II. Developments among the suppliers of major arms, 2016–20

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SIPRI has identified 65 states as exporters of major arms in the five-year period 2016–20.[1] The five largest suppliers of arms during that period—the United States, Russia, France, Germany and China—accounted for 76 per cent of all arms exports (see table 9.1). This is slightly higher than in 2011–15 and 2006–10, when the top five accounted for 73 per cent of the global total. France had the highest increase in arms exports among the top five. US and German arms exports also grew, while Russian and Chinese arms exports decreased. The composition of the top five changed between 2011–15 and 2016–20, with Germany replacing the United Kingdom.

The top 25 arms exporters accounted for 99 per cent of global exports of major arms in 2016–20. Of these 25 states, a total of 16 are in Europe and North America, 4 are in Asia and Oceania, 3 are in the Middle East, 1 is in Africa and 1 is in South America (see table 9.1). European and North American (i.e. Canada and the USA) states together accounted for 86 per cent of all arms exports. This concentration of suppliers in the Euro-Atlantic region has been a feature of the entire period covered by the SIPRI Arms Transfers Database (1950–2020). Most of the states listed in the top 25 for 2016–20 have also appeared in this list in previous periods, and there have been very few changes in the top 10 over the years. However, the Republic of Korea (South Korea), which entered the top 10 for the first time in 2015–19, remained in this group in 2016–20 and moved up one place in the ranking to become the 9th largest arms exporter in the world.

This section reviews the arms exports and arms export policies of the world's main arms suppliers in 2016–20. It starts with the two largest suppliers, the USA and Russia, which have dominated the international supply of major arms for decades. Taken together, arms exports by the USA and Russia (including exports by the Soviet Union before 1992) have accounted for more than 50 per cent of the global total for any five-year period since 1950. The section then looks at the arms supplies of members of the European Union (EU), in particular the three largest EU exporters—

[1] Except where indicated, the information on the arms deliveries and orders referred to in this section is taken from the SIPRI Arms Transfers Database. For a definition of 'major arms' and a description of how the volume of transfers is measured see box 9.1 in section I. The figures here may differ from those in previous editions of the SIPRI Yearbook because the Arms Transfers Database is updated annually.

Table 9.1. The 40 largest suppliers of major arms and their main recipients, 2016–20

