# III. Developments among the recipients of major arms, 2019–23

SIEMON T. WEZEMAN, KATARINA DJOKIC, MATHEW GEORGE, ZAIN HUSSAIN AND PIETER D. WEZEMAN

SIPRI has identified 170 states as importers of major arms in 2019–23. The top five arms importers—in descending order, India, Saudi Arabia, Qatar, Ukraine and Pakistan—received 35 per cent of total global arms imports in the period (see table 6.5). States in Asia and Oceania accounted for 37 per cent of all arms imports in 2019–23, followed by the Middle East (30 per cent), Europe (21 per cent), the Americas (5.7 per cent) and Africa (4.3 per cent) (see figure 6.2 and table 6.6).

In addition to the 170 importing states, two international organizations—the North Atlantic Treaty Organization (NATO) and the African Union—and non-state armed groups in Libya, Syria and Yemen received major arms in 2019–23. Of these, only NATO received a significant volume (0.7 per cent of the global total).

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

## Africa

Imports of major arms by African states fell by 52 per cent between 2014–18 and 2019–23.[1] The decrease was largely due to strong decreases in the arms imports of the two largest importers in the region, Algeria (−77 per cent) and Morocco (−46 per cent). The main suppliers to Africa in 2019–23 were the Russian Federation, accounting for 24 per cent of African imports of major arms, the United States (16 per cent), China (13 per cent) and France (10 per cent).

### *Sub-Saharan Africa*

States in sub-Saharan Africa accounted for 2.2 per cent of all imports of major arms in 2019–23. Their combined arms imports were 9.0 per cent lower than in 2014–18. The three largest arms importers in the subregion in 2019–23 were Nigeria (with 16 per cent of sub-Saharan imports), Angola (9.2 per cent) and Senegal (9.2 per cent).

Sub-Saharan Africa receives major arms from a diverse set of suppliers vying to build up influence in the subregion. With a 19 per cent share of subregional arms imports, China narrowly overtook Russia, which had a 17 per cent share, to become the largest supplier of major arms to sub-Saharan

[1] Note that Africa does not include Egypt, which SIPRI counts as part of the Middle East.

**Table 6.5.** The 40 largest importers of major arms and their main suppliers, 2019–23

| Rank | | | Share of total global imports (%)[a] | | Change in volume (%) from 2014–18 to 2019–23[b] | Main suppliers and their share of importer's total imports (%), 2019–23[a] | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 2019–23 | 2014–18 | Importer | 2019–23 | 2014–18 | | 1st | | 2nd | | 3rd | |
| 1 | 2 | India | 9.8 | 9.1 | 4.7 | Russia | 36 | France | 33 | United States | 13 |
| 2 | 1 | Saudi Arabia | 8.4 | 11 | −28 | United States | 75 | France | 7.1 | Spain | 7.0 |
| 3 | 20 | Qatar | 7.6 | 1.5 | 396 | United States | 45 | France | 25 | Italy | 15 |
| 4 | 80 | Ukraine | 4.9 | 0.1 | 6633 | United States | 39 | Germany | 14 | Poland | 13 |
| 5 | 10 | Pakistan | 4.3 | 2.9 | 43 | China | 82 | Sweden | 4.0 | Türkiye | 3.8 |
| 6 | 19 | Japan | 4.1 | 1.5 | 155 | United States | 97 | United Kingdom | 1.8 | Germany | 0.4 |
| 7 | 3 | Egypt | 4.0 | 5.3 | −26 | Germany | 27 | Italy | 22 | Russia | 20 |
| 8 | 6 | Australia | 3.7 | 4.6 | −21 | United States | 80 | Spain | 15 | Switzerland | 2.3 |
| 9 | 11 | South Korea | 3.1 | 2.8 | 6.5 | United States | 72 | Germany | 15 | France | 9.3 |
| 10 | 4 | China | 2.9 | 4.9 | −44 | Russia | 77 | France | 13 | Ukraine | 8.2 |
| 11 | 15 | United States | 2.8 | 1.6 | 67 | United Kingdom | 25 | Netherlands | 12 | France | 10 |
| 12 | 28 | Kuwait | 2.7 | 1.0 | 169 | United States | 70 | Italy | 20 | France | 8.6 |
| 13 | 16 | United Kingdom | 2.4 | 1.6 | 41 | United States | 89 | South Korea | 4.0 | Israel | 2.7 |
| 14 | 7 | UAE | 2.4 | 3.3 | −31 | United States | 57 | Türkiye | 9.9 | France | 9.2 |
| 15 | 14 | Israel | 2.1 | 2.0 | 5.1 | United States | 69 | Germany | 30 | Italy | 0.9 |
| 16 | 57 | Netherlands | 1.9 | 0.2 | 751 | United States | 99 | Finland | 0.6 | Germany | 0.6 |
| 17 | 13 | Türkiye | 1.6 | 2.2 | −29 | Spain | 31 | Italy | 23 | Russia | 15 |
| 18 | 33 | Norway | 1.6 | 0.8 | 92 | United States | 89 | South Korea | 4.8 | Italy | 3.6 |
| 19 | 42 | Poland | 1.6 | 0.4 | 253 | United States | 45 | South Korea | 34 | United Kingdom | 4.4 |
| 20 | 24 | Singapore | 1.5 | 1.3 | 17 | Germany | 32 | France | 27 | United States | 26 |
| 21 | 5 | Algeria | 1.1 | 4.8 | −77 | Russia | 48 | Germany | 15 | China | 14 |
| 22 | 40 | Philippines | 1.0 | 0.5 | 105 | South Korea | 37 | Israel | 28 | United States | 14 |
| 23 | 12 | Indonesia | 1.0 | 2.4 | −60 | United States | 27 | South Korea | 18 | France | 17 |
| 24 | 21 | Italy | 0.9 | 1.4 | −37 | United States | 95 | Germany | 1.8 | France | 1.4 |
| 25 | 29 | Greece | 0.9 | 0.9 | −4.2 | France | 58 | United States | 21 | United Kingdom | 11 |

| | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 26 | 25 | Bangladesh | 0.9 | 1.2 | −31 | China | 72 | Türkiye | 9.7 | United Kingdom | 5.5 |
| 27 | 36 | Brazil | 0.8 | 0.6 | 26 | France | 40 | Sweden | 23 | Italy | 13 |
| 28 | 26 | Thailand | 0.8 | 1.1 | −30 | China | 44 | South Korea | 13 | United States | 9.9 |
| 29 | 22 | Morocco | 0.8 | 1.4 | −46 | United States | 69 | France | 14 | Israel | 11 |
| 30 | 100 | NATO[c] | 0.7 | <0.05 | 1638 | France | 68 | United States | 17 | United Kingdom | 15 |
| 31 | 69 | Bahrain | 0.7 | 0.1 | 562 | United States | 93 | Türkiye | 3.0 | Italy | 1.9 |
| 32 | 56 | Romania | 0.6 | 0.2 | 180 | United States | 71 | Switzerland | 11 | Portugal | 6.3 |
| 33 | 30 | Kazakhstan | 0.6 | 0.9 | −30 | Russia | 94 | France | 1.4 | Spain | 1.4 |
| 34 | 58 | Germany | 0.6 | 0.2 | 188 | United States | 63 | Israel | 16 | United Kingdom | 5.7 |
| 35 | 27 | Canada | 0.6 | 1.1 | −44 | Australia | 32 | United States | 27 | Spain | 22 |
| 36 | 54 | France | 0.6 | 0.3 | 112 | United Kingdom | 38 | United States | 20 | Italy | 18 |
| 37 | 51 | Denmark | 0.6 | 0.3 | 99 | United States | 70 | Switzerland | 16 | Germany | 10 |
| 38 | 34 | Myanmar | 0.6 | 0.7 | −20 | Russia | 38 | China | 26 | India | 18 |
| 39 | 63 | New Zealand | 0.5 | 0.1 | 338 | United States | 69 | South Korea | 12 | United Kingdom | 11 |
| 40 | 47 | Belarus | 0.5 | 0.4 | 30 | Russia | 100 | . . | . . | . . | . . |

. . = not applicable; <0.05 = between 0 and 0.05; NATO = North Atlantic Treaty Organization; 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 importers 2014–18 differs from that published in *SIPRI Yearbook 2019* because of subsequent revision of figures for these years.
[c] The data is for imports by the organization itself, not the total imports by NATO member states.

*Source*: SIPRI Arms Transfers Database, Mar. 2024.

**Table 6.6.** Imports of major arms, by region and subregion, 2014–18 and 2019–23

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

| Recipient region | Volume of imports (TIV, in millions) | | Change in volume (%) from 2014–18 to 2019–23[b] | Share of total imports (%)[b] | |
|---|---|---|---|---|---|
| | 2014–18 | 2019–23 | | 2014–18 | 2019–23 |
| *Africa* | 12 736 | 6 081 | *–52* | *8.8* | *4.3* |
| North Africa | 9 379 | 3 018 | *–68* | *6.5* | *2.2* |
| Sub-Saharan Africa | 3 355 | 3 053 | *–9.0* | *2.3* | *2.2* |
| *Americas* | 8 538 | 7 925 | *–7.2* | *5.9* | *5.7* |
| Central America and the Caribbean | 1 356 | 447 | *–67* | *0.9* | *0.3* |
| North America | 3 920 | 4 837 | *23* | *2.7* | *3.5* |
| South America | 3 262 | 2 641 | *–19* | *2.3* | *1.9* |
| *Asia and Oceania* | 59 521 | 52 324 | *–12* | *41* | *37* |
| Central Asia | 2 409 | 1 559 | *–35* | *1.7* | *1.1* |
| East Asia | 15 767 | 14 798 | *–6.1* | *11* | *11* |
| Oceania | 6 795 | 6 112 | *–10* | *4.7* | *4.4* |
| South Asia | 20 533 | 21 896 | *6.6* | *14* | *16* |
| South East Asia | 14 017 | 7 957 | *–43* | *9.7* | *5.7* |
| *Europe* | 15 441 | 29 991 | *94* | *11* | *21* |
| Central Europe | 1 567 | 5 525 | *253* | *1.1* | *3.9* |
| Eastern Europe | 3 396 | 8 391 | *147* | *2.3* | *6.0* |
| Western Europe | 10 479 | 16 074 | *53* | *7.2* | *11* |
| *Middle East* | 48 282 | 42 544 | *–12* | *33* | *30* |
| *Other*[c] | 221 | 1 114 | *404* | *0.2* | *0.8* |
| **Total** | **144 740** | **139 978** | ***–3.3*** | | |

