II. Developments among the recipients of major arms, 2015–19

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SIPRI has identified 160 states as importers of major arms in the five-year period 2015–19.[1] The top five arms importers—Saudi Arabia, India, Egypt, Australia and China—accounted for 36 per cent of the total volume of arms imports in 2015–19 (see tables 9.5 and 9.6). Of these, Saudi Arabia, India and China were also among the top five importers in 2010–14. The top five arms importers in 2015–19 are all in the two regions—Asia and Oceania and the Middle East—that received by far the greatest volume of imports in 2015–19 (see table 9.7). States in Europe, Africa and the Americas imported much lower overall volumes of major arms. This section reviews significant developments among the main recipients of arms in each region in turn.

Africa

Arms imports by states in Africa decreased by 16 per cent between 2010–14 and 2015–19 (see table 9.7). The three largest importers were Algeria (which received 58 per cent of arms transfers to Africa), Morocco (12 per cent) and Angola (7.0 per cent). Russia accounted for 49 per cent of arms exports to the region, the United States for 14 per cent and China for 13 per cent.

North Africa

Nearly three-quarters of the arms imported by African states in 2015–19 went to the four states in North Africa—Algeria, Libya, Morocco and Tunisia. The total volume of their arms imports increased by 8.5 per cent between 2010–14 and 2015–19 (see table 9.7).

Algeria alone accounted for 79 per cent of the subregion's arms imports in 2015–19. Its arms imports were 71 per cent higher than in 2010–14, making it the sixth-largest arms importer in the world in 2015–19 (see table 9.5). The increase occurred in the context of Algeria's long-standing tensions with its neighbour Morocco, internal tensions, and the conflicts in neighbouring Mali and Libya. As in 2010–14, Russia was the largest arms supplier to Algeria in 2015–19, providing 67 per cent of Algerian arms imports (see tables 9.6

[1] Except where indicated, the information on the arms deliveries and orders referred to in this section is taken from the SIPRI Arms Transfers Database. For a definition of 'major arms' and a description of how the volume of transfers is measured see box 9.1 in section I. The sources and methods used to produce the data discussed here are also presented on the SIPRI website. The figures here may differ from those in previous editions of the SIPRI Yearbook because the Arms Transfers Database is updated annually.

and 9.8). Algeria's arms imports from Russia, including 203 T-90 tanks and 14 Su-30 combat aircraft, were 40 per cent higher than in 2010–14.

Algeria appears to have been pursuing a policy of diversifying its arms suppliers in recent years and has signed contracts for large arms deals with China (for 3 frigates) and Germany (for almost 1000 armoured vehicles and 2 frigates). It received the bulk of deliveries related to these deals in 2015–19: 13 per cent of Algeria's arms imports in this period came from China, and the volume of these was nine times higher than in 2010–14; and 11 per cent came from Germany, and the volume of these was 30 times higher. However, while there are no known outstanding deliveries of Chinese arms to Algeria, there were unconfirmed reports in 2019 of new orders from Russia, including for tanks and around 30 combat aircraft.[2]

The volume of Morocco's imports of major arms in 2015–19 was 62 per cent lower than in 2010–14 (see table 9.5). France was the main arms supplier to Morocco in 2010–14, largely due to the delivery of combat aircraft and ships. As the contracts were completed, France's share fell to 8.9 per cent in 2015–19. Because deliveries from the USA (mainly combat and other aircraft, tanks and other armoured vehicles, and artillery) were much more stable, the US share increased to 91 per cent (up from 29 per cent in 2010–14). Morocco's arms imports are likely to grow in the coming years: in 2019 it announced plans to place large orders for advanced military equipment, including 25 combat aircraft and 24–36 combat helicopters from the USA and surface-to-air missile (SAM) systems from France.[3]

Arms transfers and the conflict in Libya

The civil war between Libya's internationally recognized Government of National Accord (GNA) and the self-described Libyan National Army (LNA) that started in 2014 continued in 2019.[4] Both sides have received arms from abroad in violation of the arms embargo imposed on Libya by the United Nations Security Council in 2011, but no country has been sanctioned for this.[5]

Details about these arms deliveries are scarce and the volume cannot be estimated. For example, in 2019 the GNA received an unknown number of armoured vehicles and armed unmanned aerial vehicles (UAVs) from Turkey. In 2015–19 the LNA received armoured vehicles from Jordan and the United

[2] Safronov, I., [Algeria bought Russian fighters for about $2 billion], *Vedomosti*, 9 Sep. 2019 (in Russian); and *Military Watch*, 'Finest armour in Africa: Algerian Army receives new batch of T-90SA battle tanks', 12 Jan. 2020.

[3] US Defense Security Cooperation Agency, 'Morocco—F-16 Block-72 new purchase', News Release no. 19-09, 25 Mar. 2019; US Defense Security Cooperation Agency, 'Morocco—AH-64E helicopters', News Release no. 19-63, 20 Nov. 2019; and Moroccan Defense Network, 'Morocco buys French CAESAR howitzer and surface to air VL-MICA missiles', 21 Jan. 2020.

[4] On the conflict in Libya see chapter 6, section IV, in this volume.

[5] See chapter 14, section II, in this volume.

Table 9.5. The 50 largest recipients of major arms, 2015–19

The table lists states, international organizations and non-state actors that imported major arms in the 5-year period 2015–19. Figures for volume of imports are SIPRI trend-indicator values (TIV).

