

II. Developments among the suppliers of major arms, 2019–23

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SIPRI has identified 66 states as exporters of major arms in 2019–23. The five largest exporters of arms during that period—in descending order, the United States, France, the Russian Federation, China and Germany—accounted for over three quarters (75 per cent) of all arms exports (see table 6.2). US and French arms exports rose between 2014–18 and 2019–23, while Russian, Chinese and German arms exports fell. The top 25 arms exporters accounted for 98 per cent of the world’s arms exports in 2019–23. States in North America and Europe together accounted for 87 per cent of all arms exports in the period. The five largest exporters in Western Europe—in descending order, France, Germany, Italy, the United Kingdom and Spain—supplied around one quarter (24 per cent) of total global arms exports in 2019–23.

The United States

The USA’s arms exports grew by 17 per cent between 2014–18 and 2019–23 and its share of total global arms exports rose from 34 per cent to 42 per cent. The USA delivered major arms to 107 states in 2019–23, which was more than the next two biggest exporters combined. The volume of arms exported by the USA in 2019–23 was 282 per cent higher than that of France, the second biggest arms exporter globally.

In 2019–23 the largest share of US arms exports went to states in the Middle East (38 per cent) (see table 6.3). This was a much smaller proportion than in 2014–18 (50 per cent), after an 11 per cent decrease in US arms exports to the region between the two periods. Four Middle Eastern states were among the top 10 recipients of US arms in 2019–23: Saudi Arabia accounted for 15 per cent of US arms exports, Qatar 8.2 per cent, Kuwait 4.5 per cent and Israel 3.6 per cent.

US arms exports to states in Asia and Oceania increased by 14 per cent overall between 2014–18 and 2019–23, with the region accounting for 31 per cent of all US arms exports in 2019–23, roughly the same proportion as in 2014–18. Three states in the region, all with bilateral military alliances with the USA, were among the 10 largest recipients of US arms in 2019–23: Japan accounted for 9.5 per cent of all US arms exports, Australia 7.1 per cent and the Republic of Korea (South Korea) 5.3 per cent. There were increases in US arms exports to Japan (161 per cent), South Korea (35 per cent) and Australia (9.2 per cent) between 2014–18 and 2019–23, which were mainly driven by a perception of a growing threat from China shared by all three recipients and the USA.

Table 6.2. The 25 largest suppliers of major arms and their main recipients, 2019–23

Rank	Share of total global exports (%) ^a		Change in volume (%) from 2014–18 ^b to 2019–23		Main recipients and their share of exporter's total exports (%), 2019–23 ^a					
	2019–23	2014–18	2014–18 ^b	2019–23	1st	2nd	3rd			
1	United States	42	34	17	Saudi Arabia	15	Japan	9.5	Qatar	8.2
2	France	11	7.2	47	India	29	Qatar	17	Egypt	6.4
3	Russia	11	21	-53	India	34	China	21	Egypt	7.5
4	China	5.8	5.9	-5.3	Pakistan	61	Bangladesh	11	Thailand	6.0
5	Germany	5.6	6.3	-14	Egypt	20	Ukraine	12	Israel	12
6	Italy	4.3	2.2	86	Qatar	27	Egypt	21	Kuwait	13
7	United Kingdom	3.7	4.1	-14	Qatar	23	United States	20	Ukraine	8.5
8	Spain	2.7	2.7	-3.3	Saudi Arabia	21	Australia	20	Türkiye	18
9	Israel	2.4	3.1	-25	India	37	Philippines	12	United States	8.7
10	South Korea	2.0	1.7	12	Poland	27	Philippines	19	India	15
11	Türkiye	1.6	0.7	106	UAE	15	Qatar	13	Pakistan	11
12	Netherlands	1.2	2.2	-46	United States	28	Mexico	12	Pakistan	8.6
13	Sweden	0.8	0.7	15	United States	22	United States	20	Pakistan	20
14	Poland	0.7	0.1	1138	Brazil	96	Sweden	2.1	India	0.6
15	Canada	0.6	0.5	20	Ukraine	37	Ukraine	22	UAE	15
16	Australia	0.6	0.3	88	Saudi Arabia	32	Chile	28	United States	11
17	Switzerland	0.5	1.0	-47	Canada	17	Spain	16	Australia	16
18	Ukraine	0.4	1.4	-73	China	59	Saudi Arabia	12	India	11
19	Norway	0.4	0.4	-16	United States	26	Ukraine	20	Lithuania	9.9
20	UAE	0.3	0.4	-24	Jordan	33	Egypt	26	Algeria	10
21	South Africa	0.3	0.3	3.0	United States	24	UAE	23	India	13
22	Belgium	0.3	< 0.05	430	Saudi Arabia	38	Canada	25	Pakistan	22
23	Belarus	0.2	0.4	-34	Viet Nam	30	Serbia	22	Uganda	17
24	Brazil	0.2	0.2	-3.5	France	28	Nigeria	16	Portugal	16
25	Iran	0.2	0.1	276	Russia	75	Venezuela	16	Houthi (Yemen)	7.4