[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] Percentages below 10 are rounded to one decimal place; percentages over 10 are rounded to whole numbers.

[c] 'Other' refers to unidentified recipients or to international organizations that cannot be linked to a particular region.

*Source*: SIPRI Arms Transfers Database, Mar. 2024.

Africa in 2019–23. There were, however, notable decreases in imports of arms from both China (–23 per cent) and Russia (–44 per cent) between 2014–18 and 2019–23. France was the third largest supplier to sub-Saharan Africa in 2019–23 and had an 11 per cent share of subregional arms imports. Türkiye was the fourth largest supplier, with a share of 6.3 per cent, mostly due to its deliveries of combat helicopters to Nigeria and trainer/combat aircraft and uncrewed aerial vehicles (UAVs) to several states.

*Nigeria*

The volume of Nigeria's arms imports in 2019–23 decreased by 19 per cent in comparison to 2014–18, but remained at a relatively high level compared to the 1990s and early 2000s. Nigeria's significant increase in arms imports started at the beginning of the Boko Haram insurgency in 2009 but is also a reaction to growing destabilization and violence in other parts of the country.[2] The largest arms supplier in the 15-year period 2009–23 was China, accounting for 36 per cent of Nigeria's imports. The armament relationship with China was first established in 2005 with an order of 15 combat aircraft (delivered in 2010), and developed further from 2014 with deliveries of some 14 UAVs, 3 patrol vessels, 18 tanks, 380 other armoured vehicles and some artillery. However, in the same period Nigeria received arms from various suppliers, including Russia (15 per cent of total imports—but no deliveries since 2020), the USA (9.9 per cent), Italy (5.6 per cent), France (4.3 per cent), Pakistan (3.8 per cent) and Brazil (3.7 per cent). Nigeria's armament relationship with the USA seems to be recovering after the USA withheld arms sales to Nigeria in 2021 over concerns about possible human right abuses.[3] There are several pending orders from the USA at the end of 2023, including for 12 combat helicopters.

*Senegal*

Over the last 20 years Senegal went from a state with almost no imports of major arms to one of the largest importers in sub-Saharan Africa. Its imports of major arms in the period 2019–23 more than doubled in comparison with 2014–18 and were almost three times higher than the total imports over the 10-year period 2004–13. The most significant individual arms deal has been the procurement of three fast attack craft from France, two of which were delivered in 2023 (the third remains to be delivered). The Senegalese government has justified the enhanced arms procurement as being necessary to counter the threats of violent extremism in the Sahel region and to address challenges to maritime security, including piracy and drug trafficking.[4]

*Ethiopia*

Notwithstanding the intrastate conflict in the Tigray region (2020–22), Ethiopia's arms imports continued to decrease.[5] Their volume in the period 2019–23 was 6.2 per cent lower in comparison to 2014–18 and 69 per cent lower than in 2009–13. Almost all imported major arms in this period came from three suppliers, namely Russia (46 per cent), China (41 per cent) and Türkiye

[2] Nigerian Air Force, 'President Tinubu reaffirms commitment to end insecurity, inducts new combat helicopters into NAF inventory', 6 Feb. 2024. On armed conflict in Nigeria see Obadare, E., 'Escalating violence is putting Nigeria's future on the line', Council on Foreign Relations, 9 June 2022; and chapter 2, section I, in this volume.

[3] Oladipo, D. and Stone, M., 'Proposed US arms sale to Nigeria on "hold" over human rights concerns—sources', Reuters, 30 July 2021.

[4] Kaba, S., 'Allocution prononcée par monsieur Sidiki Kaba ministre des forces armées à l'occasion de la cérémonie de passage sous pavillon senegalais de l'OPV Walo' [Speech delivered by Mr Sidiki Kaba, Minister of the Armed Forces, on the occasion of the ceremony of passing the OPV Walo under the Senegalese flag], Senegalese Ministry of Armed Forces, 21 June 2023.