Rank			Volume of imports (TIV, millions)			Change in volume (%),
2015–19	2010–14[a]	Recipient	2019	2015–19	Share (%), 2015–19	compared with 2010–14
1	2	Saudi Arabia	3 673	17 694	*12*	*130*
2	1	India	2 964	13 412	*9.2*	*–32*
3	14	Egypt	1 193	8 396	*5.8*	*212*
4	6	Australia	1 399	7 133	*4.9*	*40*
5	5	China	887	6 300	*4.3*	*3.3*
6	10	Algeria	140	6 150	*4.2*	*71*
7	8	South Korea	1 510	5 004	*3.4*	*3.3*
8	4	UAE	644	4 982	*3.4*	*–18*
9	17	Iraq	175	4 960	*3.4*	*98*
10	46	Qatar	2 258	4 943	*3.4*	*631*
11	3	Pakistan	561	3 830	*2.6*	*–39*
12	11	Viet Nam	161	3 212	*2.2*	*–9.3*
13	9	United States	1 048	2 925	*2.0*	*–37*
14	33	Israel	507	2 873	*2.0*	*181*
15	7	Turkey	833	2 621	*1.8*	*–48*
16	23	Japan	891	2 574	*1.8*	*72*
17	15	Indonesia	219	2 553	*1.8*	*–4.6*
18	19	United Kingdom	377	2 503	*1.7*	*17*
19	12	Singapore	614	2 411	*1.7*	*–29*
20	28	Bangladesh	743	2 289	*1.6*	*93*
21	40	Italy	186	2 246	*1.5*	*175*
22	31	Thailand	301	1 741	*1.2*	*67*
23	26	Oman	105	1 710	*1.2*	*24*
24	35	Norway	443	1 628	*1.1*	*67*
25	55	Kazakhstan	312	1 523	*1.0*	*238*
26	18	Taiwan	51	1 379	*0.9*	*–41*
27	27	Canada	200	1 332	*0.9*	*4.2*
28	36	Greece	165	1 328	*0.9*	*39*
29	20	Afghanistan	391	1 296	*0.9*	*–38*
30	21	Azerbaijan	25	1 231	*0.8*	*–40*
31	13	Morocco	26	1 231	*0.8*	*–62*
32	41	Jordan	85	1 156	*0.8*	*54*
33	24	Myanmar	252	1 006	*0.7*	*–32*
34	25	Brazil	169	869	*0.6*	*–37*
35	75	Philippines	187	866	*0.6*	*403*
36	43	Mexico	3	863	*0.6*	*17*
37	63	Belarus	331	831	*0.6*	*186*
38	32	Netherlands	490	811	*0.6*	*–21*
39	34	Kuwait	70	778	*0.5*	*–22*
40	39	Poland	308	761	*0.5*	*–14*
41	45	Finland	70	734	*0.5*	*8.3*

Rank			Volume of imports (TIV, millions)		Share (%),	Change in volume (%), compared
2015–19	2010–14[a]	Recipient	2019	2015–19	2015–19	with 2010–14
42	109	Angola	166	734	*0.5*	*2 124*
43	48	Malaysia	70	729	*0.5*	*18*
44	52	Turkmenistan	–	692	*0.5*	*33*
45	62	Peru	–	591	*0.4*	*102*
46	37	Spain	56	502	*0.3*	*–47*
47	58	France	102	450	*0.3*	*23*
48	65	Iran	3	437	*0.3*	*61*
49	67	Romania	61	378	*0.3*	*65*
50	89	Armenia	248	377	*0.3*	*416*
. .	. .	Unknown recipient(s)	41	134	*0.1*	*84*
. .	. .	118 others	1 488	8 669	*5.9*	. .
		Total	**27 194**	**145 776**	***100***	***5.5***

. . = not available or not applicable; – = nil; UAE = United Arab Emirates.

Note: 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 9.1 in section I.

[a] The rank order for recipients in 2010–14 differs from that published in *SIPRI Yearbook 2015* because of subsequent revision of figures for these years.

Source: SIPRI Arms Transfers Database, Mar. 2020.

Arab Emirates (UAE), combat helicopters from Belarus, supplied via the UAE, and combat aircraft from Egypt. Combat aircraft and armed UAVs originating from the UAE have been used in the fighting, including in 2019.[6] It is unclear whether they were operated by the UAE or whether the UAE had supplied them to the LNA.[7]

The UAE's involvement in Libya is part of its assertive foreign policy, which also includes its military intervention in Yemen.[8] In 2015–19 the UAE accounted for 3.4 per cent of global arms imports. It received major arms from a total of 17 countries in 2015–19 but the bulk (68 per cent) came from the USA (see tables 9.6 and 9.8). In 2019 the UN Security Council called on states not to intervene in the conflict in Libya.[9] In the same year the UAE had major arms import deals ongoing with Australia, Brazil, Canada, China, France, Russia, South Africa, Spain, Sweden, Turkey, the United Kingdom and the USA.

[6] United Nations, Security Council, Final report of the panel of experts on Libya established pursuant to Security Council Resolution 1973 (2011), 29 Nov. 2019, S/2019/914, 9 Dec. 2019, paras 108–10 and annex 15, paras 14–16.

[7] United Nations, S/2019/914 (note 6), para. 108 and annex 15, paras 12–16.

[8] See e.g. United Nations, Security Council, Final report of the Panel of Experts on Yemen, S/2020/70, 27 Jan. 2020.

[9] United Nations, Security Council, Press statement on Libya, SC/13873, 5 July 2019; and UN Security Council Resolution 2486, 12 Sep. 2019, para. 4.