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

^a Percentages below 10 are rounded to one decimal place; percentages over 10 are rounded to whole numbers.

^b The rank order for suppliers in 2014–18 differs from that published in *SIPRI Yearbook 2019* because of subsequent revision of figures for these years.

Source: SIPRI Arms Transfers Database, Mar. 2024.

Table 6.3. The 10 largest suppliers of major arms and their recipients, by region, 2019–23

Figures are the percentage shares of the supplier's total volume of exports of major arms delivered to each recipient region in 2019–23.

	USA	France	Russia	China	Germany	Italy	UK	Spain	Israel	South Korea
Africa	1.7	4.0	10	9.9	3.5	4.4	0.1	2.1	5.9	0.3
Americas	1.2	6.7	–	0.4	5.3	7.6	26	13	12	5.0
Asia and Oceania	31	42	68	85	28	6.1	18	24	59	54
Europe	28	9.1	8.7	2.2	25	10	22	19	22	40
Middle East	38	34	13	2.5	39	71	31	41	–	1.4

– = no deliveries.

Note: Percentages below 10 are rounded to one decimal place; percentages over 10 are rounded to whole numbers. Figures may not always add up to 100% because of 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.

Source: SIPRI Arms Transfers Database, Mar. 2024.

A total of 28 per cent of US arms exports went to states in Europe in 2019–23, which was up from 11 per cent in 2014–18. US arms exports to the region increased by just over 200 per cent between the two periods. Ukraine accounted for 4.7 per cent of all US arms exports (see section I) and 17 per cent of those to Europe.

Deliveries of combat aircraft typically make up a significant part of the USA's total arms exports (see table 6.4). It delivered 420 combat aircraft in 2019–23. Of these, 249 were advanced F-35 aircraft, which were delivered to a total of 10 states and accounted for 24 per cent of all US arms exports. The USA has many pending arms export deliveries, including a total of 1071 combat aircraft (see table 6.1 in section I), of which 785 are F-35s.

The US sees arms transfers as an important foreign policy tool that it acknowledges has 'potential long-term implications for regional and global security', and has used that argument to play an active role in the disbursement of arms around the world.¹ While the USA sees Russia as a major threat, it sees China as a longer-term threat.² US military and foreign relations policies are strongly geared towards supporting allies and other partner states that perceive or actually face the same threats.³

¹ US Department of State, Bureau of Political-Military Affairs, 'Fiscal year 2023 US arms transfers and defense trade', Fact sheet, 29 Jan. 2024.

² Vergun D., 'Milley says war with China, Russia not inevitable', US Department of Defense, News, 23 Mar. 2023.

³ See e.g. US Department of State, 'US–Japan extended deterrence dialogue', Media note, 7 Dec. 2023.