Rank			Share of total global exports (%)		Change in volume (%) from 2011–15	Main recipients (share of exporter's total exports, %), 2016–20		
2016–20	2011–15[a]	Exporter[b]	2011–15	2016–20	to 2016–20	1st	2nd	3rd
1	1	United States	*32*	*37*	*15*	Saudi Arabia (*24*)	Australia (*9.4*)	South Korea (*6.7*)
2	2	Russia	*26*	*20*	*–22*	India (*23*)	China (*18*)	Algeria (*15*)
3	3	France	*5.6*	*8.2*	*44*	India (*21*)	Egypt (*20*)	Qatar (*18*)
4	6	Germany	*4.5*	*5.5*	*21*	South Korea (*24*)	Algeria (*10*)	Egypt (*8.7*)
5	4	China	*5.6*	*5.2*	*–7.8*	Pakistan (*38*)	Bangladesh (*17*)	Algeria (*8.2*)
6	5	United Kingdom	*4.6*	*3.3*	*–27*	Saudi Arabia (*32*)	Oman (*17*)	United States (*14*)
7	7	Spain	*3.5*	*3.2*	*–8.4*	Australia (*33*)	Singapore (*13*)	Turkey (*9.7*)
8	11	Israel	*1.9*	*3.0*	*59*	India (*43*)	Azerbaijan (*17*)	Viet Nam (*12*)
9	15	South Korea	*0.9*	*2.7*	*210*	United Kingdom (*14*)	Philippines (*12*)	Thailand (*11*)
10	8	Italy	*2.8*	*2.2*	*–22*	Turkey (*18*)	Egypt (*17*)	Pakistan (*7.2*)
11	10	Netherlands	*2.0*	*1.9*	*–6.1*	Indonesia (*17*)	United States (*15*)	Mexico (*10*)
12	9	Ukraine	*2.6*	*0.9*	*–68*	China (*36*)	Russia[c] (*20*)	Thailand (*17*)
13	17	Turkey	*0.6*	*0.7*	*30*	Oman (*19*)	Turkmenistan (*19*)	Malaysia (*11*)
14	13	Switzerland	*1.1*	*0.7*	*–35*	Australia (*23*)	China (*13*)	Denmark (*8.0*)
15	12	Sweden	*1.5*	*0.7*	*–54*	United States (*25*)	Pakistan (*11*)	Algeria (*11*)
16	20	Australia	*0.3*	*0.5*	*81*	Chile (*31*)	United States (*27*)	Canada (*20*)
17	14	Canada	*0.9*	*0.5*	*–45*	Saudi Arabia (*49*)	UAE (*17*)	Australia (*5.0*)
18	21	UAE	*0.3*	*0.5*	*68*	Egypt (*34*)	Jordan (*21*)	Algeria (*14*)
19	18	Belarus	*0.5*	*0.3*	*–34*	Viet Nam (*26*)	Serbia (*16*)	Sudan (*13*)
20	29	Brazil	*0.1*	*0.3*	*147*	Afghanistan (*26*)	France (*21*)	Chile (*10*)
21	16	Norway	*0.6*	*0.3*	*–50*	Oman (*47*)	United States (*17*)	Poland (*13*)
22	19	South Africa	*0.3*	*0.3*	*–16*	United States (*24*)	UAE (*17*)	India (*13*)
23	24	Czechia	*0.2*	*0.3*	*56*	Iraq (*29*)	United States (*17*)	Ukraine (*14*)
24	35	India	*0.1*	*0.2*	*228*	Myanmar (*52*)	Sri Lanka (*24*)	Mauritius (*13*)
25	43	Portugal	*<0.05*	*0.2*	*1 020*	Romania (*98*)	Cabo Verde (*1.1*)	Colombia (*1.1*)

26	28	Jordan	*0.1*	*0.2*	*18*	United States (*46*)	Egypt (*35*)	Armenia (*9.6*)
27	53	Indonesia	*<0.05*	*0.1*	*5 025*	Philippines (*88*)	Nepal (*4.4*)	Senegal (*4.4*)
28	22	Finland	*0.3*	*0.1*	*–54*	Poland (*46*)	United Kingdom (*17*)	Egypt (*11*)
29	26	Belgium	*0.2*	*0.1*	*–30*	Saudi Arabia (*66*)	Indonesia (*28*)	France (*3.3*)
30	37	Serbia	*0.1*	*0.1*	*65*	Cyprus (*32*)	Bangladesh (*31*)	Saudi Arabia (*16*)
31	33	Bulgaria	*0.1*	*0.1*	*–2.5*	Iraq (*52*)	Côte d'Ivoire (*15*)	Saudi Arabia (*14*)
32	34	Denmark	*0.1*	*0.1*	*–30*	Portugal (*40*)	Malaysia (*22*)	France/Lithuania (*9.9*)
33	23	Uzbekistan	*0.2*	*<0.05*	*–72*	China (*100*)	. .	. .
34	27	Poland	*0.1*	*<0.05*	*–68*	Ukraine (*30*)	Lithuania (*11*)	Germany/Nepal (*9.4*)
35	. .	Lithuania	–	*<0.05*	. .	Angola (*100*)	. .	. .
36	32	Austria	*0.1*	*<0.05*	*–58*	Latvia (*42*)	Portugal (*21*)	Czechia (*11*)
37	47	Slovakia	*<0.05*	*<0.05*	*253*	Azerbaijan (*45*)	Senegal (*19*)	Cameroon (*13*)
38	31	Singapore	*0.1*	*<0.05*	*–67*	Oman (*96*)	UAE (*4.2*)	. .
39	. .	Greece	–	*<0.05*	. .	Canada (*64*)	Egypt (*36*)	. .
40	30	Iran	*0.1*	*<0.05*	*–86*	Houthi rebels[d] (*80*)	Syria (*20*)	. .