Table 9.6. The 40 largest recipients of major arms and their three main suppliers, 2015–19

Rank		Main suppliers (share of recipient's total imports, %), 2015–19		
2015–19	Recipient	1st	2nd	3rd
1	Saudi Arabia	USA (73)	UK (13)	France (4.3)
2	India	Russia (56)	Israel (14)	France (12)
3	Egypt	France (35)	Russia (34)	USA (15)
4	Australia	USA (68)	Spain (21)	France (3.6)
5	China	Russia (76)	France (8.8)	Ukraine (6.9)
6	Algeria	Russia (67)	China (13)	Germany (11)
7	South Korea	USA (55)	Germany (30)	Spain (7.8)
8	UAE	USA (68)	France (11)	Netherlands (3.4)
9	Iraq	USA (45)	Russia (34)	South Korea (8.6)
10	Qatar	USA (50)	France (34)	Germany (9.2)
11	Pakistan	China (73)	Russia (6.6)	Italy (6.1)
12	Viet Nam	Russia (74)	Israel (12)	Belarus (4.9)
13	United States	Germany (21)	UK (17)	Netherlands (13)
14	Israel	USA (78)	Germany (16)	Italy (6.2)
15	Turkey	USA (38)	Italy (24)	Spain (19)
16	Japan	USA (96)	UK (2.4)	Sweden (1.6)
17	Indonesia	USA (20)	Netherlands (18)	South Korea (16)
18	United Kingdom	USA (67)	South Korea (21)	Germany (4.7)
19	Singapore	USA (37)	Spain (24)	France (18)
20	Bangladesh	China (72)	Russia (15)	UK (2.4)
21	Italy	USA (62)	Germany (25)	Israel (6.5)
22	Thailand	South Korea (21)	China (21)	Ukraine (14)
23	Oman	UK (45)	USA (13)	Norway (12)
24	Norway	USA (77)	Italy (7.9)	South Korea (7.2)
25	Kazakhstan	Russia (90)	Spain (3.2)	China (2.1)
26	Taiwan	USA (100)	–	–
27	Canada	USA (56)	Netherlands (11)	Israel (9.6)
28	Greece	Germany (64)	USA (19)	UK (7.5)
29	Afghanistan	USA (87)	Brazil (8.8)	Canada (1.2)
30	Azerbaijan	Israel (60)	Russia (31)	Turkey (3.2)
31	Morocco	USA (91)	France (8.9)	UK (0.3)
32	Jordan	USA (30)	Netherlands (30)	Russia (10)
33	Myanmar	China (49)	Russia (16)	India (14)
34	Brazil	France (26)	USA (20)	UK (17)
35	Philippines	South Korea (32)	Indonesia (21)	USA (19)
36	Mexico	USA (64)	Spain (9.5)	France (8.5)
37	Belarus	Russia (98)	Ukraine (1.2)	China (0.5)
38	Netherlands	USA (76)	Germany (13)	Italy (7.6)
39	Kuwait	USA (70)	France (9.5)	Switzerland (7.1)
40	Poland	USA (29)	Germany (18)	Italy (14)

UAE = United Arab Emirates.

Source: SIPRI Arms Transfers Database, Mar. 2020.

Table 9.7. Imports of major arms, by region and subregion, 2010–14 and 2015–19

Figures for volume of imports are SIPRI trend-indicator values (TIV).

	Volume of imports (TIV)		Change in volume from 2010–14 to	Share of total imports (%)	
Recipient region	2010–14	2015–19	2015–19 (%)	2010–14	2015–19
Africa	12 502	10 528	*–16*	*9.0*	*7.2*
North Africa	7 183	7 793	*8.5*	*5.2*	*5.3*
Sub-Saharan Africa	5 318	2 720	*–49*	*3.8*	*1.9*
Americas	13 729	8 292	*–40*	*9.9*	*5.7*
Central America and the Caribbean	998	1 228	*23*	*0.7*	*0.8*
North America	5 907	4 257	*–2.5*	*4.3*	*2.9*
South America	6 825	2 770	*–59*	*4.9*	*1.9*
Asia and Oceania	64 103	59 041	*–7.9*	*46*	*41*
Central Asia	1 019	2 629	*158*	*0.7*	*1.8*
East Asia	14 896	15 347	*3.0*	*11*	*11*
Oceania	5 321	7 287	*37*	*3.9*	*5.0*
South Asia	29 237	21 079	*–28*	*21*	*14*
South East Asia	13 627	12 698	*–6.8*	*9.9*	*8.7*
Europe	15 876	16 389	*3.2*	*11*	*11*
Central Europe	1 703	2 036	*20*	*1.2*	*1.4*
Eastern Europe	3 020	2 944	*–2.5*	*2.2*	*2.0*
Western Europe	11 153	11 409	*2.3*	*8.1*	*7.8*
Middle East	31 867	51 261	*61*	*23*	*35*
Other	126	273	*117*	*0.1*	*0.2*

Note: 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 9.1 in section I.

Source: SIPRI Arms Transfers Database, Mar. 2020.

Sub-Saharan Africa

States in sub-Saharan Africa accounted for 26 per cent of African arms imports in 2015–19. The total volume of arms imported by states in the subregion was 49 per cent lower than in 2010–14 (see table 9.7) and was at its lowest level since 1995–99. In 2015–19 Russia supplied 36 per cent of the arms imported by states in the subregion, China 19 per cent and France 7.6 per cent. The five largest arms importers in sub-Saharan Africa—Angola, Nigeria, Senegal, Sudan and Zambia—accounted for 63 per cent of all arms imports into the subregion. There were falls in the volumes of arms imported by Nigeria (–33 per cent) and Sudan (–48 per cent) between 2010–14 and 2015–19, while there were increases in those of Angola (2124 per cent), Senegal (306 per cent) and Zambia (107 per cent).

Angola accounted for 27 per cent of arms imports into sub-Saharan Africa and it was the 42nd-largest arms importer globally in 2015–19 (see table 9.5). Even though Angola's economy was in recession and its military spending fell in each year of the five-year period, its arms imports were 22 times higher than in 2010–14.[10] The increase can largely be attributed to deliveries from Russia, which supplied 68 per cent of Angola's imports in 2015–19. The Russian deliveries included 12 Su-30 combat aircraft, 12 Mi-24 combat helicopters and 12 Mi-17 transport helicopters.