Table 6.4. Deliveries by arms category by the 10 largest suppliers of major arms, 2019–23

Figures are the percentage share of each category of major arms in the suppliers' exports.^a

Arms category	USA	France	Russia	China	Germany	Italy	UK	Spain	Israel	South Korea	World total ^b
Aircraft	61	56	43	31	6.6	38	32	41	7.7	13	46
Combat aircraft ^c	45	38	34	25	0.4	18	24	4.2	2.7	12	31
Combat helicopters ^d	5.7	0.7	4.2	–	–	8.3	1.8	0.6	–	–	3.5
Air defence systems	3.6	1.7	9.0	3.0	5.1	0.1	0.8	0.2	15	–	3.7
Armoured vehicles	8.2	1.8	13	19	12	5.8	2.0	2.0	0.8	7.5	10
Artillery	0.4	1.1	0.1	2.9	1.5	0.9	3.9	1.0	4.3	35	1.8
Engines	2.0	4.6	14	0.2	9.5	0.2	13	–	–	–	4.3
Missiles	19	11	17	12	10	4.4	18	0.2	40	3.2	15
Naval weapons	0.9	0.3	1.0	–	–	2.8	–	–	1.3	–	0.7
Satellites	–	0.3	0.3	–	–	–	–	–	–	–	0.1
Sensors	3.9	3.4	2.5	1.6	7.9	3.3	1.3	2.1	20	–	4.3
Ships	0.6	20	–	31	47	44	7.0	54	3.9	42	13
Major surface warships ^e	–	5.5	–	26	19	39	–	34	–	22	6.8
Submarines	–	9.8	–	1.0	23	–	–	–	–	5.3	2.6
Other	<0.05	0.1	0.1	<0.05	–	–	23	0.1	7.0	–	1.2

– = no deliveries; <0.05 = between 0 and 0.05.

^a Percentages below 10 are rounded to 1 decimal place; percentages over 10 are rounded to whole numbers. On SIPRI's categories of major arms see box 6.1 in section I of this chapter.

^b 'World' is the share of each category for all suppliers globally.

^c Combat aircraft include combat/trainer aircraft and anti-submarine warfare aircraft.

^d Combat helicopters include anti-submarine warfare helicopters.

^e Major warships include aircraft carriers, corvettes, destroyers and frigates.

Source: SIPRI Arms Transfers Database, Mar. 2024.

France

France narrowly overtook Russia to become the world's second largest exporter of major arms in 2019–23. French arms exports represented 11 per cent of all arms transfers in this period, having increased by 47 per cent between 2014–18 and 2019–23. France delivered major arms to 64 states in 2019–23, but India was by far the largest recipient, accounting for 29 per cent of French arms exports. The bulk of France's arms exports in 2019–23 went to states in Asia and Oceania (42 per cent of arms exports) and the Middle East (34 per cent).

France perceives arms exports are perceived as essential to maintaining its autonomous national arms production, since exports increase the production run and therefore reduce per unit costs. Under President Emmanuel Macron, however, France has also strived to position its arms industry in the frame-

work of European strategic autonomy by promoting its arms exports to other European states.⁴ However, in the last 30 years European states accounted for only 11 per cent of France's total arms exports and in 2019–23 for only 9.1 per cent. More than half of its European arms exports (53 per cent) in 2019–23 went to Greece, mostly in the form of 17 Rafale combat aircraft.

A sharp rise in deliveries of Rafale combat aircraft accounted for most of the growth in French arms exports in 2019–23. France's export of 23 Rafales in 2014–18 increased to 94 in 2019–23, representing just under one third (31 per cent) of the volume of French arms exports in the latter period. A further 193 Rafales were on order for export as at the end of 2023. However, most of the aircraft France has already delivered (96 out of 117) and those still to be delivered (178 out of 193) are for states outside Europe—Egypt, India, Indonesia, Qatar and the United Arab Emirates (UAE). This highlights the challenge France faces in selling its major arms to European states, especially in the context of the strong competition from the USA (and the fact that five major users of combat aircraft in Europe—Germany, Italy, Spain, Sweden and the UK—also produce combat aircraft that cover most of their needs). Notably, 8 out of the 10 European states that preselected or ordered combat aircraft in 2019–23 opted for US F-16s or F-35s, with only Croatia and Greece opting for the Rafale.

