III. Developments among the recipients of major arms, 2018–22

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SIPRI has identified 167 states as importers of major arms in 2018–22. The top five arms importers—India, Saudi Arabia, Qatar, Australia and China—received 36 per cent of total global arms imports in the period (see table 6.5). States in Asia and Oceania accounted for 41 per cent of all arms imports in 2018–22, followed by the Middle East (31 per cent), Europe (16 per cent), the Americas (5.8 per cent) and Africa (5.0 per cent).

In addition to the 167 importing states, 2 international organizations—the North Atlantic Treaty Organization (NATO) and the African Union—and non-state armed groups in Libya, Sudan (Darfur), Syria and Yemen received major arms in 2018–22. Of these, only NATO received a significant volume (0.5 per cent of the global total).

This section reviews significant developments among the main recipients of arms in each region.

Africa

Imports of major arms by African states in 2008–12 were at their highest level since the end of the cold war (1988–92), but decreased by 12 per cent between 2008–12 and 2013–17 and by 40 per cent between 2013–17 and 2018–22 (see table 6.6).[1] This brought the African share of total global imports of major arms down to 5.0 per cent in 2018–22, compared to 8.0 per cent in 2013–17 and 10 per cent in 2008–12. The main suppliers to Africa in 2018–22 were Russia, accounting for 40 per cent of African imports of major arms, the United States (16 per cent), China (9.8 per cent) and France (7.6 per cent). Russia has been the main supplier to Africa since the end of the cold war, with China, the USA and France being the other main suppliers for the most part.

Changing import patterns for Algeria and Morocco have dominated the general trend for Africa in the post-cold war period. For both 2013–17 and 2018–22 they were by far the largest importers in the region but, despite continuing and seemingly growing tensions between the two, their imports decreased significantly between the periods: Algeria by 58 per cent and Morocco by 30 per cent.[2] The decrease may be temporary since both have recently made some significant orders for major arms for delivery in the near future. Morocco has 24 combat aircraft, 24 combat helicopters and 56 tanks on

[1] Note that Africa does not include Egypt, which SIPRI includes in the Middle East.

[2] Rachidi, I., 'Morocco and Algeria: A long rivalry', *Sada*, 3 May 2022; and 'Timeline: Algeria and Morocco's diplomatic disputes', Al Jazeera, 15 Jan. 2023.

Table 6.5. The 40 largest importers of major arms and their main suppliers, 2018–22

Rank	Rank		Share of total global imports (%)		Change in volume (%) from 2013–17	Main suppliers and their share of importer's total imports (%), 2018–22					
2018–22	2013–17[a]	Importer	2013–17	2018–22	to 2018–22	1st		2nd		3rd	
1	1	India	12	11	–11	Russia	45	France	29	USA	11
2	2	Saudi Arabia	10	9.6	–8.7	USA	78	France	6.4	Spain	4.9
3	20	Qatar	1.5	6.4	311	USA	42	France	29	Italy	14
4	7	Australia	3.6	4.7	23	USA	73	Spain	19	Switzerland	3.0
5	4	China	4.2	4.6	4.1	Russia	83	France	8.1	Ukraine	5.6
6	3	Egypt	4.5	4.5	–5.3	Russia	34	Italy	19	France	19
7	13	South Korea	2.2	3.7	61	USA	71	Germany	19	France	7.9
8	9	Pakistan	3.0	3.7	14	China	77	Sweden	5.1	Russia	3.6
9	24	Japan	1.2	3.5	171	USA	97	UK	1.9	Sweden	0.3
10	14	United States	2.0	2.7	31	UK	24	Netherlands	13	France	11
11	6	UAE	4.1	2.7	–38	USA	66	Türkiye	7.4	Russia	5.4
12	28	Kuwait	0.9	2.4	146	USA	78	Italy	10	France	9.0
13	18	United Kingdom	1.7	2.3	31	USA	81	South Korea	13	Israel	2.8
14	116	Ukraine	<0.05	2.0	8 631	USA	34	Poland	17	Germany	11
15	43	Norway	0.5	2.0	285	USA	86	South Korea	8.2	Italy	3.5
16	16	Israel	1.8	1.9	2.9	USA	79	Germany	20	Italy	0.2
17	46	Netherlands	0.4	1.9	307	USA	95	Germany	3.9	Finland	0.6
18	5	Algeria	4.1	1.8	–58	Russia	73	Germany	10	France	5.2
19	12	Türkiye	2.4	1.3	–49	Italy	35	Spain	20	Russia	19
20	21	Singapore	1.4	1.3	–14	France	52	USA	26	UK	7.6
21	29	Thailand	0.9	1.0	–1.1	South Korea	33	China	14	USA	10
22	37	Brazil	0.6	0.9	48	France	39	UK	14	Sweden	13
23	39	Philippines	0.5	0.9	64	South Korea	42	Israel	22	USA	15
24	11	Indonesia	2.7	0.9	–69	South Korea	32	USA	26	France	12
25	19	Bangladesh	1.6	0.9	–48	China	74	UK	5.8	Türkiye	4.5
26	42	Poland	0.5	0.9	64	USA	56	South Korea	17	Germany	6.5

