Five for the Sahel (G5 Sahel) established a joint force to undertake collective military operations against militant groups, such as Boko Haram.[3] In 2014–18 the combined arms imports of the G5 Sahel states accounted for 0.2 per cent of the global total. In that period, they received 26 military aircraft—which included 5 light combat aircraft and 2 combat helicopters—and 179 light armoured vehicles. These deliveries represent only a small fraction of the

[2] On armed conflicts in sub-Saharan Africa see chapter 2, section VI, in this volume.

[3] On the G5 Sahel force see chapter 3, section II, in this volume. See also van der Lijn, J., 'Multilateral non-peace operations', *SIPRI Yearbook 2018*, pp. 139–41.

Table 5.6. The 50 largest recipients of major arms, 2014–18

The table lists countries and non-state actors that imported major arms in the 5-year period 2014–18. Ranking is according to 2014–18 total imports. Volume of imports figures are SIPRI trend-indicator values (TIVs). Percentages above 10 per cent have been rounded to the nearest whole number; those below 10 per cent to 1 decimal place. Figures may not add up to stated totals because of the conventions of rounding.

Rank			Volume of imports (TIV, millions)		Share (%),	Change (%), compared
2014–18	2009–13[a]	Recipient	2018	2014–18	2014–18	with 2009–13
1	4	Saudi Arabia	3 810	16 869	*12*	*192*
2	1	India	1 539	13 876	*9.5*	*–24*
3	14	Egypt	1 484	7 429	*5.1*	*206*
4	8	Australia	1 572	6 793	*4.6*	*37*
5	11	Algeria	1 318	6 441	*4.4*	*55*
6	2	China	1 566	6 103	*4.2*	*–7.0*
7	5	UAE	1 101	5 425	*3.7*	*–5.8*
8	17	Iraq	596	5 350	*3.7*	*139*
9	9	South Korea	1 317	4 492	*3.1*	*–8.6*
10	15	Viet Nam	546	4 240	*2.9*	*78*
11	3	Pakistan	777	4 012	*2.7*	*–39*
12	22	Indonesia	354	3 590	*2.5*	*86*
13	10	Turkey	685	3 408	*2.3*	*–21*
14	38	Qatar	816	2 949	*2.0*	*225*
15	47	Israel	498	2 875	*2.0*	*354*
16	6	United States	613	2 646	*1.8*	*–47*
17	28	Taiwan	129	2 426	*1.7*	*83*
18	43	Oman	316	2 359	*1.6*	*213*
19	16	United Kingdom	533	2 352	*1.6*	*2.3*
20	39	Italy	311	2 193	*1.5*	*162*
21	23	Japan	696	2 100	*1.4*	*15*
22	7	Singapore	510	1 857	*1.3*	*–63*
23	24	Azerbaijan	330	1 846	*1.3*	*15*
24	13	Morocco	387	1 766	*1.2*	*–35*
25	36	Bangladesh	100	1 703	*1.2*	*75*
26	33	Canada	215	1 505	*1.0*	*42*
27	35	Thailand	578	1 475	*1.0*	*46*
28	20	Greece	65	1 423	*1.0*	*–30*
29	63	Kuwait	88	1 393	*1.0*	*348*
30	54	Kazakhstan	309	1 311	*0.9*	*232*
31	41	Jordan	215	1266	*0.9*	*61*
32	25	Norway	537	1 211	*0.8*	*–22*
33	18	Afghanistan	240	1 103	*0.8*	*–48*
34	44	Mexico	26	1 011	*0.7*	*40*
35	29	Brazil	304	947	*0.6*	*–28*
36	27	Myanmar	192	872	*0.6*	*–40*
37	49	Finland	130	860	*0.6*	*64*
38	40	Poland	171	816	*0.6*	*2.5*
39	50	Turkmenistan	–	765	*0.5*	*59*

Rank			Volume of imports (TIV, millions)		Share (%),	Change (%), compared
2014–18	2009–13[a]	Recipient	2018	2014–18	2014–18	with 2009–13
40	75	Peru	92	743	*0.5*	*303*
41	19	Malaysia	95	728	*0.5*	*–65*
42	78	Philippines	25	698	*0.5*	*334*
43	32	Spain	156	573	*0.4*	*–46*
44	57	Russia	26	566	*0.4*	*63*
45	67	Belarus	142	566	*0.4*	*148*
46	55	Nigeria	49	552	*0.4*	*47*
47	34	Colombia	16	500	*0.3*	*–51*
48	12	Venezuela	–	486	*0.3*	*–83*
49	58	Iran	4	448	*0.3*	*31*
50	31	Chile	70	445	*0.3*	*–64*
. .	. .	115 others	1 939	8 928	*6.1*	. .
		Total	**27 587**	**146 291**	. .	*7.8*

. . = not available or not applicable; – = nil.

