



Conventional Arms Transfers to Developing Nations, 2002-2009

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Summary

This report is prepared annually to provide Congress with official, unclassified, quantitative data on conventional arms transfers to developing nations by the United States and foreign countries for the preceding eight calendar years for use in its policy oversight functions. All agreement and delivery data in this report for the United States are government-to-government Foreign Military Sales (FMS) transactions. Similar data are provided on worldwide conventional arms transfers by all suppliers, but the principal focus is the level of arms transfers by major weapons suppliers to nations in the developing world.

Developing nations continue to be the primary focus of foreign arms sales activity by weapons suppliers. During the years 2002-2009, the value of arms transfer agreements with developing nations comprised 68.3% of all such agreements worldwide. More recently, arms transfer agreements with developing nations constituted 72.8% of all such agreements globally from 2006-2009, and 78.4% of these agreements in 2009.

The value of all arms transfer *agreements* with developing nations in 2009 was nearly \$45.1 billion. This was a decline from \$48.8 billion in 2008. In 2009, the value of all arms *deliveries* to developing nations was nearly \$17 billion, the lowest total in these deliveries values for the entire 2002-2009 period (in *constant* 2009 dollars).

Recently, from 2006-2009, the United States and Russia have dominated the arms market in the *developing world*, with both nations either ranking first or second for all of these four years in the value of arms transfer *agreements*. From 2006-2009, the United States made \$68.7 billion in such agreements, 38.6% all these agreements expressed in *constant* 2009 dollars. Russia made \$42.4 billion, 23.8% of these agreements. During this same period, collectively, the United States and Russia made 62.4% of all arms transfer agreements with developing nations, (\$111.6 billion (in *constant* 2009 dollars) during this four-year period.

In 2009, the United States ranked first in arms transfer *agreements* with *developing nations* with nearly \$17.4 billion or 38.5% of these agreements, a decline in market share from 2008, when the United States held a 60.4% market share. In second place was Russia with \$10.4 billion or 23.1% of such agreements. France ranked third with \$7.1 billion or 15.8%.

In 2009, the United States ranked first in the value of arms *deliveries* to *developing* nations at \$7.4 billion, or 43.6% of all such deliveries. Russia ranked second in these deliveries at \$3.5 billion or 20.6%.

In *worldwide* arms transfer *agreements* in 2009, the United States dominated, ranking first with \$22.6 billion in such agreements or 39.3% of all such agreements. Ranking second in *worldwide* arms transfer *agreements* in 2009 was Russia with \$10.4 billion in such *global* agreements or 18.1%.

In 2009, Brazil ranked first in the value of arms transfer *agreements* among all *developing* nations weapons *purchasers*, concluding \$7.2 billion in such agreements. Venezuela ranked second with \$6.4 billion in such agreements. Saudi Arabia ranked third with \$4.3 billion.

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Conventional Arms Transfers to Developing Nations, 2002-2009

Introduction and Overview

This report provides Congress with official, unclassified, background data from U.S. government sources on transfers of conventional arms to developing nations by major suppliers for the period 2002 through 2009. It also includes some data on worldwide supplier transactions. It updates and revises CRS Report R40796, *Conventional Arms Transfers to Developing Nations, 2001-2008*.

Data in this report provide a means for Congress to identify existing supplier-purchaser relationships in conventional weapons acquisitions. Use of these data can assist Congress in its oversight role of assessing whether the current nature of the international weapons trade affects U.S. national interests. For most of recent American history, maintaining regional stability, and ensuring the security of U.S. allies and friendly nations throughout the world have been important elements of U.S. foreign policy. Knowing the degree to which individual arms suppliers are making arms transfers to individual nations or regions provides Congress with a context for evaluating policy questions it may confront. Such policy questions may include, for example, whether or not to support specific U.S. arms sales to given countries or regions or to support or oppose such arms transfers by other nations. The data in this report may also assist Congress in evaluating whether multilateral arms control arrangements or other U.S. foreign policy initiatives are being supported or undermined by the actions of arms suppliers.

The principal focus of this report is the level of arms transfers by major weapons suppliers to nations in the developing world—where most of the potential for the outbreak of regional military conflicts currently exists, and where the greatest proportion of the conventional arms trade is conducted. For decades, during the height of the Cold War, providing conventional weapons to friendly states was an instrument of foreign policy utilized by the United States and its allies. This was equally true for the Soviet Union and its allies. The underlying rationale for U.S. arms transfer policy then was to help ensure that friendly states were not placed at risk through a military disadvantage created by arms transfers by the Soviet Union or its allies. Following the Cold War's end, U.S. arms transfer policy has been based on assisting friendly and allied nations in developing, and maintaining their ability to deal with regional security threats and concerns.

Data in this report illustrate how global patterns of conventional arms transfers have changed in the post-Cold War and post-Persian Gulf War years. Relationships between arms suppliers and recipients continue to evolve in the 21st Century in response to changing political, military, and economic circumstances. Where before the principal motivation for arms sales by foreign suppliers might have been to support a foreign policy objective, today that motivation may be based as much on economic considerations as those of foreign or national security policy.

Nations in the developing world continue to be the primary focus of foreign arms sales activity by conventional weapons suppliers. During the period of this report, 2002-2009, conventional arms transfer agreements (which represent orders for future delivery) to developing nations comprised 68.3% of the value of all international arms transfer *agreements*. The portion of agreements with developing countries constituted 72.8% of all agreements globally from 2006-2009. In 2009 arms transfer agreements with developing countries accounted for 78.4% of the value of all such agreements globally. *Deliveries* of conventional arms to *developing* nations, from 2006-2009

constituted 55.5% of all international arms deliveries. In 2009, arms *deliveries* to *developing* nations constituted 48.5% of the value of all such arms deliveries worldwide.

The data in this new report supersede all data published in previous editions. Since these new data for 2002-2009 reflect potentially significant updates to and revisions in the underlying databases utilized for this report, only the data in this most recent edition should be used. The data are expressed in U.S. dollars for the calendar years indicated, and adjusted for inflation (see box note on page 3). U.S. commercially licensed arms export delivery values are excluded (see box note on page 18). Also excluded are arms transfers by any supplier to subnational groups. The definition of developing nations, as used in this report, and the specific classes of items included in its values totals are found in box notes below on page 2. The report's table of contents provides a detailed listing and description of the various data tables to guide the reader to specific items of interest.

CALENDAR YEAR DATA USED

All arms transfer and arms delivery data in this report are for the calendar year or calendar year period given. This applies to U.S. and foreign data alike. United States government departments and agencies publish data on U.S. arms transfers and deliveries but generally use the United States fiscal year as the computational time period for these data. As a consequence, there are likely to be distinct differences noted in those published totals using a fiscal year basis and those provided in this report which use a calendar year basis. Details on data used are outlined in notes at the bottom of Tables 3, 14, 30 and 35.

ARMS TRANSFER VALUES

The values of arms transfer agreements (or deliveries) in this report refer to the total values of conventional arms orders (or deliveries as the case may be) which include all categories of weapons and ammunition, military spare parts, military construction, military assistance and training programs, and all associated services.

DEFINITION OF DEVELOPING NATIONS AND REGIONS

As used in this report, the developing nations category includes all countries except the United States, Russia, European nations, Canada, Japan, Australia, and New Zealand. A listing of countries located in the regions defined for the purpose of this analysis—Asia, Near East, Latin America, and Africa—is provided at the end of the report.

CONSTANT 2009 DOLLARS

Throughout this report values of arms transfer agreements and values of arms deliveries for all suppliers are expressed in U.S. dollars. Values for any given year generally reflect the exchange rates that prevailed during that specific year. The report converts these dollar amounts (current dollars) into constant 2009 dollars. Although this helps to eliminate the distorting effects of U.S. inflation to permit a more accurate comparison of various dollar levels over time, the effects of fluctuating exchange rates are not neutralized. The deflators used for the constant dollar calculations in this report are those provided by the U.S. Department of Defense and are set out at the bottom of Tables 4, 15, 31, and 36. *Unless otherwise noted in the report*, all dollar values are stated in *constant* terms. The exceptions to this rule are all regional data tables that are composed of four-year aggregate dollar totals (2002-2005 and 2006-2009). These tables are expressed in *current* dollar terms. And where tables rank leading arms suppliers to developing nations or leading developing nation recipients using four-year aggregate dollar totals, these values are expressed in *current* dollars.

Major Findings

General Trends in Arms Transfers Worldwide

The value of all arms transfer agreements worldwide (to both developed and developing nations) in 2009 was \$57.5 billion. This was a decrease in arms agreements values over 2008 of 8.5%, and the lowest worldwide arms agreements total since 2005 (**Figure 1**) (**Table 31**).

In 2009, the United States led in arms transfer agreements worldwide, making agreements valued at \$22.6 billion (39.3% of all such agreements), a decline from \$38.1 billion in 2008. Russia ranked second with \$10.4 billion in agreements (18.1% of these agreements globally), up from \$5.5 billion in 2008. France ranked third; its arms transfer agreements worldwide were \$7.4 billion in 2009, up from \$3.2 billion in 2008. The United States, Russia, and France collectively made agreements in 2009 valued at \$40.4 billion, 70.3% of all international arms transfer agreements made by all suppliers (**Figure 1**), (**Table 31**, **Table 32**, and **Table 34**).

For the period 2006-2009, the total value of all international arms transfer agreements (\$244.5 billion) was higher than the worldwide value during 2002-2005 (\$172.4 billion), an increase of 29.5%. During the period 2002-2005, developing world nations accounted for 61.8% of the value of all arms transfer agreements made worldwide. During 2006-2009, developing world nations accounted for 72.8% of all arms transfer agreements made globally. In 2009, developing nations accounted for 78.4% of all arms transfer agreements made worldwide (**Figure 1**), (**Table 31**).

In 2009, the United States ranked first in the value of all arms deliveries worldwide, making nearly \$14.4 billion in such deliveries or 41%. This is the eighth year in a row that the United States has led in global arms deliveries. Russia ranked second in worldwide arms deliveries in 2009, making \$3.7 billion in such deliveries. Germany ranked third in 2009, making \$2.8 billion in such deliveries. These top three suppliers of arms in 2009 collectively delivered \$20.9 billion, 59.5% of all arms delivered worldwide by all suppliers in that year (**Table 2**) (**Table 36**, **Table 37**, and **Table 39**).

The value of all international arms deliveries in 2009 was \$35.1 billion. This is a nominal decrease in the total value of arms deliveries from the previous year (a decline from \$35.9 billion). The total value of such arms deliveries worldwide in 2006-2009 (\$146.2 billion) was lower than the deliveries worldwide from 2002-2005 (about \$153 billion, a decline of \$6.8 billion) (**Table 2**), (**Table 36** and **Table 37**), (**Figure 7** and **Figure 8**).

Developing nations from 2006-2009 accounted for 55.5% of the value of all international arms deliveries. In the earlier period, 2002-2005, developing nations accounted for 66.7% of the value of all arms deliveries worldwide. In 2009, developing nations collectively accounted for 48.5% of the value of all international arms deliveries (**Table 2**) (**Table 15**, **Table 36**, and **Table 37**).

Worldwide weapons orders fell in 2009. The total of \$57.5 billion, was a decrease from \$62.8 billion in 2008, or 8.5%. Yet for the United States, the decline in its value and share of worldwide United States weapons agreements total in 2009 was (\$22.6 billion or 39.3%) falling from \$38.1 billion or 60.1% in 2008. These lower U.S. figures can be generally attributed to the number of high value arms transfer agreements signed in 2008; totals not usually duplicated two years in a row. Russia and France, meanwhile, made new high value sales in 2009, thereby increasing their respective shares of the arms market.

The general decline in new weapons sales world-wide in 2009 is partially explained by the decision of some purchasing nations to defer the purchase of major systems due to budgetary considerations given the severe international recession that accelerated from the summer of 2008 onward. Some nations chose to focus on completing the integration into their militaries of major weapons systems they had already purchased. Others limited their contracts to training and support services, as well as to selective upgrades of existing weapons systems. Orders like these can still be costly, and, in given instances, prove to be nearly as expensive as some new units of military equipment. Thus not every major supplier had to sell new weapons systems in 2008 to post arms agreement values in excess of a billion dollars. But the clear decline in all arms orders collectively in 2009 reflects, in part, the effect of the international recession.

Despite the impact of the international economic climate, the international arms market is still very competitive. While new sales have become more difficult to secure most recently, several weapons-producing countries continue to focus sales efforts on prospective clients in nations and regions where individual suppliers have historically held competitive advantages resulting from well-established military-support relationships. Yet, where feasible, several arms suppliers have also sought out new clients in regions of the world where they have not been traditional suppliers.

There are inherent obstacles to sales to developing nations with smaller defense budgets. Consequently, creative seller financing options, as well as the use of co-assembly, co-production, and counter-trade agreements to offset costs to the buyers, are instruments increasingly being utilized to facilitate securing new arms agreements. Given the limitations on significant growth of arms sales to less affluent developing nations, competition between the United States and European countries or consortia for prospective arms contracts within the European region is likely to be particularly strong in the foreseeable future. Such sales seem particularly important to European suppliers, as they may partially compensate for lost weapons deals elsewhere in the developing world resulting from reduced demand for new and expensive weapons systems.

Developed world nations continue their efforts to protect important elements of their national military industrial bases by limiting arms purchases from other developed nations. This has led several major arms suppliers to place emphasis on the joint production of various weapons

systems with other developed nations as an effective way to preserve a domestic weapons production capability, while sharing the costs of development of new weapons. Some supplying nations have decided to manufacture items for niche weapons categories where their specialized production capabilities give them important advantages in the international arms marketplace. The strong competition for weapons contracts has also led to consolidation of certain sectors of the domestic defense industries of key weapons-producing nations to enhance, further, their competitiveness.