In addition to building up its sales of combat aircraft, France increased its exports of military ships (and the weapons to arm them) by 14 per cent between 2014–18 and 2019–23.

In view of the high volume of pending arms deliveries from France (including 223 combat aircraft and 20 major warships), France is set to remain the second largest global arms exporter in the coming years.

The Russian Federation

Russia's arms exports fell by 53 per cent between 2014–18 and 2019–23 and it accounted for 11 per cent of total global arms exports. It delivered major arms to 41 states and 1 non-state armed group (the Tobruk-based House of Representatives, one of two competing governments in Libya) in 2019–23.

In 2019 the annual volume of Russian arms exports was at a similar level to that in each of the preceding 20 years. However, the export volumes in 2020, 2021 and 2022 were at much lower levels than in 2019, and in 2023 the volume was 52 per cent lower than in 2022. Another indication of the decline of Russia as a global supplier of arms is that whereas 31 states received major

⁴ French Government, 'Revue nationale stratégique 2022' [National strategic review, 2022], 9 Nov. 2022, p. 41; and Parly, F., 'Déclaration de Mme Florence Parly, ministre des armées, sur les exportations d'armement de la France, à Paris le 1er juin 2020' [Statement by Ms Florence Parly, Minister of the Armed Forces, on France's arms exports, in Paris on 1 June 2020], 1 June 2020.

arms from Russia in 2019, only 14 did in 2022 and that number fell to 12 in 2023. The demand for arms by Russia's own armed forces for use in Ukraine might partly account for these shrinking exports, especially during 2022–23. But the ongoing Russia–Ukraine war is also constraining Russia's ability to export arms in other ways. The wide-ranging trade restrictions imposed on Russia by other states is impacting Russia's ability to acquire components and receive payments for exported arms. Moreover, the USA and its allies have applied pressure on states not to acquire Russian arms.⁵

States in Asia and Oceania received 68 per cent of total Russian arms exports in 2019–23, while Middle Eastern and African states received 13 per cent and 10 per cent respectively. Just under two thirds of Russian arms exports went to three states in 2019–23: India (34 per cent), China (21 per cent) and Egypt (7.5 per cent). India was also the largest recipient of Russian arms in 2014–18, but exports to India decreased by 34 per cent between 2014–18 and 2019–23, while exports to China decreased by 39 per cent and to Egypt by 54 per cent. The decrease in exports to India and China is largely related to both countries achieving greater domestic autonomy in arms production (as well as India shifting its sourcing of arms to other suppliers), as described in section III.

Algeria and Viet Nam were the third and fourth largest recipients of Russian arms in 2014–18; however, exports to Algeria (–83 per cent) and Viet Nam (–91 per cent) dropped significantly between the two periods.

The main Russian arms exporting organization, Rosoboronexport, claimed that at the end of 2023 the portfolio of orders for export of military equipment had reached a record for the past 23 years.⁶ However, the low volume of known pending deliveries of major arms from Russia suggests that Russian arms exports are likely to remain well below the level reached in 2014–18, for at least the short term.

China

China was the fourth largest arms exporter in 2019–23 when it accounted for 5.8 per cent of total global arms exports. Its arms exports decreased by 5.3 per cent compared to 2014–18. The bulk of Chinese arms exports (85 per cent) went to states in Asia and Oceania, followed by states in Africa (9.9 per cent). China delivered major arms to 40 states in 2019–23, but well over half of its arms exports (61 per cent) went to just one state—Pakistan (see section III). Bangladesh was the second largest recipient (11 per cent) and here China

⁵ On the trade restrictions on Russia see chapter 12, section II, in this volume. On the impact of those trade restrictions on Russian arms production see chapter 5, section IV, in this volume. See also Wezeman, S. T. and Wezeman, P. D., 'Global trends in arms transfers, 2018–22', *SIPRI Yearbook 2023*, pp. 213–14, 218–21; and Wezeman, S. T. and Wezeman, P. D., 'Developments among the suppliers of major arms, 2018–22', *SIPRI Yearbook 2023*, pp. 227–29.

