SIPRI Fact Sheet

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TRENDS IN INTERNATIONAL ARMS TRANSFERS, 2011

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The volume of international transfers of major conventional weapons was 24 per cent higher in the period 2007–11 than in 2002–2006 (see figure 1). In 2011, the United States and India maintained their positions as the world's top exporter and importer of arms, respectively. The most significant order placed in 2011, and the largest arms deal for at least two decades, was Saudi Arabia's order for 84 new and 70 rebuilt F-15SG combat aircraft. Volumes of transfers continued to fluctuate by region, with significant rises in East Africa, North Africa, South East Asia and the South Caucasus.

From 19 March 2012 the SIPRI Arms Transfers Database includes newly released information on arms transfers during 2011 (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 for the period 2007–11 and describes the regional trends among recipient states. Since the volume of deliveries of arms can fluctuate significantly from one year to the next, SIPRI presents data for five-year periods to give a more stable measure of trends in international transfers of major conventional weapons.

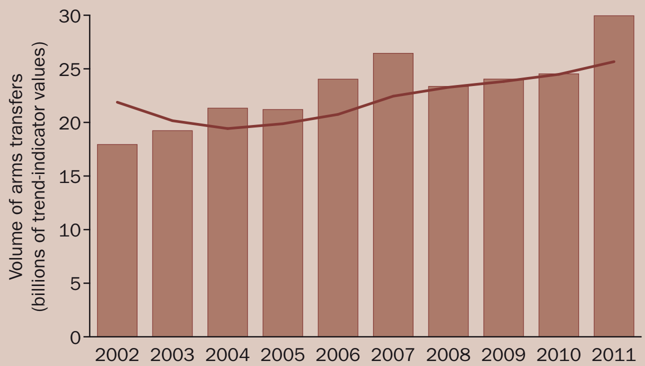

Figure 1. The trend in international transfers of major conventional weapons, 2002–11

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 Arms Transfers Programme website at <http://www.sipri.org/research/armaments/transfers/measuring>.

KEY FACTS

- The volume of international transfers of major conventional weapons in the period 2007–11 was 24 per cent higher than in 2002–2006.
- The five biggest suppliers in 2007–11 were the United States, Russia, Germany, France and the United Kingdom.
- The top 5 suppliers accounted for 75 per cent of the volume of international arms exports.
- The five biggest recipients in 2007–11 were India, South Korea, Pakistan, China and Singapore.
- The top 5 recipients accounted for 30 per cent of the volume of international arms imports.
- The main recipient region in 2007–11 was Asia and Oceania (accounting for 44 per cent of imports), followed by Europe (19 per cent), the Middle East (17 per cent), the Americas (11 per cent) and Africa (9 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 production licences) to states, international organizations and armed non-state groups from 1950 to the most recent full calendar year. It can be used to generate detailed written reports and statistical data on these transfers, including the suppliers and recipients, the type and number of weapon systems ordered and delivered, the years of deliveries, and the financial value of the deal.

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 obtain 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/>.

THE TOP 5 SUPPLIERS, 2007–11

The five biggest suppliers of major conventional weapons in the period 2007–11 were the United States, Russia, Germany, France and the United Kingdom (see table 1). The USA and Russia remained by far the largest exporters, accounting for 30 per cent and 24 per cent of all exports, respectively. The top 5 suppliers accounted for 75 per cent of exports of major conventional weapons in the period 2007–11, compared with 78 per cent for the same five suppliers in the period 2002–2006.

The United States

The volume of the USA's arms exports increased by 24 per cent between 2002–2006 and 2007–11. Asia and Oceania was the largest recipient region of US weapons (accounting for 45 per cent of exports), followed by the Middle East (27 per cent) and Europe (18 per cent). Aircraft made up 63 per cent of the volume of US deliveries in 2007–11.

During 2011, the USA delivered 64 combat aircraft, including 11 F-15Es to South Korea, 7 F-15SGs to Singapore, 9 F/A-18Es to Australia, 12 F-16Cs to Turkey and 16 F-16Cs to Morocco. The most significant order placed in 2011, and the largest arms deal for at least two decades, was Saudi Arabia's order for 84 new F-15SG combat aircraft and the rebuilding of 70 existing F-15Es to the same standard.