For four of the top five importers in sub-Saharan Africa, China was either the largest (in the cases of Sudan and Zambia) or second-largest (in the cases of Nigeria and Senegal) arms supplier in 2015–19. This is perhaps evidence of China's growing willingness to engage with African countries in a peace and security role. China's ambitions in this area were also in evidence at the first China–Africa Defense and Security Forum in 2018 and the first China–Africa Peace and Security Forum in 2019, both organized by the Chinese Ministry of National Defense.[11] China is not alone in attempting to secure greater influence in Africa through arms exports. The USA, Russia and France are also among the largest suppliers to Africa and each has a military presence in Africa.[12] All these suppliers seem to have the aim of winning influence both in specific countries and the region as a whole.[13]

South Africa was the largest arms importer in sub-Saharan Africa in 2005–2009, mainly as a result of deliveries of frigates and submarines from Germany and combat aircraft from Sweden. In 2010–14 the volume of its arms imports fell by 78 per cent and in 2015–19 it nearly reached zero. This sharp decrease was partly a result of South Africa's severe economic problems, which led to several rounds of cuts to the military budget.[14] In 2018–19 there were reports that the South African armed forces were encountering both technical and financial problems in the operation of the frigates and submarines supplied by Germany and that it had received only 40 per cent of the funding needed for the South African Air Force.[15] The financial and operational challenges raise questions about the long-term viability of South Africa's policy of procuring expensive major arms.

[10] SIPRI Military Expenditure Database.

[11] Kovrig, M., 'China expands its peace and security footprint in Africa', International Crisis Group, 24 Oct. 2018; Grieger, G., 'China's growing role as a security actor in Africa', Briefing, European Parliamentary Research Service, Oct. 2019; and Chen, L. et al., 'Overview of 1st China–Africa Peace and Security Forum', Chinese Ministry of National Defense, 17 July 2019. See also Huang, C. and Ismail, O., 'China', eds O. Ismail and E. Sköns, SIPRI, *Security Activities of External Actors in Africa* (Oxford University Press: Oxford, 2014), pp. 15–37.

[12] eds Ismail and Sköns (note 11).

[13] *The Economist*, 'The new scramble for Africa', 7 Mar. 2019.

[14] Wingrin, D., 'Defence minister sounds budget alarm bells', DefenceWeb, 18 July 2019.

[15] Wingrin, D., 'SA Navy in danger of losing frigate and submarine capabilities due to declining budget', DefenceWeb, 19 Sep. 2019; Badri-Maharaj, S., 'South Africa boosts naval capabilities: But can it afford an expansion?', Manohar Parrikar Institute for Defence Studies and Analyses, 5 Feb. 2018; and Wingrin, D., 'Parliament hears of parlous state of the Air Force', DefenceWeb, 16 Sep. 2018.

The Americas

Imports of major arms by states in the Americas decreased by 40 per cent between 2010–14 and 2015–19 (see table 9.7).

The USA was the largest importer of major arms in the region in 2015–19, receiving 35 per cent of all deliveries. The main exporters to the USA were Germany (21 per cent), the UK (17 per cent) and the Netherlands (13 per cent; see table 9.6). The USA was also the largest supplier to states in the Americas: it supplied 23 per cent of all arms imports by states in the region in 2015–19, up from 17 per cent in 2010–14.

While Russia was among the largest arms suppliers to the Americas in 2010–14, supplying 16 per cent of the total volume, its share decreased sharply in 2015–19 to just 3.0 per cent. The fall was mainly because Venezuela—the main importer of Russian arms in the region in 2010–14—did not import major arms from Russia in 2015–19 as a result of an ongoing economic crisis (see below).

Central America and the Caribbean

Arms imports by states in Central America and the Caribbean increased by 23 per cent between 2010–14 and 2015–19 (see table 9.7). Mexico received 70 per cent of all arms imported into the subregion in 2015–19. The volume of Mexico's arms imports increased by 17 per cent between 2010–14 and 2015–19 (see table 9.5) in part because of acquisitions of major arms such as helicopters and armoured vehicles for its ongoing military operations against drug cartels.[16] The USA was Mexico's largest arms supplier by far, accounting for 64 per cent of its arms imports in 2015–19 (see table 9.6).

South America

Arms imports by states in South America fell by 15 per cent between 2005–2009 and 2010–14, and by a further 59 per cent between 2010–14 and 2015–19 (see table 9.7). The USA accounted for 19 per cent of the subregion's arms imports in 2015–19, France for 16 per cent and Italy for 8.6 per cent.

Venezuela was the largest arms importer in South America in 2010–14, when it was re-equipping with mainly Russian arms. However, Venezuela's arms imports in 2015–19 were 88 per cent lower than in 2010–14, with no deliveries at all recorded in 2017–19, as it continued to be affected by a severe economic crisis.[17] China was the largest arms supplier to Venezuela in 2015–19, accounting for 58 per cent of imports, followed by Ukraine with a 38 per cent share.

[16] On the impact of the operations against drug cartels on Mexico's military expenditure see chapter 8, section II, in this volume.

[17] Ribando Seelke, C. et al., *Venezuela: Background and US Relations*, Congressional Research Service (CRS) Report for Congress R44841 (US Congress, CRS: Washington, DC, 12 Mar. 2020).

Although the volume of Brazil's arms imports in 2015–19 was 37 per cent lower than in 2010–14 (see table 9.5), it was the largest arms importer in South America and accounted for 31 per cent of the subregion's arms imports. France became Brazil's largest arms supplier in 2015–19, providing 26 per cent of its imports (see table 9.6), mainly due to the delivery of 23 helicopters and a second-hand amphibious assault ship. In 2010–14 it had been only the fourth-largest arms supplier to Brazil (with a 9.7 per cent share), behind Germany (31 per cent), the USA (22 per cent) and Russia (12 per cent). By the end of 2019 Brazil had the largest volume of outstanding orders for arms of any state in South America, including orders for combat aircraft from Sweden and submarines from France.