. . = data not available or not applicable; – = no deliveries; <0.05 = between 0 and 0.05; UAE = United Arab Emirates.

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

[a] The rank order for suppliers in 2011–15 differs from that published in *SIPRI Yearbook 2016* because of subsequent revision of figures for these years.
[b] The table lists states, international organizations and non-state armed (i.e. rebel) groups that exported major arms in the 5-year period 2016–20.
[c] This involved transport aircraft produced in Russia until 2018 under licences granted before Ukraine banned arms sales to Russia in 2014.
[d] The Houthi rebels are based in Yemen.

Source: SIPRI Arms Transfers Database, Mar. 2021.

Table 9.2. The 10 largest suppliers of major arms and their recipients, by region, 2016–20

Figures are the percentage shares of the supplier's total volume of exports of major arms delivered to each recipient region in 2016–20.

	Supplier									
Recipient region	USA	Russia	France	Germany	China	UK	Spain	Israel	South Korea	Italy
Africa	2.7	18	4.0	9.6	16	1.0	0.9	1.4	0.2	9.5
Americas	2.6	0.4	6.4	8.2	1.1	18	6.8	11	8.1	6.0
Asia and Oceania	32	55	36	38	76	24	63	63	55	19
Europe	15	5.5	5.3	21	0.4	7.5	4.5	24	23	12
Middle East	47	21	48	23	7.0	50	18	–	14	54

– = no deliveries.

Notes: Figures may not add up to 100% due to the conventions of rounding and because some suppliers exported small volumes of major arms to unidentified recipients or to international organizations that cannot be linked to a particular region. Percentages below 10 are rounded to 1 decimal place; percentages over 10 are rounded to whole numbers.

Source: SIPRI Arms Transfers Database, Mar. 2021.

France, Germany and the UK.[2] It ends by looking at the three largest suppliers outside Europe and North America: China, which is by far the largest, Israel and South Korea.

The United States

The USA's arms exports grew by 15 per cent between 2011–15 and 2016–20, increasing its global share from 32 per cent to 37 per cent. The USA delivered major arms to 96 states in 2016–20, a far higher number of recipients than any other supplier. In 2016–20 the USA's total arms exports were 85 per cent higher than Russia's—the second largest exporter—compared with 24 per cent higher in 2011–15. At the end of 2020, the USA had in place numerous contracts and planned contracts for large deliveries of major arms, with deliveries scheduled from 2021 until at least the end of the decade. This means that the USA will maintain its position as the world's largest exporter of major arms for the foreseeable future.

Almost half of US exports of major arms in 2016–20 went to states in the Middle East (see below and table 9.2). The next highest recipient region was Asia and Oceania. States in Asia and Oceania received 32 per cent of total US arms exports in 2016–20, compared with 34 per cent in 2011–15. Amid the intensifying rivalry between the USA and China, three US allies in the region were among the five largest importers of US arms in 2016–20:

[2] The UK left the EU on 31 Jan. 2020 and the EU's single market and customs union on 31 Dec. 2020. The UK is included in SIPRI's arms transfers data for the EU for 2016–20.

Table 9.3. Deliveries by arms category by the 10 largest suppliers of major arms, 2016–20

Figures are the percentage share of each category of major arms in the exports of the 10 largest suppliers in 2016–20.