⁶ 'Rosoboronexport says portfolio of orders at record high \$55 bln', TASS, 5 Feb. 2024.

has accounted for some 70 per cent of Bangladesh's imports for all five-year periods since 2004–2008. China's third largest client in 2019–23 was Myanmar (6.7 per cent) but here China has been vying with Russia as main arms supplier since the 1990s (see section III).

Germany

Arms exports by Germany made up 5.6 per cent of the global total in 2019–23. They were 14 per cent lower than in 2014–18, but 7.7 per cent higher than in 2009–13. States in the Middle East received the largest share of all German arms exports in 2019–23 (39 per cent), followed by states in Asia and Oceania (28 per cent) and Europe (25 per cent).

While year-on-year arms transfer trends may be misleading, German arms exports in 2023 were much higher than in 2019–22 and just below the highest volume since the end of the cold war, as recorded in 2007. The high level in 2023 was mainly due to a surge in arms deliveries to Ukraine, especially air defence systems, tanks and armoured vehicles, and deliveries of two frigates to Egypt, two frigates to Israel, two submarines to Singapore and one submarine to Türkiye.

Ships and armoured vehicles have long been the categories of major arms that account for the bulk of German arms exports. In contrast to exports of the other four arms exporters in the top five, combat aircraft account for very little of German arms exports. Germany is involved in the joint production of the Typhoon combat aircraft (with Italy, Spain and the UK), but has not exported the aircraft since it delivered 15 to Austria in 2009, under the terms of the specific agreements about which partners are responsible for marketing and final assembly of the Typhoon to specific parts of the world. Instead, Italy and the UK have been responsible for export contracts of 136 Typhoons since 2007, even though German companies supplied many components for these aircraft.

Italy

Italy accounted for 4.3 per cent of the world's arms exports in 2019–23. Its arms exports were 86 per cent higher in 2019–23 than in 2014–18. A total of 71 per cent of Italian arms exports went to the Middle East. Three states accounted for 61 per cent of Italian arms exports: Qatar (27 per cent), Egypt (21 per cent) and Kuwait (13 per cent). The rapid rise of Italian arms export was on the result of a few large contracts with these three states, which included the delivery in 2019–23 of four frigates and two corvettes to Qatar, two frigates to Egypt, and 13 combat aircraft to Kuwait.

The United Kingdom

Arms exports by the UK decreased by 14 per cent between 2014–18 and 2019–23. The overall drop is because exports to Saudi Arabia, which accounted for 5.3 per cent of British arms exports in 2019–23, decreased by 90 per cent from 2014–18 (when they accounted for 44 per cent of British exports). During 2014–18, the UK delivered 38 Typhoon advanced combat aircraft, which accounted with their armament for almost 90 per cent of British exports to Saudi Arabia. No Typhoon were delivered after 2018, in part due to Germany banning arms supplies to Saudi Arabia—halting a planned Saudi order of 48 Typhoon aircraft in 2019—in response to Saudi Arabia’s military operations in Yemen and its involvement in the murder of journalist Kamal Kashoggi in 2018.⁷ However, in response to Saudi Arabia’s ceasefire efforts with the Houthis and its diplomatic efforts to stop escalation of the Israel– Hamas war, Germany reconsidered its foreign policy priorities and lifted some of these arms restrictions in 2023, possibly opening the way for a potential new order for Typhoons from the UK.⁸

The largest share of British exports in 2019–23 was to Qatar (23 per cent). The first major arms order from Qatar since 1996 was in 2015. Since then, there have been orders for missiles, bombs and aircraft, including Hawk-100s and Typhoons.

