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TRENDS IN INTERNATIONAL ARMS TRANSFERS, 2012

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The volume of international transfers of major conventional weapons was 17 per cent higher in the period 2008–12 than in 2003–2007 (see figure 1). The five biggest exporters in the period 2008–12 were the United States, Russia, Germany, France and China. This is the first time since the end of the cold war that a state from outside Europe and North America has appeared among the five largest arms exporters.

The five biggest importers in 2008–12 were India, China, Pakistan, South Korea and Singapore. The flow of arms to Asia and Africa increased notably between 2008–12 and 2003–2007, while flows to Europe and the Middle East decreased. Among the noteworthy deliveries in 2012 were China's commissioning of its first aircraft carrier and India's receipt of an Akula nuclear-powered submarine from Russia.

From 18 March 2013 the SIPRI Arms Transfers Database includes newly released information on arms transfers during 2012 (see box 1). This Fact Sheet describes the trends in international arms transfers that are revealed by the new data. It lists the main exporters and importers in the period 2008–12

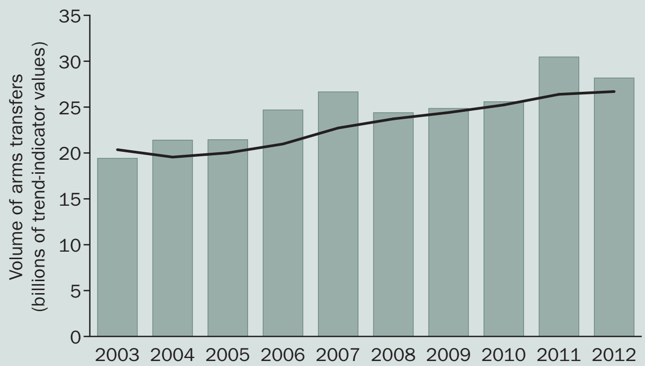

Figure 1. The trend in international transfers of major conventional weapons, 2003–12

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 conventional 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 international transfers of major conventional weapons in the period 2008–12 was 17 per cent higher than in the period 2003–2007.
- The five biggest suppliers in 2008–12 were the USA, Russia, Germany, France and China. Together, they accounted for 75 per cent of the volume of international arms exports.
- China replaced the UK as the fifth largest supplier. This is the first change in the composition of the top 5 suppliers since the end of the cold war.
- The five biggest recipients were India, China, Pakistan, South Korea and Singapore. They collectively accounted for 32 per cent of the volume of international arms imports.
- The top 5 recipients in 2008–12 were all Asian states. The main recipient region in 2008–12 was Asia and Oceania (accounting for 47 per cent of imports), followed by the Middle East (17 per cent), Europe (15 per cent), the Americas (11 per cent) and Africa (9 per cent).
- Between 2003–2007 and 2008–12, there was a notable increase in the volume of arms imports by states in Asia and Oceania (by 35 per cent), the Americas (34 per cent) and Africa (104 per cent), and a clear decrease by states in Europe (20 per cent) and the Middle East (7 per cent).

Box 1. The SIPRI Arms Transfers Database

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

The database can be used to track changes in the trends in the volume of transfers of major conventional weapons and 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?
- How do states implement their export control regulations?
- Where are potentially destabilizing build-ups of weapons occurring today?

The database is available online at <http://www.sipri.org/databases/armstransfers/>.

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 TOP 5 EXPORTERS, 2008–12

The USA and Russia remained by far the largest exporters of arms (see figure 2). The volume of arms exported by the top 5 suppliers in 2008–12 was 14 per cent higher than the volume exported by the top 5 suppliers in 2003–2007; however, their collective share of total exports dropped from 78 per cent to 75 per cent. For the first five-year period since 1950, the UK was not among the top 5 suppliers in 2008–12: China displaced it to become the fifth largest exporter.

The United States

Asia and Oceania was the biggest recipient region of US weapons, accounting for 45 per cent of US deliveries. The Middle East accounted for 27 per cent and Europe for 18 per cent.