27	10	Viet Nam	2.8	0.8	–72	Russia	55	Israel	16	Belarus	10
28	23	Italy	1.3	0.8	–41	USA	92	Israel	4.4	France	2.0
29	25	Morocco	1.1	0.8	–30	USA	76	France	15	China	6.8
30	34	Myanmar	0.8	0.8	–3.0	Russia	42	China	29	India	14
31	112	NATO[b]	<0.05	0.7	2 700	France	66	USA	18	UK	15
32	32	Afghanistan	0.8	0.7	–11	USA	96	Brazil	2.6	Belarus	1.4
33	26	Canada	1.1	0.7	–36	USA	32	Australia	27	Spain	15
34	30	Greece	0.9	0.7	–26	France	48	USA	29	UK	12
35	31	Kazakhstan	0.8	0.6	–22	Russia	94	China	2.6	South Africa	1.8
36	50	Belarus	0.3	0.6	55	Russia	100	China	0.1	. .	. .
37	85	Serbia	0.1	0.5	743	China	43	Russia	31	Belarus	20
38	53	Chile	0.3	0.5	56	UK	38	Australia	36	USA	10
39	33	Jordan	0.8	0.5	–39	USA	40	UAE	20	Russia	17
40	70	Bahrain	0.1	0.5	380	USA	83	UK	7	Italy	4.1

. . = data not available or not applicable; <0.05 = between 0 and 0.05; NATO = North Atlantic Treaty Organization; UAE = United Arab Emirates.

Notes: Percentages below 10 are rounded to one decimal place; percentages over 10 are rounded to whole numbers.

[a] The rank order for importers in 2013–17 differs from that published in *SIPRI Yearbook 2018* because of subsequent revision of figures for these years.

[b] The data is for imports by the organization itself, not the total imports by NATO member states.

Source: SIPRI Arms Transfers Database, Mar. 2023.

Table 6.6. Imports of major arms, by region and subregion, 2013–17 and 2018–22

Figures for volume of imports are SIPRI trend-indicator values (TIVs).[a]

	Volume of imports (TIV)		Change in volume (%) from 2013–17	Share of total imports (%)	
Recipient region	2013–17	2018–22	to 2018–22	2013–17	2018–22
Africa	11 626	6 923	*–40*	*8.0*	*5.0*
North Africa	8 003	4 120	*–49*	*5.5*	*3.0*
Sub-Saharan Africa	3 619	2 799	*–23*	*2.5*	*2.0*
Americas	10 160	8 071	*–21*	*7.0*	*5.8*
Central America and the Caribbean	1 410	410	*–71*	*1.0*	*0.3*
North America	4 430	4 769	*7.7*	*3.0*	*3.5*
South America	4 295	2 832	*–34*	*3.0*	*2.0*
Asia and Oceania	61 100	56 511	*–7.5*	*42*	*41*
Central Asia	2 209	1 562	*–29*	*1.5*	*1.1*
East Asia	13 945	16 836	*21*	*9.6*	*12*
Oceania	5 467	6 844	*25*	*3.8*	*5.0*
South Asia	25 223	22 949	*–9.0*	*17*	*17*
South East Asia	14 258	8 321	*–42*	*9.8*	*6.0*
Europe	15 450	22 659	*47*	*11*	*16*
Central Europe	1 603	3 556	*122*	*1.1*	*2.6*
Eastern Europe	3 338	4 579	*37*	*2.3*	*3.3*
Western Europe	10 510	14 514	*38*	*7.2*	*11*
Middle East	47 039	42 877	*–8.8*	*32*	*31*
Other[b]	180	1 157	*543*	*0.8*	*0.7*
Total	**145 576**	**138 198**	***–5.1***		

Notes: Percentages below 10 are rounded to one decimal; percentages over 10 are rounded to whole numbers.

