

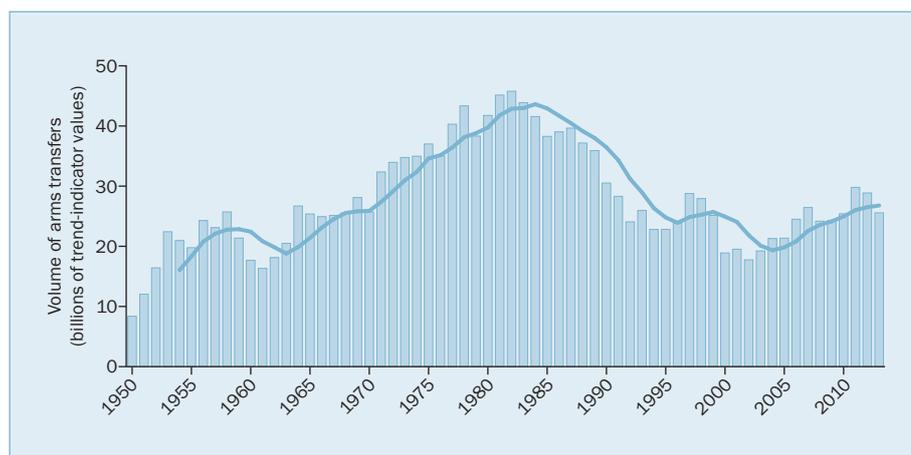
# TRENDS IN INTERNATIONAL ARMS TRANSFERS, 2013

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The volume of international transfers of major weapons in 2009–13 was 14 per cent higher than in 2004–2008 (see figure 1). The five biggest exporters in 2009–13 were the United States, Russia, Germany, China and France and the five biggest importers were India, China, Pakistan, the United Arab Emirates (UAE) and Saudi Arabia.

The flow of arms to Africa, the Americas, and Asia and Oceania increased significantly between 2004–2008 and 2009–13, while there was a notable decrease in the flow to Europe. The level of arms transfers to the Middle East remained more or less unchanged.

From 17 March 2014 the SIPRI Arms Transfers Database (see box 1) includes newly released information on arms transfers during 2013. This Fact Sheet highlights key trends and issues in arms transfers that are revealed by the new data. It lists the main exporters and importers in 2009–13 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 transfers of major weapons.



**Figure 1.** The trend in international transfers of major weapons, 1950–2013

*Note:* The bar graph shows annual totals and the line graph shows the 5-year moving average (each data point in the line graph represents an average for the preceding 5-year period). The SIPRI trend-indicator value (TIV) is a measure of the volume of international transfers of major weapons. The method used to calculate the SIPRI TIV is described on the SIPRI website at <<http://www.sipri.org/research/armaments/transfers/measuring>>.

## KEY FACTS

- The volume of transfers of major weapons in 2009–13 was 14 per cent higher than in 2004–2008.
- The five biggest exporters in 2009–13 were the USA, Russia, Germany, China and France. Together they accounted for 74 per cent of the volume of arms exports. The USA and Russia alone supplied 56 per cent of all exports.
- China has further cemented its position as a major exporter of arms, replacing France as the fourth largest arms exporter.
- The five biggest importers in 2009–13 were India, China, Pakistan, the UAE and Saudi Arabia. Together, they received 32 per cent of all arms imports.
- Saudi Arabia ranked among the five biggest recipients for the first time since 1997–2001.
- The main recipient region in 2009–13 was Asia and Oceania (accounting for 47 per cent of imports), followed by the Middle East (19 per cent), Europe (14 per cent), the Americas (10 per cent) and Africa (9 per cent).
- Between 2004–2008 and 2009–13, arms imports to states in Africa increased by 53 per cent, Asia and Oceania by 34 per cent and the Americas by 10 per cent. Imports by states in the Middle East remained largely unchanged, while imports by states in Europe decreased by 25 per cent.