Russia

The volume of Russia's arms exports increased by 12 per cent between 2002–2006 and 2007–11. Asia and Oceania was the largest recipient region of Russian weapons (accounting for 63 per cent of exports), followed by Africa (17 per cent) and the Middle East (10 per cent). India received 33 per cent of Russian arms exports, while Russia provided 80 per cent of India's arms imports.

Viet Nam was the fifth largest recipient of Russian exports during this period, accounting for 4 per cent of their total volume. Russian deliveries to

Viet Nam during 2011 included two Gepard class frigates, anti-ship missiles and eight Su 30MK2 combat aircraft. Russia is due to deliver more Gepard frigates, anti-ship missiles and Su-30MK2 combat aircraft, as well as six Project-636 submarines to Viet Nam in the coming years.

Germany

The volume of Germany's arms exports increased by 37 per cent between 2002–2006 and 2007–11. Europe was the largest recipient region of German weapons (accounting for 41 per cent of exports), followed by Asia and Oceania (27 per cent) and the Americas (12 per cent). Greece was the largest recipient of German exports in 2007–11, accounting for 13 per cent of the volume of German exports of major weapons.

During 2011 Germany agreed to subsidize the sale of a sixth Dolphin submarine to Israel and approved large deals for the export to Algeria of armoured vehicles, ships, electronics and other equipment. The first order for the TPz-1 armoured personnel carrier (APC) was signed in 2011, for 54 units. The German Government also approved in principle a sale of up to 200 Leopard-2A7+ tanks to Saudi Arabia, although a contract for the tanks had not been signed by the end of 2011. The proposed sale of tanks and other weapons to Saudi Arabia led to strong opposition in Germany.

France

The volume of France's arms exports increased by 12 per cent between 2002–2006 and 2007–11. However, France fell from being the third largest exporter to fourth place. Asia and Oceania was the largest recipient region of French arms exports (accounting for 51 per cent of exports), followed by Europe (22 per cent) and the Middle East (12 per cent).

During 2011 France received two setbacks in its search for the first exports of the Rafale combat aircraft when the United Arab Emirates (UAE) invited bids from other suppliers and Switzerland opted for the JAS-39 from Sweden. However, in January 2012 India announced the Rafale as the preferred tenderer for its Multi-Role Combat Aircraft (MRCA) programme.

The United Kingdom

The volume of the UK's arms exports rose by 2 per cent between 2002–2006 and 2007–11. The Middle East was the largest recipient region of British arms

Table 1. The five largest suppliers of major conventional weapons and their major recipients, 2007–11

Supplier	Share of international arms exports (%)	Main recipients (share of supplier's total exports) 1st	2nd	3rd
United States	*30*	South Korea (13%)	Australia (10%)	United Arab Emirates (7%)
Russia	*24*	India (33%)	China (16%)	Algeria (14%)
Germany	*9*	Greece (13%)	South Korea (10%)	South Africa (8%)
France	*8*	Singapore (20%)	Greece (10%)	Morocco (8%)
United Kingdom	*4*	Saudi Arabia (28%)	United States (21%)	India (15%)

exports (accounting for 30 per cent of exports), followed by the Americas (28 per cent), and Asia and Oceania (25 per cent).

The UK secured few major export orders in 2011. Along with other European Union (EU) member states, the UK came under strong criticism for its arms transfers to states affected the Arab Spring. While the UK suspended some arms export licences and announced changes to its export control mechanisms, it was also keen to ensure that larger contracts with states in the Middle East—including major arms deals with Saudi Arabia—were unaffected.

THE RECIPIENTS, 2007–11

The five largest importers of major conventional weapons in the period 2007–11 were all in Asia and Oceania: India, South Korea, Pakistan, China and Singapore (see table 2). Together, the top 5 recipients accounted for 30 per cent of imports of major conventional weapons in 2007–11, compared with 39 per cent in 2002–2006, when the top 5 recipients were China, India, the UAE, Greece and South Korea. India, the largest recipient, accounted for 10 per cent of global arms imports. China, which was the largest recipient in 2002–2006, fell to fourth place in 2007–11 (see box 2).