By the end of 2023, existing orders for British arms indicated its exports were unlikely to increase soon. The UK has significant naval orders in the pipeline including 29 frigates on order by Australia (9), Canada (15), Indonesia (2) and Poland (3), and three nuclear-powered submarines by Australia, but these are mainly for delivery in the 2030s and early 2040s.

Spain

Arms exports by Spain decreased by 3.3 per cent between 2014–18 and 2019–23. Ships (mainly four frigates to Saudi Arabia, one destroyer to Australia and one large amphibious ship/aircraft carrier to Türkiye) accounted for 53 per cent of the total volume of Spain’s exports, and transport aircraft for 35 per cent. However, with few outstanding deliveries of large major arms, the volume of exports is likely to decrease further in the coming years.

⁷ See Wezeman, S. T., Kuimova, A. and Wezeman, P. D., ‘Developments in arms transfers, 2016–20’, *SIPRI Yearbook 2021*, p. 297; Von der Burchard, H., ‘Germany loosens arms export restrictions to Saudi Arabia—but not on fighter jets’, *Politico*, 12 July 2023; Hille, P., ‘Germany makes U-turn on weapons deliveries to Saudi Arabia’, *Deutsche Welle*, 10 Jan. 2024; and ‘Germany rewards Saudi Arabia for its ‘constructive’ Israel stance by lifting arms export ban’, *Middle East Eye*, 8 Jan. 2024.

⁸ Von der Burchard (note 7).

Box 6.2. Financial aspects of arms transfers

Arms exports are often pursued for economic reasons, including to gain income directly from foreign trade and to increase production runs to decrease per unit costs for indigenous acquisitions. For some states, especially smaller producers, these economic benefits of arms exports are important, whereas for larger producers the economic benefits may be outweighed by other considerations that may limit arms exports. To support better understanding of such economic drivers, SIPRI collects and publishes data on the financial value of arms trade in addition to the SIPRI arms transfers trend-indicator values.

The governments of most of the main arms-exporting states publish financial data on arms exports. According to SIPRI's statistics on arms transfers, states that produce official data on the financial value of their arms exports accounted for over 90 per cent of the total volume of deliveries of major arms. There are significant limitations in using this data. One issue is that there is no internationally agreed definition of what constitutes 'arms' and governments thus use different lists that are not always transparent nor consistent over time. Another issue is that some states report on what they call export 'agreements', others on export licences issued or used, while other states report actual exports; and also these methodologies may change over time. However, the data can be used to obtain rough indications of the relative importance of arms exports for a national economy and globally.^a

The estimate of the financial value of the global international arms trade for 2022—the latest year for which relevant data is available—was at least \$138 billion. The data suggests a significant real-term increase over time from at least \$125 billion in 2013 (in constant 2022 US dollars).

Despite the increase, the estimated value of the global arms trade remains only a fraction of the total trade: for 2022 it was less than 0.5 per cent of the value of the total global trade of all products and services.^b

^a For an explanation of SIPRI's methodology for this data set, the various issues with official financial data on arms exports, and data for the period 1994–2022, see SIPRI, 'Financial value of the global arms trade', SIPRI Databases, [n.d.].

^b The value of the total global trade in all products and services in 2022 was \$32.1 trillion. World Trade Organization (WTO), *Global trade Outlook and statistics* (WTO: Geneva, Apr. 2023), p. 11.

Israel

Arms exports by Israel decreased by 25 per cent between 2014–18 and 2019–23. In 2019–23 most of Israel's exports of major arms went to countries in Asia and Oceania (59 per cent), with India accounting for 37 per cent and the Philippines for 12 per cent.