	Supplier										
Arms category	USA	Russia	France	Germany	China	UK	Spain	Israel	South Korea	Italy	World[a]
Aircraft	58	49	45	11	30	52	61	3.4	22	47	45
Air defence systems	4.3	7.0	2.2	–	9.9	1.1	–	24	–	–	4.9
Armoured vehicles	12	10	3.3	15	16	0.3	1.4	0.7	1.1	6.5	10
Artillery	0.3	0.2	0.9	1.9	1.8	2.6	0.7	0.9	17	2.2	1.3
Engines	3.0	13	6.0	10	–	12	–	–	–	0.0	5.8
Missiles	19	13	16	9.0	17	10	–	40	0.4	3.5	14
Naval weapons	0.8	0.6	0.4	–	0.2	–	–	0.4	–	3.9	0.6
Satellites	–	0.2	1.7	–	–	–	–	1.2	–	1.6	0.2
Sensors	2.6	1.2	7.2	6.4	3.2	2.3	2.9	17	–	8.9	4.1
Ships	1.2	5.6	17	46	23	6.8	34	9.8	59	26	13
Other[b]	–	0.5	0.2	–	–	13	–	3.0	–	0.5	0.8

– = no deliveries.

Notes: Figures may not add up to 100% due to the conventions of rounding. Percentages below 10 are rounded to 1 decimal place; percentages over 10 are rounded to whole numbers.

[a] 'World' is the share of each category for all suppliers globally.

[b] 'Other' includes gun turrets for armoured vehicles, and air refuelling systems. On SIPRI's categories of major arms see box 9.1 in section I.

Source: SIPRI Arms Transfers Database, Mar. 2021.

Australia accounted for 9.4 per cent of US arms exports, South Korea for 6.7 per cent and Japan for 5.7 per cent.

States in Europe received 15 per cent of total US arms exports in 2016–20. This was an increase of 79 per cent on 2011–15, which was mainly due to deliveries of combat aircraft that were ordered in 2006–12.

African states accounted for 2.7 per cent of US arms exports in 2016–20, an increase of 6.6 per cent on 2011–15. In 2016–20 Morocco was by far the largest recipient of US arms in Africa, accounting for 77 per cent of US arms exports to the region, followed by Tunisia with 11 per cent.

US arms exports to states in the Americas fell by 48 per cent between 2011–15 and 2016–20, and together these states received 2.6 per cent of US arms exports in 2016–20. Canada (39 per cent) and Mexico (29 per cent) were the main recipients of US arms exports to the Americas.

Aircraft accounted for 58 per cent of US arms exports in 2016–20 (see table 9.3). These transfers included deliveries of a total of 334 combat aircraft, including 177 F-35s.

US arms exports to the Middle East

States in the Middle East received 47 per cent of US arms exports in 2016–20, an increase of 28 per cent on the previous five-year period. There were particularly large increases in US arms exports to three countries in the region between 2011–15 and 2016–20: Israel (335 per cent), Qatar (208 per cent) and Saudi Arabia (175 per cent).

Saudi Arabia was the main recipient of US arms transfers in 2016–20, accounting for 24 per cent of US arms exports. The volume of transfers to Saudi Arabia was especially high in 2016–20 due to the delivery of the first 91 F-15SA combat aircraft, of 152 ordered in 2011. US arms exports to Saudi Arabia came under increased scrutiny from the US Congress after Saudi Arabia launched a controversial military intervention in Yemen in 2015. The US Congress also expressed concerns about the general human rights situation in Saudi Arabia. In 2016 the administration of President Barack Obama imposed restrictions on the delivery of certain major arms to Saudi Arabia, in particular guided bombs. In 2019 the administration of President Donald J. Trump removed the restrictions, despite opposition from many in the US Congress.[3] This resulted in deliveries of large numbers of Paveway guided bombs—estimated to total around 20 000—from the USA to Saudi Arabia during 2019–20.

The delivery of 27 F-35 combat aircraft was the main reason for the large increase in US arms exports to Israel between 2011–15 and 2016–20. The increase in arms exports to Qatar was largely due to the delivery of 9 Patriot surface-to-air missile (SAM) systems and 24 AH-64E combat helicopters in 2016–20, which are part of the recent major expansion of Qatar's armed forces (see section III).