Table 2. The five largest recipients of major conventional weapons and their major suppliers, 2007–11

Recipient	Share of international arms imports (%)	Main suppliers (share of recipient's total imports)		
		1st	2nd	3rd
India	*10*	Russia (80%)	United Kingdom (6%)	Israel (4%)
South Korea	*6*	United States (74%)	Germany (17%)	France (7%)
Pakistan	*5*	China (42%)	United States (36%)	Sweden (5%)
China	*5*	Russia (78%)	France (12%)	Switzerland (5%)
Singapore	*4*	United States (43%)	France (39%)	Germany (8%)

The regional breakdown of arms deliveries has remained relatively stable over the past decade. As in 2002–2006, the main recipient region in the period 2007–11 was Asia and Oceania (see figure 2).

Africa

The volume of deliveries of major conventional weapons to states in Africa increased by 110 per cent between 2002–2006 and 2007–11. Deliveries to sub-Saharan Africa increased by 20 per cent, but deliveries to North Africa increased by 273 per cent, and the share of African imports going to North African states rose from 33 per cent to 59 per cent. Algeria, South Africa and Morocco were by far the largest arms importers in Africa in 2007–11, accounting for, respectively, 43 per cent, 17 per cent and 16 per cent of the region's imports.

Morocco and Algeria

Morocco's imports of major weapons increased by 443 per cent between 2002–2006 and 2007–11 due to a steep increase in deliveries in 2011. Nota-

Box 2. China: declining arms imports and growing arms exports

Due to significant progress in its arms production capabilities, China has become less dependent on arms imports and at the same time has increased the volume of its arms exports. Between 2002–2006 and 2007–11, China fell from being the largest to the fourth largest recipient of major conventional weapons, while the volume of its exports increased by 95 per cent, making it the sixth largest supplier, narrowly trailing the UK.

Most of China's exports went to other states in Asia and Oceania (73 per cent of the volume of exports), followed by the Middle East (12 per cent), Africa (9 per cent) and South America (6 per cent).

The increase in the volume of China's exports is largely a result of Pakistan importing more arms. Pakistan has a long-term military relationship with China and during 2007–11 it received 64 per cent of the volume of Chinese exports. This included 50 JF-17 combat aircraft, 3 F-22P (Zulfiquar) frigates and 203 MBT-2000 tanks.

China has not achieved a major breakthrough in any other significant market. Moreover, despite significant progress in its arms industry, China continues to rely on the import of engines from Russia for its combat aircraft and of other key components and designs from Russia, France, Switzerland, the UK, Ukraine and Germany.

ble deliveries in 2007–11 included 16 F-16C combat aircraft from the USA, 27 MF-2000 combat aircraft from France and 1 SIGMA-90 class frigate from the Netherlands. In the same period imports by Morocco's regional rival Algeria included 36 Su-30MK combat aircraft, 185 T-90S tanks, 2 S-300PMU-2 surface-to-air missile (SAM) systems and 2 Project-636E submarines, all supplied by Russia. Both countries have significant outstanding orders for more weapons.

Kenya and Uganda

Imports by Uganda and Kenya increased significantly between 2002–2006 and 2007–11. Uganda's imports increased by over 300 per cent, mainly due to the delivery of 4 Su-30MK combat aircraft and associated guided weapons from Russia in 2011. Kenya did not import major weapons in 2002–2006 but in 2007–11 it received 15 second-hand F-5E combat aircraft from Jordan, 32 WZ 551 APCs and 4 Z-9WA helicopters from China, 3 Mi-171 helicopters from Russia and 35 Puma M-26 APC from South Africa. During 2011 Kenya used some of the recently acquired weapons in its campaign in Somalia.

South Africa

South Africa was the largest importer of arms in sub-Saharan Africa in 2007–11, accounting for 41 per cent of sub-Saharan African imports. Germany made 55 per cent of the deliveries to South Africa, including two frigates and two submarines. Sweden was the second largest supplier, at 30 per cent, delivering 21 JAS-39 combat aircraft, including 6 in 2011.