Occasionally, less-affluent nations in the developing world are compelled by financial considerations to limit their weapons purchases. Yet other prospective purchasers in the developing world with significant financial assets continue to launch new and costly weapons-procurement programs. Increases in the price of oil has proven to be a major advantage for major oil producing states in funding their arms purchases. At the same time, such oil price increases have caused economic difficulties for many oil consuming states, and contributed to their decisions to curtail or defer new weapons acquisitions. In such circumstances, less affluent developing nations have sometimes chosen to upgrade existing weapons systems in their inventories, instead of purchasing new ones. This curtailment of sales of some new weapons systems does not necessarily leave arms suppliers with minimal options. The weapons upgrade market can be very lucrative for some arms producers, and in some instances help offset the effect of diminished opportunities for sales of major defense equipment items.

In spite of the volatility of the international economy in recent years, some nations in the Near East and Asia regions have resumed or continued large weapons purchases. These major orders have been made by a select few developing nations in these regions. They have primarily been made by India and, to a lesser extent, China in Asia, and Saudi Arabia and the United Arab Emirates in the Near East. For the larger group of developing nations in these regions, the strength of their individual economies appears to be the most significant factor in the timing of many of their arms acquisitions.

In the Latin American region, and, to a much lesser extent, Africa, some developing nations in these regions seek to modernize key sectors of their military forces. During the last decade, some nations in these regions have placed large arms orders, by regional standards, to advance that goal. Within these two regions, many countries are significantly constrained by their financial resources and thus limited to the weapons they can purchase. So long as nations in these regions face a limited availability of seller-supplied credit and financing for weapons purchases, their smaller national budgets will, in many cases, limit their military purchases. Few major weapons systems purchases are likely to be made, especially in the Africa region.

General Trends in Arms Transfers to Developing Nations

The value of all arms transfer agreements with developing nations in 2009 was \$45.1 billion, a decrease from the \$48.8 billion total in 2008 (**Figure 1**) (**Table 1**) (**Table 3**) (**Table 4**). In 2009, the value of all arms deliveries to developing nations (\$17 billion) was lower than the value of 2008 deliveries (nearly \$20.5 billion), and the lowest total for the 2002-2009 period (**Figure 7** and **Figure 8**) (**Table 2**) (**Table 15**).

Recently, from 2006-2009, the United States and Russia have dominated the arms market in the developing world, with both nations either ranking first or second for all four years in terms of the value of arms transfer agreements. From 2006-2009, the United States made \$68.7 billion of these agreements, or 36.7% of them. During this same period, Russia made \$42.4 billion, 23.8%

of all such agreements, expressed in constant 2009 dollars. Collectively, the United States and Russia made 62.4% of all arms transfer agreements with developing nations during this four year period. The United Kingdom, the third leading supplier, from 2006-2009 made \$15.9 billion or 8.9% of all such agreements with developing nations during these years. In the earlier period (2002-2005) the United States ranked first with \$31.9 billion in arms transfer agreements with developing nations or 29.9%; Russia made \$29.9 billion in arms transfer agreements during this period or 28%. The United Kingdom made \$11.1 billion in agreements or 10.4% (**Table 4**).

From 2002-2009, most arms transfers to developing nations were made by two or three major suppliers in any given year. The United States ranked first among these suppliers for five of the eight years of this period, notably the last three. From 2004 through 2006, the United States ranked second each year. Russia has been a strong competitor for the lead in arms transfer agreements with developing nations, ranking first every year from 2004 through 2006, and second from 2007 through 2009. Russia has lacked the larger traditional client base for armaments held by the United States and the major West European suppliers. However, it has been a major source of weaponry for a few key purchasers in the developing world. Russia's most significant high value arms transfer agreements continue to be with India. Russia has also had some success in concluding arms agreements with clients in the Near East, and in Southeast Asia.

Russia has increased its sales efforts in Latin America where it was a major supplier to Cuba during the Cold War. Venezuela has become Russia's significant new arms client for in this region. Russia has adopted more flexible payment arrangements, including loans, for its prospective customers in the developing world generally, including a willingness in specific cases to forgive outstanding debts owed to it by a prospective client in order to secure new arms purchases. Russia continues efforts to enhance the quality of its follow-on support services to make Russian weaponry more attractive and competitive, attempting to assure potential clients that it will provide timely and effective service and spare parts for the weapons systems it exports.

Among the four major West European arms suppliers, France and the United Kingdom have been most successful in concluding significant orders with developing countries from 2002-2009, based on either long-term supply relationships or their having specialized weapons systems available for sale. Germany has shown particular success in selling naval systems customized for developing nations. Although the United States faces on-going competition from other major arms suppliers, the U.S. appears likely to hold its position as the principal supplier to key developing world nations, especially with those able to afford major new weapons. Beginning in the Cold War period, the United States developed an especially large and diverse base of arms equipment clients globally with whom it is able to conclude a continuing series of arms agreements annually. It has also for decades provided upgrades, spare parts, ordnance and support services for the wide variety of weapons systems it has previously sold to this large list of clients. This large customer base has given distinct competitive advantages to the United States. It makes the United States a logical supplier for new generation equipment to traditional clients. It also provides for a steady stream of orders from year to year, even when the U.S. does not conclude major new arms agreements for major weapons systems.

Major arms-supplying nations continue to focus their sales efforts on the wealthier developing countries, while arms transfers to the less affluent developing nations are constrained by the scarcity of funds in their defense budgets and the unsettled state of the international economy. Between the years 2002 and 2003, the level of arms agreements with developing nations was relatively flat. But from 2004 through 2008 arms transfer agreements with developing nations

have increased every year. These agreements reached a peak in 2008 at \$48.8 billion. The increase in agreements with developing nations from 2003 forward have been driven to an important degree by sales to the more affluent countries in this group, particularly key oil producing states, which have been especially active in seeking new weaponry during these years.

The less traditional European and non-European suppliers, including China, have been successful in securing some agreements with developing nations in recent years, although at lower levels, and with uneven results, compared to the major weapons suppliers. However, these non-major arms suppliers have occasionally made arms deals of significance. Although their agreement values appear larger when they are aggregated as a group, most of their annual arms transfer agreement values during 2002-2009 have been comparatively low when they are examined as individual suppliers. In various cases these suppliers have been successful in selling older generation or less advanced equipment. This group of arms suppliers is more likely to be the source of small arms and light weapons and associated ordnance, rather than routine sellers of major weapons systems. Most of these arms suppliers do not rank high in the value of their arms agreements and deliveries (**Table 4, Table 9, Table 10, Table 15, Table 20, and Table 21**).

United States

The total value—in real terms—of United States arms transfer agreements with developing nations fell from \$29.5 billion in 2008 to \$17.4 billion in 2009. The U.S. share of the value of all such agreements was 38.5% in 2009, an extraordinary decline from a 60.4% share in 2008 (**Figure 1, Figure 7, and Figure 8**) (**Table 1**) (**Table 4** and **Table 5**).

In 2009, the total value of U.S. arms transfer agreements with developing nations was attributable to a couple of major new orders from clients in the Near East and in Asia, but more broadly to the continuation of significant equipment and support services contracts with a broad-based number of U.S. clients globally. The \$17.4 billion arms agreement total for the United States in 2009 illustrates dramatically the continuing U.S. advantage of having well-established defense support arrangements with many weapons purchasers worldwide, based upon the existing U.S. weapons systems the militaries of these clients utilize. U.S. agreements with all of its customers in 2009 include not only sales of very costly major weapons systems, but also the upgrading and the support of systems previously provided. It is important to emphasize that arms agreements involving a wide variety of items such as spare parts, ammunition, ordnance, training, and support services can have significant costs associated with them.

Among the larger valued arms transfer agreements the United States concluded in 2009 with developing nations were: with Egypt for 24 F-16 C/D Block 50/52 fighter aircraft for \$1.7 billion; with Taiwan for a Patriot air defense missile system for \$3.2 billion; with Kuwait for KC-130J aircraft and support for \$1.1 billion; with the United Arab Emirates for support of UH-60M Black Hawk helicopters for \$745 million and for support of AH-64D Apache helicopters for \$252 million; with Saudi Arabia for support of AH-64D Apache helicopters for \$540 million, and for support of various armored vehicles for \$400 million. Other U.S. arms transfer agreements in 2009 include contracts with South Korea for various missiles and support for \$214 million; with Iraq for 20 T-6A Texan aircraft for \$110 million; and several score of missile, ordnance, and weapons systems support cases worth tens of millions of dollars each for customers throughout the world.

Russia

The total value of Russia's arms transfer agreements with developing nations in 2009 was \$10.4 billion, a substantial increase from \$5.4 billion in 2008, placing Russia second in such agreements with the developing world. Russia's share of all developing world arms transfer agreements also rose from 11.1% in 2008 to 23.1% in 2009 (**Figure 1, Figure 7, and Figure 8**) (**Table 1, Table 4, Table 5, and Table 10**).

Russia's arms transfer agreement totals with developing nations have been notable during the last four years. During the 2006-2009 period, Russia ranked second among all suppliers to developing countries, making \$40.5 billion in agreements (in current 2009 dollars) (**Table 9**). Russia's status as a leading supplier of arms to developing nations represents a successful effort to overcome the significant problems associated with the dissolution of the former Soviet Union. Traditional arms clients of the former Soviet Union were generally less wealthy developing countries. During the Soviet-era several client states received substantial military aid grants and significant discounts on their arms purchases. Faced with a limited client base, and stiff competition from Western arms suppliers in the post-Cold War period, Russia adapted its selling practices in an effort to regain and sustain an important share of the developing-world arms market.

In recent years, Russia has made significant efforts to provide more creative financing and payment options for prospective arms clients. Russia's leaders have agreed to engage in counter-trade, offsets, debt-swapping, and, in key cases, to make significant licensed production agreements in order to sell Russia's weapons. Willingness to agree to licensed production has been a critical element in several cases involving important arms clients, particularly India and China. Russia's efforts to expand its arms customer base elsewhere have met with mixed results. Other successful Russian arms sales efforts have been focused on Southeast Asia. In this region Russia has secured arms agreements with Malaysia, Vietnam, Burma, and Indonesia. Russia has also concluded major arms deals with Venezuela and with Algeria. Elsewhere in the developing world Russian military equipment has been competitive because it ranges from the most basic to the highly advanced. For less affluent developing nations Russia's less expensive armaments have proven attractive.

Military aircraft and missiles continue to provide a significant portion of Russia's arms exports. Yet the absence of substantial funding for new research and development efforts in this and other military equipment areas has jeopardized Russia's longer-term foreign arms sales prospects. Military weapons research and development (R&D) programs exist in Russia, but other major arms suppliers have advanced much more rapidly in developing and producing weaponry than have existing Russian military R&D programs, a factor that may deter expansion of the Russian arms client base. One case in point is Russia's efforts to acquire French technology through the prospective purchase of the Mistral amphibious assault ship, rather than relying on Russian shipbuilding specialists to create a comparable ship for the Russian Navy.

Nevertheless, Russia has had important arms development and sales programs particularly involving India and, to a lesser extent, China, which should provide it with sustained business for a decade. During the mid-1990s, Russia sold major combat fighter aircraft, and main battle tanks to India, and has provided other major weapons systems through lease or licensed production. It continues to provide support services and items for these various weapons systems. Sales of advanced weaponry in South Asia by Russia have been a matter of ongoing concern to the United States because of long-standing tensions between India and Pakistan. A key U.S. policy objective

is keeping a potentially destabilizing arms race in this region within check. In support of that end, the United States has recently expanded its military cooperation with India.¹

Another of Russia's key arms clients in Asia has been China, which purchased advanced aircraft and naval systems. Since 1996, Russia has sold China Su-27 fighter aircraft and agreed to their licensed production. It has sold the Chinese quantities of Su-30 multi-role fighter aircraft, Sovremenny-class destroyers equipped with Sunburn anti-ship missiles, and Kilo-class Project 636 diesel submarines. Russia has also sold the Chinese a variety of other weapons systems and missiles. Chinese arms acquisitions are apparently aimed at enhancing its military projection capabilities in Asia, and its ability to influence events throughout the region. A U.S. policy concern is, among other things, ensuring that it provides appropriate military equipment to U.S. allies and friendly states in Asia to help offset any prospective threat China may pose to such nations.² In recent years there have been no especially large Russian arms agreements with China. The Chinese military is currently focused on absorbing and integrating into its force structure the significant weapons systems obtained from Russia. There has also been tension between Russia and China over efforts by China to reverse engineer and copy major combat systems obtained from Russia, in violation of their licensed production agreements.

The most significant arms transfer agreements Russia made in 2009 were with Vietnam for 6 Kilo-class Project 636 diesel submarines for \$1.8 billion and 8 Su-MK2 fighter aircraft for \$500 million. Russia sold Burma 20 MiG-29 fighter aircraft for \$570 million; and 122 jet engines for China's J-10 fighters for \$500 million. In 2009 Russian also concluded a major procurement agreement with Venezuela. Russia provided Venezuela with a \$2.2 billion loan which will be applied toward the purchase of 92 T-72 main battle tanks, over 300 BMP-3 armored cars, BUK-M12, and Pechora 2-M anti-aircraft missile systems.

