

# TRENDS IN INTERNATIONAL ARMS TRANSFERS, 2009

PAUL HOLTOM, MARK BROMLEY, PIETER D. WEZEMAN  
AND SIEMON T. WEZEMAN

## INTRODUCTION

The SIPRI Arms Transfers Database contains information on all international transfers of major conventional weapons to states, international organizations and armed non-state groups since 1950.<sup>1</sup> The database can be used to (a) monitor trends in the volume of transfers of major conventional weapons and (b) identify the quantity and types of weapons that have been transferred, broken down by supplier or recipient. This data can be used to answer such questions as:

- Who are the main suppliers and recipients of major conventional weapons?
- How have the relationships between different suppliers and recipients changed over time?
- Where do countries in conflict get their weapons from?
- How do states implement their export control regulations?
- Where are potentially destabilizing build-ups of weapons occurring today?

The SIPRI Arms Transfers Database is available online at <<http://www.sipri.org/databases/armstransfers>>. From 15 March 2010 it includes newly released information on arms transfers during 2009. This Fact Sheet describes the trends in international arms transfers that are revealed by the new data in the SIPRI Arms Transfers Database. It lists the main exporters and importers for the period 2005–2009 and describes the regional trends.

Since the volume of deliveries of arms can fluctuate significantly from one year to the next, SIPRI uses a five-year moving average to give a more stable measure of trends in international transfers of major conventional weapons. The trend for the decade 2000–2009 is shown in figure 1. The volume of international transfers of major conventional weapons for the period 2005–2009 was 22 per cent higher than for the period 2000–2004.

## THE MAIN SUPPLIERS OF MAJOR CONVENTIONAL WEAPONS, 2005–2009

The five biggest suppliers of major conventional weapons for the period 2005–2009 were the United States, Russia, Germany, France and the United

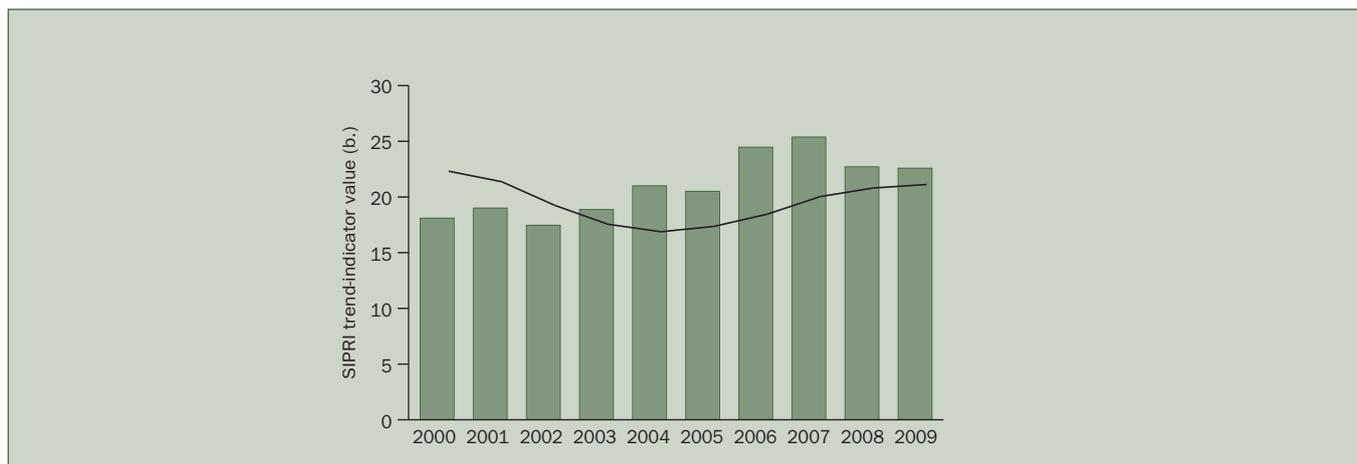
## SUMMARY

● The SIPRI Arms Transfers Database now contains information on all international transfers of major conventional weapons from 1950 to the end of 2009. It is the only publicly available resource providing consistent data on international arms transfers for this length of time. This Fact Sheet describes the trends that are revealed by the new data.