**Box 1. The SIPRI Arms Transfers Database**

The SIPRI Arms Transfers Database contains information on all international transfers of major weapons (including sales, gifts and production under licence) to states, international organizations and armed non-state groups since 1950. It is the only publicly available resource providing consistent data on arms transfers for this length of time.

The database can be used to track transfers of major weapons and to answer such questions as:

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

The database is available online at [http://www.sipri.org/databases/arms\\_transfers/](http://www.sipri.org/databases/arms_transfers/).

**THE EXPORTERS, 2009–13**

SIPRI has identified 55 countries as exporters of major weapons in 2009–13. The top 5 exporters—the USA, Russia, Germany, China and France—were responsible for 74 per cent of all arms exports (see table 1). The composition of the five largest exporters of arms changed between 2004–2008 and 2009–13: while the USA and Russia remained by far the largest exporters, China notably replaced France as the fourth largest exporter. The top 5 in 2009–13 exported 9 per cent more arms in that period than the top 5 in 2004–2008.

**The United States**

US exports of major weapons increased by 11 per cent between 2004–2008 and 2009–13 (see figure 2). The USA delivered more weapons than any other supplier in 2009–13, to at least 90 recipients. Asia and Oceania was the biggest recipient region of US weapons, accounting for 47 per cent of US deliveries. The Middle East received 28 per cent and Europe 16 per cent.

Aircraft made up 61 per cent of the volume of US deliveries in 2009–13, including 252 combat aircraft. US exports of combat aircraft will be further boosted by planned deliveries of the F-35 to Australia, Israel, Italy, Japan, South Korea, the Netherlands, Norway, Turkey and the United Kingdom. The F-35 programme is the most expensive weapon programme ever. However, it is facing delays. Of 590 aircraft planned for export, only 5 have been delivered to date and several states have reduced the number that they plan

to purchase or are considering less advanced alternatives.

In 2009–13 the USA delivered long-range missile defence systems to Germany, Japan, the Netherlands, Taiwan and the UAE and received orders for such systems from Kuwait, Saudi Arabia and South Korea (see also box 5 below).

**Table 1.** The 10 largest exporters of major weapons and their main clients, 2009–13

| Exporter | Share of international arms exports (%) |           | Main clients (share of exporter's total exports), 2009–13 |                   |                 |
|----------|---|-----------|---|-------------------|-----------------|
|          | 2009–13                                 | 2004–2008 | 1st   | 2nd               | 3rd             |
| USA      | 29                                      | 30        | Australia (10%)   | South Korea (10%) | UAE (9%)        |
| Russia   | 27                                      | 24        | India (38%)   | China (12%)       | Algeria (11%)   |
| Germany  | 7                                       | 10        | USA (10%)   | Greece (8%)       | Israel (8%)     |
| China    | 6                                       | 2         | Pakistan (47%)  | Bangladesh (13%)  | Myanmar (12%)   |
| France   | 5                                       | 9         | China (13%)   | Morocco (11%)     | Singapore (10%) |
| UK       | 4                                       | 4         | Saudi Arabia (42%)  | USA (18%)         | India (11%)     |
| Spain    | 3                                       | 2         | Norway (21%)  | Australia (12%)   | Venezuela (8%)  |
| Ukraine  | 3                                       | 2         | China (21%)   | Pakistan (8%)     | Russia (7%)     |
| Italy    | 3                                       | 2         | India (10%)   | UAE (9%)          | USA (8%)        |
| Israel   | 2                                       | 2         | India (33%)   | Turkey (13%)      | Colombia (9%)   |



## Russia

Russian exports of major weapons increased by 28 per cent between 2004–2008 and 2009–13. Russia delivered weapons to 52 states in 2009–13 but more than half of its exports went to just three countries: India, China and Algeria (see table 1). Asia and Oceania received 65 per cent of Russian arms exports in 2009–13, followed by Africa (14 per cent) and the Middle East (10 per cent).