China

China became an important supplier of less expensive weaponry during the Iran-Iraq war in the 1980s. During that conflict China demonstrated that it was willing to provide arms to both combatants in quantity and without conditions. In the years that followed, China's arms sales have been more regional and targeted in the developing world. From 2006-2009, the value of China's arms transfer agreements with developing nations averaged over \$1.9 billion annually. During the period of this report, the value of China's arms transfer agreements with developing nations were highest in 2005 at \$3.3 billion. A significant portion of China's totals can be attributed to a significant contract with Pakistan, a key client, associated with the production of the J-17 fighter aircraft. Generally, China's sales figures reflect several smaller valued weapons deals in Asia, Africa, and the Near East, rather than one or two especially large agreements for major weapons systems. In 2009, the most notable Chinese arms contract was the sale of 36 J-10 fighter aircraft to Pakistan for \$1.4 billion (**Table 4**, **Table 10**, and **Table 11**) (**Figure 7**).

¹ For detailed background see CRS Report RL33515, *Combat Aircraft Sales to South Asia: Potential Implications*, by Christopher Bolcom, Richard F. Grimmett, and K. Alan Kronstadt; CRS Report RS22757, *U.S. Arms Sales to Pakistan*, by Richard F. Grimmett; CRS Report RL32115, *Missile Proliferation and the Strategic Balance in South Asia*, by Andrew Feickert and K. Alan Kronstadt; and CRS Report RL30427, *Missile Survey: Ballistic and Cruise Missiles of Selected Foreign Countries*, by Andrew Feickert.

² For detailed background see CRS Report RL30700, *China's Foreign Conventional Arms Acquisitions: Background and Analysis*, by Shirley A. Kan, Christopher Bolcom, and Ronald O'Rourke; and CRS Report RL33153, *China Naval Modernization: Implications for U.S. Navy Capabilities—Background and Issues for Congress*, by Ronald O'Rourke.

Few developing nations with significant financial resources have purchased Chinese military equipment during the eight-year period of this report. Most Chinese weapons for export are less advanced and sophisticated than weaponry available from Western suppliers or Russia. China, consequently, does not appear likely to be a key supplier of major conventional weapons in the developing world arms market in the immediate future. Instead, China's likely client base will be states in Asia and Africa seeking quantities of small arms and light weapons, rather than major combat systems. Nonetheless, China appears to be making efforts to produce weapons systems for export based upon designs obtained from Russia through previous licensed production programs. China has been an important source of missiles in the developing world arms market. China supplied Silkworm anti-ship missiles to Iran. Credible reports persist in various publications that China has sold surface-to-surface missiles to Pakistan. North Korea and Iran have also reportedly received Chinese missile technology, which may have increased their capabilities to threaten other countries in their respective neighborhoods. Such activities reported by credible sources raise important questions about China's stated commitment to the restrictions on missile transfers set out in the Missile Technology Control Regime (MTCR), including its pledge not to assist others in building missiles that could deliver nuclear weapons. Yet because China has military products—particularly missiles—that some developing countries would like to acquire, it can present an obstacle to efforts to stem proliferation of advanced missile systems to some areas of the developing world where political and military tensions are significant, and where some nations are seeking to develop military capabilities of an asymmetric nature.³

Further, China has been a key source of a variety of small arms and light weapons transferred to African states. Since the prospects for significant revenue earnings from these arms sales are limited, China likely views such sales as one means of enhancing its status as an international political power, and increasing its ability to obtain access to significant natural resources, especially oil. Controlling the sales of small arms and light weapons to regions of conflict, in particular to some African nations, has been a matter of concern to the United States. The United Nations also has undertaken an examination of this issue in an effort to achieve consensus on a path to curtail this weapons trade comprehensively.⁴

Major West European Suppliers

The four major West European arms suppliers—France, the United Kingdom, Germany, and Italy—can supply a wide variety of more highly sophisticated weapons to would-be purchasers. They provide alternative sources of armaments for nations that the United States chooses not to supply for policy reasons. For example, the United Kingdom sold major combat fighter aircraft to Saudi Arabia in the mid-1980s, when the U.S. chose not to sell a comparable aircraft for policy reasons. These four NATO allies of the United States have generally supported the U.S. position in restricting arms sales to certain nations during the Cold War era. However, in the post-Cold

³ For detailed background on the MTCR and proliferation control regimes and related policy issues see CRS Report RL31559, *Proliferation Control Regimes: Background and Status*, coordinated by Mary Beth Nikitin; and CRS Report RL31848, *Missile Technology Control Regime (MTCR) and International Code of Conduct Against Ballistic Missile Proliferation (ICOC): Background and Issues for Congress*, by Andrew Feickert.

⁴ For background on China's actions and motivations for increased activities in Africa see CRS Report RL33055, *China and Sub-Saharan Africa*, by Raymond W. Copson, Kerry Dumbaugh, and Michelle Weijing Lau. For background on U.S. Policy concerns regarding small arms and light weapons transfers see CRS Report RS20958, *International Small Arms and Light Weapons Transfers: U.S. Policy*, by Richard F. Grimmert.

War period, their national defense export policies have not been fully coordinated, as before, with the United States.

The leading European arms supplying states, especially France, view arms sales foremost as a matter for national decision. Economic considerations appear to be a greater driver in French arms sales decision-making than matters of foreign policy. France has also frequently used foreign military sales as an important means for underwriting development and procurement of new weapons systems for its own military forces. The potential for policy differences between the United States and major West European supplying states over conventional weapons transfers to specific countries has increased in recent years, because of a divergence of views over what is an appropriate arms sale. An example of such a conflict resulted from an effort led by France and Germany to lift the arms embargo on arms sales to China adhered to by members of the European Union. The United States viewed this as a misguided effort, and vigorously opposed it. Ultimately, the proposal to lift the embargo was not adopted. Yet it proved to be a source of significant tension between the U.S. and the European Union. The arms sales activities of major European suppliers, consequently, will continue to be of interest to U.S. policymakers, given their capability to make sales of advanced military equipment to countries of concern to U.S. national security policy.⁵

The four major West European suppliers (France, the United Kingdom, Germany, and Italy), as a group, registered a notable increase in their collective share of all arms transfer agreements with developing nations between 2008 and 2009. This group's share rose from 14.3% in 2008 to 23.5% in 2009. The collective value of this group's arms transfer agreements with developing nations in 2009 was \$10.6 billion compared to a total of nearly \$7 billion in 2008. Of these four nations, France was the leading supplier with \$7.1 billion in agreements in 2009, more than twice its agreements total of \$3.2 billion in 2008. Italy, meanwhile registered \$2.4 billion in arms agreements in 2009, up from \$1.3 billion in 2008 (**Figure 7** and **Figure 8**) (**Table 4** and **Table 5**).

Collectively, the four major West European suppliers held a 23.5% share of all arms transfer agreements with developing nations during 2009. In the period from 2006-2009 they have generally been important participants in the developing world arms market. Individual suppliers within the major West European group have had notable years for arms agreements during this period: France in 2009 (\$7.1 billion) and in 2008 (\$3.2 billion); the United Kingdom in 2007 (\$10.3 billion) and 2006 (\$4.3 billion); Germany (over \$2.2 billion) in 2008, and in 2007 (\$1.9 billion); Italy in 2009 (\$.2.4 billion). In the case of all of these West European nations, large agreement totals in one year have usually reflected the conclusion of large arms contracts with one or a small number of major purchasers in that particular year (**Table 4** and **Table 5**).

The major West European suppliers have enhanced their competitive position in weapons exports through strong government marketing support for their foreign arms sales. All of them can produce both advanced and basic air, ground, and naval weapons systems. The four major West European suppliers have competed successfully for arms sales contracts with developing nations against both the United States, which has tended to sell to several of the same clients. The

⁵For detailed background see CRS Report RL32870, *European Union's Arms Embargo on China: Implications and Options for U.S. Policy*, by Kristin Archick, Richard F. Grimmett, and Shirley A. Kan. It should be noted that members of the European Union, and others, have agreed to a common effort to attempt some degree of control on the transfer of certain weapons systems, but the principal vehicle for this cooperation—the Wassenaar Arrangement—lacks a mechanism to enforce its rules. For detailed background see CRS Report RS20517, *Military Technology and Conventional Weapons Export Controls: The Wassenaar Arrangement*, by Richard F. Grimmett.

continuing demand for U.S. weapons in the global arms marketplace, from a large established client base, has created a more difficult environment for individual West European suppliers to secure, on a sustained basis, large new contracts with developing nations. But, as the data indicate, the major West European suppliers continue to make significant arms transfer contracts from year to year.

Concern for maintaining their market share of the arms trade in the face of the strong demand for U.S. defense equipment, among other considerations, led European Union (EU) member states to adopt a new code of conduct for defense procurement practices. This code was agreed to on November 21, 2005 at the European Defense Agency's (EDA) steering board meeting. Currently voluntary, the EU hopes it will become mandatory, and through its mechanisms foster greater cooperation within the European defense equipment sector in the awarding of contracts for defense items. By fostering greater intra-European cooperation in defense program planning, and collaboration in defense contracting, the EU hopes that the defense industrial bases of individual EU states will be preserved, thereby enhancing the capability of European defense firms to compete for arms sales in the international arms marketplace.

Certain European arms suppliers have begun to phase out production of certain types of weapons systems. These suppliers have increasingly sought to engage in joint production ventures with other key European weapons suppliers or even client countries in an effort to sustain major sectors of their individual defense industrial bases—even if a substantial portion of the weapons produced are for their own armed forces. The Eurofighter and Eurocopter projects are examples. Other European suppliers have also adopted the strategy of cooperating in defense production ventures with the United States such as the Joint Strike Fighter (JSF), rather than attempting to compete directly, thus meeting their own requirements for advanced combat aircraft, while positioning themselves to share in profits resulting from future sales of this new fighter aircraft.⁶

Regional Arms Transfer Agreements

The leading markets for arms in regions of the developing world historically have been predominately in the Near East and Asia. Nations in the Latin America and Africa regions, by contrast, have not been major purchasers of weapons, except on rare occasions. The regional arms agreement data tables in this report demonstrate this. United States policymakers have placed emphasis on helping to maintain stability throughout the regions of the developing world. Thus, the U.S. has made and supported arms sales and transfers it has believed would advance that goal, while discouraging significant sales by other suppliers to states and regions where military threats to nations in the area are minimal. Other arms suppliers do not necessarily share the U.S. perspective on what constitutes an appropriate arms sale, and in some instances the financial benefit of the sale to the supplier trumps other considerations. The regional and country specific arms-transfer data in this report provide an indication of where various arms suppliers are focusing their attention and who their principal clients are. By reviewing these data, policymakers can identify potential developments that may be of concern, and use this information to assist their review of options they may choose to consider given the circumstances. What follows below is a review of data on arms-transfer agreement activities in the two regions that lead in arms

⁶ For detailed background on issues relating to the Joint Strike Fighter program see CRS Report RL30563, *F-35 Joint Strike Fighter (JSF) Program: Background and Issues for Congress*, by Jeremiah Gertler.

acquisitions, the Near East and Asia. This is followed, in turn, by a review of data regarding the leading arms purchasers in the developing world more broadly.

Near East⁷

The Persian Gulf crisis of August 1990-February 1991 provided the principal catalyst for major new weapons procurements in the Near East region from that time forward. This crisis, culminating in a U.S.-led war to expel Iraq from Kuwait, created new demands by key purchasers such as Saudi Arabia, Kuwait, the United Arab Emirates, and other members of the Gulf Cooperation Council (GCC) for a variety of advanced weapons systems. Subsequently, concerns over the growing strategic threat from Iran, which have continued in the 21st century, have become the principal basis of GCC states' advanced arms purchases. Because GCC states do not share a land border with Iran, their weapons purchases have focused primarily on air, naval, and missile defense systems. Meanwhile, Egypt and Israel continue their military modernization programs, increasing their purchases of advanced weaponry, primarily from the United States.

Most recently, Saudi Arabia has been the principal arms purchaser in the Persian Gulf region. In the period from 2006-2009, Saudi Arabia's total arms agreements were valued at \$29.5 billion (in current dollars). Also placing substantial orders during this same period was the U.A.E., making \$14.2 billion in agreements (in current dollars) (**Table 11** and **Table 12**).

The Near East has generally been the largest arms market in the developing world. However, in 2001-2004, it ranked second with 41.4% of the total value of all developing nations arms transfer agreements (\$38.4 billion in current dollars). The Asia region ranked first in 2002-2005 with 48.7% of these agreements (\$45.2 billion in current dollars). But, during 2006-2009, the Near East region again placed first with 51.3% of all developing nations agreements (\$90.2 billion in current dollars). The Asia region ranked second in 2006-2009 with \$59.8 billion of these agreements or 34% (**Table 6** and **Table 7**).

The United States dominated arms transfer agreements with the Near East during the 2002-2005 period with 45.9% of their total value (\$17.6 billion in current dollars). The United Kingdom was second during these years with 15.6% (\$6.8 billion in current dollars). Recently, from 2006-2009, the United States accounted for 52.4% of arms agreements with this region (\$47.3 billion in current dollars), while the United Kingdom accounted for 15.7% of the region's agreements (\$14.2 billion in current dollars). Russia accounted for 12.8% of the region's agreements in the most recent period (\$11.5 billion in current dollars) (**Figure 5**) (**Table 6** and **Table 8**).