The volume of international transfers of major conventional weapons for the period 2005–2009 is 22 per cent higher than for the period 2000–2004. Combat aircraft accounted for 27 per cent of the volume of international arms transfers. These weapon systems are potentially destabilizing, and orders and deliveries have led to arms race concerns in regions of tension in Latin America, the Middle East, North Africa, South Asia and South East Asia.

The five biggest arms suppliers for the period 2005–2009 were the USA, Russia, Germany, France and the UK. The five biggest recipients were China, India, South Korea, the UAE and Greece. The volume of arms transferred to the two largest importers—China and India—decreased by 20 per cent and 7 per cent, respectively, in 2005–2009 in comparison with 2000–2004.

<sup>1</sup> The database does not cover international transfers of small arms.



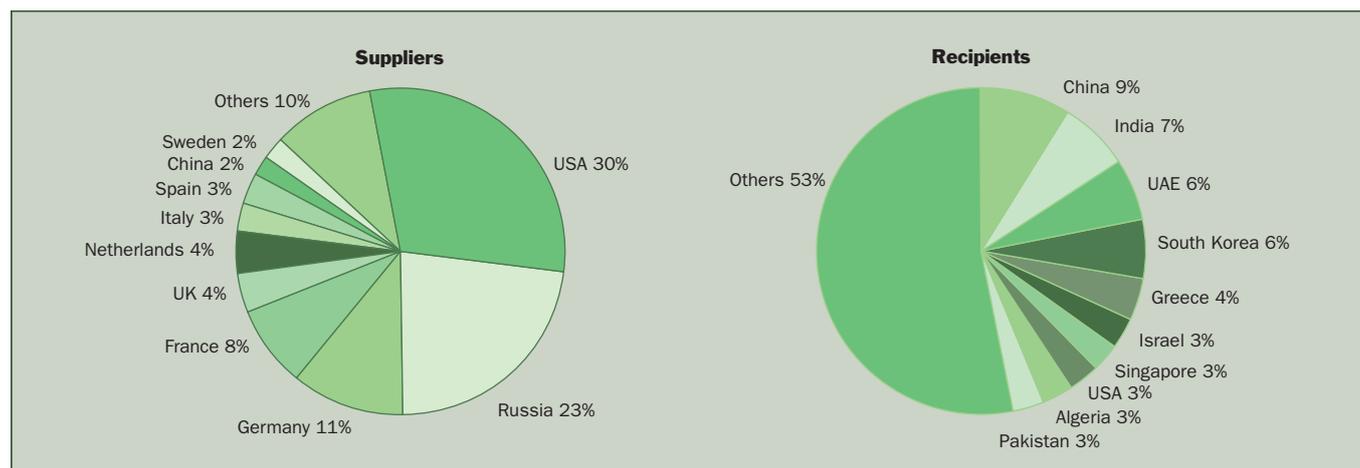
**Figure 1.** The trend in transfers of major conventional weapons, 2000–2009

The bar graph shows annual totals and the line graph shows the five-year moving average. Five-year averages are plotted at the last year of each five-year period. The SIPRI trend-indicator value gives an indication of the volume of international transfers of major conventional weapons. The method used to calculate the SIPRI trend-indicator value is described on the SIPRI Arms Transfers Programme website at <<http://www.sipri.org/research/armaments/transfers/measuring>>.

Kingdom (see table 1 and figure 2). The USA and Russia remained by far the largest exporters, accounting for 30 per cent and 23 per cent of all exports, respectively. The top five suppliers accounted for 76 per cent of exports of major conventional weapons in the period 2005–2009, compared with 80 per cent for the period 2000–2004.