Russia was the largest exporter of ships in 2009–13, accounting for 27 per cent of all such deliveries. This included the delivery to India of an aircraft carrier and the only nuclear-powered submarine exported in this period.

Aircraft accounted for 43 per cent of Russian arms exports in 2009–13, including 219 combat aircraft delivered in this period.

## Germany

Germany's exports of major weapons decreased by 24 per cent between 2004–2008 and 2009–13, although it retained its position as the third largest exporter. Other states in Europe received 32 per cent of German arms exports in 2009–13, followed by the Middle East (17 per cent), Asia and Oceania (29 per cent) and the Americas (22 per cent).

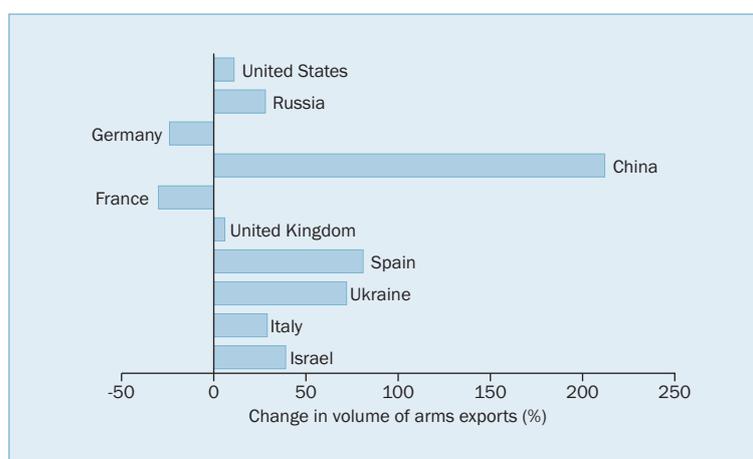
Germany continued to be the largest exporter of submarines in 2009–13, delivering 8 submarines to 5 countries. By the end of 2013, orders for 23 submarines were outstanding. Germany was the second largest exporter of tanks (after Russia) in 2009–13, delivering 650 tanks to 7 states (5 of which were outside Europe). By the end of 2013 it had a backlog of more than 280 tanks on order, including 62 Leopard-2s ordered by Qatar in 2013—the first time Germany has allowed the sale of tanks to an Arab state.

## China

Chinese exports of major arms increased by 212 per cent between 2004–2008 and 2009–13, and China's share of global arms exports increased from 2 to 6 per cent.

China supplied major arms to 35 states in 2009–13, mainly low- and middle-income countries. Almost three-quarters of Chinese exports went to just three clients: Pakistan, Bangladesh and Myanmar (see table 1).

China's rapidly developing military technology partly explains its expansion as an arms supplier to such countries as Algeria, Morocco and Indonesia, in direct competition with Russia, the USA and European states. In 2013 Turkey—a member of the North Atlantic Treaty Organization (NATO)—selected China's HQ-9/FD-2000 surface-to-air missile system (SAM) in preference to European, Russian and US alternatives.



**Figure 2.** Changes in major arms exports since 2004–2008 by the 10 largest exporters in 2009–13

**France**

France was the fifth largest exporter in 2009–13, with exports 30 per cent lower than in 2004–2008. It exported arms to 69 countries in 2009–13: 42 per cent of its exports went to states in Asia and Oceania, 19 per cent to other states in Europe, 15 per cent to Africa, 12 per cent to the Middle East and 11 per cent to the Americas.

In 2009–13, China received 13 per cent of French deliveries. This was mainly due to the licensed production of French helicopters in China, in particular the Z-9 version of the AS-565. India is expected to become a major recipient of French arms as a result of outstanding orders for 49 Mirage 2000-5 combat aircraft and 6 Scorpene submarines and a planned order for 126 Rafale combat aircraft.