Note: The SIPRI data on arms transfers relates to actual deliveries of major arms. To permit comparison between the data on deliveries of different arms and to identify general trends, SIPRI uses a TIV. This value is only an indicator of the volume of arms transfers and not of the financial values of such transfers. Thus, it is not comparable to economic statistics. The method for calculating the TIV is described in box 5.1.

[a] The rank order for recipients in 2009–13 differs from that published in *SIPRI Yearbook 2014* because of subsequent revision of figures for these years.

Source: SIPRI Arms Transfers Database, Mar. 2019.

global transfers of such weapons in 2014–18 but, in the context of the limited inventories of the G5 Sahel states, they are substantial.

Although military aid programmes implemented by external actors are not unique to sub-Saharan Africa, it is important to highlight that arms supplies to sub-Saharan African countries are often part of such programmes and that military equipment other than major arms is frequently a significant part of the related deliveries. For example, in 2017 and 2018 the USA delivered to Chad not only major arms (armoured vehicles and surveillance aircraft), but also radios, and command and control equipment.[4] In 2018 the Central African Republic (CAR) received small arms from France and Russia, and vehicles and non-lethal equipment from Belgium, China and the USA.[5] Some commentators argue that such military aid is at least partly designed to act as an instrument to gain influence in natural-resource rich countries. Media reports suggest, for example, that the arms supplies by Russia and France to

[4] United States Africa Command, 2018 Posture Statement to US House of Representatives Armed Services Committee, 2018.

[5] United Nations, Security Council, Final Report of the Panel of Experts on the Central African Republic extended pursuant to Security Council Resolution 2399 (2018), S/2018/1112, 14 Dec. 2018, p. 41.

Table 5.7. The 10 largest recipients of major arms and their suppliers, 2014–18

Figures are the percentage shares of the recipient's total volume of imports received from each supplier. Only suppliers with a share of 1 per cent or more of total imports of any of the 10 largest recipients are included in the table. Smaller suppliers are grouped together under 'Others'. 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 100 because of the conventions of rounding.

	Recipient									
Supplier	Saudi Arabia	India	Egypt	Australia	Algeria	China	UAE	Iraq	South Korea	Viet Nam
Belarus	–	–	–	–	–	–	–	0.8	–	4.1
Bulgaria	0.1	–	<0.05	–	–	–	–	2.1	–	–
Canada	1.1	0.8	0.4	0.4	–	–	1.1	–	–	0.5
China	0.7	–	0.4	–	13	. .	2.2	0.3	–	–
Czechia	–	–	–	–	–	–	–	3.6	–	1.1
France	4.3	7.0	37	5.0	0.4	10	10	–	1.2	–
Germany	1.8	0.8	6.1	1.1	10	0.9	2.4	0.6	39	–
Israel	–	–	–	–	–	–	–	–	2.7	9.1
Italy	1.3	0.2	0.1	2.4	4.8	–	2.2	3.2	–	–
Netherlands	0.3	0.2	0.6	–	0.6	–	3.1	–	–	–
Russia	–	58	30	–	66	70	1.5	33	–	78
South Africa	0.1	0.3	<0.05	–	0.3	–	1.7	<0.05	–	–
South Korea	<0.05	0.3	0.8	–	–	–	–	8.0	. .	2.8
Spain	2.3	–	2.6	29	–	–	–	0.6	2.2	0.8
Sweden	1.0	–	–	0.2	1.6	–	2.7	–	0.9	–
Switzerland	1.6	0.3	–	1.8	–	4.3	–	–	–	–
Turkey	0.8	–	–	–	–	–	7.8	–	–	–
UAE	–	–	2.8	–	0.5	–	. .	–	–	–
UK	16	3.6	–	0.6	1.1	4.3	0.1	–	3.0	–
Ukraine	–	0.8	–	–	<0.05	8.6	–	–	–	2.0
USA	68	12	19	60	0.4	–	64	47	51	1.3
Uzbekistan	–	–	–	–	–	1.7	–	–	–	–
Others	0.4	0.3	0.2	0.2	0.5	–	0.6	0.8	–	0.5

. . = not available or not applicable; – = nil; <0.05 = between 0 and 0.05; UAE = United Arab Emirates.