- The USA delivered weapons to 70 countries and to NATO in the period 2005–2009, more than any other supplier. Asia and Oceania accounted for most US deliveries (39 per cent), followed by the Middle East (36 per cent) and Europe (18 per cent). Combat aircraft and associated weapons and components accounted for 48 per cent of the volume of US deliveries of major conventional weapons during this period. Deliveries included 72 F-16E combat aircraft to the United Arab Emirates, 52 F-16I combat aircraft to Israel and 40 F-15K combat aircraft to South Korea.
- Asia and Oceania accounted for 69 per cent of Russian arms exports for 2005–2009. Africa accounted for the second largest share of Russian exports: 14 per cent for 2005–2009, up from 10 per cent for 2000–2004. Combat aircraft accounted for 40 per cent of the volume of Russian arms exports for 2005–2009, including deliveries of 82 Su-30MKI combat aircraft to India, 28 Su-30MKKA combat aircraft to Algeria and 18 Su-30MKM combat aircraft to Malaysia. Russia has high hopes of securing an Indian order for 126 combat aircraft ahead of European and US supplier.
- The volume of Germany's arms exports increased by over 100 per cent between 2000–2004 and 2005–2009 and its share of the global market rose from 6 per cent to 11 per cent. Armoured vehicles accounted for 27 per cent of German exports for the period 2005–2009. Germany exported over 1700 armoured vehicles to 21 destinations, of which over 1100 were second-hand. While European recipients represent the main

***The volume of Germany's arms exports increased by over 100 per cent between 2000–2004 and 2005–2009***



**Figure 2.** The suppliers and recipients of major conventional weapons, 2005–2009

destinations, German armoured vehicles have also been delivered to states in Asia and Oceania and the Americas.

- The volume of France's arms exports increased by almost 30 per cent in 2005–2009 in comparison with 2000–2004. French exports have been boosted by deliveries of 25 Mirage-2000 combat aircraft to Greece and 34 to the United Arab Emirates (UAE), as well as ongoing deliveries of La Fayette frigates to Singapore. In September 2009 France reached final agreement with Brazil to supply 50 EC-725 helicopters, 4 conventionally powered submarines and some of the technology required for a nuclear-powered submarine. France is also confident of winning Brazil's long-standing competition for 36 combat aircraft.
- The UK saw a drop of around 13 per cent in the volume of its arms exports between 2000–2004 and 2005–2009. The 24th and final British-built Hawk trainer aircraft for India was delivered in 2009, along with the first 5 of 42 built under licence in India. In 2009 the UK began delivery of 72 Typhoon combat aircraft to Saudi Arabia.

### THE MAIN RECIPIENTS OF MAJOR CONVENTIONAL WEAPONS, 2005–2009

Although the list of five states that receive most major conventional weapons has changed much since 1950—more than that of the five largest suppliers—in recent years the composition of the list has remained relatively stable. The volume of arms transferred to the top five major recipients for the period 2005–2009 has increased by 4 per cent over 2000–2004, but the volume of arms transferred to the two largest importers for both periods, China and India, has decreased by 20 per cent and 7 per cent, respectively. The top five recipients accounted for 32 per cent of imports of major conventional weapons for the period 2005–2009, compared with 38 per cent for the period 2000–2004 (see table 2 and figure 2).

*The volume of arms transferred to China and India has decreased by around 20 per cent and 7 per cent, respectively*



**Table 1.** The top 5 suppliers of major conventional weapons and their largest recipients, 2005–2009

Supplier	Share of global arms exports (%)	Main recipients (share of supplier’s transfers)		
		1st	2nd	3rd
United States	30	South Korea (14%)	Israel (11%)	UAE (11%)
Russia	23	China (35%)	India (24%)	Algeria (11%)
Germany	11	Turkey (14%)	Greece (13%)	South Africa (12%)
France	8	UAE (25%)	Singapore (21%)	Greece (12%)
United Kingdom	4	United States (23%)	India (15%)	Saudi Arabia (10%)

**REGIONAL TRENDS IN MAJOR CONVENTIONAL WEAPON DELIVERIES, 2005–2009**

The regional breakdown of arms deliveries has remained relatively stable. The major recipient region for the period 2005–2009 Asia and Oceania, followed by Europe, the Middle East, the Americas and Africa.