The Americas

The volume of deliveries of major conventional weapons to states in the Americas increased by 61 per cent between 2002–2006 and 2007–11. Imports to Central America and the Caribbean decreased by 15 per cent, imports to North America increased by 54 per cent, and imports to South America increased by 77 per cent. The USA was the largest importer of conventional weapons

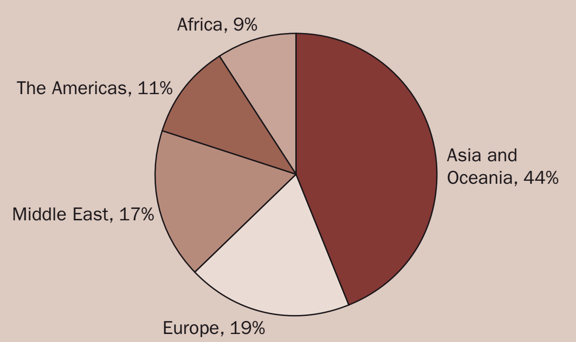

Figure 2. The recipients of major conventional arms, by region, 2007–11

in the region and the eighth largest in the world. Chile and Venezuela jointly accounted for 61 per cent of South American imports.

The United States

Of the 10 largest arms importers, the USA has the most diverse supply base. During 2007–11 the USA imported arms from 15 different countries, none of which accounted for more than 23 per cent of US imports. In recent years, the USA has imported a range of weapon systems that have been used in military operations in Afghanistan or Iraq, including Piranha-3 APCs from Canada, RG 31 APCs from South Africa and M 777 155-mm towed guns from the UK. The vast majority of arms transferred to the USA are produced in the USA under licensed production agreements

Venezuela

Venezuela's arms imports increased by 555 per cent between 2002–2006 and 2007–11 and it rose from being the 46th largest importer to the 15th largest. In 2011 Venezuela took delivery of a range of weapon systems from Russia, including T-72M1M tanks and S-125 Pechora-2M SAM systems. Venezuela also reached final agreement with Russia on an additional $4 billion line of credit for future arms purchases.

Brazil

Brazil has a wide range of arms on order that will result in a dramatic increase in the volume of its imports in the coming years. Significant orders in recent years include licensed production deals with France for 4 Scorpène class submarines, 1 SNBR nuclear-powered submarine and 50 EC-725 helicopters, as well as a licensed production deal with Italy for over 2000 VBTP Guarani APCs. Four of the helicopters had been delivered by the end of 2011, while deliveries of the armoured vehicles and submarines are due to start in 2012 and 2017, respectively. Brazil made no decision on awarding long-discussed deals for combat aircraft and naval systems but did order three VT-90m offshore patrol vessels from the UK.

Asia and Oceania

The volume of deliveries of major weapons to states in Asia and Oceania increased by 24 per cent between 2002–2006 and 2007–11. The region accounted for 44 per cent of all imports in 2007–11, up slightly from 43 per cent in 2002–2006. The main recipient subregion was South Asia (37 per cent of transfers to the region), followed by East Asia (29 per cent), South East Asia (23 per cent), Oceania (8 per cent) and Central Asia (1 per cent).

India and Pakistan

India's imports of major weapons increased by 38 per cent between 2002–2006 and 2007–11. Notable deliveries of combat aircraft during 2007–11 included 120 Su-30MKs and 16 MiG-29Ks from Russia and 20 Jaguar Ss from the UK. While India was the world's largest importer in 2007–11, with 10 per cent of all imports, its neighbour Pakistan was the third largest, accounting for 5 per cent of imports. Pakistan took delivery of a significant quantity of combat aircraft during this period: 50 JF-17s from China and 30 F-16s from the USA. Both India and Pakistan have taken and will continue to take delivery of large quantities of tanks.

South East Asia

Arms deliveries to states in South East Asia increased by 185 per cent between 2002–2006 and 2007–11 to reach their highest level since the end of the Viet Nam War in 1975. Deliveries to both Malaysia and Singapore increased by nearly 300 per cent, while deliveries to Indonesia rose by 144 per cent and deliveries to Viet Nam by 80 per cent. There are strong tensions in the region over maritime borders, mainly in the South China Sea, and ships and other weapons with a maritime role as well as aircraft and other weapons with a dual maritime and over-land role accounted for most of the imports.