**THE IMPORTERS, 2009–13**

SIPRI has identified 152 countries that imported major weapons in 2009–13, about three-quarters of all countries. The top 5 recipients in 2009–13—India,

**Table 2.** The 10 largest importers of major weapons and their main suppliers, 2009–13

| Importer     | Share of international arms imports (%) |           | Main suppliers (share of importer’s total imports), 2009–13 |               |               |
|--------------|---|-----------|---|---------------|---------------|
|              | 2009–13                                 | 2004–2008 | 1st   | 2nd           | 3rd           |
| India        | 14                                      | 7         | Russia (75%)  | USA (7%)      | Israel (6%)   |
| China        | 5                                       | 11        | Russia (64%)  | France (15%)  | Ukraine (11%) |
| Pakistan     | 5                                       | 2         | China (54%)   | USA (27%)     | Sweden (6%)   |
| UAE          | 4                                       | 6         | USA (60%)   | Russia (12%)  | France (8%)   |
| Saudi Arabia | 4                                       | 2         | UK (44%)  | USA (29%)     | France (6%)   |
| USA          | 4                                       | 3         | UK (19%)  | Germany (18%) | Canada (14%)  |
| Australia    | 4                                       | 2         | USA (76%)   | Spain (10%)   | France (7%)   |
| South Korea  | 4                                       | 6         | USA (80%)   | Germany (13%) | France (3%)   |
| Singapore    | 3                                       | 2         | USA (57%)   | France (16%)  | Germany (11%) |
| Algeria      | 3                                       | 2         | Russia (91%)  | France (3%)   | UK (2%)       |

China, Pakistan, the UAE and Saudi Arabia—imported 32 per cent of the total volume of arms imports (see table 2). India and China were the two largest arms importers in both 2004–2008 and 2009–13. Asia and Oceania accounted for nearly half of imports in 2009–13, followed by the Middle East, Europe, the Americas and Africa (see figure 3).

**Africa**

Between 2004–2008 and 2009–13 imports by states in Africa increased by 53 per cent. The three largest importers in Africa in 2009–13 were Algeria (36 per cent of imports), Morocco (22 per cent) and Sudan (9 per cent).

States in sub-Saharan Africa received 41 per cent of imports by African states. Many have made or plan to make acquisitions for maritime security (see box 2). Sudan was the largest and Uganda the second largest importer in the subregion, accounting for, respectively, 17 per cent and 16 per cent of the subregional total.

*Sudan*

Between 2004–2008 and 2009–13 imports by Sudan increased by 35 per cent. Deliveries included 44 Mi-24 combat helicopters from Russia, 4 Su-25 and 12 Su-24 combat aircraft from Belarus, and 170 T-72 and T-55 tanks from Ukraine, some of which have been used in the border conflict with South



Sudan and—despite a United Nations embargo on arms for use in Darfur—in the conflict in Darfur.

### Uganda

The volume of Ugandan imports in 2009–13 was about 1200 per cent higher than in 2004–2008, mainly due to the delivery of 6 Su-30 combat aircraft and 44 T-90S tanks from Russia and 4 S-125 SAM systems from Ukraine. Some of these weapons were used by Uganda in its intervention in the civil war in South Sudan in 2013.

### The Americas

Imports of major weapons by states in the Americas increased by 10 per cent between 2004–2008 and 2009–13. However, the region's share of global imports decreased from 11 per cent to 10 per cent. The USA was the largest importer of major weapons in the Americas in 2009–13 and the sixth largest in the world. Venezuela was the second largest importer in the Americas, the largest importer in South America and the 17th largest in the world.