[a] The SIPRI TIV is an indicator of the volume of arms transfers and not their financial value. The method for calculating the TIV is described in box 6.1 in section I of this chapter.

[b] ‘Other’ refers to unidentified recipients or to international organizations that cannot be linked to a particular region.

Source: SIPRI Arms Transfers Database, Mar. 2023.

order from the USA, all for delivery by the end of 2025. It also has 2 surface-to-air missile (SAM) systems and 30 self-propelled guns on order from France, and in 2022 signed a US$500 million deal with Israel for several long-range SAM systems.[3] The Algerian orders are less clear as Algeria and some of its suppliers are not very transparent on orders or planned orders for arms. It is known to have 22 combat aircraft on order from Russia, and there are reports of an order for 14 more, as well as for an unknown number of tanks.[4] However, any planned deliveries from Russia may be affected by the fallout

[3] Zaken, D., ‘IAI agrees $500m missile defense systems deal with Morocco’, Globes, 13 Feb. 2022.

[4] BMPD, [Algeria received a new batch of T-90SA tanks], LiveJournal, 10 Aug. 2022 (in Russian); and Genty-Boudry, Y., ‘Algérie : Su-34 contre le Maroc?’ [Algeria: Su-34 against Morocco?], *Air & Cosmos*, 23 Mar. 2021.

from the war in Ukraine, including US pressure on Algeria to reconsider arms deals with Russia, and possible diversion by Russia of weapons produced for export to its own forces.[5] Algeria also has at least one and possibly up to six frigates on order from China for delivery from 2023.[6]

Sub-Saharan Africa

States in sub-Saharan Africa accounted for 2.0 per cent of total global imports of major arms in 2018–22. Despite numerous armed conflicts, internal and bilateral tensions, and other security concerns in sub-Saharan Africa, arms imports to the subregion decreased 23 per cent between 2013–17 and 2018–22, reaching their lowest level in two decades.[7]

Several arms-exporting states are competing for influence in sub-Saharan Africa. Russia overtook China to become the largest supplier to the subregion in 2018–22. Its share of arms imports to sub-Saharan Africa rose from 21 per cent in 2013–17 to 26 per cent in 2018–22, while China's fell from 29 per cent to 18 per cent. Until 2013–17 Russia's deliveries to the subregion had been larger than China's for all periods since at least the end of the cold war. France increased its share from 4.8 per cent to 8.3 per cent, making it the third largest arms supplier to sub-Saharan Africa in 2018–22.

Arms import volumes vary significantly over time for most states in sub-Saharan Africa and these states often have a diverse range of suppliers—as exemplified by the three largest sub-Saharan importers in 2018–22: Angola, Nigeria and Mali.

Angola's imports in 2018–22 were 57 per cent higher than in 2013–17 and almost 1000 per cent higher than in 2008–12, when almost no major arms were imported. Russia accounted for over 55 per cent of all supplies in both 2018–22 and 2013–17. However, Angola received major arms from at least 10 other suppliers in both periods, including Belarus, Brazil, China, France, Israel, Lithuania, South Africa and the USA. Neither Russia nor China supplied major arms to Angola in the decade before 2013.

Nigeria has had a relatively more stable trend in total imports in the last two decades: imports in 2018–22 were 9.4 per cent lower than in 2013–17, and the biggest variation was the 147 per cent increase between 2003–2007 and 2008–12. In 2013–17 Russia was the largest arms supplier to Nigeria, but in both 2008–12 and 2018–22 it was China. However, neither accounted for more than 38 per cent of total Nigerian imports in the last decade, and in both 2013–17 and 2018–22 they shared the Nigerian arms market with at least

[5] Rubio, M. (US Senator for Florida), 'Rubio calls for sanctions on Algerian purchase of Russian weapons', Press release, 15 Sep. 2022; and Malyasov, D., 'Russia uses T-90S tanks originally bound for export customers', Defence Blog, 4 Oct. 2022.