There were notable decreases in US arms exports to the United Arab Emirates (UAE) and to Turkey between 2011–15 and 2016–20. US arms exports to the UAE fell by 36 per cent, making it the fifth largest recipient of US arms in 2016–20, having been the third largest in 2011–15. However, in late 2020 the USA agreed to sell 50 F-35s to the UAE after the UAE improved its relations with Israel through a normalization agreement (see section III).[4]

As part of US efforts to limit Russia's global influence, the US Congress passed the Countering America's Adversaries Through Sanctions Act (CAATSA) in 2017.[5] Among other things, the act gives the US Government

[3] Wezeman, S. et al., 'International arms transfers and developments in arms production', *SIPRI Yearbook 2020*, pp. 277–78.

[4] Metha, A., 'US State Dept. approves UAE's purchase of F-35 jets, MQ-9 drones', *Defense News*, 10 Nov. 2020. On the UAE's normalization agreement with Israel see chapter 6, section III, in this volume.

[5] Countering America's Adversaries Through Sanctions Act, US Public Law 115-44, signed into law 2 Aug. 2017.

the authority to deny US arms exports to countries that buy arms from Russia. The act had a considerable impact on US arms exports to Turkey—a long-term ally of the USA and member of the North Atlantic Treaty Organization (NATO)—during 2016–20. US arms exports to Turkey decreased by 81 per cent and it dropped from being the 3rd largest recipient of US arms exports in 2011–15 to the 19th largest in 2016–20. Invoking CAATSA, the USA halted deliveries of F-35 combat aircraft to Turkey in 2019 after Turkey imported S-400 SAM systems from Russia.[6] Had the USA not suspended the contract, the fall in US arms exports to Turkey would not have been as steep.

While CAATSA had a significant impact on US arms exports to Turkey in 2016–20, its influence on US arms trade relations with other importers of major arms in the Middle East remained limited. For example, in 2019 the USA cautioned Egypt that a deal with Russia for Su-35 combat aircraft could trigger sanctions under CAATSA and could be an obstacle to future US arms exports to Egypt.[7] However, although preparations for the delivery of the Su-35s continued throughout 2020, there were no public statements on the issue from the US Government that year. Moreover, the USA continued to supply arms as military aid to Egypt in 2020 and signed a major arms export agreement with the country for 43 AH-64E combat helicopters.

Russia

Russia was the second largest supplier of major arms in 2016–20. It delivered major arms to 45 states and accounted for 20 per cent of total global arms exports in the period. The volume of Russian arms exports in 2016–20 was at a similar level to 2001–2005 and 2006–10, but was 22 per cent lower than in 2011–15, when Russian arms exports peaked.[8] While Russian arms exports in 2016–18 remained at a relatively high level, they fell in both 2019 and 2020. The low volume of transfers in 2020 may be partly explained by the impact of the Covid-19 pandemic, which appears to have affected the delivery schedules for several contracts (see section I).[9] For example, media reports from May 2020 stated that it had not been possible to determine a timeline for the delivery of the first batch of Su-35 combat aircraft to Egypt due to the outbreak of the pandemic.[10] None of the at least 24 Su-35s on order had been delivered to Egypt by the end of the year.

[6] Wezeman et al. (note 3), p. 281.

[7] Sharp, J. M., *Egypt: Background and US Relations*, Congressional Research Service (CRS), Report for Congress RL33003 (US Congress, CRS: Washington, DC, 27 May 2020), pp. 11–12.

[8] Wezeman, S. T. et al., 'International arms transfers', *SIPRI Yearbook 2016*, p. 569.

[9] Stepanov, A., [The Red Sea under the keel], *Rossiyskaya Gazeta*, 27 Dec. 2020 (in Russian).

[10] [Russia started production of Su-35 for Egypt], TASS, 16 May 2020 (in Russian).