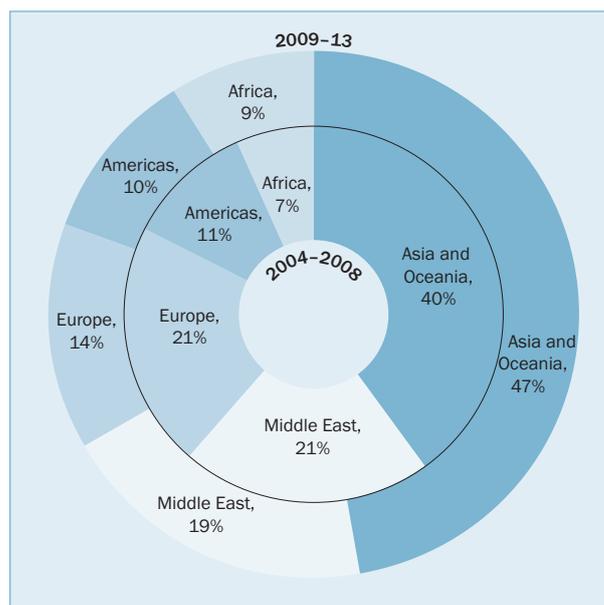
### Brazil

Brazil's arms imports increased by 65 per cent between 2004–2008 and 2009–13. Even though relations with its neighbouring states are generally good, Brazil has started several major and costly arms-procurement programmes.

After a long process, partly slowed down by economic constraints, in 2013 Brazil finally selected 36 JAS-39 Gripen-E combat aircraft from Sweden for an estimated \$4.8 billion. During 2009–13 Brazil also ordered 1 nuclear-powered and 4 Scorpene submarines from France for \$9.7 billion and started licensed production of up to 2044 Guarani armoured vehicles for \$3.6 billion from Italy.

### Colombia

Colombia continues to import weapons for use in operations against rebel forces. As part of its long-standing military aid to Colombia, the USA supplied Paveway guided bombs, which have been used to kill rebel leaders. The USA also supplied 35 UH-60L transport helicopters, some of which were upgraded with Israeli-supplied Spike-MR missiles. Israel also supplied other precision-strike weapons (including 13 Kfir combat aircraft armed



**Figure 3.** The importers of major weapons, by region, 2004–2008 and 2009–13

### Box 2. Acquisitions for maritime security by sub-Saharan African states

Most sub-Saharan African states have significant maritime zones but, with the exception of South Africa, have generally neglected their naval forces for decades. As a result, piracy, smuggling and illegal fishing are common problems, resulting in significant losses to already weak economies. However, this has begun to change in recent years.

Most sub-Saharan African states have started to acquire maritime patrol assets. For example, in 2009 Nigeria received its first new patrol vessels in almost 25 years. It has since ordered 2 large Hamilton patrol vessels from the USA (of which 1 was delivered in 2011), 2 P18N patrol vessels from China, and several smaller patrol craft from France and Israel. In 2011 Ghana received its first new patrol vessel in 30 years and Kenya its first in 17 years. In 2013 Mozambique received from Spain its first new ship since 1985 and ordered 6 patrol vessels from France.

Most other states in sub-Saharan Africa were planning to acquire, had ordered or received more patrol vessels in 2009–13 than in the decades before. Most of the naval acquisitions are simple patrol vessels suited to combatting illegal activities and are appropriate for the low level of supporting infrastructure and available funding found in the region.



with Griffin guided bombs) and Hermes-900 and Hermes-450 reconnaissance unmanned aerial vehicles (UAVs).

### Asia and Oceania

Arms imports by states in Asia and Oceania increased by 34 per cent between 2004–2008 and 2009–13. States in the region received 47 per cent of all imports in 2009–13, up from 40 per cent in 2004–2008. States in South Asia accounted for 45 per cent of the regional total, East Asia for 27 per cent, South East Asia for 23 per cent, Oceania for 8 per cent and Central Asia for 1 per cent. The three largest importers in 2009–13 are all Asian states: India, China and Pakistan. Many Asian states have started acquiring and deploying submarines in recent years (see box 3).