Aircraft made up 62 per cent of the volume of US deliveries in 2008–12. Among these deliveries were 49 combat aircraft, including the first 2 F-35s (to the UK). The F-35 is the most significant future US arms export programme.

Iraq and Afghanistan have become significant recipients of US major weapons in connection with the withdrawal of US combat forces and the handover of operations to local forces. In 2008–12 Iraq and Afghanistan each received 4 per cent of US exports. Deliveries included large numbers of light armoured vehicles for internal security operations. However, Iraq also received tanks and ordered 36 F-16 combat aircraft.

Russia

Asia and Oceania received 65 per cent of Russian arms exports in 2008–12, followed by Africa (17 per cent) and the Middle East (9 per cent). India remained the largest recipient of Russian arms exports, with China and Viet Nam also among the top 5 recipients of Russian exports. Russia has contributed significant materiel to the arms build-up in South East Asia, delivering an estimated 37 Su-30MK and Su-27S combat aircraft, along with a variety of missiles, to Indonesia, Malaysia and Viet Nam during 2008–12.

Aircraft accounted for 46 per cent and missiles for 20 per cent of Russian arms exports. During 2008–12 Russia exported an estimated 343 Mi-17 helicopters to 26 states for military and internal security purposes. Almost half of these helicopters were delivered to states in Asia and Oceania (166 helicopters), followed by recipients in the Americas (57), the Middle East (48), Europe (43) and Africa (29).

Germany

German arms exports decreased by 8 per cent between 2003–2007 and 2008–12. The fall coincides with the completion of deliveries under several high-value deals for naval and land systems made in the 2000s.

Other states in Europe received 35 per cent of Germany's arms exports in 2008–12, followed by Asia and Oceania (31 per cent) and the Americas (17 per cent).

The Middle East received 14 per cent of German arms exports in 2008–12 and further high-value deals are under discussion. These include the possible sale to Saudi Arabia of 600–800 Leopard-2A7+ tanks, up to 100 Dingo-2 armoured vehicles and several hundred Boxer armoured vehicles, as well as the possible sale to Qatar of up to 200 Leopard-2A7+ tanks. During 2012 these prospective sales—together with agreed deals with Algeria (see below)—were at the centre of a long-running domestic political debate about the level of restrictiveness of German arms export controls.

France

France's arms exports decreased by 18 per cent between 2003–2007 and 2008–12. States in Asia and Oceania received 54 per cent of French arms exports in 2008–12, followed by other states in Europe (14 per cent) and Africa (13 per cent).

Like Germany, the fall in French exports coincides with the completion of deliveries under several high-value deals for naval, air and land systems made in the 2000s. At the end of 2012 France had several unfulfilled orders for high-value weapon systems, including 10 submarines ordered by Brazil and India, 7 frigates ordered by Malaysia and Morocco, and 175 combat aircraft ordered by India.

The Middle East received 11 per cent of French arms exports in 2008–12, and France has orders for a number of weapon systems from states in this region. The issue of supplying arms to states in the Middle East has aroused far less political controversy in France than it has in Germany.