Asia

Several developing nations in Asia have been engaged in upgrading and modernizing defense forces, and this has led to new conventional weapons sales in that region. Beginning in the mid-1990s, Russia became the principal supplier of advanced conventional weaponry to China for about a decade—selling it fighters, submarines, destroyers, and missiles—while establishing itself as the principal arms supplier to India. Russian arms sales to these two countries have been

⁷ In this report the Near East region includes the following nations: Algeria, Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Syria, Tunisia, United Arab Emirates, and Yemen. The countries included in the other geographic regions are listed at the end of the report.

primarily responsible for much of the increase in Asia's overall share of the arms market in the developing world during the period of this report. Russia has also expanded its client base in Asia, securing aircraft orders from Malaysia, Vietnam, Burma, and Indonesia. It is notable that India, while the principal Russian arms customer, has begun to diversify its weapons supplier base, purchasing the Phalcon early warning defense system aircraft in 2004 from Israel and numerous items from France in 2005, in particular 6 Scorpene diesel attack submarines. In 2008 India purchased 6 C130J cargo aircraft from the United States. This pattern of Indian arms purchases indicates that it is likely that Russia will face strong new competition from other major weapons suppliers for the India arms market. In other major arms agreements with Asia more recently, the United States concluded a multi-billion dollar sale to Pakistan in 2006 of new F-16 fighter aircraft, weapons, and aircraft upgrades, while Sweden sold it a SAAB-2000 based AWACS airborne radar system. In 2007, Pakistan contracted with China for production of J-17 fighter aircraft; in 2008 it purchased an AWACS aircraft from China. In 2009, Pakistan also purchased J-10 fighters from China. Meanwhile, in 2009 the United States sold a comprehensive Patriot air defense missile system to Taiwan. The data on regional arms-transfer agreements from 2002-2009 continue to reflect that Asia and the Near East are the regions of the developing world that are the primary sources of orders for conventional weaponry.

Asia has traditionally been the second largest developing-world arms market. In 2006-2009, Asia ranked second, accounting for 34% of the total value of all arms transfer agreements with developing nations (\$59.8 billion in current dollars). Yet in the earlier period, 2002-2005, the Asia region ranked first, accounting for 48.7.6% of all such agreements (\$45.2 billion in current dollars) (**Table 6** and **Table 7**).

In the earlier period (2002-2005), Russia ranked first in the value of arms transfer agreements with Asia with 39.8% (\$18 billion in current dollars). The United States ranked second with 16.9% (\$7.6 billion in current dollars). The major West European suppliers, as a group, made 21.7% of this region's agreements in 2002-2005. In the later period (2006-2009), Russia ranked first in Asian agreements with 29.6% (\$17.7 billion in current dollars), primarily due to major combat aircraft and naval system sales to India and China. The United States ranked second with 28.1% (\$16.8 billion in current dollars). The major West European suppliers, as a group, made 14.9% of this region's agreements in 2006-2009. (**Figure 6**) (**Table 8**).

Leading Developing Nations Arms Purchasers

Saudi Arabia was the leading developing world arms purchaser from 2002-2009, making arms transfer agreements totaling \$39.9 billion during these years (in current dollars). In the 2002-2005 period, India ranked first in arms transfer agreements at \$15.3 billion (in current dollars). In 2006-2009 Saudi Arabia ranked first in arms transfer agreements, with a substantial increase to \$29.5 billion from \$15.3 billion in the earlier 2002-2005 period (in current dollars). These increases reflect the military modernization efforts by both Saudi Arabia and India, underway since the 1990s. The total value of all arms transfer agreements with developing nations from 2002-2009 was \$262.3 billion (in current dollars). Thus Saudi Arabia alone accounted for 15.2% of all developing-world arms-transfer agreements during these eight years. In the most recent period, 2006-2009, Saudi Arabia made \$29.5 billion in arms transfer agreements (in current dollars). This total constituted 17.2% of all arms transfer agreements with developing nations during these four years (\$171.5 billion in current dollars). India ranked second in arms transfer agreements during 2006-2009 with \$17.1 billion (in current dollars), or about 10% of the value of all developing-world arms-transfer agreements (**Table 3**, **Table 6**, **Table 12**, and **Table 13**).

During 2002-2005, the top ten recipients collectively accounted for 67.8% of all developing world arms transfer agreements. During 2006-2009, the top ten recipients collectively accounted for 68% of all such agreements. Arms transfer agreements with the top ten developing world recipients, as a group, totaled \$38 billion in 2009 or 84.3% of all arms transfer agreements with developing nations that year. These percentages reflect the continued concentration of major arms purchases by developing nations among a few countries (**Table 3**, **Table 12**, and **Table 13**).

Brazil ranked first among all developing world recipients in the value of arms transfer agreements in 2009, concluding \$7.2 billion in such agreements. Venezuela ranked second in agreements with \$6.4 billion. Saudi Arabia ranked third with \$4.3 billion in agreements. Five of the top ten recipients were in the Near East region; three were in the Asian region; two were in the Latin American region (**Table 13**).

Saudi Arabia was the leading recipient of arms *deliveries* among developing world recipients in 2009, receiving \$2.7 billion in such deliveries. China ranked second in arms deliveries in 2009 with \$1.5 billion. South Korea ranked third with \$1.4 billion (**Table 24**).

Arms *deliveries* to the top ten developing nation recipients, as a group, were valued at \$12.9 billion, or 75.9% of all arms deliveries to developing nations in 2009. Five of these top ten recipients were in the Near East; four were in Asia; one was in Latin America. (**Table 14** and **Table 24**).

Weapons Types Recently Delivered to Near East Nations

Regional weapons delivery data reflect the diverse sources of supply and type of conventional weaponry actually transferred to developing nations. Even though the United States, Russia, and the four major West European suppliers dominate in the delivery of the fourteen classes of weapons examined, it is also evident that the other European suppliers and some non-European suppliers, including China, are capable of being leading suppliers of selected types of conventional armaments to developing nations (Tables 25-29) (pages 63-67).

Weapons deliveries to the Near East, historically the largest purchasing region in the developing world, reflect the quantities and types delivered by both major and lesser suppliers. The following is an illustrative summary of weapons deliveries to this region for the period 2006-2009 from **Table 27**:

United States

- 331 tanks and self-propelled guns
- 566 APCs and armored cars
- 6 minor surface combatants
- 62 supersonic combat aircraft
- 32 helicopters
- 339 surface-to-air missiles

Russia

- 270 tanks and self-propelled guns
- 160 APCs and armored cars
- 50 supersonic combat aircraft
- 10 helicopters
- 5,430 surface-to-air missiles
- 10 surface-to-surface missiles
- 20 anti-ship missiles

China

- 150 APCs and armored cars
- 30 anti-ship missiles

Major West European Suppliers

- 30 minor surface combatants
- 10 supersonic combat aircraft
- 10 helicopters
- 400 surface-to-air missiles
- 50 anti-ship missiles

All Other European Suppliers

- 30 tanks and self-propelled guns
- 1,360 APCs and armored cars
- 2 minor surface combatants
- 9 guided missile boats
- 40 supersonic combat aircraft
- 520 surface-to-air missiles
- 60 anti-ship missiles

All Other Suppliers

- 170 APCs and armored cars
- 20 minor surface combatants
- 20 helicopters
- 10 surface-to-surface missiles
- 50 anti-ship missiles

Significant quantities of major combat systems were delivered to the Near East region from 2006-2009, specifically, tanks and self-propelled guns, armored vehicles, minor surface combatants, supersonic combat aircraft, helicopters, air defense and anti-ship missiles. The United States and Russia made deliveries of supersonic combat aircraft to the region. The United States, China, and the European suppliers delivered anti-ship missiles. The United States, Russia, and European suppliers in general were the principal suppliers of tanks and self-propelled guns, APCs and armored cars, surface-to-air missiles, as well as helicopters. Three of these weapons categories—supersonic combat aircraft, helicopters, and tanks and self-propelled guns—are especially costly and are a large portion of the dollar values of arms deliveries by the United States, Russia, and European suppliers to the Near East region during the 2006-2009 period.

The cost of naval combatant vessels is generally high, and the suppliers of such systems during this period had their delivery value totals notably increased due to these transfers. Some of the less expensive weapons systems delivered to the Near East are nonetheless deadly and can create important security threats within the region. For example, from 2006-2009, the four major West European suppliers collectively delivered 50 anti-ship missiles to the Near East region, China delivered 30, and the other European suppliers delivered 60. Russia delivered 10 surface-to-surface missiles. The United States delivered six minor surface combatants to the Near East, while the four major West European suppliers collectively delivered 30 of them. The other European suppliers collectively delivered 30 tanks and armored cars, 1,360 APCs and armored cars, 40 supersonic combat aircraft, and 520 surface-to-air missiles. Other non-European suppliers collectively delivered 170 APCs and armored cars, 20 minor surface combatants, 40 anti-ship missiles, as well as 10 surface-to-surface missiles.

UNITED STATES COMMERCIAL ARMS EXPORTS

United States commercially licensed arms deliveries data are not included in this report. The United States is the only major arms supplier that has two distinct systems for the export of weapons: the government-to-government Foreign Military Sales (FMS) system, and the licensed commercial export system. It should be noted that data maintained on U.S. commercial sales agreements and deliveries are incomplete, and are not collected or revised on an on-going basis, making them significantly less precise than those for the U.S. FMS program—which accounts for the overwhelming portion of U.S. conventional arms transfer agreements and deliveries involving weapons systems. There are no official compilations of commercial agreement data comparable to that for the FMS program maintained on an annual basis. Once an exporter receives from the State Department a commercial license authorization to sell—valid for four years—there is no current requirement that the exporter provide to the State Department, on a systematic and on-going basis, comprehensive details regarding any sales contract that results from the license authorization, including if any such contract is reduced in scope or cancelled. Nor is the exporter required to report that no contract with the prospective buyer resulted.

Annual commercially licensed arms deliveries data are obtained from shipper's export documents and completed licenses from ports of exit by the U.S. Customs and Border Protection Agency which are then provided to the U.S. Census Bureau. The Census Bureau takes these arms export data, and, following a minimal review of them, submits them to the Directorate of Defense Trade Controls in the Political-Military Bureau (PM/DDTC) of the State Department, which makes the final compilation of such data—details of which are not publicly available. Once compiled by the Directorate of Defense Trade Controls at the State Department, these commercially licensed arms deliveries data are not revised. By contrast, the U.S. Foreign Military Sales (FMS) program data, for both agreements and deliveries, maintained by the Defense Department, are systematically collected, reviewed for accuracy on an on-going basis, and are revised from year-to-year as needed to reflect any changes or to correct any errors in the information. This report includes all FMS deliveries data. By excluding U.S. commercial licensed arms deliveries data, the U.S. arms delivery totals will be understated.

Some have suggested that a systematic data collection and reporting system for commercial licensed exports, comparable to the one which exists now in the Department of Defense, should be established by the Department of State. Having current and comprehensive agreement and delivery data on commercially licensed exports would provide a more complete picture of the U.S. arms export trade, in this view, and thus facilitate Congressional oversight of this sector of U.S. exports.

Arms Values Data Tables and Charts for 2002-2009

Tables 3 through 13 (pages 34-47) present data on arms transfer *agreements* with developing nations by major suppliers from 2002-2009. These data show the most recent trends in arms contract activity by major suppliers. *Delivery* data, which reflect implementation of sales previously concluded, are provided in Tables 14 through 24 (pages 48-61). **Table 30**, **Table 31**, **Table 32**, **Table 33**, and **Table 34** (pages 69-74) provide data on *worldwide* arms transfer

agreements from 2002-2009, while **Table 35**, **Table 36**, **Table 37**, **Table 38**, and **Table 39** on (pages 75-80) provide data on *worldwide arms deliveries* during this period. To use these data regarding agreements for purposes other than assessing general trends in seller/buyer activity is to risk drawing conclusions that can be readily invalidated by future events—precise values and comparisons, for example, may change due to cancellations or modifications of major arms transfer agreements previously concluded.

These data sets reflect the comparative magnitude of arms transactions by arms suppliers with recipient nations expressed in *constant* dollar terms, unless otherwise noted. Illustrative pie and bar charts are provided in this section to give the relative market share of individual arms suppliers globally, to the developing world and to specific regions. **Table 1** (pages 26-27) provides the value of *worldwide arms transfer agreements* for 2002-2005, 2006-2009 and 2009, and the *suppliers' share of such agreements with the developing world*. **Table 2** (pages 32-33) provides the value of *worldwide arms deliveries* for 2002-2005, 2006-2009 and 2009, and the *suppliers' share of such deliveries with the developing world*. Specific content of other individual data tables is described below.

Table 3 shows the annual current dollar values of arms transfer agreements to developing nations by major suppliers from 2002-2009. This table provides the data from which **Table 4** (constant dollars) and **Table 5** (supplier percentages) are derived.

- **Regional Arms Transfer Agreements, 2002-2009**

Table 6 gives the values of arms transfer agreements between suppliers and individual regions of the developing world for the periods 2002-2005 and 2006-2009. These values are expressed in current U.S. dollars. **Table 7**, derived from **Table 6**, gives the percentage distribution of each supplier's agreement values within the regions for the two time periods. **Table 8**, also derived from **Table 6**, illustrates what percentage share of each developing world region's total arms transfer agreements was held by specific suppliers during the years 2002-2005 and 2006-2009.

- **Arms Transfer Agreements With Developing Nations, 2002-2009: Leading Suppliers Compared**

Table 9 gives the values of arms transfer agreements with the developing nations from 2002-2009 by the top eleven suppliers. The table ranks these suppliers on the basis of the total current dollar values of their respective agreements with the developing world for each of three periods—2002-2005, 2006-2009 and 2002-2009.

- **Arms Transfer Agreements With Developing Nations in 2009: Leading Suppliers Compared**

Table 10 ranks and gives for 2009 the values of arms transfer agreements with developing nations of the top eleven suppliers in current U.S. dollars.

- **Arms Transfer Agreements With Near East 2002-2009: Suppliers and Recipients**

Table 11 gives the values of arms transfer agreements with the Near East nations by suppliers or categories of suppliers for the periods 2002-2005 and 2006-2009. These values are expressed in current U.S. dollars. They are a subset of the data contained in **Table 3** and **Table 6**.