Asia and Oceania

Arms imports by states in Asia and Oceania decreased by 7.9 per cent between 2010–14 and 2015–19 (see table 9.7). States in the region received 41 per cent of the total global volume of arms imports in 2015–19, compared with 46 per cent in 2010–14. Of the 10 largest importers in 2015–19, four are in Asia and Oceania: India, Australia, China and South Korea. Russia accounted for 29 per cent of arms imports by states in the region, the USA for 27 per cent and China for 10 per cent.

The decrease in the regional total disguises wide variations in subregional trends. Between 2010–14 and 2015–19 there were increases in arms transfers to Central Asia (158 per cent), Oceania (37 per cent) and East Asia (3.0 per cent), while there were decreases in transfers to South Asia (–28 per cent) and South East Asia (–6.8 per cent).[18] Overall, the large absolute decrease in imports into South Asia—in particular India and Pakistan—had the greatest influence on the regional trend.

India and Pakistan

In 2010–14 India was the largest and Pakistan the third-largest importer of major arms globally. Between 2010–14 and 2015–19 arms imports by India decreased by 32 per cent and those by Pakistan fell by 39 per cent, making India the second-largest arms importer and Pakistan the 11th-largest in 2015–19 (see table 9.5). India accounted for 9.2 per cent of global imports of major arms, about 3.5 times Pakistan's share of 2.6 per cent. Although both countries produce major arms, they remain largely dependent on imports and have substantial outstanding orders and plans for imports of all types of major arms.

[18] On arms imports by South East Asian states see Wezeman, S. T., *Arms Flows to South East Asia* (SIPRI: Stockholm, Dec. 2019).

Russia was the largest supplier to India in both 2010–14 and 2015–19, but its deliveries fell by 47 per cent and its share of total Indian arms imports fell from 72 to 56 per cent (see tables 9.6 and 9.8). The USA became the second-largest arms supplier to India in 2010–14 as the security relationship between the two countries developed into a strategic partnership.[19] However, the new closer relationship did not lead to a continued increase in US arms sales to India. On the contrary, in 2015–19 Indian arms imports from the USA were 51 per cent lower than in 2010–14, and the USA was only the fourth-largest supplier of major arms to India. This was partly because lengthy negotiations on planned acquisitions had reached an impasse due to India's insistence on including technology transfers as part of the deals and the USA's reluctance to agree to this.[20] There was a breakthrough in the negotiations in December 2019 when the two states signed an agreement on technology transfers.[21] This paved the way for new US sales of advanced major arms to India.[22] There is, nonetheless, still a risk that the USA might invoke its 2017 Countering America's Adversaries Through Sanctions Act (CAATSA) to block future deals with India.[23] CAATSA allows the US Government to deny arms exports to states that buy arms from Russia—and India has ordered, among other things, S-400 SAM systems from Russia. In June 2019 a senior official of the US Department of State stated that the USA had informed India that at some point 'a strategic choice has to be made about partnerships and a strategic choice about what weapons systems and platforms . . . to adopt'.[24]

Another reason why the developing strategic partnership between the USA and India might not lead to an immediate rise in arms imports from the USA is that India appears to be maintaining its long-standing policy of supplier diversification.[25] In 2015–19 India's arms imports from Israel increased by 175 per cent (mainly land-based and naval air defence systems) and those from France increased by 715 per cent (including the first 2 of 6 Scorpene submarines and the first 4 of 36 Rafale combat aircraft). This made Israel the second-largest and France the third-largest supplier of major arms to India in the period, ahead of the USA.

[19] Council on Foreign Relations, 'US–India relations 1947–2020', 2020.

[20] Rej, A., 'Dalliance no more: How India–US defence trade relationship matures over years', News18, 24 Feb. 2020.

[21] Indo-Asian News Service (IANS), 'India, US sign defence tech transfer pact, pledge to boost strategic ties at 2+2', *Economic Times*, 19 Dec. 2019.

[22] Sink, J. et al., 'US and India to sign $3 billion in defense deals, Trump says', *Fortune*, 24 Feb. 2020.

[23] Countering America's Adversaries Through Sanctions Act, US Public Law 115–44, signed into law 2 Aug. 2017. On CAATSA see also section I in this chapter; and Wezeman, S. T. et al., 'Supplier developments, 2018', *SIPRI Yearbook 2019*, pp. 235–39.

[24] Wells, A., US Acting Assistant Secretary of State for South and Central Asia, quoted in Rajghatta, C., 'US cautions India over S-400 deal with Russia, cites strategic partnership choices', *Times of India*, 15 June 2019.

[25] Kapoor, N., *India–Russia Ties in a Changing World Order: In Pursuit of a 'Special Strategic Partnership'*, Observer Research Foundation (ORF) Occasional Paper no. 218 (ORF: New Dehli, 22 Oct. 2019).

Table 9.8. The 10 largest recipients of major arms and their suppliers, 2015–19

Figures are the percentage shares of the recipient's total volume of imports received from each supplier. Only suppliers with a share of 1 per cent or more of total imports of any of the 10 largest recipients are included in the table. Smaller suppliers are grouped together under 'Others'.

