6. International arms transfers

Overview

The volume of international transfers of major arms in 2018–22 was 5.1 per cent lower than in 2013–17 and 3.9 per cent higher than in 2008–12. The volume of transfers in 2018–22 was among the highest since the end of the cold war but was still around 35 per cent lower than the totals for 1978–82 and 1983–87, when arms transfers peaked. States' arms acquisitions, often from foreign suppliers, are largely driven by armed conflict and political tensions between states (see section I). There are strong indications that tensions are increasing in most regions, most pronounced in Europe after Russia's invasion of Ukraine in February 2022, and it is thus highly likely that there will be more demand for major arms in the coming years, much of which will be fulfilled by international transfers.

SIPRI has identified 63 states as exporters of major arms in 2018–22, but most are minor exporters. The 25 largest suppliers accounted for 98 per cent of the total volume of exports, and the 5 largest suppliers in the period—the United States, Russia, France, China and Germany—accounted for 76 per cent of the total volume of exports (see section II). Since 1950, the USA and Russia (or the Soviet Union before 1992) have consistently been by far the largest suppliers. However, in 2018–22 the USA's position became more dominant and the gap with Russia larger. In 2018–22 the USA's arms exports were 14 per cent higher than in 2013–17 and its share of the global total increased from 33 to 40 per cent. In contrast, Russia's arms exports decreased by 31 per cent and its share of the global total dropped from 22 to 16 per cent. Exports by France, the third largest supplier, grew by 44 per cent between 2013–17 and 2018–22, while exports by China and Germany decreased by 23 per cent and 35 per cent respectively. Known plans for future deliveries strongly indicate that the gap between the USA and Russia will increase. These plans also suggest that in a few years Russia may no longer be the second largest exporter of major arms, at least partly as a result of some of its main clients becoming more capable of producing their own locally designed major arms but also partly due to pressure from the USA and others not to buy Russian arms.

SIPRI has identified 167 states as importers of major arms in 2018–22. The five largest arms importers were India, Saudi Arabia, Qatar, Australia and China, which together accounted for 36 per cent of total arms imports (see section III). The region that received the largest volume of major arms supplies in 2018–22 was Asia and Oceania, accounting for 41 per cent of the total, followed by the Middle East (31 per cent), Europe (16 per cent), the Americas (5.8 per cent) and

Africa (5.0 per cent). Between 2013–17 and 2018–22, the flow of arms to Europe (47 per cent) increased, while flows to Africa (–40 per cent), the Americas (–21 per cent), the Middle East (–8.8 per cent), and Asia and Oceania (–7.5 per cent) decreased. Asia and Oceania has been the region with the highest share of global arms imports since 1988–92, and the share of the Middle East, despite the decrease in imports, remained among the highest since 1988–92. While Africa's share decreased significantly, the level of imports in 2018–22 was higher than between 1988 and 2007. In contrast, the level of imports to states in the Americas was the lowest since 1983–87.

Many of the 167 importers are directly involved in armed conflict or in tensions with other states in which the imported major arms play an important role. Many of the exporters are direct stakeholders or participants in at least some of the conflicts and tensions, which partly explains why they are willing to supply arms, even when the supply seems to contradict their stated arms export policies.

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