- **Arms Transfers to Developing Nations, 2002-2009: Agreements With Leading Recipients**

Table 12 gives the values of arms transfer agreements made by the top ten recipients of arms in the developing world from 2002-2009 with all suppliers collectively. The table ranks recipients on the basis of the total current dollar values of their respective agreements with all suppliers for each of three periods—2002-2005, 2006-2009 and 2002-2009.

- **Arms Transfers to Developing Nations in 2009: Agreements With Leading Recipients**

Table 13 names the top ten developing world recipients of arms transfer agreements in 2009. The table ranks these recipients on the basis of the total current dollar values of their respective agreements with all suppliers in 2009.

- **Developing Nations Arms Delivery Values**

Table 14 shows the annual current dollar values of arms deliveries (items actually transferred) to developing nations by major suppliers from 2002-2009. The utility of these particular data is that they reflect transfers that have occurred. They provide the data from which **Table 15** (constant dollars) and **Table 16** (supplier percentages) are derived.

- **Regional Arms Delivery Values, 2002-2009**

Table 17 gives the values of arms deliveries by suppliers to individual regions of the developing world for the periods 2002-2005 and 2006-2009. These values are expressed in current U.S. dollars. **Table 18**, derived from **Table 17**, gives the percentage distribution of each supplier's deliveries values within the regions for the two time periods. **Table 19**, also derived from **Table 17**, illustrates what percentage share of each developing world region's total arms delivery values was held by specific suppliers during the years 2002-2005 and 2006-2009.

- **Arms Deliveries to Developing Nations, 2002-2009: Leading Suppliers Compared**

Table 20 gives the values of arms deliveries to developing nations from 2002-2009 by the top eleven suppliers. The table ranks these suppliers on the basis of the total current dollar values of their respective deliveries to the developing world for each of three periods—2002-2005, 2006-2009 and 2002-2009.

- **Arms Deliveries to Developing Nations in 2009: Leading Suppliers Compared**

Table 21 ranks and gives for 2009 the values of arms deliveries to developing nations of the top ten suppliers in current U.S. dollars.

- **Arms Deliveries to Near East, 2002-2009: Suppliers and Recipients**

Table 22 gives the values of arms delivered to Near East nations by suppliers or categories of suppliers for the periods 2002-2005 and 2006-2009. These values are expressed in current U.S. dollars. They are a subset of the data contained in **Table 14** and **Table 17**.

- **Arms Deliveries to Developing Nations, 2002-2009: The Leading Recipients**

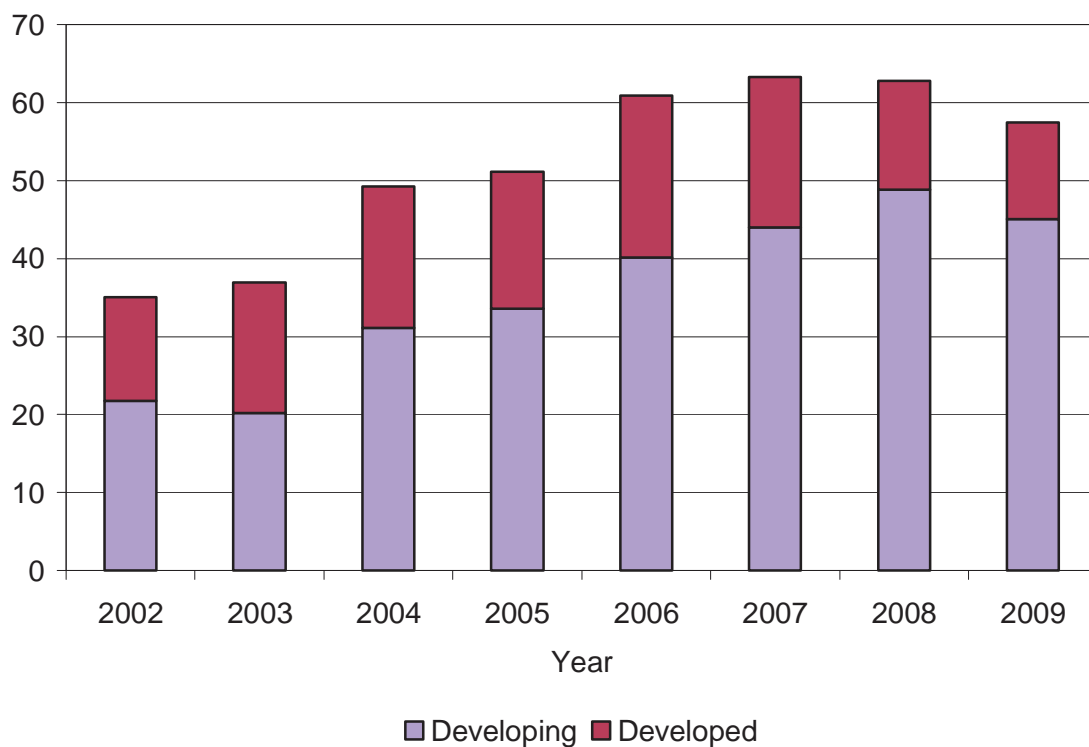
Table 23 gives the values of arms deliveries made to the top ten recipients of arms in the developing world from 2002-2009 by all suppliers collectively. The table ranks recipients on the basis of the total current dollar values of their respective deliveries from all suppliers for each of three periods—2002-2005, 2006-2009 and 2002-2009.

- **Arms Transfers to Developing Nations in 2009: Agreements With Leading Recipients**

Table 24 names the top ten developing world recipients of arms transfer agreements in 2009. The table ranks these recipients on the basis of the total current dollar values of their respective agreements with all suppliers in 2009.

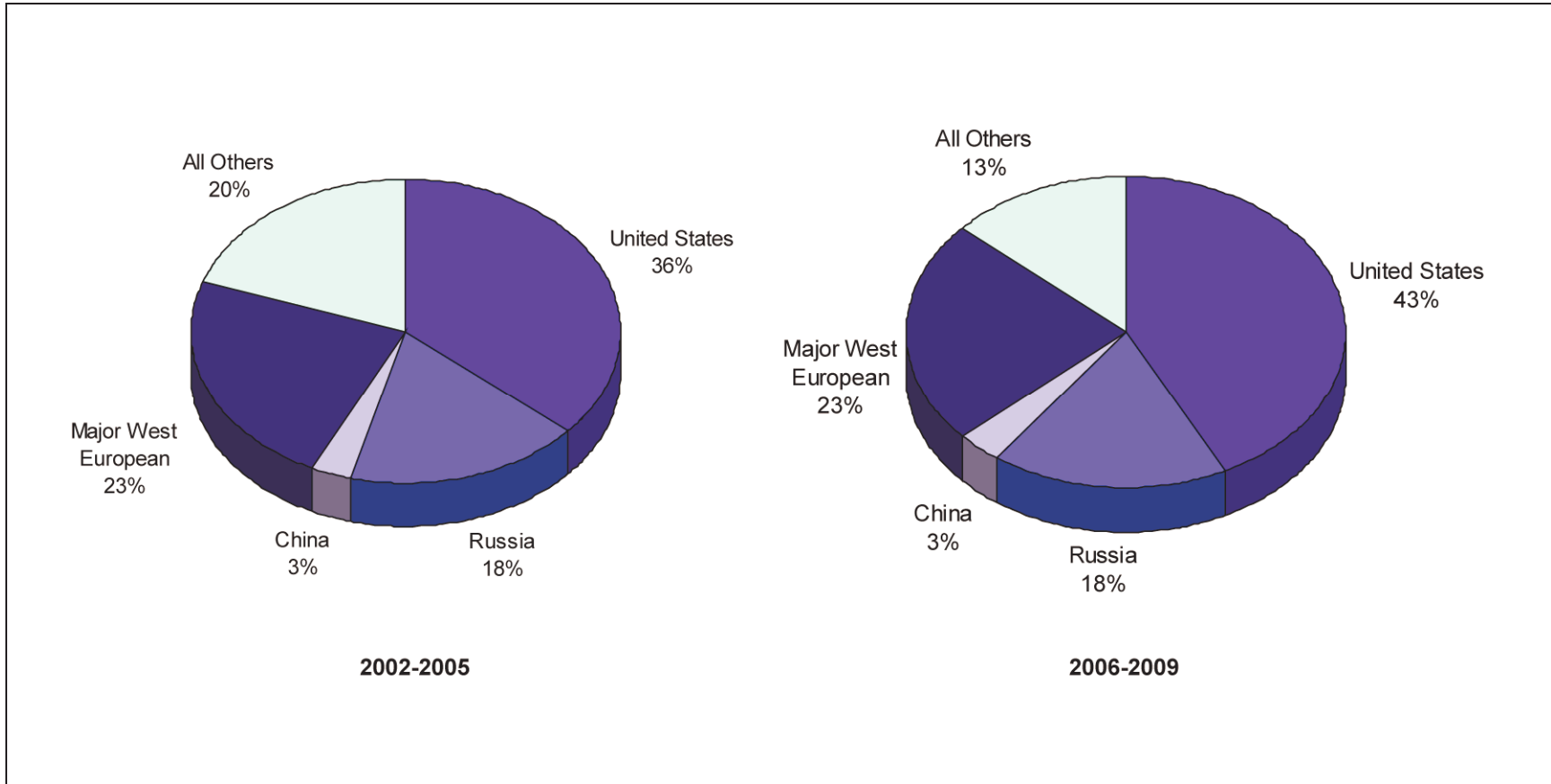
Figure 1. Arms Transfer Agreements Worldwide, 2002-2009 Developed and Developing Worlds Compared

In billions of constant 2009 dollars



Source: U.S. Government

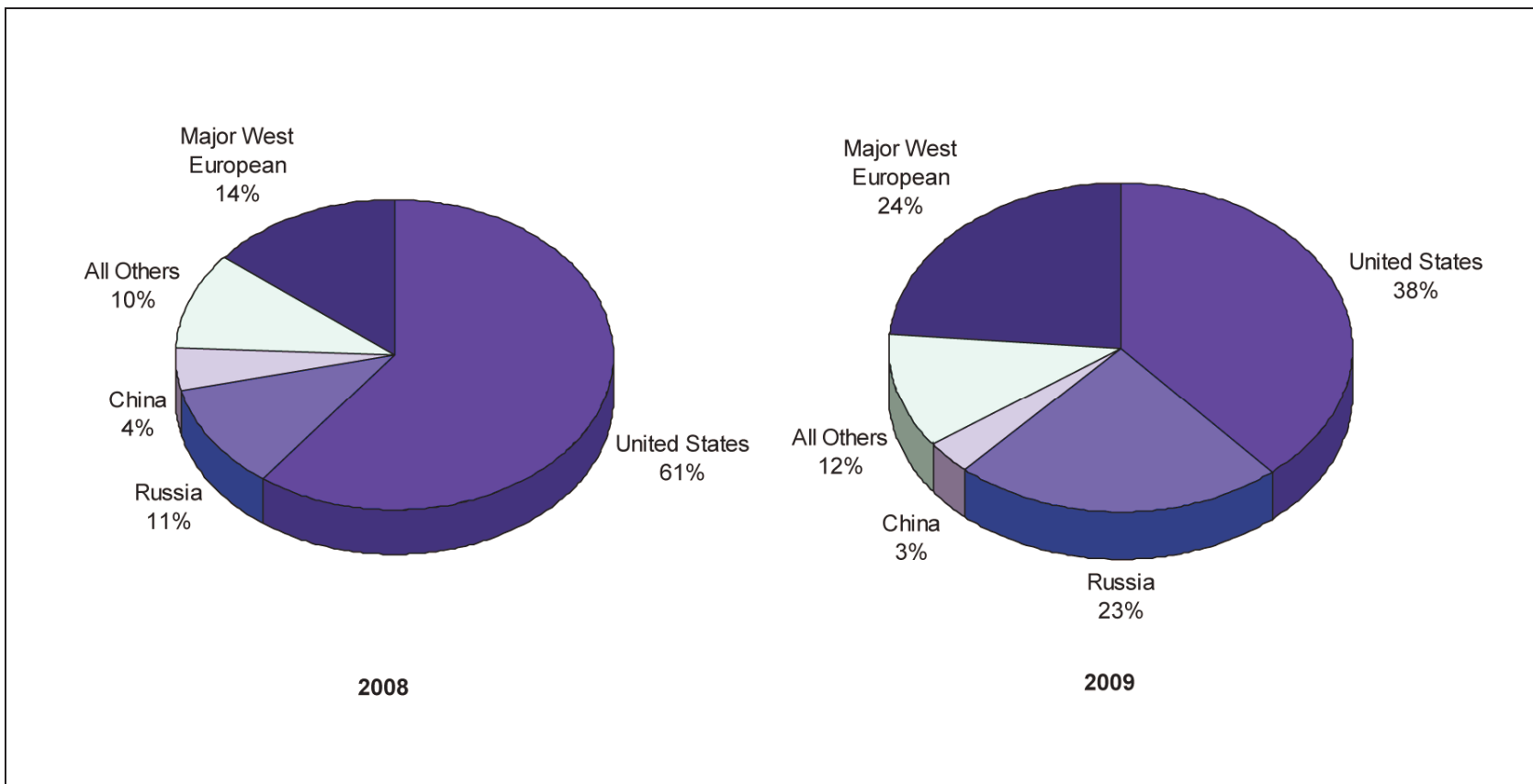
Figure 2. Arms Transfer Agreements Worldwide
(supplier percentage of value)