While the pandemic may have had some general impact on Russia's arms deliveries in 2020, the overall decrease in its arms exports between 2011–15 and 2016–20 was largely attributable to a 53 per cent drop in its arms exports to India. Despite this, India remained the main recipient of Russian arms in 2016–20, accounting for 23 per cent of total Russian arms exports. Although several large Russian arms deals with India, including for combat aircraft, were completed by 2020, a few remained pending. India placed new orders for a variety of Russian arms in 2019–20, including for a 10-year lease of a Project 971I (Akula class) nuclear-powered attack submarine and for 12 Su-30MK combat aircraft, planned to be produced under licence in India. The ensuing deliveries will probably lead to an increase in Russian arms exports in the coming five years.

In 2016–20 Russia continued to strengthen its arms trade relations with its strategic partners. Russia substantially increased its arms transfers to China (up by 49 per cent compared with 2011–15), Algeria (up by 49 per cent) and Egypt (up by 430 per cent), making these three countries the largest recipients of Russian arms after India. However, these large increases did not offset the fall in Russian arms exports to India.

At the regional level, states in Asia and Oceania accounted for 55 per cent of Russian arms exports in 2016–20, the Middle East for 21 per cent and Africa for 18 per cent. Between 2016–20 and 2011–15, Russian arms exports to Asia and Oceania fell (–36 per cent), while exports to the Middle East and Africa increased by 64 per cent and 23 per cent, respectively.

Aircraft accounted for 49 per cent of Russian arms exports in 2016–20 (see table 9.3). These transfers included deliveries of a total of 231 combat aircraft.

Arms suppliers in the European Union and Western Europe

The combined arms exports of EU member states accounted for 26 per cent of the global total in 2016–20, the same percentage as in 2011–15. The top five West European arms exporters—France, Germany, the UK, Spain and Italy—together accounted for 22 per cent of global arms exports in 2016–20, compared with 21 per cent in 2011–15.

France

French arms exports accounted for 8.2 per cent of the global total after increasing by 44 per cent between 2011–15 and 2016–20. At the regional level, the Middle East accounted for 48 per cent of French arms exports in 2016–20 while Asia and Oceania accounted for 36 per cent. Of the 69 states to which France delivered major arms in 2016–20, the three largest recipients—India, Egypt and Qatar—together received 59 per cent of French arms exports (see table 9.1).

Deliveries of aircraft, which included 97 combat aircraft, made up 45 per cent of French arms exports in 2016–20, while deliveries of ships accounted for 17 per cent.

Germany

German arms exports represented 5.5 per cent of the global total in 2016–20 and were 21 per cent higher than in 2011–15. Germany delivered major arms to 55 states in 2016–20. Deliveries of ships, including 11 submarines, made up 46 per cent of total German arms exports in 2016–20, while deliveries of armoured vehicles accounted for 15 per cent. Deliveries of aircraft represented 11 per cent of German arms exports in 2016–20 (see table 9.3). Germany was the only member of the top five arms exporters that did not export combat aircraft in the period.

A total of 38 per cent of German exports of major arms went to states in Asia and Oceania. South Korea received 64 per cent of German arms exports to the region in 2016–20. Deliveries to South Korea included five Type-214 submarines. States in Europe accounted for 21 per cent of German arms exports in the period.

The Middle East received 23 per cent of German arms exports in 2016–20, making it the second largest recipient of German arms transfers at the regional level. This was mainly due to the delivery of three Type-209 submarines to Egypt, which had not been a major recipient of German arms before 2016. Based on existing contracts, it seems likely that Egypt will remain among the main recipients of German arms in the coming years. At the end of 2020, planned German arms exports to Egypt included deliveries of one Type-209 submarine, four MEKO-A200 frigates and seven IRIS-T SAM systems.