	Recipient									
Supplier	Saudi Arabia	India	Egypt	Australia	China	Algeria	South Korea	UAE	Iraq	Qatar
Bulgaria	0.1	–	–	–	–	–	–	–	2.2	–
Canada	1.6	0.7	0.3	0.6	–	–	–	1.7	–	0.3
China	0.9	–	0.5	–	. .	13	–	2.5	1.1	2.4
Czechia	–	–	–	–	–	–	–	–	3.8	–
France	4.3	12	35	3.6	8.8	1.3	1.1	11	–	34
Germany	1.6	1.5	7.6	1.4	0.7	11	30	1.2	0.5	9.2
Israel	–	14	–	–	–	–	2.0	–	–	–
Italy	1.3	0.1	0.1	2.2	–	1.9	–	2.2	3.4	0.8
Netherlands	0.1	0.1	0.5	–	–	0.6	–	3.4	–	–
Russia	<0.05	56	34	–	76	67	–	2.4	34	0.2
South Africa	0.1	0.3	–	–	–	0.3	–	1.7	<0.05	–
South Korea	–	1.6	0.7	–	–	–	. .	–	8.6	–
Spain	1.7	–	1.7	21	–	–	7.8	1.2	0.6	–
Sweden	–	–	–	–	–	1.7	0.2	1.8	–	–
Switzerland	1.1	0.1	–	3.4	3.1	–	–	–	–	1.8
Turkey	–	–	–	–	–	–	–	2.4	–	1.3
UAE	–	–	2.6	–	–	1.2	–	. .	–	–
Ukraine	–	0.8	–	–	6.9	–	–	–	–	0.5
United Kingdom	13	2.7	–	0.3	3.3	1.2	3.4	0.3	–	–
United States	73	9.1	15	68	–	0.4	55	68	45	50
Uzbekistan	–	–	–	–	1.6	–	–	–	–	–
Others	0.5	0.3	1.6	<0.05	–	0.1	–	0.4	1.0	<0.05

. . = not available or not applicable; – = nil; <0.05 = between 0 and 0.05; UAE = United Arab Emirates.

Source: SIPRI Arms Transfers Database, Mar. 2020.

The decrease of 39 per cent in Pakistan's arms imports in 2015–19 was linked to the reduction in arms supplied as military aid from the USA since around 2011. This culminated in an almost complete halt in aid in 2017.[26] As a consequence, the USA's share of Pakistan's arms imports fell from 30 per cent in 2010–14 to only 4.1 per cent in 2015–19. In an attempt to meet its ongoing demand for major arms, Pakistan turned increasingly to China: the latter's share of Pakistan's arms imports rose from 51 per cent in 2010–14 to 73 per cent in 2015–19 (see table 9.6). Pakistan also continued to import major arms from European states in 2015–19 (in particular Russia and Italy) and strengthened its arms import relations with Turkey with orders for 30 combat helicopters and 4 frigates in 2018.

Cross-border attacks between India and Pakistan intensified in early 2019.[27] Pakistan reportedly used JF-17 combat aircraft imported from China, equipped with Russian engines, and F-16 combat aircraft from the USA supported by Saab-2000 airborne early warning and control (AEW&C) aircraft from Sweden.[28] India reportedly used Mirage-2000 combat aircraft imported from France, MiG-21 combat aircraft from Russia, SPICE guided bombs from Israel and FH-77 artillery from Sweden.[29] Some of these major arms, such as the SPICE guided bombs and JF-17 aircraft, were recent deliveries but some, such as the MiG-21 aircraft and the FH-77 artillery, were supplied decades ago. This shows that exported arms can play a major role in an armed conflict many years after delivery.

East Asia

Arms imports by East Asian states increased by 3.0 per cent between 2010–14 and 2015–19 (see table 9.7). Together, states in East Asia imported 11 per cent of all arms transfers in 2015–19.

China, which accounted for 4.3 per cent of global arms imports in 2015–19, was the largest arms importer in East Asia and the fifth largest in the world (see table 9.5). Although China has developed an advanced arms industry, it remains reliant on imports for certain arms technologies. Its arms imports increased by 3.3 per cent between 2010–14 and 2015–19, largely due to deliveries in 2018–19 from Russia. These included the engines for most combat and large transport aircraft produced in China and S-400 SAM systems. China also continued to acquire some engines for large military

[26] Kronstadt, K. A., 'Pakistan–US relations', In Focus, US Congress, Congressional Research Service (CRS), 15 July 2019.

[27] On the conflict between India and Pakistan see chapter 4, section II, in this volume

[28] Seligman, L., 'India's dogfight loss could be a win for US weapons-makers', *Foreign Policy*, 5 Mar. 2019; and Press Trust of India, 'JF-17 used to shoot down Indian aircraft, says Pakistan military', *Economic Times*, 25 Mar. 2019.

[29] Frantzman, S. J. and Ahronheim, A., 'If India and Pakistan go to war, Israeli weapons could be decisive', *Jerusalem Post*, 1 Mar. 2019; Seligman (note 28); and Gurung, S. K., 'Army uses Bofors guns to respond to border shelling by Pakistan', *Economic Times* (New Delhi), 7 Mar. 2019.

ships from France and Ukraine or to produce them under licence in 2015–19. In addition, it continued to produce helicopters of French design under licence. However, China's need to rely on arms imports is rapidly diminishing as its arms industry is mastering the design and production of indigenous alternatives. For example, the latest versions of Chinese combat aircraft reportedly use Chinese engines instead of Russian engines.[30]

Taiwan imports all of its major arms from the USA (see table 9.6). Its arms imports in 2015–19 were 41 per cent lower than in 2010–14 (see table 9.5). However, in 2019 it placed orders for 66 F-16V combat aircraft and 108 tanks from the USA. The USA had initially been reluctant to agree to these transfers because of the damage that previous arms sales to Taiwan had caused to Chinese–US relations.[31] These relations were especially sensitive in 2019 as China and the USA were negotiating a trade agreement.[32] The sales appear to be in line with the USA's perception that China is the major potential military threat to the USA and its allies in Asia and Oceania and with its policy of creating a network of allies and friendly states in the region. China objected to the arms deal and announced that it would impose sanctions on the US companies involved, some of which have growing civilian markets in China.[33] While the US sales will increase Taiwan's arms imports in the coming years, they are relatively minor compared with China's new arms acquisitions (mainly from Chinese domestic production).

The volume of arms imported by Japan increased by 72 per cent between 2010–14 and 2015–19 (see table 9.5). It mainly imports major arms from the USA, which accounted for 89 per cent of Japan's imports in 2010–14 and 96 per cent in 2015–19. Japan's imports and the high US share are both likely to continue to rise based on new orders for arms from the USA, including an order in 2019 for 105 F-35 combat aircraft.