Australia

Australia's arms imports increased by 48 per cent between 2002–2006 and 2007–11. It was the sixth largest importer in 2007–11, accounting for 4 per cent of all transfers. Deliveries included 24 F/A-18E combat aircraft, 6 airborne early warning aircraft and 5 C-17 transport aircraft from the USA, and 4 A-330 tanker aircraft from France. These weapons, and those on order and planned, reflect Australia's policy goals of long-range defence and intervention.

Europe

The volume of deliveries of major conventional weapons to states in Europe increased by 13 per cent between 2002–2006 and 2007–11. Eighty per cent of transfers to European states originated in Western Europe. Greece was the largest importer in the region in 2007–11 and, along with the UK and Norway, was one of only three European states among the 20 largest importers.

Greece

Greece's arms imports decreased by 18 per cent between 2002–2006 and 2007–11. In 2007–11 it was the 10th largest arms importer, down from being the fourth largest in 2002–2006. Greece placed no new order for major conventional weapons in 2011 but it did take delivery of the second of four Super Vita fast attack craft from the UK and related systems from Italy and the Netherlands. Greece also took delivery of the first of 20 NH-90 helicopters from France. It still has outstanding orders for five Type-214 submarines from Germany.

Russia

Russia, a minor importer of major conventional weapons, finally signed a contract with France in 2011 to jointly produce 4 Mistral amphibious assault landing ships, as well as a deal with Italy to assemble 60 Lynx LMV light armoured vehicles, which could increase to 2500 vehicles. Russia also took delivery of unmanned aerial vehicles from Israel.

Azerbaijan and Armenia

The volume of Azerbaijan's imports of major conventional weapons increased by 164 per cent between 2002–2006 and 2007–11, making it the

38th largest recipient of weapons. Azerbaijan's arms imports are connected to its ongoing dispute with Armenia over the disputed region of Nagorno-Karabakh. Although Armenia dropped from being the 71st largest recipient to 84th place between 2007–11 and 2002–2006, the Armenian Government has declared that it will procure arms in response to Azerbaijan's arms acquisitions. Russia is the main supplier of arms to both states: in 2007–11 it provided 55 per cent of Azerbaijan's arms imports and 96 per cent of Armenia's arms imports.

The Middle East

Although the volume of deliveries of major conventional weapons to states in the Middle East decreased by 8 per cent between 2002–2006 and 2007–11, there are signs that this trend will soon be reversed. In 2007–11 states in the region received about 195 combat aircraft, while an additional 416 on order remained undelivered at the end of 2011.

States affected by the Arab Spring

During 2011, the governments of Bahrain, Egypt, Libya, Tunisia and Syria used imported weapons in the suppression of peaceful demonstrations among other alleged violations of human rights and international humanitarian law. The transfer of arms to states affected by the Arab Spring has provoked public and parliamentary debate in a number of supplier states. However, the impact on states' arms export policies has been mixed. The United Nations imposed an arms embargo on Libya in February 2011. Egypt, by far the largest arms importer of the five countries, continued to receive and order major arms, in particular from the USA. In 2011 Egypt received 45 M-1A1 tanks from the USA and ordered 125 more.

Syria's imports of major weapons increased by 580 per cent between 2002–2006 and 2007–11. Russia supplied 78 per cent of Syrian imports in 2007–11, followed by Belarus (17 per cent) and Iran (5 per cent). Russia's arms supplies included an estimated 36 Pantsir-S1 and 2 Buk-M2E SAM systems and 2 Bastion-P coastal defence missile systems. Russia has opposed a proposal for a UN arms embargo on Syria and plans further deliveries, including 24 MiG-29M2 combat aircraft and 36 Yak-130 trainer/combat aircraft.

Saudi Arabia

Saudi Arabia ranked as the 11th largest arms importer in 2007–11. The UK was the largest supplier, accounting for 41 per cent of Saudi Arabia's imports, thanks largely to the delivery of 24 out of 72 Typhoon combat aircraft on order. In 2011 the UK made the first deliveries of Storm Shadow air-launched cruise missiles, which improved Saudi Arabia's long-range strike capabilities. These capabilities will receive a further significant boost from the mid-2010s with the delivery of 154 new and rebuilt F-15SA combat aircraft ordered from the USA in 2011.

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