[5] On the armed conflict in Ethiopia see chapter 2, section I, in this volume.

(6.4 per cent). The most valuable equipment Ethiopia received between 2019 and 2023 were four Pantsyr air defence systems from Russia and 32 SH-15 155 mm self-propelled guns from China. However, low transparency of arms procurement makes it difficult to establish the actual volume of arms imports and types and numbers of major arms Ethiopia has received.

## The Americas

Arms imports by states in the Americas decreased by 7.2 per cent between 2014–18 and 2019–23. The USA (accounting for 50 per cent of the regional total), Brazil (15 per cent) and Canada (11 per cent) were the top three importers of major arms in the region in 2019–23.

In 2019–23, 89 per cent of US arms imports came from US allies, including 78 per cent from European allies. However, the volume of imports from Europe is only 19 per cent of US exports to Europe, indicating the continuing dependency in Europe on US military technologies.

Canada's arms imports decreased by 44 per cent between the two periods, but it has 102 combat aircraft (88 F-35A and 14 P-8A) from the USA and 15 frigates from the United Kingdom on order. These acquisitions are in line with the 2023 update of Canada's 2017 defence policy, which emphasised new challenges to Canada's security, especially in the Arctic, from China and Russia.[6]

Arms imports by states in South America decreased by 19 per cent between 2014–18 and 2019–23. This decrease is despite the two largest importers in 2019–23, Brazil (44 per cent of the subregional) and Chile (23 per cent), increasing their arms imports by 26 per cent and 39 per cent, respectively. Nonetheless, South American states have witnessed few large arms acquisition programmes due to the absence of major interstate conflicts or tensions.

Of Brazilian imports, 40 per cent came from France with its delivery in 2022 of a Scorpene submarine and associated torpedoes and missiles. Brazil's ongoing procurement programme of 40 Gripen-E combat aircraft, 8 of which were delivered between 2020–23, forms the bulk of the 23 per cent of imports from its second largest supplier, Sweden.

The main suppliers to South America in 2019–23 were France, providing 23 per cent of subregional imports, the USA (14 per cent) and the UK (12 per cent). While Russia delivered substantial volumes of major arms to South America between 2006 and 2017, it did not deliver any in 2019–23.

[6] Canadian Government, Standing Senate Committee on National Security, Defence and Veterans Affairs, 'Defence policy update', 19 Nov. 2023; and Edvardsen, A., 'Canada with defense policy update on the horizon', *High North News*, 23 Nov. 2023.

## Asia and Oceania

Imports of major arms by states in Asia and Oceania dropped by 12 per cent between 2014–18 and 2019–23, mainly because of a sharp drop in Chinese arms imports. However, it remained the region with the highest volume of arms imports and 6 of the world's 10 largest arms importers in 2019–23 were in Asia and Oceania: India, Pakistan, Japan, Australia, South Korea and China. The main suppliers to the region were the USA, with a 34 per cent share of regional imports, Russia (19 per cent) and China (13 per cent).

### *India and Pakistan*

India and Pakistan have been among the largest arms importers for decades, largely driven by tensions with each other and, in the case of India, more recently with China. For the 40-year period 1984–2023, India was by far the largest importer of major arms globally, with 8.7 per cent of the global total, while Pakistan was the eighth largest (with 2.9 per cent), and both continue to have major ongoing arms import programmes.

India's arms imports increased by 4.7 per cent between 2014–18 and 2019–23, making it again the world's biggest arms importer in 2019–23 with a 9.8 per cent share of all arms imports. Russia remained India's main supplier, but its share of Indian arms imports has shrunk from 76 per cent in 2009–13 to 58 per cent in 2014–18 and then to 36 per cent in 2019–23. India has instead looked to Western suppliers, most notably France and the USA, and its own arms industry to meet its demand for major arms. This shift is also visible in India's new orders, many of which have been placed with Western suppliers or India's own industry, and in its arms procurement plans, which do not appear to include any Russian options.

Arms imports by Pakistan grew by 43 per cent between 2014–18 and 2019–23, and accounted for 4.3 per cent of the global total, making it the fifth largest arms importer globally. Pakistan's imports in recent years have been higher than at any time since 1950. Pakistan's imports reached an all-time high in the decade 2009–13, more than double the level in all but one five-year period since 1954. Although Pakistan's arms imports dropped 41 per cent in 2014–18, they were still higher than in any period before 2009, and in 2019–23 returned to a level just 10 per cent less than in 2009–13. Pakistan continued to strengthen its arms procurement relationship with China: 82 per cent of its arms imports came from China in 2019–23, as against 69 per cent in 2014–18, and 51 per cent in 2009–13. Arms imports from the USA, still the second largest supplier to Pakistan in both 2009–13 and 2014–18, fell to only 0.3 per cent of Pakistan's imports in 2019–23, making it the 11th largest supplier to Pakistan. This decline in US exports to Pakistan reflects the worsening political relations between the two countries in recent years.[7]

*East Asia*

Arms imports by states in East Asia decreased by 6.1 per cent between 2014–18 and 2019–23. However, China, Japan and the Republic of Korea (South Korea) were among the top 10 importers of major arms globally in 2019–23, despite all having large indigenous arms industries.