Germany's exports of major arms to the Middle East have regularly caused controversy, which, in a few cases, has led to extensive export restrictions.[11] During 2020, Germany extended its suspension of exports of complete weapons to Saudi Arabia (the world's largest arms importer; see section III), which it first imposed in 2018 based on concerns about the military intervention in Yemen and the alleged involvement of the Saudi Arabian Government in the murder of the journalist Jamal Khashoggi. However, it continued to allow the export of certain components for weapons produced elsewhere for final delivery to Saudi Arabia.[12]

In 2020, in reaction to Turkey's increasingly polarizing approach to its claims on oil and gas resources in the Mediterranean, the German

[11] Hüllinghorst, Y. and Roll, S., 'German arms exports and the militarisation of Arab states' foreign policies', SWP Comment no. 6, Stiftung Wissenschaft und Politik (SWP), Jan. 2021; and Wezeman et al. (note 3), pp. 286–87.

[12] 'Stopp für Rüstungsexporte nach Saudi-Arabien verlängert' [Arms export stop to Saudi Arabia extended], Deutsche Welle, 10 Dec. 2020.

parliament discussed the possibility of suspending the permission given in 2009 to export six Type-214 submarines to Turkey. However, the German Government opposed the suspension, thereby allowing the delivery to go ahead as planned over the period 2022–27.[13]

The United Kingdom

The UK was the world's sixth largest arms exporter in 2016–20 and accounted for 3.3 per cent of total arms exports. British arms exports fell by 27 per cent compared with 2011–15, when they peaked due to the delivery to Saudi Arabia of the bulk of an order made in 2007 for 72 Typhoon combat aircraft. The UK exported arms to 39 countries in 2016–20 with its main recipient, Saudi Arabia, receiving 32 per cent of its arms exports in that period. Deliveries included the final batches of Typhoons from the 2007 order, the last of which was delivered in 2017.

The fall in the UK's arms exports between 2011–15 and 2016–20 was due to a sharp drop in deliveries to Saudi Arabia. In 2019–20 the long-standing arms supply relationship between the UK and Saudi Arabia came under increased pressure. In June 2019 the Court of Appeal in London ordered the British Government to re-assess past and future licences for the export of arms to Saudi Arabia. The court's decision was based on concerns that Saudi Arabia had used British-supplied weapons in violations of international humanitarian law in its military intervention in Yemen.[14] As a result, between mid 2019 and mid 2020, the British Government suspended the issuance of new licences for the export of arms to Saudi Arabia that might be used in Yemen. The temporary suspension may have had an impact on Saudi Arabia's planned acquisition of an additional 48 Typhoons, for which it signed a Memorandum of Intent in 2018 with the producer company BAE Systems. As of late 2020, the deal appeared to have stalled.[15]

Spain and Italy

In 2016–20 Spain and Italy—the two other West European states among the top 10 arms exporters—accounted for 3.2 per cent and 2.2 per cent of total

[13] Weiland, S., 'FDP-Außenpolitiker gegen U-Boot-Lieferungen in die Türkei' [FDP-foreign policy politician against submarine deliveries to Turkey], *Der Spiegel*, 13 Dec. 2020; and German Federal Ministry for Economic Affairs and Energy, 'Schriftliche Frage an die Bundesregierung im Monat November 2020 Frage Nr. 212' [Written question to the Federal Government in the month November 2020 Question no. 212], 20 Nov. 2020.

[14] Brooke-Holland, L. and Smith, B., *UK Arms Exports to Saudi Arabia: Q&A*, Briefing Paper no. 08425 (House of Commons Library: London, 29 Jan. 2021); and Wezeman et al. (note 3), pp. 287–88.

[15] The Memorandum of Intent was mentioned in BAE Systems' half-yearly report in 2020, but was omitted from its preliminary results report for 2020. BAE Systems, 'Half-yearly report 2020', 29 July 2020, p. 31; and BAE Systems, 'Preliminary announcement 2020', 24 Feb. 2021.

arms exports respectively. Both countries' arms exports decreased between 2011–15 and 2016–20: Spain's by 8.4 per cent and Italy's by 22 per cent.