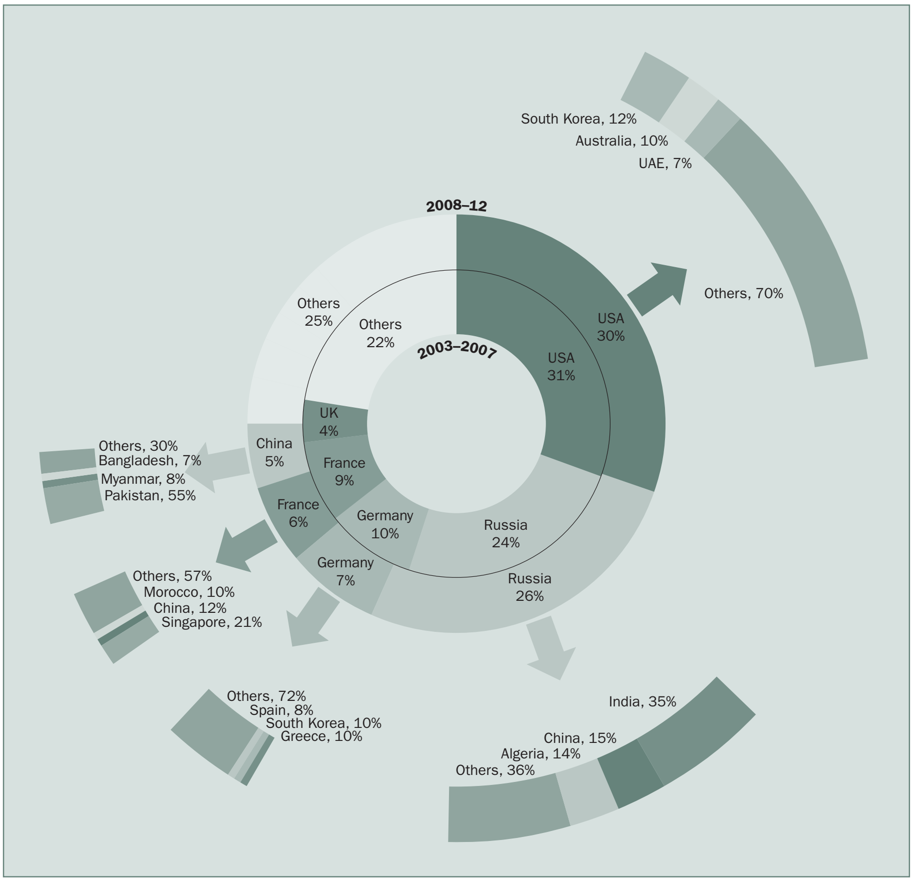

Figure 2. The five largest exporters of major conventional weapons, 2003–2007 and 2008–12, and their main recipient states, 2008–12

China

The volume of Chinese exports of major conventional weapons rose by 162 per cent between 2003–2007 and 2008–12, and China's share of the volume of international arms exports increased from 2 to 5 per cent. As a result, for the first time since 1986–90, China ranked as the fifth largest suppliers of major arms. During 2008–12 Asia and Oceania received 74 per cent of the volume of Chinese arms exports and Africa 13 per cent.

Pakistan—which accounted for 55 per cent of Chinese arms exports—is likely to remain the largest recipient of Chinese arms in the coming years due to large outstanding and planned orders for combat aircraft, submarines and frigates from China. Recent major deals indicate that China is establishing itself as a substantial arms supplier to a growing number of large arms recipients, including Algeria, Morocco and Venezuela.

THE IMPORTERS, 2008–12

Since 1950 the list of the five states that have imported most major conventional weapons has changed much more than the list of the five largest exporters. In recent years the composition of the list has remained relatively stable, and China and India were the world's two largest arms importers in both 2003–2007 and 2008–12 (see table 1). The volume of arms imported by the top five recipients in 2008–12 was 3 per cent lower than the volume imported by the top five importers in 2003–2007; and its share of total imports dropped from 38 per cent to 32 per cent.

Table 1. The five largest importers of major conventional weapons and their major suppliers, 2008–12

	Share of international arms imports (%)		Main suppliers (share of importer's total imports), 2008–12		
Importer	2008–12	2003–2007	1st	2nd	3rd
India	*12*	*9*	Russia (79%)	United Kingdom (6%)	Uzbekistan (4%)
China	*6*	*12*	Russia (69%)	France (13%)	Ukraine (10%)
Pakistan	*5*	*2*	China (50%)	United States (27%)	Sweden (5%)
South Korea	*5*	*5*	United States (77%)	Germany (15%)	France (5%)
Singapore	*4*	*1*	United States (44%)	France (30%)	Germany (11%)

The regional breakdown of arms deliveries has remained relatively stable over the past 10 years. Asia and Oceania accounted for almost half of imports of major conventional weapons in 2008–12, followed by the Middle East and Europe (see figure 3). There was a notable increase in the shares of Asia and Oceania and Africa, and a clear decrease for Europe and the Middle East.