The decrease in East Asia is largely due to the 44 per cent decrease in Chinese arms imports: China dropped from being the fourth largest arms importer in 2014–18, with a 4.9 per cent share of the global total, to the 10th largest in 2019–23, accounting for 2.9 per cent of the global total. As in all five-year periods since 1989, most Chinese arms imports in 2019–23 came from Russia (77 per cent). The drop in Chinese imports is to the result of China's growing ability to design and produce its own major arms. Its arms imports will probably continue to decrease as it further develops this capacity.

Both Japan and South Korea are expanding their military capabilities, mainly because of tensions with China and North Korea. Japan (155 per cent) and South Korea (6.5 per cent) increased their arms imports between 2014–18 and 2019–23. The USA is the main supplier to both states, accounting for 97 per cent of Japan's arms imports and 72 per cent of South Korea's. The two states are investing heavily in long-range strike capabilities. The USA supplied 29 combat aircraft to Japan and 34 to South Korea in 2019–23. Japan also ordered 400 long-range land-attack missiles from the USA in 2023, which for the first time will give Japan the capability to reach targets deep inside China or North Korea.

Taiwan's arms imports dropped by 69 per cent between 2014–18 and 2019–23 despite heightened tensions with China. The decrease was partly due to technical delays in the delivery of 66 F-16 combat aircraft that are on order from the USA.[8] The USA supplied over 99 per cent of Taiwanese arms imports in 2019–23, and it plans to make major deliveries to Taiwan over the next five years, including all 66 F-16 aircraft, 108 tanks and 460 anti-ship missiles as it sees the strengthening of Taiwan's abilities to defend against a potential attack by China of growing urgency.[9]

[7] Afzal, M., 'The Biden administration's two-track Pakistan policy misses the mark', Brookings Commentary, 2 Mar. 2023; and Kronstadt, K. A., 'Pakistan and US–Pakistan relations', Congressional Research Service Report, R47565, 22 May 2023.

[8] Garamone, J., 'US strengthening deterrence in Taiwan Strait', US Department of Defense (DOD) News, 19 Sep. 2023.

[9] Garamone (note 8).

*South East Asia*

Arms imports by South East Asian states fell by 43 per cent between 2014–18 and 2019–23. However, tensions, mainly with China, continued to drive arms acquisitions by many states in the subregion. For example, there was an increase in arms imports by the Philippines (105 per cent) and Singapore (17 per cent). Indonesia, Malaysia and Singapore all placed substantial orders for combat aircraft and ships in 2019–23. To a lesser degree in most cases, internal conflict and tensions also drove arms imports by several South East Asian states.

Several intrastate armed conflicts have been ongoing in Myanmar for decades, including one (against the Rohingya ethnic group) labelled by the United Nations special rapporteur on the situation of human rights in Myanmar as 'genocidal'.[10] These conflicts culminated, after a military coup, in the current civil war (2021 to date).[11] Myanmar depends on imports for almost all its major arms and accounted for 10 per cent of all South East Asian arms imports in 2019–23. Its arms imports in the period mainly came from Russia (38 per cent), China (26 per cent) and India (18 per cent). However, Austria, Belarus, Israel, South Korea and Ukraine also supplied major arms to Myanmar in that period. Imported arms were used extensively in the armed conflicts, raising questions about how the suppliers interpreted their stated policies and about the legality of the transfers in light of reported widespread and growing violations of the laws of war.[12]

*Oceania*

Arms imports by states in Oceania decreased by 10 per cent between 2014–18 and 2019–23. In this region only Australia (among the top 10 largest importers since 2009–13) and New Zealand have military forces of significance, and both see China as a growing military threat.[13]

Australia's arms imports dropped by 21 per cent between 2014–18 and 2019–23 as deliveries came to an end on some of its major arms procurement programmes of the last decade. However, the volume of imports in each of the three five-year periods since 2009 has been significantly higher than in any of the earlier five-year periods since 1950. Substantial orders for additional major arms have been placed in recent years, including for long-range

[10] United Nations, General Assembly, Report of the Special Rapporteur on the situation of human rights in Myanmar, A/78/527, 12 Oct. 2023.

[11] On the civil war in Myanmar see chapter 2, section I, in this volume.

[12] United Nations, Human Rights Council, 'The billion dollar death trade: The international arms networks that enable human rights violations in Myanmar', A/HRC/53/CRP.2, 17 May 2023; and Human Rights Watch, 'Myanmar: Military abuses against civilians intensify', News, 30 Jan. 2024.