Source: SIPRI Arms Transfers Database, Mar. 2019.

the CAR in 2018 were motivated by their competition for influence in that country.[6]

The Americas

Imports of major arms by states in the Americas decreased by 36 per cent between 2009–13 and 2014–18. Although the USA is the world's largest arms exporter and has the capability to produce all types of arms, in 2014–18 it was the largest importer of major arms in the Americas, accounting for 29 per cent of all arms deliveries to the region. Most (69 per cent) of the deliveries were arms produced in the USA under licence from European North Atlantic Treaty Organization (NATO) partners. However, as several large procurement programmes came to an end, US arms imports fell by 47 per cent between 2009–13 and 2014–18, and it moved from sixth-largest importer globally to 16th.

Central America and the Caribbean, and South America

Imports of major arms by states in Central America and the Caribbean grew by 49 per cent between 2009–13 and 2014–18. In contrast, arms imports by South American states fell by 51 per cent over the same period. Together, the two subregions accounted for 3.4 per cent of total global arms imports in 2014–18. The USA was the main exporter to both subregions: in 2014–18 it accounted for 17 per cent of the arms imports by states in South America and 47 per cent by states in Central America and the Caribbean. France and Germany were the other main suppliers to South America in the period, accounting for 13 per cent and 9.7 per cent of South American arms imports, respectively. After the USA, the Netherlands was the second-largest supplier of arms to Central America and the Caribbean, accounting for 16 per cent of arms deliveries to the subregion in 2014–18.

Mexico accounted for 72 per cent of arms imports to Central America and the Caribbean. Its arms imports increased by 40 per cent between 2009–13 and 2014–18, mainly due to imports of weapons for use by the Mexican military in internal operations against drug cartels. The USA was the main supplier of arms to Mexico in 2014–18, accounting for 63 per cent of total Mexican arms imports.

Brazil accounted for 27 per cent of South America's arms imports in 2014–18, making it the subregion's largest arms importer. Between 2009–13 and 2014–18, Brazilian arms imports decreased by 28 per cent. The severe economic recession that hit Brazil in 2014 may have delayed deliveries

[6] Lorgerie, P. and Louet, S., 'France gives weapons to Central Africa, favors end to embargo', Reuters, 11 Dec. 2018; and Beaumont, P., 'Russia's scramble for influence in Africa catches western officials off-guard', *The Guardian*, 11 Sep. 2018.

Table 5.8. The 40 largest importers of major arms and their three main suppliers, 2014–18

Percentages above 10 per cent have been rounded to the nearest whole number; those below 10 per cent to 1 decimal place.