#### *India and Pakistan*

India's imports of major arms increased by 111 per cent between 2004–2008 and 2009–13, making it the world's largest importer. Its imports—14 per cent of the global total—were almost three times larger than those of China or Pakistan, the second and third largest arms importers and regional rivals of India. Russia supplied 75 per cent of Indian arms imports, the USA 7 per cent and Israel 6 per cent.

Pakistan's arms imports increased by 119 per cent between 2004–2008 and 2009–13. China provided 54 per cent of Pakistan's imports and the USA 27 per cent.

During 2009–13 India and Pakistan both invested heavily in air-strike capabilities. India received 90 of 222 Su-30MKI combat aircraft ordered from Russia. It also received 27 of a total of 45 MiG-29K combat aircraft ordered for use on aircraft carriers. India has 62 Russian MiG-29SMT and 49 French Mirage 2000-5 combat aircraft on order. It has also selected, but not yet ordered, 144 Russian T-50 and 126 French Rafale combat aircraft. Pakistan received 42 JF-17 combat aircraft from China and ordered 100 more. Pakistan also received 18 F-16C combat aircraft from the USA and ordered 13 second-hand F-16Cs from Jordan.

#### *North and South Korea*

In 2013 tensions between North and South Korea flared up again. North Korea, which is subject to a UN arms embargo, has focused on indigenously produced ballistic missiles and nuclear weapons as key military tools. South Korea uses its economic strength to continuously modernize its conventional forces.

Although South Korea is increasingly capable of producing weapons indigenously, it was the eighth largest arms importer in 2009–13. It received 80 per cent of

#### **Box 3.** Submarine procurement by Asian states

In recent years submarines have been increasingly featured among the acquisitions of many Asian countries. While China and Japan continue to build their own designs, other existing submarine operators have imported new boats.

During 2009–13 India received a nuclear-powered submarine from Russia; it was also building 6 French submarines under licence and plans 6 more. South Korea finished the last of 3 submarines produced under licence from Germany and has 6 more on order. Singapore received 2 submarines from Sweden and ordered 2 more from Germany, while Indonesia has 3 boats on order from South Korea. Australia plans to acquire 12 new boats and Pakistan 6 from China.

In addition, several Asian states have recently become submarine operators: Viet Nam received in 2013 the first of 6 boats on order from Russia, and Malaysia received 1 submarine from France and 1 from Spain in 2009 and has plans for more boats. Bangladesh agreed in 2013 on the procurement from China of its first 2 submarines. Thailand, Myanmar and the Philippines have plans to acquire submarines as well.



its arms imports from the USA. Part of the acquisitions is aimed at building a capability to detect and destroy North Korean missiles. This included deliveries in 2009–13 of 21 F-15K combat aircraft with guided bombs and missiles from the USA. In 2013 South Korea decided to procure 4 RQ-4A Global Hawk reconnaissance UAVs and 40 F-35A combat aircraft from the USA, and 177 Taurus KEPD-350 cruise missiles from Germany.

## Europe

Imports by states in Europe decreased by 25 per cent between 2004–2008 and 2009–13. The UK was the largest importer of major weapons in Europe (receiving 12 per cent of deliveries), followed by Azerbaijan (12 per cent) and Greece (11 per cent). Many European states are choosing second-hand weapons as cheaper alternatives (see box 4).

### *Azerbaijan*

Azerbaijan, which has a territorial dispute with Armenia, increased its arms imports by 378 per cent between 2004–2008 and 2009–13. In 2009–13 Russia accounted for 80 per cent of Azerbaijan's arms imports. Other notable arms suppliers were Belarus, Ukraine, Israel and Turkey.

#### **Box 4.** Sales of second-hand weapons to European states

Due to the continuing economic crisis, several European states decided in 2013 to abandon plans to buy new weapons and to instead buy less-expensive second-hand weapons. In many cases the alternative weapons had become surplus in other European states because of their cuts in defence spending.