Africa

Imports by African states increased 104 per cent between 2003–2007 and 2008–12. During 2003–2007 countries in sub-Saharan Africa accounted for 71 per cent of the imports to Africa; during 2008–12 these countries imported 5 per cent more arms. In contrast, imports by North African countries increased by 350 per cent in 2008–12 and accounted for 64 per cent of imports by African states. Algeria, Morocco and South Africa were by far the largest arms importers in Africa in 2008–12.

Algeria and Morocco

The volume of deliveries to Algeria increased by 277 per cent between 2003–2007 and 2008–12 and it rose from 22nd to 6th largest recipient.

Russia supplied 93 per cent of Algerian arms imports, including 44 Su-30MKA combat aircraft, 2 Project-636 submarines, an estimated 3 S-300PMU-2 (SA-20B) long-range surface-to-air missile (SAM) systems and 185 T-90S tanks. However, in 2011–12 Algeria turned to Germany for 2 MEKO-A200 frigates and for a first batch of 54 of a planned 1200 Fuchs armoured personnel carriers and to China for 3 F-22A frigates.

The volume of deliveries to Morocco increased by 1460 per cent between 2003–2007 and 2008–12. Morocco rose from being 69th largest recipient to 12th largest, with a considerable volume of deliveries taking place during 2011–12. Morocco's imports during 2008–12 included 24 F-16C combat aircraft from the USA, 27 MF-2000 combat aircraft from France, 3 SIGMA frigates from the Netherlands and 54 Type-90-2 tanks from China.

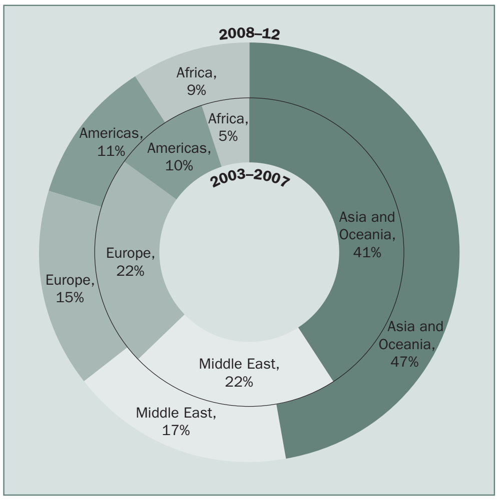

Figure 3. The importers of major conventional weapons, by region, 2003–2007 and 2008–12

Sub-Saharan Africa

South Africa accounted for 24 per cent of imports by sub-Saharan African states in 2008–12. However, having completed a substantial modernization of its forces, its imports were 40 per cent lower than in 2003–2007.

Uganda and Sudan were the second and third largest importers in the region, accounting for 15 per cent and 12 per cent, respectively. The volume of Ugandan imports during 2008–12 was almost 1200 per cent higher than in 2003–2007, mainly due to the delivery of 6 Su-30 combat aircraft from Russia in 2011–12. The volume of Sudanese imports for 2008–12 was 29 per cent lower than during 2003–2007 despite deliveries of 20 Mi-24 combat helicopters from Russia, 15 Su-25 combat aircraft from Belarus, and 160 T-72 and T-55 tanks from Ukraine during 2008–12.

West Africa

West African states have traditionally imported few major weapons. The volume of imports to the region almost doubled between 2003–2007 and 2008–12, but this still only accounted for 1 per cent of the global total. Nigeria was the largest importer in West Africa, accounting for 42 per cent of the region's imports in 2008–12. Ships made up 36 per cent of West Africa's imports, as maritime patrol assets were acquired to combat increasing piracy and other illegal activities. Small numbers of armoured vehicles, helicopters and aircraft were also delivered to the region. Weapons delivered in this period, such as F-7MG combat aircraft delivered to Nigeria from China and armoured vehicles delivered to Mali from Bulgaria, were used in the conflict with rebels in northern Mali in 2012 and early 2013.