Rank		Share of arms imports (%)		Per cent change from 2009–13	Main suppliers (share of importer's total exports, %), 2014–18		
2014–18	Importer	2014–18	2009–13	to 2014–18[a]	1st	2nd	3rd
1	Saudi Arabia	*12*	*4.3*	*192*	USA *(68)*	UK *(16)*	France *(4.3)*
2	India	*9.5*	*13*	*–24*	Russia *(58)*	Israel *(15)*	USA *(12)*
3	Egypt	*5.1*	*1.8*	*206*	France *(37)*	Russia *(30)*	USA *(19)*
4	Australia	*4.6*	*3.6*	*37*	USA *(60)*	Spain *(29)*	France *(5.0)*
5	Algeria	*4.4*	*3.1*	*55*	Russia *(66)*	China *(13)*	Germany *(10)*
6	China	*4.2*	*4.8*	*–7.0*	Russia *(70)*	France *(10)*	Ukraine *(8.6)*
7	UAE	*3.7*	*4.2*	*–5.8*	USA *(64)*	France *(10)*	Turkey *(7.8)*
8	Iraq	*3.7*	*1.6*	*139*	USA *(47)*	Russia *(33)*	South Korea *(8.0)*
9	South Korea	*3.1*	*3.6*	*–8.6*	USA *(51)*	Germany *(39)*	UK *(3.0)*
10	Viet Nam	*2.9*	*1.8*	*78*	Russia *(78)*	Israel *(9.1)*	Belarus *(4.1)*
11	Pakistan	*2.7*	*4.8*	*–39*	China *(70)*	USA *(8.9)*	Russia *(6.0)*
12	Indonesia	*2.5*	*1.4*	*86*	UK *(19)*	USA *(18)*	Netherlands *(13)*
13	Turkey	*2.3*	*3.2*	*–21*	USA *(60)*	Spain *(17)*	Italy *(15)*
14	Qatar	*2.0*	*0.7*	*225*	USA *(64)*	Germany *(15)*	France *(7.4)*
15	Israel	*2.0*	*0.5*	*354*	USA *(65)*	Germany *(27)*	Italy *(8.9)*
16	United States	*1.8*	*3.7*	*–47*	Germany *(22)*	Netherlands *(13)*	France *(11)*
17	Taiwan	*1.7*	*1.0*	*83*	USA *(100)*	Germany *(0.2)*	Italy *(0.1)*
18	Oman	*1.6*	*0.6*	*213*	UK *(39)*	USA *(30)*	Norway *(8.5)*
19	United Kingdom	*1.6*	*1.7*	*2.3*	USA *(71)*	South Korea *(17)*	Germany *(4.5)*
20	Italy	*1.5*	*0.6*	*162*	USA *(59)*	Germany *(26)*	Israel *(7.5)*
21	Japan	*1.4*	*1.3*	*15*	USA *(95)*	UK *(3.1)*	Sweden *(1.5)*
22	Singapore	*1.3*	*3.7*	*–63*	USA *(46)*	France *(21)*	Spain *(11)*
23	Azerbaijan	*1.3*	*1.2*	*15*	Russia *(51)*	Israel *(43)*	Turkey *(2.8)*
24	Morocco	*1.2*	*2.0*	*–35*	USA *(62)*	France *(36)*	Italy *(0.6)*
25	Bangladesh	*1.2*	*0.7*	*75*	China *(70)*	Russia *(18)*	USA *(3.2)*
26	Canada	*1.0*	*0.8*	*42*	USA *(63)*	Netherlands *(16)*	Germany *(6.9)*

27	Thailand	*1.0*	*0.7*	*46*	South Korea (*20*)	Ukraine (*18*)	China (*18*)
28	Greece	*1.0*	*1.5*	*–30*	Germany (*67*)	USA (*20*)	France (*8.4*)
29	Kuwait	*1.0*	*0.2*	*348*	USA (*87*)	Russia (*3.4*)	Switzerland (*2.9*)
30	Kazakhstan	*0.9*	*0.3*	*232*	Russia (*84*)	Spain (*5.5*)	France (*3.0*)
31	Jordan	*0.9*	*0.6*	*61*	Netherlands (*37*)	USA (*30*)	Italy (*5.8*)
32	Norway	*0.8*	*1.1*	*–22*	USA (*76*)	South Korea (*9.3*)	Italy (*6.2*)
33	Afghanistan	*0.8*	*1.6*	*–48*	USA (*66*)	Russia (*18*)	Brazil (*10*)
34	Mexico	*0.7*	*0.5*	*40*	USA (*63*)	France (*9.4*)	Netherlands (*8.9*)
35	Brazil	*0.6*	*1.0*	*–28*	France (*26*)	USA (*17*)	UK (*15*)
36	Myanmar	*0.6*	*1.1*	*–40*	China (*61*)	Russia (*20*)	Belarus (*6.5*)
37	Finland	*0.6*	*0.4*	*64*	USA (*37*)	Netherlands (*19*)	Norway (*19*)
38	Poland	*0.6*	*0.6*	*2.5*	Germany (*28*)	Finland (*20*)	Italy (*16*)
39	Turkmenistan	*0.5*	*0.4*	*59*	Turkey (*43*)	China (*31*)	Russia (*13*)
40	Peru	*0.5*	*0.1*	*303*	South Korea (*34*)	Russia (*22*)	Italy (*14*)

<0.05 = between 0 and 0.05; UAE = United Arab Emirates.