**Asia and Oceania**

For the period 2005–2009 Asia and Oceania accounted for 41 per cent of imports of major conventional weapons. The volume of deliveries of major conventional weapons to Asian states increased by 11 per cent in 2005–2009 in comparison to 2000–2004. Transfers to North East Asia accounted for 46 per cent of transfers to Asia for 2005–2009, transfers to South East Asia for 20 per cent and those to South Asia for 27 per cent. Five of the ten largest importers for 2005–2009 are Asian states: China, India, South Korea, Singapore and Pakistan.

- Transfers of major conventional weapon systems to China have dropped significantly in the past three years. With the exception of a handful of helicopters from France and Russia, no major conventional weapons were delivered to China in 2009, although transfers (including via licensed production) of engines for aircraft, ships and armoured vehicles from Russia, Germany, Ukraine, France and the UK continue. The volume of deliveries to Taiwan remained low. However, orders were placed in 2009 for 4 new Patriot surface-to-air systems and the modernization of 3 more; new PAC-3 missiles, and 60 UH-60M transport helicopters from the USA.
- Deliveries to South East Asia nearly doubled in 2005–2009 compared to 2000–2004. Deliveries to Malaysia increased by 722 per cent in 2005–2009 compared to 2000–2004, for Singapore by 146 per cent and for Indonesia by 84 per cent. In 2009 Malaysia received 6 Su-30MKM combat aircraft with advanced missiles from Russia, 2 Scorpene submarines from France and Spain, 2 MEKO-200 frigates from Germany and 21 PT-91 tanks from Poland. Singapore received 8 F-15E combat aircraft with advanced air-to-air and air-to-ground missiles from the USA, 2 La Fayette frigates from France and 40 Leopard-2A4 tanks from Germany.
- The volume of deliveries to India and Pakistan has increased significantly in recent years and will continue to rise during the next five years. India

*Transfers of major conventional weapon systems to China have dropped significantly in the past three years*

**Table 2.** The top 5 recipients of major conventional weapons and their largest suppliers, 2005–2009

Recipient	Share of global arms imports (%)	Main suppliers (share of recipient's transfers)		
		1st	2nd	3rd
China	9	Russia (89%)	France (3%)	Ukraine (3%)
India	7	Russia (77%)	United Kingdom (8%)	Israel (5%)
South Korea	6	United States (66%)	Germany (20%)	France (10%)
UAE	6	United States (60%)	France (35%)	Germany (1%)
Greece	4	Germany (35%)	United States (26%)	France (23%)

continues to receive Su-30MKI combat aircraft and T-90S tanks from Russia and in 2009 received its first A-50 airborne early warning (AEW) aircraft, considered an important force-multiplier, from Israel. Pakistan received 2 Jiangwei (or F-22P) frigates, its first new major surface warship for many years, and the first of up to 300 JF-17 combat aircraft from China. It also received its first AEW aircraft, the Saab-2000AEW from Sweden.

## Europe

European states received 24 per cent of international transfers of major conventional weapons for the period 2005–2009, compared with 25 per cent for 2000–2004. Member states of the European Union (EU) accounted for 17 per cent of global arms imports over the period 2005–2009, with intra-EU transfers accounting for 60 per cent of those imports and imports from the USA for 29 per cent. The largest importer of major conventional weapons in Europe in recent years has been Greece.

- Greece remains among the top five largest recipient of major conventional weapons for 2005–2009, but has fallen from third place for 2000–2004. The transfer of 26 F-16C from the USA and 25 Mirage-2000-9 combat aircraft from France accounted for 38 per cent of the volume of Greek imports. Greece is to proceed with the licensed production of 3 Type-214 submarines, despite problems in 2009 with payments for these submarines to Germany.
- Russia ranked as the 80th largest importer of major conventional weapons for 2005–2009. In 2009 much attention was focused on Russian orders and plans to import major conventional weapons. In 2009 Russia ordered 10 UAVs from Israel and found France willing to permit the export of Mistral amphibious assault ships and technology to Russia.

## The Middle East

Middle Eastern states accounted for 17 per cent of international transfers of major conventional weapons for the period 2005–2009. Transfers to the region were 22 per cent higher in 2005–2009 than in 2000–2004. During 2005–2009, 33 per cent of all major arms transfers to the Middle East went to the UAE, 20 per cent to Israel and 13 per cent to Egypt.

