

## 6. International arms transfers

### Overview

*The volume of international transfers of major arms in the last 15 years remained at about the same level. In 2019–23 it was 3.3 per cent lower than in 2014–18 but 3.2 per cent higher than in 2009–13. These levels since 2009 are considerably higher than the 15 years before and the highest since the end of the cold war, but still around 35 per cent lower than the totals for 1974–78, 1979–83 and 1984–88, when arms transfers peaked. Trends for the different regions, subregions and individual suppliers and recipients, however, varied significantly.*

*States' arms acquisitions, often from foreign suppliers, are largely driven by armed conflict between and within states and by political tensions between states (see section I). Such conflicts and tensions remain or are increasing in most regions—being most pronounced in Europe after the Russian Federation's full-scale invasion of Ukraine in February 2022—leading to continued or higher demand for major arms that will be fulfilled mainly by international transfers.*

*Noteworthy is the emphasis many states place in their arms inventories for long-range land-attack weapons, a role traditionally filled by advanced combat aircraft, which continue to account for a significant share of total transfers of major arms. However, the last decade has seen growth in states' interest in and transfers of advanced missiles and of much simpler and cheaper armed uncrewed aircraft and missiles with similar characteristics (see section I).*

*SIPRI has identified 66 states as exporters of major arms in 2019–23, but most are minor exporters. The 25 largest suppliers accounted for 98 per cent of the total volume of exports, and top five—the United States, France, Russia, China and Germany—accounted for 75 per cent (see section II). Between 1950 and 2019, the USA and Russia (or the Soviet Union before 1992) have consistently been by far the two largest suppliers. However, in recent years the USA's share of global exports has increased while Russia's share decreased. In 2019–23 the USA's arms exports were 17 per cent higher than in 2014–18 and its share of the global total increased from 34 to 42 per cent, far higher than any other exporter. In contrast, Russia's arms exports dramatically decreased by 53 per cent and its share of the global total dropped from 21 to 11 per cent. Exports by France rose by 47 per cent between 2014–18 and 2019–23, resulting in France becoming the second largest exporter of major arms in 2019–23 and Russia falling to third place. The drop in Russian exports is at least partly the result of some of its main clients becoming more capable of producing their own locally designed major arms or finding other suppliers more attractive, but is also due to pressure from the USA and others not to buy Russian arms. Sanctions on Russia since 2022*

have also probably started to have a negative effect on Russia's arms exports. Exports by China stabilized—but still decreased by 5.3 per cent between 2014–18 and 2019–23—and those of Germany decreased by 14 per cent.

Known plans for future deliveries strongly indicate that the USA remains unchallenged as the largest arms exporter and that France will consolidate its second position. They also indicate that Russia's arms exports may well reduce even further while those of some of the other current top 10 exporters are likely to remain steady or increase, possibly leaving Russia to drop further in the ranking of exporters within a few years.

SIPRI has identified 170 states as importers of major arms in 2019–23. The five largest arms importers were India, Saudi Arabia, Qatar, Ukraine and Pakistan, which together accounted for 35 per cent of total arms imports (see section III). The region that received the largest volume of major arms supplies in 2019–23 was Asia and Oceania, accounting for 37 per cent of the total, followed by the Middle East (30 per cent), Europe (21 per cent), the Americas (5.7 per cent) and Africa (4.3 per cent). Between 2014–18 and 2019–23, the flow of arms to Europe increased by 94 per cent, while flows to all other regions decreased: Africa (–52 per cent), Asia and Oceania (–12 per cent), the Middle East (–12 per cent) and the Americas (–7.2 per cent). Asia and Oceania has been the region with the highest share of global arms imports since 1989–93, and the share of the Middle East, despite the decrease in imports, remained among the highest since 1989–93. While Africa's share decreased significantly, the level of imports in 2019–23 was higher than for any of the four five-year periods between 1989 and 2008. In contrast, the level of imports for the Americas was the lowest since 1984–88.

Many of the 170 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. It is also noteworthy that, for most suppliers, arms exports are only a small part of the financial value of their total exports. Based on information published by most larger exporters for 2022 (the latest year for which data is available), the financial value of global arms exports was around \$138 billion. This is less than 0.5 per cent of total global trade.

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