The drop in Israeli arms exports should not be seen as a trend, however. The exports in 2019–23 were still substantially higher than in any five-year period between 1994 and 2013, and interest in Israeli major arms remains high. While Israeli arms exports to Europe decreased by 34 per cent, Europe's increased demand for weapons in response to Russia's 2022 full-scale invasion of Ukraine has benefited Israel's arms industry. In 2023 Germany purchased Israel's advanced Arrow-3 air-defence/anti-ballistic missile system, and several other European states bought Israeli artillery and long-range land-attack missiles as well as anti-tank missiles.

Following normalization of relations between Israel and some states in the Middle East and North Africa under the Abraham Accords signed in 2020, there have been several orders from those states for Israeli major arms. Official Israeli data on the financial value of arms export agreements (see box 6.2) also show an increase in orders from the Abraham Accords states, accounting for 24 per cent of all orders (not deliveries) in 2022.⁹ These orders included surface-to-air missile (SAM) systems, satellites and uncrewed aerial vehicles (UAVs) to Morocco, and SAM systems to the UAE. Deliveries of the SAM systems to Morocco started in 2022.

South Korea

Arms exports by South Korea increased by 12 per cent between 2014–18 and 2019–23, giving it a 2.0 per cent share of the global total in 2019–23. Asia and Oceania remained the main recipient region, accounting for 54 per cent of South Korean exports in 2019–23. However, exports to Europe have doubled between 2014–18 and 2019–23, and accounted for 40 per cent of South Korea's exports in 2019–23. Most new orders signed in the last five years are also from European states. South Korea aims to become one of the top arms exporters within a few years, and government credits to buyers of South Korean arms are an important component of this policy. However, exports orders in recent years have outgrown the budget for credits and a substantial increase of that budget is planned for early 2024.¹⁰

Other exporters

Most of the 56 exporting states ranked lower than 10 exported only small volumes of major arms. Only 2 accounted for more than 1 per cent each of the global total of exports (Türkiye with 1.6 per cent and Netherlands with 1.2 per cent) and 27 accounted for only 0.1 per cent or less each. Many of the smaller exporters have well-established arms industries and have exported substantial volumes of major arms for many decades, sometimes even being among the top 10 exporters (e.g. the Netherlands and Sweden). However, a few are relative newcomers among both producers and exporters, and several of these have adopted active export policies with ambitions to rapidly become a major, possibly a top 10, exporter. These include Türkiye, India and

⁹ Fabian, E., 'Israeli arms sales doubles in a decade, hit new record of \$12.5 billion in 2022', *Times of Israel*, 14 June 2023.

¹⁰ Kim, H-K, 'Hanwha expected to sign \$751 mn howitzer deal with Romania', *Korea Economic Daily*, 26 Feb. 2024; Lee, J. and Kim, C., 'Financing uncertainty clouds South Korea's push for massive arms deals', *US News*, 7 Feb. 2024; and Yi, W., 'New Polish FM vows to respect defense deal with Seoul signed under previous gov't', *Yonhap News Agency*, 15 Mar. 2024. On South Korea's arms industry see chapter 5, section IV, in this volume.

Australia, currently the 11th, 16th and 28th exporters, respectively.¹¹ Of these, Türkiye is the most prolific exporter of major arms. From almost no exports of major arms in the 1990s, its exports more than doubled between 2009–13 and 2014–18, and did so again between 2014–18 and 2019–23. During those 15 years, Turkish arms exports went mainly to Asia and Oceania and to the Middle East, but in 2019–23 Africa also became an important destination (see section III). In 2019–23 Türkiye made headlines with its exports of armed UAVs, but its arms exports ranged much wider, from simple light armoured vehicles to advanced combat helicopters and frigates, all from local production. Despite having a larger arms industry than Türkiye and producing a wider variety of major arms, India has not been able to export as many weapons.

¹¹ ‘Turkey to allocate 150% more to defense budget in 2024—minister’, Reuters, 17 Oct. 2023; Verma, A., ‘Govt policies & incentives driving India’s defence manufacturing, R&D, exports’, *Economic Times*, 14 Nov. 2023; and Australian Department of Defence, ‘Defence export strategy’, 2018.