[6] Martin, G., 'Algerian navy takes delivery of Chinese-built corvette', defenceWeb, 3 Apr. 2023.

[7] On armed conflict in sub-Saharan Africa see 'Armed conflict and peace processes in sub-Saharan Africa', *SIPRI Yearbook 2022*, pp. 193–239; and chapter 2 in this volume.

11 other suppliers, including Brazil, Czechia, France, Germany, Ukraine and the USA.

Mali's imports increased by 210 per cent between 2013–17 and 2018–22. Russia was its main supplier in both periods, but Mali also received major arms from Brazil, China, France, South Africa, Spain, Türkiye, the United Arab Emirates (UAE) and the USA. After the coups in Mali in 2020 and 2021, France and the USA became far more reluctant to supply arms to the country. Russia, in contrast, increased its arms exports to Mali in 2021–22 with supplies of three combat helicopters and two light combat aircraft. These arms deliveries are widely assumed to be part of Russian efforts to expand its presence and influence in Mali and were combined with the deployment of the Wagner Group, a Russian private military and security company (PMSC).[8] Similar use by Russia of a combination of arms deliveries and deployment of Russian PMSCs has been previously observed in Libya and the Central African Republic.[9]

The Americas

Arms imports by states in the Americas decreased by 21 per cent between 2013–17 and 2018–22. The USA and Brazil were the largest importers of major arms in the region in 2018–22, accounting for 47 per cent and 16 per cent of the regional total, respectively. Of the US imports, 24 per cent came from the United Kingdom, mainly in the form of large gas turbines for USA-produced warships and air-refuelling systems for USA-produced tanker aircraft. Another 21 per cent was accounted for by 110 second-hand combat aircraft from several states (including Australia, France, Israel and Jordan), acquired by several US companies to train US forces and in some cases also those of US allies.

Imports of major arms by South American states decreased by 34 per cent between 2013–17 and 2018–22. Despite ongoing intrastate violence in South America, tensions between states in the region are few.[10] Nevertheless, some states, including Brazil and Chile, have significant ongoing arms import programmes. Brazil's arms imports were 48 per cent higher than in 2013–17 and accounted for 44 per cent of the subregional total in 2018–22. Chile's arms

[8] The exact status of the Wagner Group is unclear, but it appears to be operating on behalf of the Russian state rather than as non-state 'mercenaries'. Racz, A., 'Band of brothers: The Wagner Group and the Russian state', Center for Strategic and International Studies, 21 Sep. 2020.

[9] On the role of the Wagner Group in Mali and the Central African Republic see chapter 4, section II, in this volume. See also Lindén, K., 'Russia's relations with Africa: Small, military-oriented and with destabilising effects', Swedish Defence Research Agency (FOI) Studies in African Security, Memo no. 8090, Jan. 2023.

[10] On armed gang violence and other armed violence in parts of South America see chapter 2, section I, in this volume.

imports rose by 56 per cent between the two periods, giving it a 24 per cent share of total South American arms imports.

Asia and Oceania

Imports of major arms by states in Asia and Oceania decreased by 7.5 per cent between 2013–17 and 2018–22. However, arms imports by states in Oceania alone increased by 25 per cent between 2013–17 and 2018–22, with Australia by far the largest arms importer. Six of the world's 10 largest arms importers in 2018–22 were in Asia and Oceania: India, Australia, China, the Republic of Korea (South Korea), Pakistan and Japan. The USA (31 per cent) accounted for the largest share of arms exported to states in the region, followed by Russia (26 per cent) and France (12 per cent).

India and Pakistan

India and Pakistan have been among the largest arms importers for decades. Their demand for arms is mainly driven by tensions with each other and, in the case of India, with China. For the 30-year period 1993–2022, India was the largest importer of major arms globally, while Pakistan was the eighth largest, and both have major ongoing arms import programmes.

With an 11 per cent share of total global arms imports, India was the world's biggest importer of major arms in 2018–22. It retained this position even though its arms imports dropped by 11 per cent between 2013–17 and 2018–22. The decrease can be attributed to several factors, including India's slow and complex arms procurement process, efforts to diversify its arms suppliers, and attempts to replace imports with major arms that are designed and produced domestically.