[13] Australian Government, *National Defence: Defence Strategic Review* (Australian Government: Canberra, 2023); and Pearse, A., 'New Zealand's message to China in new defence strategy, minister rejects country on "path to war" ', *New Zealand Herald*, 4 Aug. 2023.

land-attack missiles (see section I). In 2023 Australia reached an agreement with the UK and the USA to import or produce under licence at least six and possibly eight nuclear-powered submarines in the 2030s and 2040s, adding to the modernization and expansion of Australia's naval capabilities during the last decade.[14]

New Zealand recorded a 338 per cent increase of arms imports in 2019–23, pushing its imports to the highest level since 1950. New Zealand accounted for 0.5 per cent of the global total in 2019–23, another record high for the country since 1950. Imports of four anti-submarine warfare aircraft from the USA, one support ship from South Korea, and missiles and radars for modernization of two frigates made up the bulk of the imports.

For both Australia and New Zealand, the USA was the main supplier in 2019–23 (accounting for 80 per cent and 69 per cent of imports, respectively), as it had also been in the decade before.

### Europe

Arms imports by states in Europe were 94 per cent higher in 2019–23 than in 2014–18. Ukraine received 23 per cent of the region's arms imports in 2019–23. It was, by far, the largest arms importer in Europe and the fourth largest in the world (see section I). The UK, which accounted for 11 per cent of European arms imports, and the Netherlands (9.0 per cent) were the next biggest arms importers in the region. A total of 55 per cent of European arms imports came from the USA in 2019–23, compared with 35 per cent in 2014–18. The next largest suppliers to the region were Germany and France, which accounted for 6.4 per cent and 4.6 per cent of European arms imports, respectively.

These high and increasing imports from the USA both contrast with and have been a driver for the efforts of the European Union (EU) to promote an EU defence technological and industrial base that can provide more EU autonomy in military technology, efforts which span more than two decades and which in 2022–23 gained more political support in the EU and several of its larger member states.[15]

[14] Briggs, P., 'How many nuclear-powered submarines for Australia?', *The Strategist*, 12 Oct. 2023; and Conroy, P., Australian Minister for Defence Industry, 'Address to the National Press Club', Canberra, 28 Nov. 2023.

[15] European Commission, 'Commission unveils significant actions to contribute to European defence, boost innovation and address strategic dependencies', 15 Feb. 2022; 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; and European Parliament, Directorate-General for External Policies, Policy Department, 'The impact of the "defence package" directives on European defence', Study EP/EXPO/B/SEDE/FWC/2013-08/Lot6/01, June 2015.

*West and Central European states*

Russia's initial invasion of Ukraine in 2014 increased the demand for arms in West and Central European states, especially for combat aircraft and air defence systems. For example, by the end of 2023 these states had ordered a total of 791 combat aircraft and combat helicopters from foreign suppliers, mainly the USA. In response to Russian missile attacks against Ukraine, many West and Central European states supplied air defence systems to Ukraine and several placed new import orders or accelerated existing procurement processes for them.[16] In 2023 Poland ordered 12 air defence systems from the USA, and Germany ordered a single but particularly high-value system from Israel. In 2022–23 Austria, Estonia, Latvia and Slovenia ordered air defence systems from Germany, while Finland and Slovakia ordered Israeli systems, and Lithuania and the Netherlands ordered Norwegian systems. In addition, some states ordered missiles for systems being produced domestically or as additional stocks for their existing systems. For example, in 2023 Poland and Norway ordered missiles from the UK and the USA, respectively, for their new indigenous systems, while Germany ordered 500 missiles and Romania 200, all from the USA, for their existing systems.

## The Middle East

Arms imports by states in the Middle East were 12 per cent lower in 2019–23 than in 2014–18. Three of the global top 10 arms-importing states in 2019–23 were in the Middle East: Saudi Arabia, Qatar and Egypt.

The USA accounted for 52 per cent of Middle Eastern arms imports. The next largest suppliers were France (12 per cent), Italy (10 per cent) and Germany (7.1 per cent). Exports from each of these four suppliers have grown since 2009–13, in both volume and share of the total Middle Eastern imports. Exports from Russia and China declined between 2009–13 and 2019–23. Those from Russia dropped by 55 per cent and its share declined from 16 per cent to 4.6 per cent, while those from China dropped 68 per cent and its share went down from 2.0 per cent to 0.5 per cent. Except for Syria and Iran, states in the region were solid clients of the USA and West European states, and all evidence from known orders and plans for major arms shows clearly that this will remain so in the foreseeable future.

*Egypt*

Egypt's arms imports decreased by 26 per cent between 2014–18 and 2019–23, having previously increased by 209 per cent between 2009–13 and 2014–18. It moved from being the third largest importer globally in 2014–18 to seventh

[16] On Russia's use of missiles in the Russia–Ukraine war see chapter 10, section III, in this volume.

in 2019–23. Egypt has for decades had a very diversified group of suppliers of major arms, and in 2019–23 imported major arms from 10 states, including from the five largest suppliers globally.