Source: U.S. Government

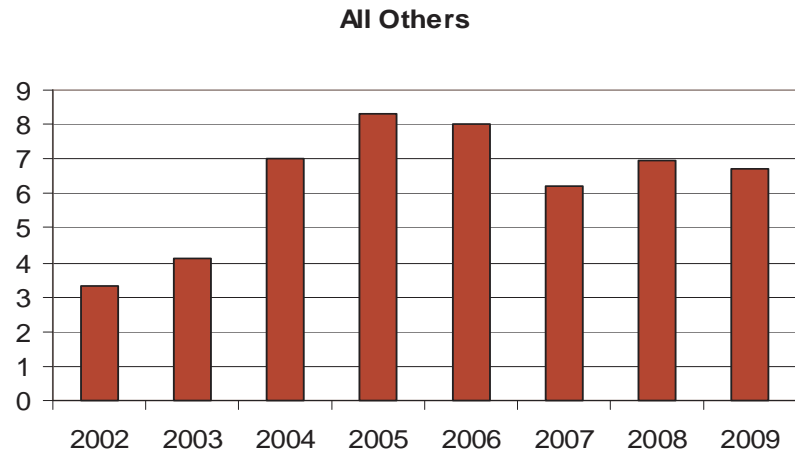
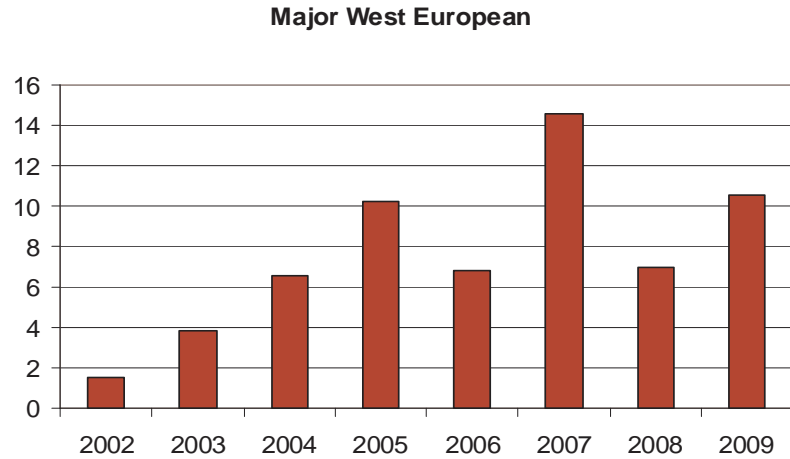
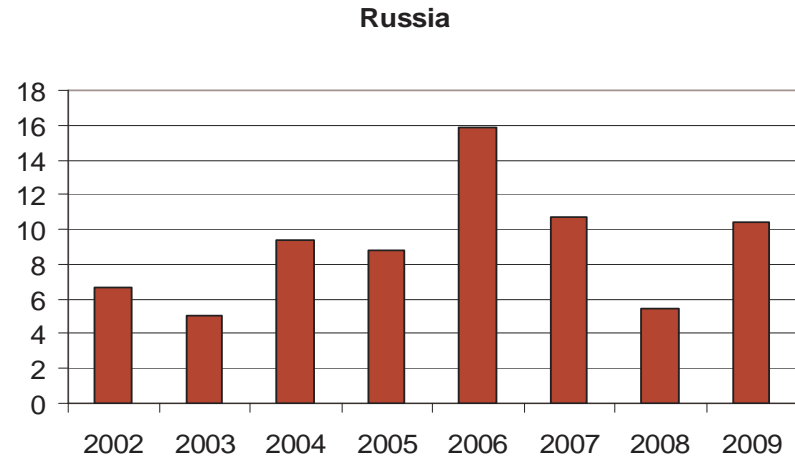
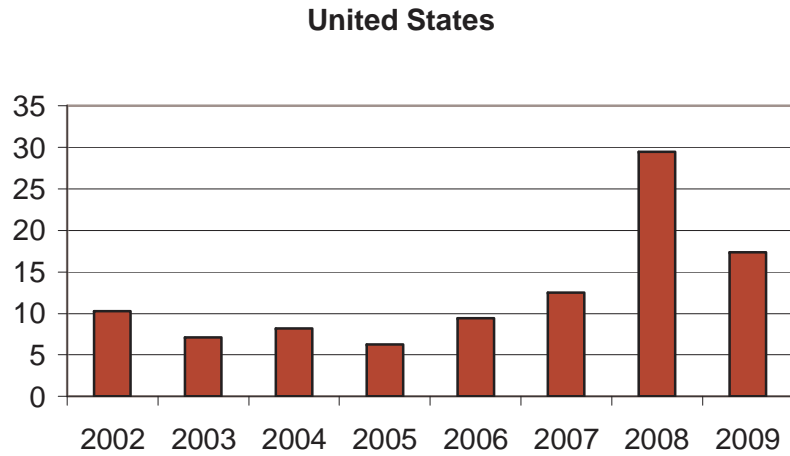
Figure 3. Arms Transfer Agreements With Developing Nations

(supplier percentage of value)



Source: U.S. Government

Figure 4. Arms Transfer Agreements With Developing Nations by Major Supplier, 2002-2009
 (billions of constant 2009 dollars)



Source: U.S. Government

Table I. Worldwide Arms Transfer Agreements, 2002-2009 and Suppliers' Share with Developing World

(in millions of constant 2009 U.S. dollars)

Supplier	Worldwide Agreements Value 2002-2005	Percentage of Total with Developing World
United States	62,574	50.90%
Russia	30,912	96.60%
France	14,141	60.00%
United Kingdom	12,782	86.80%
China	5,644	100.00%
Germany	9,129	12.60%
Italy	3,371	41.10%
All Other European	23,065	43.50%
All Others	10,772	65.80%
TOTAL	172,389	61.80%

Supplier	Worldwide Agreements Value 2006-2009	Percentage of Total with Developing World
United States	103,704	66.30%
Russia	43,053	98.50%
France	21,034	57.40%
United Kingdom	16,597	95.70%
China	8,008	97.50%
Germany	10,613	52.30%
Italy	9,160	59.30%
All Other European	20,687	55.30%
All Others	11,687	74.20%
TOTAL	244,531	72.80%

Source: U.S. Government

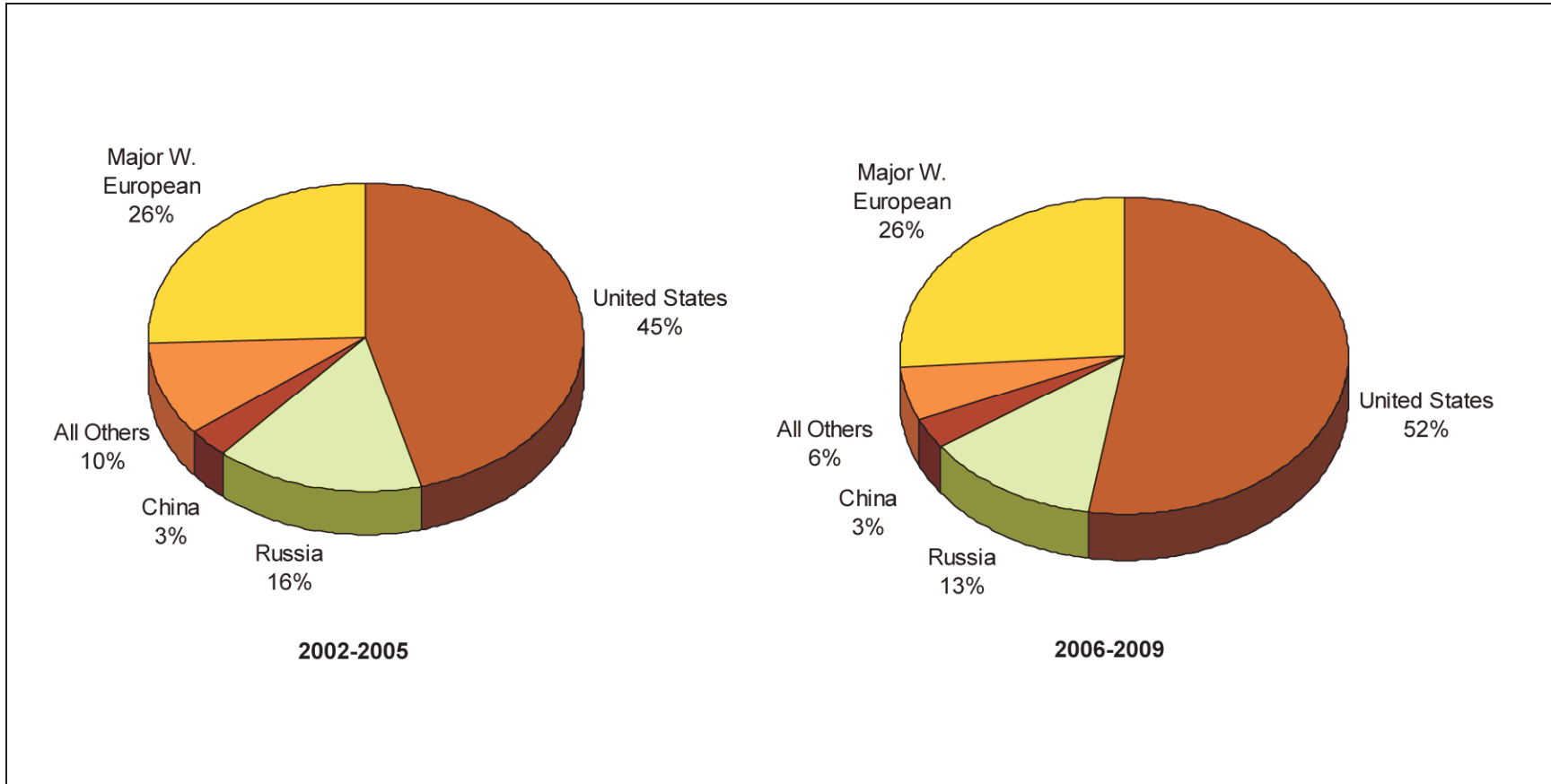
Worldwide Arms Transfer Agreements, 2002-2009 and Suppliers' Share with Developing World (Continued)

(in millions of constant 2009 U.S. dollars)

Supplier	Worldwide Agreements Value 2009	Percentage of Total with Developing World
United States	22,610	76.80%
Russia	10,400	100.00%
France	7,400	96.00%
United Kingdom	1,500	66.70%
China	1,700	88.20%
Germany	3,700	2.7%
Italy	2,700	88.90%
All Other European	4,500	62.20%
All Others	3,000	80.00%
TOTAL	57,510	78.40%

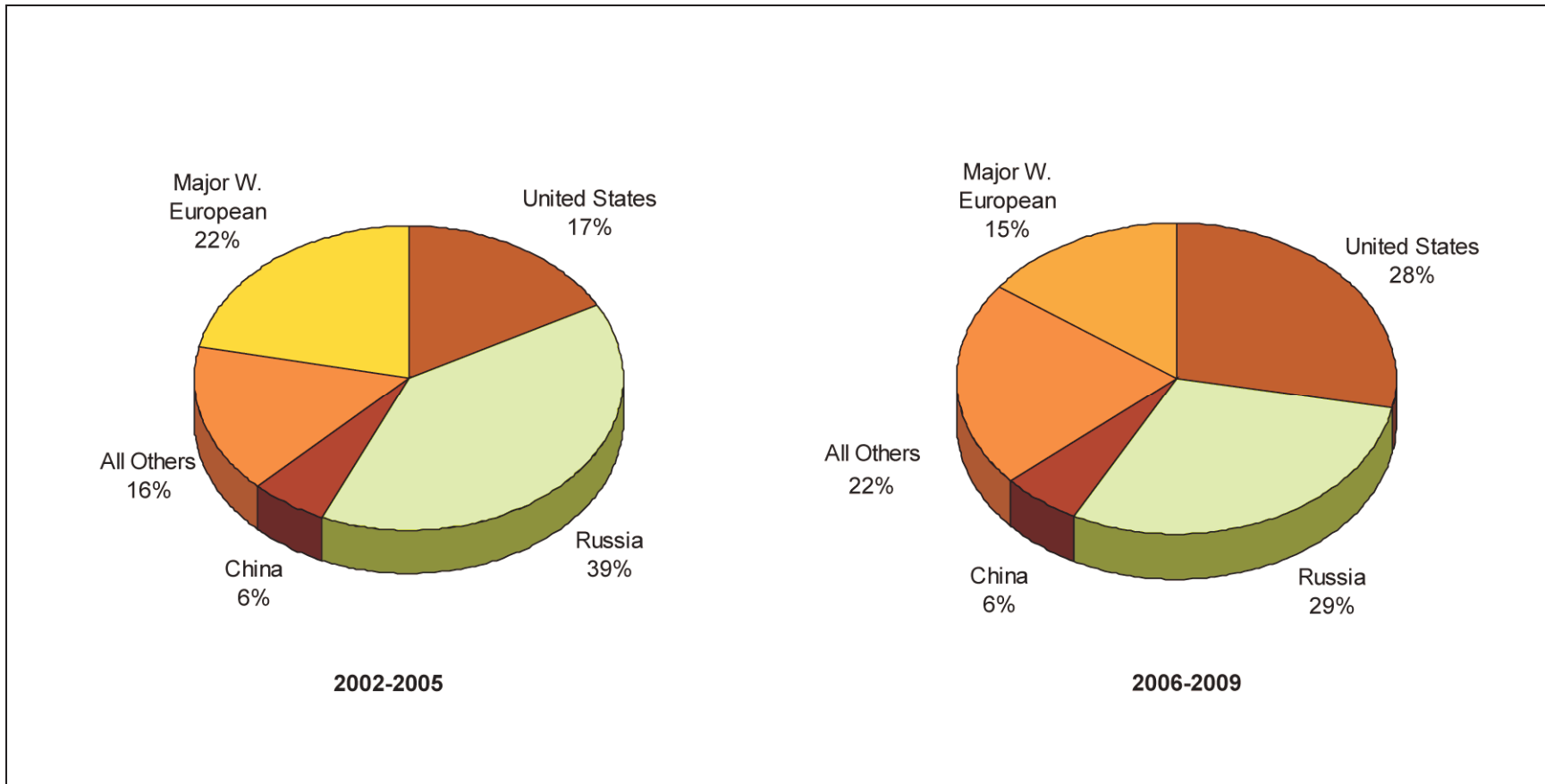
Source: U.S. Government

Figure 5. Arms Transfer Agreements With Near East
(supplier percentage of value)