Second-hand weapon deals in 2013 included Romania's purchase of 9 F-16C combat aircraft from Portugal and 3 more from the USA, Croatia's purchase of 5 MiG-21bis combat aircraft from Ukraine, Poland's purchase of 119 Leopard-2 tanks from Germany, and Finland's order of 100 Leopard-2 tanks from the Netherlands.

### *Greece*

Greece was the fifth largest arms importer in 2004–2008. However, further major procurement plans were thrown into disarray by the country's economic crisis. Greek imports of major arms fell by 47 per cent between 2004–2008 and 2009–13. Delivery of 4 submarines ordered from Germany before the crisis began has been severely delayed. Investigations in 2013 into corruption in arms deals have raised questions about how personal financial gain of key decision makers may have influenced arms procurement.

## The Middle East

Arms imports by states in the Middle East increased by 3 per cent between 2004–2008 and 2009–13. During 2009–13, 22 per cent of arms transfers to the region went to the UAE, 20 per cent to Saudi Arabia and 15 per cent to Turkey. The USA accounted for 42 per cent of total arms supplies to the region. Iran, which remained blocked from importing most types of major arms due to UN sanctions, received only 1 per cent of the region's arms imports in 2009–13.

### *The United Arab Emirates and Saudi Arabia*

In 2009–13 the UAE was the world's fourth largest arms importer and Saudi Arabia the fifth largest, having been the 18th largest in 2004–2008. Both countries have large outstanding orders for arms or advanced procurement plans. In particular, Saudi Arabian imports will increase with additional

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### Box 5. Acquisitions of missiles and guided bombs by Middle Eastern states

States in the Middle East are investing heavily in missiles and aircraft-launched guided bombs, weapons that have played a central role in recent warfare in the region.

In 2009–13 Israel, Saudi Arabia and the UAE each received or ordered thousands of guided bombs from the USA. Saudi Arabia received hundreds of air-launched Storm Shadow cruise missiles (with a range of approximately 300 kilometres) from the UK. The USA delivered 48 AGM-84H cruise missiles with a similar range to Turkey.

In 2013 the USA was, for the first time, willing to negotiate the sale of hundreds of AGM-84H missiles to Saudi Arabia and the UAE. Bahrain and the UAE received ATACMS surface-to-surface missiles from the USA in 2012–13.

Iran partly compensated for not being able to import long-range combat aircraft by producing its own ballistic missiles with ranges of up to approximately 2000 km.

deliveries of Typhoon combat aircraft from the UK, and deliveries of 154 F-15SA combat aircraft from the USA from 2015. In 2013 Saudi Arabia selected armoured vehicles from Canada worth \$10 billion.

### *Arms exports to countries in conflict*

Ongoing political turmoil and high numbers of people killed in Egypt in July and August 2013 led to some countries restraining their arms exports to Egypt. The USA suspended the scheduled deliveries of 12 F-16 combat aircraft, M-1A1 tanks and 10 AH-64D combat helicopters. Spain halted the scheduled delivery of C-295 transport aircraft. However, Russia delivered 14 Mi-17V-5 helicopters and continued to market its weapons to Egypt. The USA supplied a corvette in late 2013, and Germany continued its construction of 2 Type-209 submarines for Egypt.

Syria appeared to be primarily dependent on Russia for its weapons, which included few major weapons. The planned delivery of MiG-29 combat aircraft and S-300PMU-2 SAM systems from Russia was again postponed in 2013.

Iraq continued to rebuild its armed forces with major weapons from a variety of suppliers. By the end of 2013 it had received the first 4 Mi-35 combat helicopters from Russia and awaited delivery of other Russian weapons. Iraq ordered 24 T-50IQ trainer/combat aircraft from South Korea in 2013 and expects delivery of the first of 36 F-16C combat aircraft from the USA in 2014.

The use of missiles and aircraft-launched guided bombs in conflicts has been highlighted by recent acquisitions in the Middle East (see box 5).

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