The largest suppliers to Egypt in 2019–23 were Germany (27 per cent of Egyptian arms imports), Italy (22 per cent), Russia (20 per cent), France (17 per cent) and the USA (6.5 per cent). Russia was Egypt's largest supplier (37 per cent) in 2009–13 and the second largest (31 per cent) in 2014–18, but has started to drop away as a supplier to Egypt—Russia still accounted for 20 per cent of Egypt's arms imports but delivered no major arms in 2021–23 and there are no known expected deliveries or new orders from Russia.

Against the backdrop of Egypt's tensions with Ethiopia over water from the Nile River and maritime disputes in the eastern Mediterranean, Egypt has significantly strengthened its long-range military capabilities.[17] In 2019–23 its imports included 3 frigates and 2 submarines from Germany; 2 frigates from Italy; 20 combat aircraft from Russia; and 3 frigates and long-range missiles from France. These added to imports in 2014–18 that included 23 combat aircraft and 2 frigates from France; 30 combat aircraft from Russia; 2 submarines from Germany; and 12 combat aircraft and 2 corvettes from the USA. By the end of 2023, Egypt's pending deliveries included 30 combat aircraft from France and one frigate from Germany.

*Iran*

Since around 1993 Iran's arms imports have been at a very low level relative to those of other arms importers in the Gulf region. Especially in the past 20 years, when the UN imposed an embargo on Iran that banned the supply of many major arms, Iran's imports were reduced largely to limited production under licence of some major arms of Russian and Chinese origin.[18] In the period 2004–23 Iran's arms imports were only 5.1 per cent of those of Saudi Arabia, its main adversary in the Gulf, and barely higher than those of tiny Bahrain.

There are indications that Iran's arms imports will grow significantly in the coming years, however. In 2023 Iran placed by far its largest import order for major arms in 20 years, for 24 Su-35S combat aircraft from Russia, the first significant procurement of combat aircraft since the early 1990s. This was in addition to a 2022 order for 24 Yak-130 trainer/combat aircraft from Russia, the first Iranian procurement of major arms after the expiration in 2020 of the UN arms embargo on Iran. The first two Yak-130 were delivered in 2023. Such delivery volumes are much smaller than those of many other Gulf

[17] See also Wezeman, S. T. and Wezeman, P. D., 'Developments among the recipients of major arms, 2018–22', *SIPRI Yearbook 2023*, p. 245; and Hall. N., 'Guardians of the Nile: No interstate war, no peace', Center for Strategic and International Studies, 11 July 2023.

[18] For the evolution of the UN arms embargo on Iran see SIPRI Arms Embargoes Database. See also chapter 8, section III, and chapter 12, section II, in this volume.

states: Saudi Arabia received 237 combat aircraft in the past 20 years and has 31 more on order, while the United Arab Emirates has ordered 80. Additional Iranian orders, including for S-400 surface-to-air missile (SAM) systems, combat helicopters and satellites, have been reported as being discussed with Russia but the status of these remained unclear by the end of 2023.[19] The Russian arms supplies and the discussions on more orders coincided with Iranian supplies of UAVs and missiles to Russia for use against Ukraine (see section I).

*Israel*

Between 2014–18 and 2019–23, arms imports by Israel rose marginally (5.1 per cent). As in any other period from the late 1960s, the USA was the main supplier of major arms to Israel, and in 2009–13 it accounted for 69 per cent of Israeli arms imports. Germany accounted for 30 per cent. Many of the deliveries from the USA and Germany were fully or partly as military aid. Israel has in recent years received almost $4 billion annually in US military aid, mostly in the form of 'Foreign Military Financing' which finances much of Israel's acquisitions of weapons from US production.[20] Germany has partly financed Israeli orders for German submarines and frigates.[21] Pending deliveries of major arms include 61 F-35 and F-15 combat aircraft and 12 AH-64 combat helicopters from the USA, and four Dolphin and Dakar submarines from Germany.

Imported weapons—in particular, F-15, F-16 and F-35 combat aircraft, and AH-64 combat helicopters and associated missiles and guided bombs received from the USA—have for years been used in Israel's military actions against Hamas and other militant groups in Gaza, against Hezbollah in Lebanon, and against Syria and Iranian forces in Syria. These weapons, as well as frigates recently imported from Germany, were also used in the Israel–Hamas war that reignited in 2023.[22] In addition, the USA has rapidly delivered thousands of guided bombs and missiles since October 2023 for use in Gaza and started discussions on additional military aid to Israel.[23]

[19] Avdaliani, E., 'Iran and Russia enter a new level of military cooperation', Stimson Commentary, 6 Mar. 2024.

[20] US Department of State, Bureau of Political-Military Affairs, 'US security cooperation with Israel', Fact sheet, 19 Oct. 2023.