[30] Rupprecht, A. and Ju, J., 'Images suggest China has begun fitting indigenous WS10 engine into J-10C fighters', *Jane's Defence Weekly*, 5 Mar. 2020.

[31] Gady, F.-S., 'US administration accused of delaying F-16 fighter jets sale to Taiwan', The Diplomat, 31 July 2019; and Wong, E., 'Trump administration approves F-16 fighter jet sales to Taiwan', *New York Times*, 16 Aug. 2019.

[32] US Department of Defense (DOD), Office of the Secretary of Defense, *Military and Security Developments Involving the People's Republic of China 2019*, Annual Report to Congress (DOD: Arlington, VA, May 2019); US Defense Intelligence Agency (DIA), *China Military Power: Modernizing a Force to Fight and Win* (DIA: Washington, DC, 2019); US Department of State, *A Free and Open Indo-Pacific: Advancing a Shared Vision* (Department of State: Washington, DC, 4 Nov. 2019); and Dotson, J., 'Arms sales and high-level visits signal closer US relations with Taiwan', *China Brief*, vol. 19, no. 14 (31 July 2019).

[33] E.g. Zhou, C., 'US defence giant Honeywell distances itself from Taiwan under threat of China sanctions over arms deal', *South China Morning Post*, 16 July 2019.

Europe

Imports of major arms by states in Europe fell by 37 per cent between 2005–2009 and 2010–14. However, this downward trend reversed in 2015–19: the volume of arms imports by European states was 3.2 per cent higher than in 2010–14 and accounted for 11 per cent of the global total (see table 9.7). The USA supplied 41 per cent of the region's arms imports in 2015–19, Germany 14 per cent and Russia 10 per cent.

Arms transfers and armed conflict in Europe

Major arms were used in conflicts in Europe in 2015–19: in eastern Ukraine and in skirmishes between Armenia and Azerbaijan.[34]

The volume of arms imported by Ukraine was low in 2015–19, despite the armed conflict there, mainly because it had inherited large inventories of major arms from the Soviet Union and has a substantial local arms industry.[35] Its largest imports of major arms included 50 second-hand armoured vehicles from Czechia and 210 anti-tank missiles from the USA.

Armenia's arms imports increased by 416 per cent between 2010–14 and 2015–19 (see table 9.5). Nearly all (94 per cent) of its arms imports in 2015–19 came from Russia. Despite a fall of 40 per cent between 2010–14 and 2015–19, the volume of arms imported by Azerbaijan in 2015–19 was over three times higher than that of Armenia. Israel supplied 60 per cent and Russia 31 per cent of Azerbaijan's arms imports in 2015–19 (see table 9.6). In 2018 Azerbaijan received LORA surface-to-surface missiles (SSMs) from Israel, probably in response to Armenia's acquisition of Iskander SSMs from Russia in 2016. With these acquisitions, each state is now capable of attacking key targets deep inside the other's territory.

Re-equipping European air forces

In many West and Central European states, growing tensions with Russia and involvement in military air operations in the Middle East have contributed to a growing demand for new combat aircraft.[36] In 2015–19 states in Western and Central Europe imported a total of 59 new combat aircraft. At the end of 2019, these states had outstanding orders for imports of 380 new combat aircraft (356 F-35s and 24 F-16s), most for delivery in 2020–29.

All of these aircraft will be supplied by the USA. In most cases, they were selected over rival offers from a French company (the Rafale), a Swedish company (the Gripen) or a consortium of British, German, Italian and Spanish

[34] On these armed conflicts see chapter 5, sections I and II, in this volume.

[35] Wezeman, S. T. and Kuimova, A., 'Ukraine and Black Sea security', SIPRI Background Paper, Dec. 2018.

[36] On spending on military equipment by European members of the North Atlantic Treaty Organization (NATO) see chapter 8, section III, in this volume.

companies (the Typhoon) supported by their respective governments. For example, in 2019 Bulgaria selected the F-16V combat aircraft over the Typhoon and the Gripen.[37] Similarly, Poland selected the F-35A over European alternatives on the basis that it wanted to procure a fifth-generation, multi-role combat aircraft.[38] West and Central European suppliers have been more successful in selling other categories of major arms to their European neighbours. For example, in 2015–19 all warships and all tanks imported or ordered for import by European states came from suppliers in Europe.

The Middle East

The volume of arms imported by states in the Middle East was 61 per cent higher in 2015–19 than in 2010–14 (see table 9.7). Five of the world's top 10 arms-importing countries in 2015–19 are in the Middle East: Saudi Arabia (which received 35 per cent of arms transfers to the region), Egypt (16 per cent), the UAE (9.7 per cent), Iraq (9.7 per cent) and Qatar (9.6 per cent). Israel and Turkey also imported significant volumes of arms (see table 9.5). The USA supplied 53 per cent of total arms transfers to the region, France 12 per cent and Russia 11 per cent.

Saudi Arabia

Saudi Arabia was the world's largest arms importer in 2015–19, accounting for 12 per cent of all imports of major arms (see table 9.5). The volume of its arms imports was 130 per cent higher in 2015–19 than in 2010–14. The USA is by far the largest arms supplier to Saudi Arabia—in 2015–19 it accounted for 73 per cent of Saudi Arabian arms imports (see tables 9.6 and 9.8), followed by the UK (13 per cent).

Discussions in the USA, Canada and many West European states about restrictions on arms exports to Saudi Arabia continued in 2019 based on concerns that the Saudi Arabian-led military intervention in Yemen involved violations of international humanitarian law and was prolonging the civil war there (see section I).[39] However, Saudi Arabia continued to import arms from some of these states in 2019, including 30 F-15SA combat aircraft and large numbers of missiles and guided bombs from the USA, armoured vehicles from Canada, armoured vehicles and patrol boats from France, and missiles

[37] Adamowski, J., 'Bulgaria approves draft deals to buy F-16s in record defense procurement', *Defense News*, 10 July 2019; and Radio Free Europe/Radio Liberty, 'Bulgaria gives final green light to biggest military acquisition since fall of communism', 31 July 2019.