Source: U.S. Government

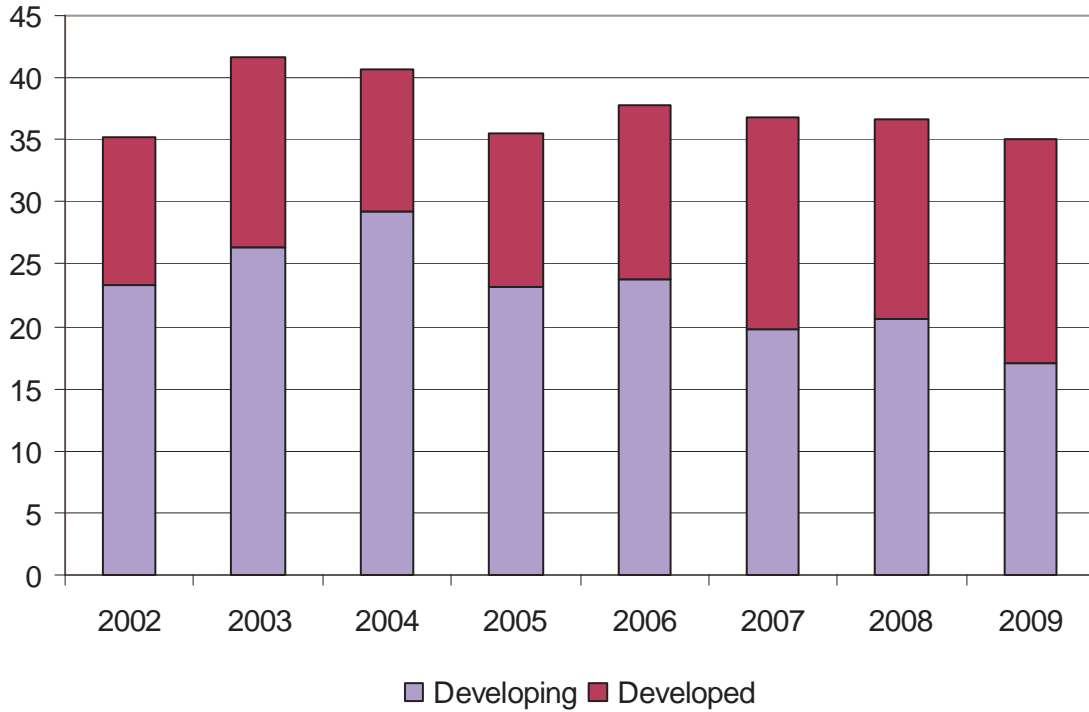
Figure 6. Arms Transfer Agreements With Developing Nations in Asia
(supplier percentage of value)
(excludes Japan, Australia, and New Zealand)



Source: U.S. Government

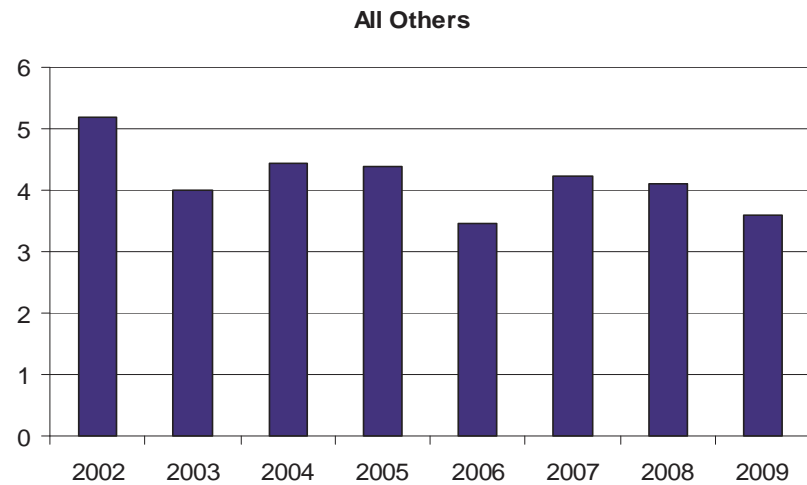
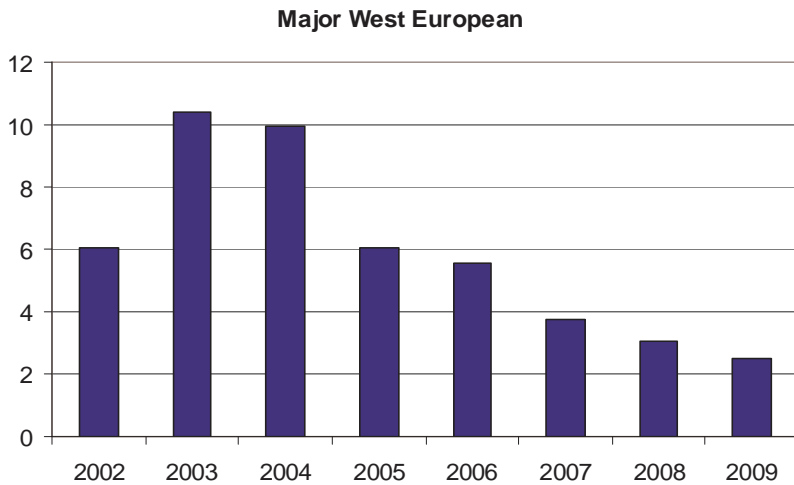
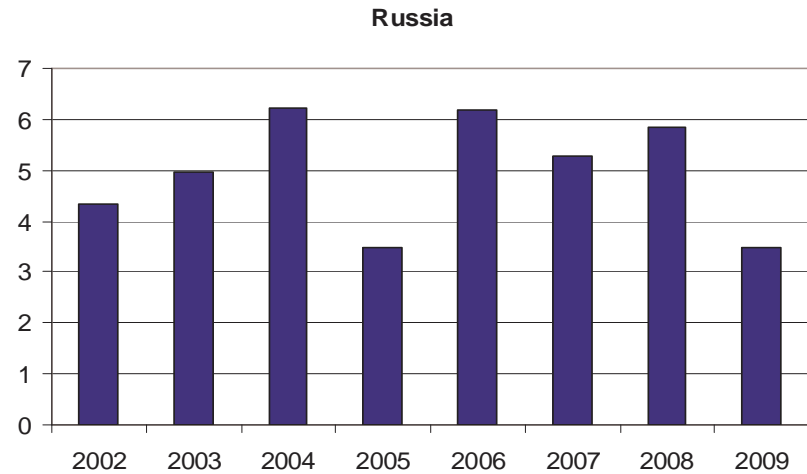
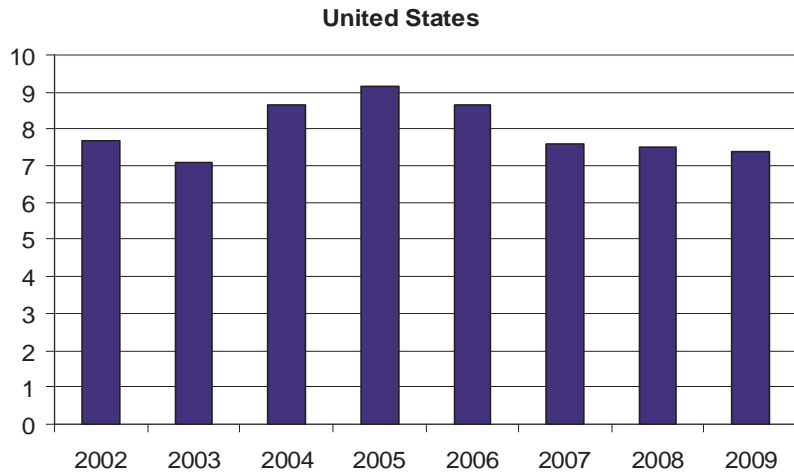
Figure 7. Arms Deliveries Worldwide 2002-2009 Developed and Developing Worlds Compared

(in billions of constant 2009 dollars)



Source: U.S. Government

Figure 8. Arms Deliveries to Developing Countries by Major Supplier, 2002-2009
 (in billions of constant 2009 dollars)



Source: U.S. Government

Table 2. Worldwide Arms Deliveries, 2002-2009 and Suppliers' Share with Developing World

(in millions of constant 2009 U.S. dollars)

Supplier	Worldwide Deliveries Value 2002-2005	Percentage of Total to Developing World
United States	51,959	62.70%
Russia	19,662	96.40%
France	14,335	81.90%
United Kingdom	22,294	78.50%
China	4,367	91.80%
Germany	8,976	29.10%
Italy	2,581	23.10%
All Other European	15,190	46.30%
All Others	13,594	51.20%
TOTAL	152,955	66.70%

Supplier	Worldwide Deliveries Value 2006-2009	Percentage of Total to Developing World
United States	53,021	58.80%
Russia	21,627	96.10%
France	7,108	32.20%
United Kingdom	11,768	56.70%
China	7,575	98.60%
Germany	12,352	31.90%
Italy	2,383	39.20%
All Other European	17,954	29.00%
All Others	12,427	21.70%
TOTAL	146,216	55.50%

Source: U.S. Government

**Worldwide Arms Deliveries, 2002-2009 and Suppliers' Share with Developing World
(Continued)**

(in millions of constant 2009 U.S. dollars)

Supplier	Worldwide Deliveries Value 2009	Percentage of Total to Developing World
United States	14,383	51.50%
Russia	3,700	94.60%
France	1,200	33.30%
United Kingdom	2,200	36.40%
China	1,800	100.00%
Germany	2,800	35.70%
Italy	600	50.00%
All Other European	4,700	19.10%
All Others	3,700	24.30%
TOTAL	35,083	48.50%

Source: U.S. Government

Table 3. Arms Transfer Agreements with Developing Nations, by Supplier, 2002-2009

(in millions of current U.S. dollars)

	2002	2003	2004	2005	2006	2007	2008	2009	2002-2009
United States	8,322	5,872	6,985	5,614	8,690	11,839	28,775	17,371	93,468
Russia	5,400	4,200	8,000	7,800	14,600	10,200	5,300	10,400	65,900
France	400	900	1,100	5,000	500	1,200	3,100	7,100	19,300
United Kingdom	700	1,900	4,100	2,800	4,000	9,800	200	1,000	24,500
China	400	600	1,000	2,900	1,500	2,400	2,100	1,500	12,400
Germany	100	100	100	700	1,200	1,800	2,200	100	6,300
Italy	0	300	300	600	600	1,000	1,300	2,400	6,500
All Other European	1,300	1,400	2,400	3,500	3,000	2,000	3,200	2,800	19,600
All Others	1,000	1,400	2,600	1,000	2,900	1,500	1,500	2,400	14,300
TOTAL	17,622	16,672	26,585	29,914	36,990	41,739	47,675	45,071	262,268

Source: U.S. Government

Notes: Developing nations category excludes the U.S., Europe, Canada, Japan, Australia, and New Zealand. All data are for the calendar year given except for U.S. MAP (Military Assistance Program), IMET (International Military Education, and Training), and Excess Defense Article data, which are included for the particular fiscal year. All amounts given include the values of all categories of weapons, spare parts, construction, all associated services, military assistance, excess defense articles, and training programs. Statistics for foreign countries are based upon estimated selling prices. All foreign data are rounded to the nearest \$100 million.

Table 4. Arms Transfer Agreements with Developing Nations, by Supplier, 2002-2009

(in millions of constant 2009 U.S. dollars)

	2002	2003	2004	2005	2006	2007	2008	2009	TOTAL 2002-2009
United States	10,280	7,098	8,172	6,301	9,426	12,487	29,455	17,371	100,590
Russia	6,671	5,077	9,359	8,754	15,837	10,758	5,425	10,400	72,281
France	494	1,088	1,287	5,612	542	1,266	3,173	7,100	20,562
United Kingdom	865	2,297	4,796	3,143	4,339	10,336	205	1,000	26,980
China	494	725	1,170	3,255	1,627	2,531	2,150	1,500	13,452
Germany	124	121	117	786	1,302	1,899	2,252	100	6,699
Italy	0	363	351	673	651	1,055	1,331	2,400	6,823
All Other European	1,606	1,692	2,808	3,928	3,254	2,109	3,276	2,800	21,473
All Others	1,235	1,692	3,042	1,122	3,146	1,582	1,535	2,400	15,755
TOTAL	21,769	20,152	31,101	33,574	40,124	44,024	48,802	45,071	284,616
Dollar inflation Index::(2009= 1)*	0.8095	0.8273	0.8548	0.8910	0.9219	0.9481	0.9769	1	

Source: U.S. Government

* Based on Department of Defense Price Deflator

Table 5. Arms Transfer Agreements with Developing Nations, by Supplier, 2002-2009

(expressed as a percent of total, by year)

	2002	2003	2004	2005	2006	2007	2008	2009
United States	47.23%	35.22%	26.27%	18.77%	23.49%	28.36%	60.36%	38.54%
Russia	30.64%	25.19%	30.09%	26.07%	39.47%	24.44%	11.12%	23.07%
France	2.27%	5.40%	4.14%	16.71%	1.35%	2.88%	6.50%	15.75%
United Kingdom	3.97%	11.40%	15.42%	9.36%	10.81%	23.48%	0.42%	2.22%
China	2.27%	3.60%	3.76%	9.69%	4.06%	5.75%	4.40%	3.33%
Germany	0.57%	0.60%	0.38%	2.34%	3.24%	4.31%	4.61%	0.22%
Italy	0.00%	1.80%	1.13%	2.01%	1.62%	2.40%	2.73%	5.32%
All Other European	7.38%	8.40%	9.03%	11.70%	8.11%	4.79%	6.71%	6.21%
All Others	5.67%	8.40%	9.78%	3.34%	7.84%	3.59%	3.15%	5.32%
[Major West European*	6.81%	19.19%	21.06%	30.42%	17.03%	33.06%	14.26%	23.52%]
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: U.S. Government

* Major West European category includes France, United Kingdom, Germany, Italy.