Russia was the largest supplier of arms to India in both 2013–17 and 2018–22, but its share of total Indian arms imports fell from 64 per cent to 45 per cent. Russia's position as India's main arms supplier is under pressure due to strong competition from other supplier states (including France, Israel, South Korea, the UK and the USA), increased Indian arms production and, since 2022, the constraints on Russia's arms exports related to its invasion of Ukraine (discussed in section II).

India's arms imports from France, which included 62 combat aircraft and 4 submarines, increased by 489 per cent between 2013–17 and 2018–22, and thus France displaced the USA as the second largest supplier to India.

Imports of major weapons by Pakistan increased by 14 per cent between 2013–17 and 2018–22 and accounted for 3.7 per cent of the global total. China supplied over three-quarters (77 per cent) of Pakistan's arms imports in 2018–22. The long-standing reactive armament dynamic between India and Pakistan was illustrated by Pakistan's import in 2022 of 14 J-10C combat aircraft, out of a total of 36 ordered from China. Pakistani Prime Minister

Imran Khan referred to the procurement as being needed to counter efforts 'to create an imbalance in the region', while earlier the Pakistani interior minister stated that the procurement was aimed at countering the Indian purchase of Rafale combat aircraft from France.[11]

East Asia

Imports of major arms by states in East Asia increased by 21 per cent between 2013–17 and 2018–22. China, Japan and South Korea were among the top 10 importers of major arms globally in 2018–22. All three have expanded their military capabilities and continue to do so but with different levels of dependency on arms imports. China is rapidly moving towards self-reliance in major arms, while Japan and South Korea, despite their well-developed arms industries, remain reliant on arms imports in some key weapon categories, especially long-range strike capabilities such as advanced combat aircraft and missiles.[12] Both Japan's and South Korea's arms acquisitions are largely driven by tensions with the Democratic People's Republic of Korea (DPRK, or North Korea) and, in the case of Japan, with China. The USA, a treaty ally of Japan and South Korea, and itself experiencing tense security relations with North Korea and China, has been their main supplier since 1950.

Arms imports by China grew by 4.1 per cent and accounted for 4.6 per cent of the global total in 2018–22. Most Chinese arms imports (83 per cent) came from Russia. Russian deliveries to China in the last three years of the period (2020–22) consisted almost entirely of helicopters and aircraft engines, which are the last few types of major arms that China has seemingly had difficulties in developing.

Japan increased its arms imports between 2013–17 and 2018–22 by 171 per cent. The USA delivered 29 F-35 combat aircraft to Japan, amounting to one-third (33 per cent) of Japanese arms imports. Japan has pending deliveries of 118 F-35 combat aircraft from the USA, and in 2022 decided to order up to 400 long-range (at least 1600 kilometres) Tomahawk land-attack missiles from the USA for use on Japanese naval ships as a 'counterstrike capability'. The Tomahawks provide a new capability for Japan and are a quick off-the-shelf order as Japan's own long-range land-attack missiles are still being developed.[13] Until now, only the UK has received Tomahawks from the USA, with 195 delivered between 1997 and 2016.

[11] Press Trust of India, 'Pakistan gets China-made J-10C fighter jets to "counter India's Rafale"', NDTV, 11 Mar. 2022; and 'Six China-made J-10C jets inducted into PAF', *Dawn*, 12 Mar. 2022.

[12] Béraud-Sudreau, L. et al., *Arms-production Capabilities in the Indo-Pacific Region: Measuring Self-reliance* (SIPRI: Stockholm, Oct. 2022).

[13] Nemoto, R., 'Japan seeks to buy 400 US Tomahawk missiles, Kishida says', Nikkei Asia, 28 Feb. 2023; and Kosuke, T., 'PM Kishida announces Japan will acquire 400 Tomahawk missiles from US', The Diplomat, 28 Feb. 2023.

South Korea increased its arms imports between 2013–17 and 2018–22 by 61 per cent. The USA delivered 40 F-35 combat aircraft to South Korea in 2018–22, which accounted for 43 per cent of South Korean arms imports in the period. South Korea has 20 F-35 combat aircraft on order from the USA.