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

Source: SIPRI Arms Transfers Database, Mar. 2019.

planned in 2014–18.[7] Brazil has large orders for arms from abroad with outstanding deliveries, including 36 Gripen-E combat aircraft from Sweden and 5 large submarines from France, as well as several planned major arms procurements. However, it is very likely that these deliveries and planned orders will also be delayed due to the economic recession.

Arms imports by Venezuela, which was the largest arms importer in South America in 2009–13, fell by 83 per cent between 2009–13 and 2014–18, coinciding with a severe economic crisis in the country. 2018 was the second consecutive year that it received no major weapons.

Asia and Oceania

Arms imports by states in Asia and Oceania decreased by 6.7 per cent between 2009–13 and 2014–18. States in the region received 40 per cent of global arms imports in 2014–18, compared with 47 per cent in 2009–13. Of the 10 largest importers in 2014–18, half were in Asia and Oceania: India, Australia, China, South Korea and Viet Nam. Russia accounted for 31 per cent of arms exports to the region, the USA for 27 per cent and China for 9.0 per cent.

Between 2009–13 and 2014–18, arms deliveries to Central Asia increased by 154 per cent, those to Oceania by 36 per cent and those to East Asia by 3.1 per cent. Deliveries to South Asia and South East Asia decreased by 25 per cent and 6.2 per cent, respectively.

Australia

Due to its heightened perception of threats in the Asia-Pacific region, Australia has embarked on major military procurement programmes.[8] As a result, its arms imports increased by 37 per cent between 2009–13 and 2014–18, to the highest level since 1950. In 2014–18 Australia was the world's fourth-largest arms importer and accounted for 4.6 per cent of the global total. The USA and Spain were the main arms suppliers to Australia in 2014–18, accounting for 60 per cent and 29 per cent of Australia's arms imports, respectively. All Australian armed services received new major arms in 2014–18 but the main focus was on aircraft and ships. Deliveries of 10 F-35 combat aircraft and 8 P-8 anti-submarine warfare aircraft from the USA made up 53 per cent of Australian arms imports. Spain delivered two large amphibious assault ships and two destroyers, accounting for 29 per cent of imports. Further deliveries,

[7] Groizeleau, V., 'Update on Brazil's submarine programme', Mer et Marine, 21 July 2017; and Biller, D., 'Brazil's highs and lows', Bloomberg, 5 Oct. 2018.

[8] On Australia's defence policy and threat perceptions see Australian Department of Defence (DOD), *2016 White Paper* (DOD: Canberra, 2016); External Panel of Experts on the 2015 Defence White Paper, *Guarding Against Uncertainty: Australian Attitudes to Defence* (DOD: Canberra, 2015); and Medcalf, R. and Brown, J., *Defence Challenges 2035: Securing Australia's Lifelines* (Lowy Institute for International Policy: Sydney, Nov. 2014).

such as for at least 62 F-35 combat aircraft from the USA, 12 submarines from France, 1 destroyer from Spain and 9 frigates from the UK, are still outstanding. However, 21 of the ships are due for delivery only from the late 2020s to around 2050.

South Asia

Despite the long-standing conflict between India and Pakistan, arms imports decreased for both countries in 2014–18 compared with 2009–13.[9]

India was the world's second-largest importer of major arms in 2014–18 and accounted for 9.5 per cent of the global total. Its imports decreased by 24 per cent between 2009–13 and 2014–18, partly due to delays in deliveries of arms produced under licence from foreign suppliers, such as T-90S tanks and Su-30 combat aircraft on order from Russia and submarines on order from France.[10] Russia accounted for 58 per cent of India's arms imports in 2014–18, compared with 76 per cent in 2009–13. India ordered S-400 missile systems from Russia in 2018, despite pressure from the USA not to do so. At the same time, however, India cancelled its participation in the Russian Su-57 fifth-generation combat aircraft. India had planned to order at least 100 under the designation Fifth Generation Fighter Aircraft (FGFA), but there had been growing dissatisfaction with the agreement in recent years.[11] Israel, the USA and France all increased their arms exports to India in 2014–18, and US and European offers are on the table to replace the cancelled Su-57, including production in India and technology transfers.[12]

Pakistan's arms imports decreased by 39 per cent between 2009–13 and 2014–18. China was the largest supplier to Pakistan, accounting for 70 per cent of Pakistan's imports of major arms in 2014–18. It has been Pakistan's main supplier for most years since 1965. In 2009–13 the USA accounted for 28 per cent of Pakistan's imports of major arms but in recent years it has become increasingly reluctant to provide arms as military aid or to sell arms to Pakistan.[13] In 2018 the USA suspended or cancelled several packages of

[9] On the India–Pakistan conflict see chapter 2, section III, in this volume.