- The UAE was the fourth largest arms importer worldwide for the period 2005–2009, mainly due to deliveries of 34 Mirage-2000 combat aircraft



from France and 72 F-16s from the USA. The UAE looks set to remain a major arms importer in the coming years based on orders that include 4 Patriot-3 surface-to-air missile systems, 6 C-17 transport aircraft, 40 UH-60M helicopters and 20 HIMARS multiple rocket launchers from the USA; 4 Baynunah corvettes and 3 A-330 MRTT tanker/transport aircraft from France; and up to 50 96K9 Pantsyr-S1 air defence systems from Russia.

- After almost a decade of a relatively low volume of imports of major conventional weapons, the volume of arms transferred to Saudi Arabia is likely to increase significantly. In 2009 it received the first 8 of 72 Eurofighter/Typhoon combat aircraft from the UK. Further major deliveries in coming years are 724 Piranha armoured vehicles from Canada, 6 A-330 multi-role tanker/transport (MRTT) aircraft from the European Airbus consortium, and 373 M-1A2S tanks and 12 AH-64D combat helicopters from the USA.
- Iran's arms imports remained low in 2009. It was the 29th largest recipient of major conventional weapons worldwide for 2005–2009. In 2007 it ordered 5 S-300PMU-1/SA-20A long-range surface-to-air missile systems from Russia, with delivery of the first systems due in 2009, but delivery has been delayed.

### **The Americas**

States in the Americas accounted for 11 per cent of imports of major conventional weapons over the period 2005–2009, the same as for 2000–2004. However, transfers to South America were 150 per cent higher in 2005–2009 than in 2000–2004, reflecting the significant upswing in both military spending and arms acquisitions in the region in recent years. The USA was the largest importer of conventional weapons in the Americas for the period 2005–2009 and the eighth largest in the world. Chile was the largest importer of conventional weapons in South America for the period 2005–2009 and the 13th largest in the world.

- Arms acquisitions by states in South America continued to be a source of tension, with several commentators again raising the spectre of a potential arms race in the region. In 2009 the Peruvian president, Alan Garcia Perez, called for a military non-aggression pact in South America and a commitment to decrease armament expenditure through mechanisms of transparency and confidence building.
- A number of states in South America are investing in tanks and armoured vehicles. In September 2009 Venezuela received \$2.2 billion in credit from Russia, which will be used to purchase an unknown quantity and type of air defence systems, artillery and armoured vehicles, as well as 92 T-72M1M tanks. In 2009 Brazil began to take delivery of 220 second-hand Leopard-1A5 tanks from Germany, while Chile completed the acquisition of 140 second-hand Leopard-2A4 tanks, also from Germany. In late 2009 Peru announced that it was planning to sign a deal for 80 MBT-2000 tanks from China.
- While the majority of major weapon systems are being sourced outside the region, South American companies are also benefiting from the increase in acquisitions. Chile and Ecuador have ordered Super Tucano



trainer/combat aircraft from Embraer of Brazil. In 2008 the Colombian armed forces used Super Tucano trainer/combat aircraft—ordered from Brazil in 2006—in an attack on a FARC camp in neighbouring Ecuador.

## Africa

African states accounted for 7 per cent of international imports of major conventional weapons over the period 2005–2009, compared with 6 per cent for 2000–2004. During the period 2005–2009, Algeria and South Africa were the two largest arms importers in Africa, accounting for 43 per cent and 28 per cent, respectively, of the region's imports. The third largest recipient of major conventional weapons was Sudan, which accounted for 5 per cent of Africa's imports. In several cases relatively small volumes of arms supplies to sub-Saharan African countries have had a major impact on regional conflict dynamics.