Australia

As a key ally of the USA, Australia is also building up its long-range strike capabilities based on a perceived heightened threat from China.[14] Australia increased its arms imports by 23 per cent between 2013–17 and 2018–22. With a 4.7 per cent share of global arms imports, it was the fourth largest arms importer in the world in 2018–22. The delivery of 64 combat aircraft from the USA accounted for 62 per cent of Australian arms imports in the period. Substantial orders for major arms have been placed in recent years for delivery after 2022, further expanding Australian military capabilities. These include at least 510 ship-, air- and land-launched land-attack missiles with ranges between 300 and at least 1600 km—a new capability for Australia.

South East Asia

Although most South East Asian states continued to be affected by tensions in the South China Sea, mainly with China, arms imports by states in the subregion fell by 42 per cent between 2013–17 and 2018–22. The decrease is at least partly because many of those states are still in the process of incorporating the substantial volumes of major arms delivered before 2018 into their armed forces. Nevertheless, states in the subregion are continuing to build up their military capabilities. The Philippines, for example, increased its arms imports by 64 per cent between 2013–17 and 2018–22. Imports of two frigates from South Korea in 2020–21 provided the Philippines with its first two modern major combat ships, and two more frigates are on order. Singapore expects to take delivery of four submarines from Germany within the next few years. During the period 2018–22, Indonesia placed orders for 42 Rafale combat aircraft from France, doubling its current inventory, as well as 3 submarines from South Korea and 6 frigates from Italy and 2 from the UK.

Europe

Arms imports by European states were 47 per cent higher in 2018–22 than in 2013–17. The biggest European arms importer in 2018–22 was the UK, which was the 13th largest arms importer in the world, followed by Ukraine (see section I) and Norway, ranked 14th and 15th respectively. For all three, the

[14] Shugart, T., 'Australia and the growing reach of China's military', Lowy Institute Analysis, Aug. 2021; and Grady, J., 'Australia developing new defense strategy in response to China, says deputy prime minister', USNI News, 12 July 2022.

USA was the largest supplier and in total the USA accounted for 56 per cent of arms imports by European states in 2018–22, a significant increase over the previous three five-year periods (covering 2003–17) when the US share was 33–35 per cent. These increasing imports from the USA both contrast with and are a driver for efforts since 2013 by the European Union (EU) to promote an EU defence technological and industrial base that can provide more EU autonomy in military technology.[15] Russia accounted for 5.8 per cent of European arms imports in 2018–22 (mainly to Belarus) and Germany 5.1 per cent.

European NATO states

Largely in response to the deteriorating security environment in the region, NATO states in Europe increased their arms imports by 65 per cent between 2013–17 and 2018–22. The USA accounted for 65 per cent of total arms imports by European NATO member states and by NATO itself in 2018–22. The next biggest suppliers were France (8.6 per cent) and South Korea (4.9 per cent). Based on existing programmes, the arms imports of European NATO states are expected to continue to rise in the coming years. This includes orders placed before the February 2022 Russian invasion of Ukraine and several large orders announced since, some of which were the result of accelerated procurement processes implemented in response to the war, for example by Poland, Germany, the Netherlands and the Baltic states.

In the first four years of the period (2018–21), Poland's most notable arms import orders included 32 combat aircraft and 4 missile and air defence systems from the USA. In 2022, however, Poland announced new orders for 394 tanks, 96 combat helicopters and 12 missile and air defence systems from the USA; 48 combat aircraft, 1000 tanks, 672 self-propelled guns and 288 multiple-rocket launchers from South Korea; and 3 frigates from the UK.

As a direct reaction to the 2022 invasion of Ukraine, Germany introduced new legislation to allow faster decisions and procurement processes for new arms.[16] The largest German arms import order was for 35 F-35 combat aircraft from the USA, a deal signed in late 2022 after an accelerated procurement process.[17] This was the first time since the late 1970s that Germany has ordered combat aircraft from a foreign supplier.

[15] European Commission, 'Commission unveils significant actions to contribute to European defence, boost innovation and address strategic dependencies', 15 Feb. 2022; and Csernatoni, R., 'The EU's defense ambitions: Understanding the emergence of a European defense technological and industrial complex', Carnegie Europe Working Paper, 6 Dec. 2021.