[10] Singh, S., 'Amid Rafale row, HAL's 3-year delay in Sukhoi rollout raises concerns; company says delivery on schedule', *Indian Express*, 2 Oct. 2018; Indian Government, Standing Committee on Defence, *Ministry of Defence: Demands for Grants (2017-18): Ordnance Factories, Defence Research and Development Organisation, Directorate General of Quality Assurance and National Cadet Corps*, Demand no. 20, 30th Report (Indian Government: New Delhi, Mar. 2017); and Basu, N., 'PMO raps Defence Ministry over delay in $3.75-b Scorpene submarine project', *Hindu Business Line*, 30 Jan. 2018.

[11] Pubby, M., 'DRDO's technology boast fells $9 billion Indo-Russian aircraft deal', *Economic Times*, 13 June 2018; and Gady, F.-S., 'India pulls out of joint stealth fighter project with Russia', The Diplomat, 23 Apr. 2018.

[12] Miglani, S., 'Lockheed unveils new F-21 fighter jet configured for India', Reuters, 20 Feb. 2019; and McLeary, P., 'India is going big on new fighters; Lockheed, Boeing pledge India plants', Breaking Defense, 12 Feb. 2019.

[13] Iqbal, A., 'Pakistan reducing dependence on US arms', *Dawn*, 19 Apr. 2018. See also Wezeman, S. et al., 'Developments in arms transfers, 2017', *SIPRI Yearbook 2018*, p. 207.

military aid, including the delivery of 12 AH-1Z combat helicopters.[14] US arms exports to Pakistan fell by 81 per cent between 2009–13 and 2014–18, and it accounted for only 8.9 per cent of Pakistan's total arms imports in 2014–18. The fall in US deliveries is the main reason behind the decrease in Pakistan's total arms imports between the two periods. Pakistan has instead turned to other suppliers. For example, in 2018 it ordered 4 frigates and 30 combat helicopters from Turkey. However, the order for the helicopters has encountered some problems as the helicopter engine is partly of US design and the USA has refused to allow its export for the Pakistani helicopters.[15]

China

Despite the rapid development of its indigenous arms-production capabilities in recent years, China was the sixth-largest arms importer in 2014–18 and accounted for 4.2 per cent of the global total. China's arms imports decreased by 7.0 per cent between 2009–13 and 2014–18. Russia accounted for 70 per cent of China's arms imports in 2014–18. China remains reliant on imports for certain arms technologies. It has ordered several S-400 long-range air and missile defence systems from Russia and the first deliveries were made in 2018. Engines for most Chinese combat aircraft and large transport aircraft currently in production are also acquired from Russia, and engines for large naval ships are still partly acquired from France and Ukraine and produced under licence in China. The Chinese arms industry has yet to develop the technological capability to match the foreign suppliers in these fields. Notably, even the prototypes of China's latest-generation combat aircraft (J-20 and J-31) still use Russian engines because development of Chinese engines has been delayed by technical problems. However, China has already succeeded in replacing equipment that it previously needed to import with indigenously designed and produced counterparts. It is therefore very likely that this will soon also be the case with engines.[16]

Europe

Imports by states in Europe decreased by 13 per cent between 2009–13 and 2014–18. The fall is partly attributable to the long-term effects of the global financial and economic crisis that started around 2008, which caused many countries in Europe to scale down arms procurement. European countries

[14] Mohammed, A. and Landay, J., 'US suspends at least $900 million in security aid to Pakistan', Reuters, 4 Jan. 2018; Stewart, P. and Ali, I., 'Pentagon cancels aid to Pakistan over record on militants', Reuters, 1 Sep. 2018; and *Asian Military Review*, 'Pakistan Army attack helicopter options', 7 Dec. 2018.

[15] Bekdil, B. E., 'Diplomatic row jeopardizes $1.5B helicopter deal between Turkey and Pakistan', *Defense News*, 13 Aug. 2018; Görgülü, E., '1.5 milyar dolarlık satış için ATAK'a motor seferberliği' [ATAK engine search for $1.5 billion sales], *Hürriyet*, 30 Nov. 2018; and *Asian Military Review* (note 14).