The Americas

The volume of transfers of major conventional weapons to states in the Americas increased by 34 per cent between 2003–2007 and 2008–12 and their share of global imports rose from 10 per cent to 11 per cent. The USA was the largest importer of conventional weapons in the Americas in 2008–12 and the 8th largest in the world. Venezuela was the largest importer of conventional weapons in South America and the 13th largest in the world.

Venezuela

Deliveries of arms related to Venezuela's ongoing rearmament programme continued during 2008–12. Russia supplied 66 per cent of transfers to Venezuela, followed by Spain (12 per cent) and China (12 per cent). Deliveries from Russia in 2012 included BMP-3 and BTR-80 armoured vehicles, S-125 Pechora-2M SAM systems, T-72 tanks and 2S19 MSTA-S and 2S23 Nona-SVK self-propelled guns.

Brazil

For several years, Brazil has been seeking to use arms acquisitions from abroad as a means of strengthening its defence industrial base by insisting on significant levels of technology transfer. During 2012 there were signs that this strategy is starting to bear fruit. In 2009 Brazil signed a deal with the Italian company Iveco for the licensed production of 2044 Guarani armoured vehicles. In 2012 it was announced that Argentina intended to buy 14 of these vehicles from Brazil.

Internal security in Central America

In Central America, arms imports increased by 68 per cent. These acquisitions were largely motivated by internal security concerns, particularly counter-narcotics operations. Deliveries included helicopters and surveillance aircraft, and light armoured vehicles. Mexico plans to import at least 20 T-6C light combat aircraft from the USA, and in 2012 Guatemala allocated funding for 6 EMB-314 trainer/combat aircraft from Brazil.

Asia and Oceania

The volume of deliveries of major weapons to states in Asia and Oceania increased by 35 per cent between 2003–2007 and 2008–12. States in South Asia accounted for 41 per cent of the regional total in 2008–12, East Asia 27 per cent, South East Asia 23 per cent, Oceania 9 per cent and Central Asia 1 per cent. All of the five largest importers in 2008–12 are from Asia: India, China, Pakistan, South Korea and Singapore.

India

India was the world's largest importer of major conventional weapons in 2008–12. Its arms imports, accounting for 12 per cent of global imports, were 109 per cent higher than those of China, the second biggest arms importer. India imported 59 per cent more arms in 2008–12 than in 2003–2007. In 2008–12 it improved its long-range military capabilities with the import of such items as over 100 Su-30MKI combat aircraft from Russia, 3 A-50EhI airborne early warning aircraft (combining components from Israel, Russia and Uzbekistan), an Akula nuclear-powered submarine from Russia and the first of 8 P-8I anti-submarine warfare aircraft from the USA.

China

In 2012 China revealed several new domestically produced weapon systems that show its decreasing dependence on arms imports. Whereas in 2003–2007 it was by far the largest importer of major weapons, in 2008–12 it fell to second place and its imports fell by 47 per cent. However, new Chinese weapons continue to incorporate significant foreign components. For example, the first Chinese aircraft carrier, delivered in 2012, was based on a design and hull imported from Ukraine. The most important Chinese mass-produced combat aircraft, the J-10 and the J-11, use Russian-supplied AL-31FN engines. China also continues to augment its own production of major arms with imports. In 2012 it ordered 55 Mi-17 transport helicopters from Russia and negotiated possible deals with Russia for Su-35 combat aircraft and submarines.

Maritime security acquisitions in South East Asia

The volume of deliveries to South East Asian states in 2008–12 increased by 169 per cent compared to 2003–2007. Strong tensions exist in the region over maritime borders, primarily between China and Viet Nam or the Philippines in the South China Sea. Weapons with a maritime role, or a dual maritime and over-land role, accounted for most of the imports to the region.

Countries in South East Asia have shown a growing interest in submarines, considered an effective maritime area-denial system. In 2012 Singapore received the second of 2 Västergotland submarines from Sweden and Indonesia ordered 3 Type-209 submarines from South Korea. Viet Nam has 6 Project-636 submarines from Russia on order. Singapore and Malaysia confirmed plans to acquire additional submarines, while Thailand and the Philippines confirmed plans to become submarine operators.