[16] German Ministry of Defence, 'Parlamentsbeschluss: Beschaffung für die Bundeswehr wird beschleunigt' [Parliament resolution: Procurement for the Bundeswehr will be accelerated], 8 July 2022.

[17] The F-35 will replace the Tornado aircraft in Germany's nuclear strike role within NATO. For further detail see section I of this chapter and chapter 7, section I, in this volume.

The Netherlands ordered six additional F-35s in 2022 to ensure that it would not be left behind in the growing queue for this aircraft model.[18] Similarly, Estonia, Latvia and Lithuania each decided to acquire from the USA HIMARS multiple-rocket launchers and 300 km range ATACMS missiles for use with the HIMARS.

The Middle East

Arms imports by states in the Middle East were 8.8 per cent lower in 2018–22 than in 2013–17. Three of the top 10 arms-importing states in 2018–22 were in the Middle East: Saudi Arabia, Qatar and Egypt. The USA accounted for 54 per cent of Middle Eastern arms imports. The next largest suppliers were France (12 per cent), Russia (8.6 per cent) and Italy (8.4 per cent).

Arms transfers continued to play a major role in security developments in the Gulf region in 2018–22, where various tensions persisted, including those between Iran and most other Gulf states. Imported arms also play a major role in the war in Yemen where Saudi Arabia and the UAE have since 2015 actively supported the government against Houthi forces who are supported by Iran.[19]

Saudi Arabia

The world's second largest arms importer in 2018–22 was Saudi Arabia, which received 9.6 per cent of all arms imports. The USA supplied 78 per cent of Saudi Arabian arms imports in the period, which included the delivery of 91 combat aircraft with hundreds of land-attack missiles and over 20 000 guided bombs. Saudi Arabia has used US aircraft delivered since 2016 in its heavily criticized air attacks in Yemen, which continued in 2022 at least up until the six-month truce between the Saudi Arabia-led coalition and the Houthi forces that started in April 2022.[20] Since US President Joe Biden took office in January 2021, his administration has put restrictions on new licences for exports of what it described as 'offensive weapons' to Saudi Arabia, without specifying what defined 'offensive'. Discussions of further US restrictions on arms exports to Saudi Arabia continued in the US Congress during 2022 but in December 2022 the Biden administration made clear it

[18] Dutch Ministry of Defence, 'Defence accelerates purchases of F-35s and MQ-9 Reapers', 24 June 2022.

[19] On the armed conflict and peace process in Yemen see chapter 2, section II, in this volume.

[20] 'Saudi-led airstrikes in Yemen have been called war crimes. Many relied on US support', *Washington Post*, 4 June 2022; 'Biden ends support for Saudi's Yemen war in foreign policy shift', Al Jazeera, 4 Feb. 2021; and United Nations, Security Council, 'Final report of the panel of experts on Yemen established pursuant to Security Council Resolution 2140 (2014)', S/2023/130, 21 Feb. 2023.

would continue to supply arms to Saudi Arabia.[21] At the end of 2022, Saudi Arabia still had 41 combat aircraft on order from the USA.

Saudi Arabia also acquired air defence systems from the USA during 2018–22, partly to defend against missile attacks from the Houthi forces in Yemen, and partly to deal with a perceived missile threat from Iran.[22] In particular, Saudi Arabia imported 2 Patriot SAM systems and over 400 Patriot missiles from the USA, to add to much larger numbers supplied before 2018, and in 2018 ordered 7 THAAD anti-ballistic missile (ABM) systems for delivery from 2023.

Qatar

With an increase in arms imports by 311 per cent between 2013–17 and 2018–22, Qatar became the third largest arms importer in the world. Its main suppliers in 2018–22 were the USA, which accounted for 42 per cent of Qatari arms imports, France (29 per cent) and Italy (14 per cent). Qatar's arms imports in 2018–22 included 36 Rafale combat aircraft from France, 26 F-15QA combat aircraft from the USA and 8 Typhoon combat aircraft from the UK, as well as 3 frigates from Italy. By the end of 2022, Qatar also had 22 F-15QAs on order from the USA and 16 Typhoons from the UK.