[16] Chow, E. K., 'China may have solved the one thing that was poised to stop its military rise', *National Interest*, 20 Jan. 2018; and Gertz, B., 'China's Ukrainian jet engines', *Washington Times*, 15 Aug. 2018.

accounted for 11 per cent of total global imports in 2014–18. Although many of the larger European countries have sizable arms industries, they all continue to import arms. However, by 2018 Russia no longer imported major arms and had no outstanding orders from foreign suppliers. Before 2014, Russia had been importing arms from Ukraine and had started importing arms from other European countries. The Russian annexation of Crimea in 2014 ended these arms trade relations and the EU has maintained an arms embargo on Russia since 2014.[17]

Over the years, efforts have been made within the EU to increase cooperation at the European level on the development and procurement of arms. For example, in 2017 the EU established the European Defence Fund, which aims to promote cooperation among EU member states in the development and production of military equipment.[18] However, EU member states continue to procure large volumes of major arms from outside the EU. In 2014–18 the USA accounted for 41 per cent of imports of major arms by EU member states and 12 per cent came from other non-EU states. The USA will remain a major supplier to EU member states in the coming years, largely due to outstanding deliveries of a total of 296 F-35 combat aircraft to Belgium, Denmark, Italy, the Netherlands and the UK. The competition between EU and US suppliers continued in 2018: for example, rather than choosing alternatives available from EU member states, Belgium and Slovakia decided to procure US combat aircraft and the UK ordered US anti-submarine warfare aircraft. Belgium's decision to acquire US aircraft drew criticism from French President Emmanuel Macron who argued that 'strategically it goes against European interests'.[19]

Central and Northern Europe

Although arms imports to Europe decreased overall in 2014–18, many states in the region—particularly in Central and Northern European countries where there are growing tensions with Russia—have implemented major military procurement programmes since 2014. In 2014–18 Norway received the first 16 of the 52 F-35 combat aircraft ordered from the USA in 2008. It also ordered five maritime patrol/anti-submarine warfare aircraft from the USA and four submarines from Germany. In 2018 Poland and Romania ordered 30 and 54 short-range ballistic missiles from the USA, respectively. The Polish order was in addition to 138 air-launched cruise missiles (ALCMs) ordered from the USA in 2015–16. Poland, Romania and Sweden ordered air and missile defence systems from the USA in 2018.

[17] For further detail see chapter 10, section II, in this volume.

[18] European Commission, 'The European defence fund', 13 June 2018.

[19] Agence France-Presse, 'Macron "regrette" l'achat de F-35 par la Belgique, "contraire aux intérêts européens"' [Macron 'regrets' the purchase of the F-35 by Belgium, 'against the interests of Europe'], *Le Figaro*, 26 Nov. 2018.

Despite the armed conflict in the country, Ukraine's imports of major arms were very small in 2014–18. At the start of the conflict in 2014, the USA, Canada and most countries in Western and Central Europe made clear that while they supported Ukraine, this was not going to translate into supplies of large volumes of lethal military equipment. However, by 2017 some states had become more willing to deliver limited volumes of lethal equipment.[20] For example, in 2018 Czechia delivered second-hand armoured vehicles and the USA delivered anti-tank missiles.

The Middle East

Arms imports by states in the Middle East increased by 87 per cent between 2009–13 and 2014–18. Four of the world's top 10 arms-importing countries in 2014–18 were in the Middle East: Saudi Arabia, which received 33 per cent of arms transfers to the region, Egypt (15 per cent), the United Arab Emirates (UAE; 11 per cent) and Iraq (11 per cent). The USA supplied 54 per cent of total arms transfers to the region, Russia 9.6 per cent and France 8.6 per cent. The growth in transfers to the Middle East occurred despite increasing political opposition in the USA and in Western and Central Europe to arms exports to countries involved in the war in Yemen, especially Saudi Arabia and the UAE (see section I).