Europe

Imports by European states decreased by 20 per cent between 2008–12 and 2003–2007. European Union (EU) member states accounted for 12 per cent of international arms imports in 2008–12. The UK was the largest importer of major conventional weapons in Europe, followed by Greece and Norway.

Greece

Having been fourth largest arms importer in 2003–2007, Greece was 15th largest in 2008–12. Its volume of imports declined by 61 per cent between these two periods. As part of its own cost-saving exercises, Greece placed no new orders for major conventional weapons in 2012 and has delayed or cancelled a range of arms import plans, including the acquisition of 6 FREMM frigates from France and over 400 armoured vehicles from Russia.

The United Kingdom

The UK was the 14th largest arms importer during both 2008–12 and 2003–2007, but its volume of imports increased by 18 per cent between these two periods. The USA supplied 70 per cent of British arms imports and other EU member states 27 per cent.

Missiles accounted for 41 per cent of the volume of British imports. The UK has used US-supplied GMLRS guided rockets in Afghanistan and Paveway guided bombs in Libya. With the drawdown in Afghanistan, the UK is exploring options to supply surplus arms to Afghanistan and countries in Central Asia, as well as offering Typhoon combat aircraft, which are now considered surplus to requirements, to states in the Gulf region.

Azerbaijan

The volume of arms imports by Eastern Europe increased by 21 per cent between 2003–2007 and 2008–12. However, this increase is entirely due to Azerbaijan, which was the only state in the region to increase its volume of imports. Azerbaijan increased its imports by 155 per cent and rose from 48th to 35th largest importer. These imports are connected to the ongoing dispute with Armenia over the region of Nagorno-Karabakh. In 2012 deliveries continued of Aerostar and Hermes-450 unmanned aerial vehicles (UAVs) from Israel, Mi-24 combat helicopters from Russia, and Matador and Marauder armoured vehicles from South Africa built under licence in Azerbaijan.

The Middle East

Arms imports by states in the Middle East decreased by 7 per cent between 2008–12 and 2003–2007. During 2008–12, 19 per cent of all major arms transfers to the Middle East went to the United Arab Emirates (UAE), followed by Saudi Arabia (18 per cent), Turkey (17 per cent) and Iraq (10 per cent).

Missile defence systems for the Arab states of the Gulf

Partly in response to the perceived threat from Iran, several Arab states in the Gulf are investing heavily in arms imports. Missile defence systems procured from the USA are an increasingly important element of their arms imports. In 2012 the UAE ordered 2 THAAD anti-ballistic missile systems and received the first components of 4 Patriot PAC-3 SAM systems ordered in 2008. In 2011 Saudi Arabia ordered an estimated 21 Patriot PAC-3 systems, and Kuwait ordered PAC-2 GEM-T missiles to upgrade its Patriot systems. In 2012 Qatar announced plans to procure THAAD and Patriot PAC-3 systems, and Kuwait announced plans to procure Patriot PAC-3 systems.

Syria

During 2008–12 Russia supplied 71 per cent of Syria's imports of major weapons, Iran supplied 14 per cent and Belarus 11 per cent. Russia's arms supplies included an estimated 24 96K9 Pantsyr-S1 and 6 9K40 Buk SAM systems and 2 K-300P Bastion-P coastal defence missile systems.

Saudi Arabia

Saudi Arabia ranked as the 10th largest arms importer in 2008–12. The country is likely to become one of the five largest importers in 2013–17 due to major outstanding orders, such as for 48 Typhoon combat aircraft from the UK and 152 F-15SA combat aircraft from the USA. While German Government decisions to approve in principle the sale of tanks and armoured vehicles to Saudi Arabia were controversial in Germany because of concerns that the weapons could be used in internal violence, Saudi Arabia continues to receive armoured vehicles from the USA, Canada and France.

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