[21] 'Israel to buy 3 submarines from Thyssenkrupp', Deustche Welle, 20 Jan. 2022; and Ben Zion, I., 'Israel buying 4 new warships from Germany, PM confirms', *Times of Israel*, 25 Dec. 2014.

[22] Decker, A., 'US rushed new F-35 capabilities to Israel after Hamas attack', Defense One, 12 Dec. 2023. See also chapter 10, section II, in this volume.

[23] Kampeas, R., '$14b US aid package for Israel crafted with eye to "multi-front war", not just Gaza', *Times of Israel*, 21 Feb. 2024.

*Qatar*

In 2019–23, Qatar was the third largest arms importer in the world, with a global share of 7.6 per cent, as its arms imports increased by 396 per cent between 2014–18 and 2019–23. Its main suppliers in 2019–23 were the USA, which accounted for 45 per cent of Qatari arms imports, France (25 per cent) and Italy (15 per cent). Qatar's arms imports in the period included 88 advanced combat aircraft (36 Rafale from France, 36 F-15QA from the USA and 16 Typhoon from the UK), as well as 4 frigates from Italy.

Qatar will remain a major importer for some years to come as it has substantial volumes of major arms, including 20 combat aircraft (12 F-15QA from the USA and 8 Typhoons from the UK) still on order, as well as plans for 24 combat aircraft and a fleet of almost 500 infantry fighting vehicles.[24]

*Saudi Arabia*

Saudi Arabia was the world's second largest arms importer in 2019–23, with an 8.4 per cent share of all arms imports. Its arms imports fell by 28 per cent after peaking at their highest point ever in 2014–18. The USA supplied 75 per cent of Saudi Arabian arms imports in 2019–23, which included the delivery of 67 combat aircraft and hundreds of land-attack missiles. The next biggest arms exporters to Saudi Arabia were France (7.6 per cent) and Spain (7 per cent).

In 2019–23 Saudi Arabia received air defence systems from the USA, notably three Patriot systems. It has also received other air defence systems from France (VL-MICA SAM system) and has more air defence systems on order from France, South Korea (Cheongung SAM system) and the USA (THAAD anti-ballistic missile system). These systems are partly to defend against missile attacks from Houthi forces in Yemen, and partly to deal with a perceived missile threat from Iran.

*Türkiye*

In 2019–2, Türkiye's arms imports accounted for 1.6 per cent of global arms imports and it was the 17th largest arms importer globally. This is a 23 per cent decrease from 2014–18 (when it ranked 13th). The four largest arms exporters to Türkiye in 2019–23 were Spain (31 per cent of Turkish arms imports), Italy (23 per cent), Russia (15 per cent) and Germany (14 per cent).

Türkiye is increasingly focusing on its domestic arms industry to become more independent of foreign arms, but still relies on imports of arms and parts, or licensed production, from and with other states to keep up with

[24] 'Qatar : vers une nouvelle commande de Rafale pour Dassault Aviation' [Qatar: Towards a new Rafale order for Dassault Aviation], *La Tribune*, 25 July 2023; 'Nexter back in the competition to supply its VBCI IFV to Qatar Army', Army Recognition, 9 Mar. 2023; Binnie, J., 'Qatar displays upgraded VAB APCs on exercise', *Jane's Defence Weekly*, 14 June 2023, p. 15.

its military priorities.[25] In 2019–23 the main arms imports included aircraft (accounting for 39 per cent of Turkish arms imports), ships (33 per cent) and missiles (11 per cent).

Turkish arms imports from some states decreased, especially from the USA. In 2014–18 US exports to Türkiye accounted for 57 per cent of Turkish arms imports, making it Türkiye's main arms supplier, but in 2019–23 US exports accounted for only 14 per cent. This decrease is partly due to tensions between the USA and Türkiye over the latter's acquisition of the S-400 SAM system from Russia in 2019, and their differing involvements in regional conflicts.[26] Despite these tensions, US arms-related transfers to Türkiye did not cease completely in 2019–23 and included helicopters, missiles and guided bombs for aircraft, as well as engines for Türkiye's locally designed major arms.

Türkiye's arms imports are motivated by military priorities that include security in the Black Sea, guarding its geopolitical interests in the Mediterranean, and its conflict with Kurdish armed groups in Iraq and Syria. For example, Türkiye has used F-16 combat aircraft to attack Kurdish militants in Syria.[27]

[25] Bastien, J., 'Turkey: An emerging global arms exporter. Growing competitiveness and strategic recalibration of the Turkish defense industry', Stiftung Wissenschaft und Politik (SWP) Comment no. 6/2024, Feb. 2024.

[26] Zanotti, J. and Thomas, C., 'Turkey: Background and US relations', Congressional Research Service Report R41368, 22 Dec. 2022.

[27] Iddon, P., 'Syrian Kurdish opposition to Turkish F-16 sale isn't first time Kurds worried about American fighter exports', *Forbes*, 30 Dec. 2023.