The Gulf region

Arms imports by some Arab states of the Gulf rose sharply between 2009–13 and 2014–18. Among the key reasons behind these increases were the mutual distrust between Iran on the one hand and Saudi Arabia and the UAE on the other; the war in Yemen, which began in 2015; and, since mid 2017, the hostile relations between Qatar on the one side and Saudi Arabia and the UAE on the other.[21]

Arms imports by Saudi Arabia increased by 192 per cent between 2009–13 and 2014–18, making it the world's largest arms importer in 2014–18. The USA supplied 68 per cent of Saudi Arabian arms imports. Arms deliveries to Saudi Arabia in 2014–18 included 56 combat aircraft from the USA and 38 from the UK. Planned deliveries for 2019–23 include 98 combat aircraft, 7 missile defence systems and 83 tanks from the USA; 737 armoured vehicles from Canada; 5 frigates from Spain; and short-range ballistic missiles from Ukraine.

[20] Wezeman, S. T. and Kuimova, A., 'Ukraine and Black Sea security', SIPRI Background Paper, Dec. 2018, p. 12.

[21] On the interstate rivalries in the Middle East and North Africa, see chapter 2, section V, in this volume.

In 2014–18 the UAE was the seventh-largest arms importer in the world. The USA accounted for 64 per cent of arms imports by the UAE. Deliveries in 2014–18 included 5 missile defence systems and 1671 APCs from the USA, and 3 corvettes from France. Some of the armoured vehicles were subsequently supplied by the UAE to militias in Yemen.

Qatari arms imports increased by 225 per cent between 2009–13 and 2014–18. The USA accounted for 65 per cent of Qatari arms imports in 2014–18. Qatar also imported smaller volumes of arms from other suppliers, including tanks from Germany, combat aircraft from France and short-range air defence systems from Russia. Planned deliveries to Qatar for 2019–23 include 93 combat aircraft (36 from the USA, 33 from France and 24 from the UK) and 4 frigates from Italy.

Iran accounted for 0.9 per cent of arms imports to the Middle East in 2014–18. Since 2010 it has been under a United Nations arms embargo that is scheduled to last until late 2020.[22] Iran has an arms industry that can produce certain types of major arms, such as ballistic missiles, or modernize existing arms, such as US aircraft imported in the 1970s. However, the level of performance of these arms is widely questioned. Iranian ballistic missiles, including those supplied to the Houthis in Yemen in 2017 and 2018, have proven to be inaccurate in actual use in combat.[23] In addition, when Iran presented a new combat aircraft in 2018 that it claimed was indigenously produced, many Western observers noted that it was probably in fact a rebuilt version of a light combat aircraft that Iran had procured from the USA in the 1970s.[24]

Iraq and Syria

While conflict persisted in both Iraq and Syria in 2014–18, the trends in arms imports by the governments of these countries differed markedly.[25] In 2014–18 Iraq was the eighth-largest arms importer, whereas Syria ranked 60th. Iraq received a wide variety of major arms—including combat aircraft and combat helicopters—mainly from the USA and Russia. Its arms imports increased by 139 per cent between 2009–13 and 2014–18. By contrast, Syria's arms imports fell by 87 per cent between the two periods. Whereas in 2009–13 Russia supplied high-value air defence systems and anti-ship missiles to Syria, in 2014–18 it supplied mainly low-value arms such as second-hand armoured vehicles. Instead of supplying major arms, Russia deployed its own military forces to support the Syrian Government. However, in 2018

[22] See the SIPRI Arms Embargo Archive.

[23] Binnie, J., 'Proving grounds: Assessing Iranian weapon performance in Syria and Yemen', *Jane's Defence Weekly*, 1 Aug. 2018.

[24] Dudley, D., 'Iran's "new" fighter jet provokes derision, as observers note likeness to US jet from the '60s', *Forbes*, 21 Aug. 2018.

[25] On the armed conflicts in Iraq and Syria see chapter 2, section V, in this volume.

Russia delivered three long-range air defence systems to Syria, its first high-value arms export to that country since 2013.

Transfers of missiles to the Middle East

Many countries in the Middle East have acquired and are continuing to acquire surface- or air-launched guided missiles with ranges of between 250 and 500 kilometres. Iran, Israel and Turkey produce some missiles indigenously while other missiles are imported into the region. In 2014–18 Egypt ordered ALCMs from France; Kuwait ordered ALCMs from the UK; Qatar ordered ALCMs from France and received short-range ballistic missiles from China; Saudi Arabia received ALCMs from the UK and the USA and ordered short-range ballistic missiles from Ukraine; Turkey received ALCMs from the USA; and the UAE received short-range ballistic missiles from the USA.