[38] Jarocki, M., 'Poland's billion-dollar-procurement programmes', European Security & Defence, 7 May 2019.

[39] On control on exports to Saudi Arabia see also chapter 14, section IV, in this volume; and e.g. Russell, A., 'Experts dispute Canada's claim of no link between Saudi arms sales and human rights abuses', Global News, 22 Nov. 2019. On the armed conflict in Yemen see chapter 6, section V, in this volume.

and trainer aircraft from the UK. Unlike the other European suppliers among the top 10 arms exporters in 2015–19, Germany suspended the bulk of its—already limited—arms exports to Saudi Arabia (see section I).

China and Russia each supplied less than 1 per cent of Saudi Arabia's arms imports in 2015–19 (see table 9.8). China has supplied armed UAVs to Saudi Arabia since 2014. In 2019 Russia exported major arms to Saudi Arabia for the first time; however, the transfer was for only a limited number of specialized rocket launchers of a type not available from other suppliers.

Egypt

The volume of Egypt's arms imports was 212 per cent higher in 2015–19 than in 2010–14, and it rose from 14th place to be the third-largest arms importer in the world (see table 9.5). Its arms imports accounted for 5.8 per cent of the global total. The upward trend in Egypt's arms imports coincided with its military involvement in Libya and in Yemen and fighting with rebel groups in the Sinai peninsula.[40] It might also be linked to Egypt's concerns over the security of its natural gas fields in the Mediterranean Sea and its water supply from the Nile Basin.[41]

The USA, which has supplied large volumes of major arms to Egypt since 1978 as aid, was the largest arms supplier to Egypt in all five-year periods between 1980 and 2014. Although the volume of US arms exports to Egypt remained largely unchanged in 2015–19, the USA was only the third-largest arms supplier to Egypt in this period: it accounted for 15 per cent of Egypt's arms imports, down from 47 per cent in 2010–14 (see tables 9.6 and 9.8). Notable deliveries from the USA in 2015–19 included 125 M-1A1 Abrams tanks, 12 F-16C combat aircraft, 10 AH-64 combat helicopters and 1 corvette. Most of these were delivered in 2015. Because of frictions with the USA related to the military coup in Egypt in 2013, Egypt has intensified its efforts to become less dependent on the USA and procure more arms from other suppliers.[42] In 2015–19 France became the largest arms supplier to Egypt, supplying 35 per cent of imports, up from 2.3 per cent in 2010–14. Deliveries from France in 2015–19 included 24 Rafale combat aircraft, 2 Mistral amphibious assault ships, a FREMM frigate and cruise missiles. Russia remained Egypt's second-largest arms supplier, supplying 34 per cent of Egyptian arms imports in 2015–19. Its deliveries in 2015–19 included 39 MiG-29 combat aircraft, 48 Ka-52 combat helicopters and 3 S-300V SAM systems.

[40] On the armed conflict in Egypt see chapter 6, section IV, in this volume.

[41] Sharp, J. M., *Egypt: Background and US Relations*, Congressional Research Service (CRS) Report for Congress RL33003 (US Congress, CRS: Washington, DC, 21 Nov. 2019), p. 16.

[42] Sharpe (note 41), p. 16.

Qatar

Qatar's arms imports in 2015–19 were 631 per cent higher than in 2010–14 and it entered the top 10 group of arms recipients for the first time (see table 9.5). The increase in Qatari arms imports was mainly due to the delivery of 21 Rafale combat aircraft from France in 2019.

Qatar has several outstanding orders for major arms, including 15 more Rafale combat aircraft from France, 24 Typhoon combat aircraft from the UK, 36 F-15QA combat aircraft from the USA, and 4 frigates and a landing ship from Italy. All these major arms are to be delivered in 2020–25 and will increase the volume of Qatar's arms imports significantly.

Turkey

In 1995–99 Turkey was the third-largest arms importer in the world; by 2005–2009 it was the ninth largest and in 2015–19 it ranked 15th. The volume of Turkey's arms imports in 2015–19 was 48 per cent lower than in 2010–14, even though its armed forces were fighting the Kurdistan Workers' Party (Partiya Karkerên Kurdistanê, PKK) rebel group and were involved in the conflicts in Libya and Syria.[43] The decrease was partly due to delays in the production of submarines ordered from Germany, which were originally planned for delivery in 2015–19.[44] An additional factor was the increase in procurement from Turkey's domestic arms industry of warships and armoured vehicles, which in the past Turkey has mostly imported.

The volume of Turkish arms imports in 2015–19 was also affected by restrictions imposed in 2018 and 2019 by arms suppliers. In 2019 the USA blocked the sale of up to 100 F-35 combat aircraft to Turkey, including the delivery of the first batch planned for 2019 (see section I).[45] In addition, Turkey's attack on Kurdish groups in Syria led to several European states restricting their arms sales to Turkey in 2019.[46]

[43] On Turkey's role in the conflicts in Syria and Libya see chapter 6, sections II and IV, respectively, in this volume. See also Wezeman, S. T. and Kuimove, A., 'Turkey and Black Sea security', SIPRI Background Paper, Dec. 2018.

[44] Naval Today, 'Turkish 1st type 214 class submarine launched', 23 Dec. 2019.

[45] White House, 'Statement by the Press Secretary', 17 July 2019; and Roque, A. and Herschelman, K., 'Washington to cut ties with Turkey on F-35 programme and shift supply chain to US', *Jane's Defence Weekly*, 24 July 2019, p. 5.

[46] See chapter 14, section II, in this volume.