Spain's exports in 2016–20 included 13 A330 MRTT tanker aircraft and 12 A400M transport aircraft. These aircraft are produced by the trans-European company Airbus, with most of the production taking place outside Spain. The aircraft are finished in Spain and then exported under Spanish export licences. Spain's other main arms transfer in 2016–20 was the delivery of three Hobart frigates to Australia.

Deliveries of aircraft, including 48 A-129 combat helicopters to Turkey, made up the bulk of Italy's arms exports in 2016–20. It also delivered one FREMM frigate to Egypt (see section III).

Both Spain and Italy have several significant export orders with planned deliveries in the coming years. For Spain, these deliveries include 5 Avante-2200 frigates to Saudi Arabia in 2021–22; 1 BPE amphibious assault ship to Turkey in 2021; and 9 A330 MRTTs and 7 A400Ms to various states in 2021–25. Italy plans to deliver another FREMM frigate to Egypt in 2021; 4 frigates and 2 corvettes to Qatar by 2024; and 28 Typhoon combat aircraft to Kuwait in 2021–23.

Arms suppliers outside Europe and North America

Three states outside Europe and North America were among the top 10 arms exporters in 2016–20: China, Israel and South Korea. These three exporters are the focus of this subsection.

China

China was the world's fifth largest arms exporter in 2016–20 and accounted for 5.2 per cent of total arms exports. After an increase of 77 per cent between 2006–10 and 2011–15, Chinese arms exports decreased by 7.8 per cent between 2011–15 and 2016–20. China delivered major arms to 51 states in 2016–20. States in Asia and Oceania (76 per cent) and Africa (16 per cent) received most of China's arms exports in the period. Pakistan remained the main recipient of Chinese arms and accounted for 38 per cent of Chinese arms exports in 2016–20. It was followed by Bangladesh, another long-standing recipient of Chinese arms, which received 17 per cent of total Chinese arms exports in the period.

In 2016–20 China continued to seek new arms export markets in the Middle East. While some states in other regions do not import Chinese arms for political reasons, Middle Eastern states appear less likely to share such concerns. However, China has only been moderately successful in increasing arms sales to the Middle East: exports to the region grew by 71 per cent between 2011–15 and 2016–20 and the region accounted for 7.0 per cent of Chinese arms exports in 2016–20, compared with 3.8 per cent in 2011–15. Despite this increase, China accounted for only 1.1 per cent of all Middle Eastern imports of major arms in 2016–20. The most significant Chinese exports to the Middle East were armed unmanned aerial vehicles (UAVs), with an estimated total of 338 armed UAVs delivered to Egypt, Iraq, Jordan, Saudi Arabia and the UAE in 2016–20. The armed UAVs accounted for 67 per cent of all Chinese exports to the Middle East. While several other states produce armed UAVs, only China and Turkey supplied them to states in the Middle East in 2016–20.

Israel

Israel was the eighth largest arms exporter in 2016–20. Its arms exports represented 3.0 per cent of the global total and were 59 per cent higher than in 2011–15. Israel delivered major arms to 40 states in 2016–20 but its main recipient, India, accounted for 43 per cent of the total. Israel's deliveries to India in 2016–20 included air defence systems. Azerbaijan was the second largest recipient of Israeli arms exports, accounting for 17 per cent of the total (see section III).

South Korea

South Korea was the ninth largest arms exporter in 2016–20, with a 2.7 per cent share of the global total. The volume of its arms exports was 210 per cent higher in 2016–20 than in 2011–15, and 649 per cent higher than in 2001–2005. This rapid growth has mainly been the result of the increased competitiveness of the South Korean arms industry compared with those in more established arms-supplying countries.[16] In 2016–20 Asia and Oceania accounted for 55 per cent of South Korean arms exports, Europe 23 per cent and the Middle East 14 per cent.

[16] See also Béraud-Sudreau, L. et al., 'Emerging suppliers in the global arms trade', SIPRI Insights on Peace and Security no. 2020/13, Dec. 2020.