- Deliveries to Algeria in 2009 included the last of the 28 Su-30MK combat aircraft ordered from Russia in 2006. Two Type-636E/Kilo submarines and 4 S-300PMU-2/SA-20B and 38 96K9 Pantsyr-S1 air defence systems are also on order from Russia. Algeria's neighbours Libya and Morocco received much smaller volumes of arms during this period. However, Morocco is slated for major arms imports having ordered 24 F-16C combat aircraft from the USA, 1 FREMM frigate from France and 3 smaller SIGMA frigates from the Netherlands in 2008. Libya continues to discuss the procurement of combat aircraft, tanks and small warships with several potential suppliers.
- Worryingly, arms continue to flow to unstable parts of Africa. During 2005–2009, Sudan received armoured vehicles and military aircraft from Russia, China and Belarus. Ukraine continued deliveries of Su-25 combat aircraft to Chad in 2009 and completed the delivery of 110 T-72M tanks to Kenya, although rumours continue to circulate alleging that the Government of Southern Sudan remains the intended end-user. Kenya is also in the process of receiving 15 F-5E combat aircraft from Jordan and 4 Z-9WA combat helicopters from China.
- International concerns relating to the flow of major conventional weapons and small arms and light weapons (SALW) to areas of conflict in Africa are reflected by the fact that 7 of the 12 United Nations arms embargoes in force during 2009 had African targets. In December 2009 a UN arms embargo was imposed on Eritrea. However, the enforcement of these embargoes remains problematic. In 2009 the UN arms embargoes on entities in Côte d'Ivoire, the Darfur region of Sudan, the Democratic Republic of the Congo and Somalia were seriously violated.

*Relatively small volumes of arms supplies to sub-Saharan African countries have had a major impact on regional conflict dynamics*

**SIPRI is an independent international institute dedicated to research into conflict, armaments, arms control and disarmament. Established in 1966, SIPRI provides data, analysis and recommendations, based on open sources, to policymakers, researchers, media and the interested public.**

### **GOVERNING BOARD**

Ambassador Rolf Ekéus,  
Chairman (Sweden)  
Dr Alexei G. Arbatov (Russia)  
Ambassador Lakhdar Brahimi  
(Algeria)  
Jayantha Dhanapala  
(Sri Lanka)  
Dr Nabil Elaraby (Egypt)  
Ambassador Wolfgang  
Ischinger (Germany)  
Professor Mary Kaldor  
(United Kingdom)  
The Director

### **DIRECTOR**

Dr Bates Gill (United States)

### **ABOUT THE SIPRI ARMS TRANSFERS PROGRAMME**

The **SIPRI Arms Transfers Programme** is one of SIPRI's longest running research programmes. As well as maintaining the SIPRI Arms Transfers Database, the programme undertakes research to identify shifting trends in international arms transfers.

The **SIPRI Arms Transfers Database**, <<http://www.sipri.org/databases/armstransfers>>, is a fully searchable online database containing information on all international transfers of seven categories of major conventional weapons from 1950 to the most recent full calendar year. It can be used to generate detailed written reports and statistical data on these transfers, including the suppliers and recipients, the type and number of weapon systems ordered and delivered, the years of deliveries, and the financial value of the deal.

### **RELATED SIPRI PUBLICATIONS**

**SIPRI Yearbook 2009: Armaments, Disarmament and International Security**  
Oxford University Press, 2009

**End-user certificates: improving standards to prevent diversion**  
SIPRI Insights on Peace and Security no. 2010/3  
by Mark Bromley and Hugh Griffiths  
SIPRI, March 2010

**Air Transport and Destabilizing Commodity Flows**  
SIPRI Policy Paper no. 24  
by Hugh Griffiths and Mark Bromley  
SIPRI, May 2009

**Stemming destabilizing arms transfers: the impact of European Union air safety bans**  
SIPRI Insights on Peace and Security no. 2008/3  
By Hugh Griffiths and Mark Bromley  
SIPRI, October 2008

**Ukrainian exports of small arms and light weapons, 2004–2007**  
SIPRI Background Paper  
By Paul Holtom  
SIPRI, October 2008

**Transparency in Transfers of Small Arms and Light Weapons: Reports to the United Nations Register of Conventional Arms, 2003–2006**  
SIPRI Policy Paper no. 22  
By Paul Holtom  
SIPRI, July 2008

**The Impact on Domestic Policy of the EU Code of Conduct on Arms Exports: The Czech Republic, the Netherlands and Spain**  
SIPRI Policy Paper no. 21  
By Mark Bromley  
SIPRI, May 2008