United Arab Emirates

The UAE's arms imports in 2018–22 were 38 per cent lower than in 2013–17, and it was the 11th largest arms importer globally. The USA was its main supplier, accounting for 66 per cent of the UAE's total arms imports. Notable US deliveries in 2018–22 included hundreds of SAMs and over 20 000 guided bombs. More US missiles are on order and the UAE also has substantial volumes of major arms on order from other suppliers, including 80 Rafale combat aircraft and 2 frigates from France, 4 corvettes from Singapore, and over 30 armed uncrewed aerial vehicles (UAVs) from China, South Africa and Türkiye.

Kuwait

Arms imports by Kuwait increased by 146 per cent between 2013–17 and 2018–22. This was mainly due to the delivery of 28 combat aircraft and 218 tanks from the USA and 6 combat aircraft from Italy (with 22 more still on order at the end of 2022).

[21] Blanchard, C. M., 'Saudi Arabia', Congressional Research Service (CRS) In Focus no. IF10822, 10 Mar. 2023; Abramson, J., 'Biden urged to halt arms sales to Saudi Arabia', *Arms Control Today*, Nov. 2022; and Widakuswara, P., 'White House defends support for Saudis in Yemen war', Voice of America, 16 Dec. 2022.

[22] United Nations, S/2023/130 (note 20), p. 8.

Iran

Arms imports by Iran have been at a very low level relative to those of other arms importers in the Gulf since around 1993. Its imports of major arms in 2018–22 were close to zero. In 2022 Iran placed an order for 24 Su-35 combat aircraft from Russia, its first significant procurement of combat aircraft since the early 1990s and the first procurement of major arms after the expiration in 2020 of the UN embargo on such supplies to Iran.[23]

Egypt

Egypt's arms imports decreased by 5.3 per cent between 2013–17 and 2018–22, and it dropped from third largest to sixth largest arms importer in the world. Egypt has a very diversified group of suppliers and in 2018–22 imported major arms from nine states. Russia was Egypt's largest arms supplier during that period, accounting for 34 per cent of total Egyptian arms imports. However, Russia has dropped away as a supplier to Egypt—it delivered no major arms in 2021–22 and there are no known expected deliveries, or plans for new Egyptian orders, from Russia. A major deal for 24 Su-35 combat aircraft from Russia planned for delivery in 2021–22 was cancelled by Egypt in 2022, reportedly after pressure on Egypt from the USA.[24]

In 2018–22 France and Italy each accounted for 19 per cent of Egyptian arms imports and both are likely to remain important suppliers to Egypt. At the end of 2022 Egypt still had 30 Rafale combat aircraft and 1 frigate on order from France, while Italy was negotiating a $10–12 billion arms deal for 24 Typhoon combat aircraft, 20 trainer aircraft, 4 large frigates, 20 patrol craft, 20–24 helicopters and a satellite.[25] The USA accounted in 2018–22 for 6.9 per cent of Egypt's arms imports but in 2020 approved an order for up to 43 combat helicopters and in 2022—probably as compensation for Egypt's cancellation of the Su-35 from Russia—offered to supply Egypt F-15 combat aircraft.[26]

Before 2022 South Korea had only once supplied major arms to Egypt (a second-hand corvette as a gift in 2017). After 2022 it is set to become a new major supplier after signing an order for at least 200 self-propelled guns. It was also by the end of 2022 close to gaining an Egyptian order for possibly over 100 advanced trainer/light combat aircraft.[27]

[23] Bromley, M. and Wezeman, P. D., 'Multilateral arms embargoes', *SIPRI Yearbook 2022*, p. 601.

[24] 'Will Iran get the Su-35?', Scramble, 5 Jan. 2022; and Lake, J., 'Egypt grows its modern family', Times Aerospace, 18 Jan. 2023.

[25] 'Egypt close to completing $3bn arms deal with Italy', Middle East Eye, 6 June 2022; and Lake (note 24).

[26] O'Brien, C., 'US plans to sell F-15 fighters to Egypt amid human rights dispute', Politico, 15 Mar. 2022; and Lake (note 24).

[27] Jung, M., 'KAI to focus on Egypt project after FA-50 export deal with Malaysia', *Korea Times*, 2 Mar. 2023; and Nh, J., 'Egypt aims for local production of South Korean trainer aircraft', *Asian Military Review*, 19 Jan. 2023.