Table 6. Regional Arms Transfer Agreements, by Supplier, 2002-2009

(in millions of current U.S. dollars)

	Asia		Near East		Latin America		Africa	
	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009
United States	7,634	16,782	17,622	47,301	1,363	2,426	173	166
Russia	18,000	17,700	6,000	11,500	600	11,100	800	200
France	6,300	3,200	2,000	4,800	300	6,300	100	0
United Kingdom	2,700	400	6,800	14,200	400	300	0	0
China	2,700	3,500	1,100	2,800	100	600	800	600
Germany	500	4,000	500	900	0	300	0	0
Italy	300	1,300	500	3,700	100	0	300	200
All Other European	3,400	7,000	2,400	4,200	2,300	1,400	800	600
All Others	3,700	5,900	1,500	800	600	1,300	500	300
[Major West European*	9,800	8,900	9,800	23,600	800	6,900	400	200]
TOTAL	45,234	59,782	38,422	90,201	5,763	23,726	3,473	2,066

Source: U.S. Government

Notes: All foreign data rounded to the nearest \$100 million.

* Major West European category included France, United Kingdom, Germany, and Italy.

Table 7. Percentage of Each Supplier's Agreements Value by Region, 2002-2009

	Asia		Near East		Latin America		Africa		TOTAL	
	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009
United States	28.49%	25.17%	65.77%	70.94%	5.09%	3.64%	0.65%	0.25%	100 %	100%
Russia	70.87%	43.70%	23.62%	28.40%	2.36%	27.41%	3.15%	0.49%	100%	100%
France	72.41%	22.38%	22.99%	33.57%	3.45%	44.06%	1.15%	0.00%	100%	100%
United Kingdom	27.27%	2.68%	68.69%	95.30%	4.04%	2.01%	0.00%	0.00%	100%	100%
China	57.45%	46.67%	23.40%	37.33%	2.13%	8.00%	17.02%	8.00%	100%	100%
Germany	50.00%	76.92%	50.00%	17.31%	0.00%	5.77%	0.00%	0.00%	100%	100%
Italy	25.00%	25.00%	41.67%	71.15%	8.33%	0.00%	25.00%	3.85%	100%	100%
All Other European	38.20%	53.03%	26.97%	31.82%	25.84%	10.61%	8.99%	4.55%	100%	100%
All Others	58.73%	71.08%	23.81%	9.64%	9.52%	15.66%	7.94%	3.61%	100%	100%
[Major West European*]	47.12%	22.47%	47.12%	59.60%	3.85%	17.42%	1.92%	0.51%	100%	100%
TOTAL	48.70%	34.01%	41.36%	51.32%	6.20%	13.50%	3.74%	1.18%	100%	100%

Source: U.S. Government

* Major West European category included France, United Kingdom, Germany, and Italy.

Table 8. Percentage of Total Agreements Value by Supplier to Regions, 2002-2009

	Asia		Near East		Latin America		Africa	
	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009
United States	16.88%	28.07%	45.86%	52.44%	23.65%	10.23%	4.98%	8.03%
Russia	39.79%	29.61%	15.62%	12.75%	10.41%	46.78%	23.03%	9.68%
France	13.93%	5.35%	5.21%	5.32%	5.21%	26.55%	2.88%	0.00%
United Kingdom	5.97%	0.67%	17.70%	15.74%	6.94%	1.26%	0.00%	0.00%
China	5.97%	5.85%	2.86%	3.10%	1.74%	2.53%	23.03%	29.04%
Germany	1.11%	6.69%	1.30%	1.00%	0.00%	1.26%	0.00%	0.00%
Italy	0.66%	2.17%	1.30%	4.10%	1.74%	0.00%	8.64%	9.68%
All Other European	7.52%	11.71%	6.25%	4.66%	39.91%	5.90%	23.03%	29.04%
All Others	8.18%	9.87%	3.90%	0.89%	10.41%	5.48%	14.40%	14.52%
[Major West European*	21.67%	14.89%	25.51%	26.16%	13.88%	29.08%	11.52%	9.68%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: U.S. Government

* Major West European category included France, United Kingdom, Germany, and Italy.

**Table 9. Arms Transfer Agreements with Developing Nations, 2002-2009:
Leading Suppliers Compared**
(in millions of current U.S. dollars)

Rank	Supplier	Agreement Value 2002-2005
1	United States	26,793
2	Russia	25,400
3	United Kingdom	9,500
4	France	7,400
5	China	4,900
6	Israel	2,600
7	Ukraine	1,900
8	Spain	1,700
9	Netherlands	1,500
10	Italy	1,200
11	Poland	1,000

Rank	Supplier	Agreement Value 2006-2009
1	United States	66,675
2	Russia	40,500
3	United Kingdom	15,000
4	France	11,900
5	China	7,500
6	Germany	5,300
7	Italy	5,300
8	Israel	4,800
9	Ukraine	3,200
10	Sweden	1,700
11	Spain	1,300

Source: U. S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

**Arms Transfer Agreements with Developing Nations, 2002-2009:
Leading Suppliers Compared (Continued)**

(in millions of current U.S. dollars)

Rank	Supplier	Agreement Value 2002-2009
1	United States	93,468
2	Russia	65,900
3	United Kingdom	24,500
4	France	19,300
5	China	12,400
6	Israel	7,400
7	Italy	6,500
8	Germany	6,300
9	Ukraine	5,100
10	Spain	3,000
11	Netherlands	2,400

Source: U. S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Table 10. Arms Transfer Agreements with Developing Nations in 2009: Leading Suppliers Compared
(in millions of current U.S. dollars)

Rank	Supplier	Agreements Value 2009
1	United States	17,371
2	Russia	10,400
3	France	7,100
4	Italy	2,400
5	Israel	1,600
6	China	1,500
7	Ukraine	1,200
8	United Kingdom	1,000
9	Spain	800
10	Brazil	400
11	Turkey	300

Source: U.S. Government

Notes: All foreign data are rounded to the nearest \$100 million. where rounded data totals are the same, the rank order is maintained.

Table II. Arms Transfer Agreements with Near East, by Supplier
(in millions of current U.S. dollars)

Recipient Country	U.S.	Russia	China	Major West European*	All Other European	All Others	Total
2002-2005							
Algeria	0	500	100	0	0	0	600
Bahrain	300	0	0	100	0	0	400
Egypt	5,900	400	400	100	500	0	7,300
Iran	0	2,000	300	0	100	300	2,700
Iraq	100	100	0	0	500	200	900
Israel	3,100	300	0	0	100	0	3,500
Jordan	800	200	0	0	300	100	1,400
Kuwait	1,900	0	0	0	0	0	1,900
Lebanon	0	0	0	0	0	0	0
Libya	0	300	0	100	300	200	900
Morocco	0	200	0	400	0	100	700
Oman	900	0	0	1,200	0	0	2,100
Qatar	0	0	0	0	0	0	0
Saudi Arabia	4,000	0	0	6,300	0	100	10,400
Syria	0	1,400	200	0	0	400	2,000
Tunisia	0	0	0	0	0	0	0
U.A.E.	1,400	100	0	1,300	200	100	3,100
Yemen	0	500	0	0	300	100	900

Source: U.S. Government

Notes: 0=data less than \$50 million or nil. All data are rounded to the nearest \$100 million.

* Major West European category included France, United Kingdom, Germany, and Italy totals as an aggregate figure.

Arms Transfer Agreements with Near East, by Supplier (Continued)

(in millions of current U.S. dollars)

Recipient Country	U.S.	Russia	China	Major West European*	All Other European	All Others	Total
2006-2009							
Algeria	0	5,700	500	600	0	0	6,800
Bahrain	400	0	0	0	0	0	400
Egypt	6,500	0	100	0	0	0	6,600
Iran	0	400	100	0	300	100	900
Iraq	5,100	200	100	600	1,100	100	7,200
Israel	2,700	0	0	800	0	0	3,500
Jordan	1,100	0	100	0	200	0	1,400
Kuwait	2,600	0	0	0	0	0	2,600
Lebanon	200	0	0	0	0	300	500
Libya	0	200	0	1,200	200	0	1,600
Morocco	2,500	0	300	1,000	900	0	4,700
Oman	100	0	0	1,300	0	0	1,400
Qatar	200	0	100	500	0	100	900
Saudi Arabia	13,100	0	900	14,600	800	100	29,500
Syria	0	4,400	600	0	100	300	5,400
Tunisia	0	0	0	0	0	0	0
U.A.E.	10,600	300	100	2,800	400	0	14,200
Yemen	0	200	0	100	100	0	400

Source: U.S. Government

Notes: 0=data less than \$50 million or nil. All data are rounded to the nearest \$100 million.

* Major West European category included France, United Kingdom, Germany, and Italy totals as an aggregate figure.

**Table 12. Arms Transfer Agreements with Developing Nations, 2002-2009:
Agreements by the Leading Recipients**
(in millions of current U.S. dollars)

Rank	Recipient	Agreements Value 2002-2005
1	India	15,300
2	Saudi Arabia	10,400
3	China	9,800
4	Egypt	7,300
5	Pakistan	3,600
6	Israel	3,500
7	U.A.E.	3,100
8	South Korea	3,000
9	Malaysia	2,900
10	Iran	2,700

Rank	Recipient	Agreements Value 2006-2009
1	Saudi Arabia	29,500
2	India	17,100
3	U.A.E.	14,200
4	Venezuela	11,300
5	Pakistan	8,900
6	Brazil	8,200
7	Iraq	7,200
8	South Korea	6,800
9	Algeria	6,800
10	Egypt	6,600

Source: U.S. Government

Notes: All data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Arms Transfer Agreements with Developing Nations, 2002-2009: Agreements by the Leading Recipients (Continued)

(in millions of current U.S. dollars)

Rank	Recipient	Agreements Value 2002-2009
1	Saudi Arabia	39,900
2	India	32,400
3	U.A.E.	17,300
4	Egypt	13,900
5	Venezuela	12,700
6	Pakistan	12,500
7	China	11,700
8	South Korea	9,800
9	Brazil	8,600
10	Iraq	8,100

Source: U.S. Government

Notes: All data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Table 13. Arms Transfer Agreements with Developing Nations in 2009: Agreements by Leading Recipients

(in millions of current U.S. dollars)

Rank	Recipient	Agreement Value 2009
1	Brazil	7,200
2	Venezuela	6,400
3	Saudi Arabia	4,300
4	Taiwan	3,800
5	U.A.E.	3,600
6	Iraq	3,300
7	Egypt	3,000
8	Vietnam	2,400
9	India	2,400
10	Kuwait	1,600

Source: U.S. Government

Notes: All data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Table 14. Arms Deliveries to Developing Nations, by Supplier, 2002-2009

(in millions of current U.S. dollars)

	2002	2003	2004	2005	2006	2007	2008	2009	2002-2009
United States	6,230	5,865	7,390	8,168	7,969	7,214	7,321	7,405	57,562
Russia	3,500	4,100	5,300	3,100	5,700	5,000	5,700	3,500	35,900
France	900	1,900	5,200	2,000	400	800	600	400	12,200
United Kingdom	3,500	5,800	2,400	3,000	3,600	900	1,000	800	21,000
China	800	700	900	1,000	1,300	2,000	2,100	1,800	10,600
Germany	300	800	800	300	900	600	1,300	1,000	6,000
Italy	200	100	100	100	200	300	100	300	1,400
All Other European	1,900	1,600	1,100	1,300	1,200	1,400	1,500	900	10,900
All Others	1,500	1,000	1,800	1,600	700	600	400	900	8,500
TOTAL	18,830	21,865	24,990	20,568	21,969	18,814	20,021	17,005	164,062

Source: U.S. Government

Note: Developing nations category excludes the U.S., Europe, Canada, Japan, Australia, and New Zealand. All data are for the calendar year given except for U.S. MAP (Military Assistance Program), IMET (International Military Education, and Training), and Excess Defense Article data, which are included for the particular fiscal year. All amounts given include the values of all categories of weapons, spare parts, construction, all associated services, military assistance, excess defense articles, and training programs. Statistics for foreign countries are based upon estimated selling prices. All foreign data are rounded to the nearest \$100 million.

Table 15. Arms Deliveries to Developing Nations, by Supplier, 2002-2009

(in millions of constant 2009 U.S. dollars)

	2002	2003	2004	2005	2006	2007	2008	2009	2002-2009
United States	7,696	7,089	8,645	9,167	8,644	7,609	7,494	7,405	63,750
Russia	4,324	4,956	6,200	3,479	6,183	5,274	5,835	3,500	39,750
France	1,112	2,297	6,083	2,245	434	844	614	400	14,028
United Kingdom	4,324	7,011	2,808	3,367	3,905	949	1,024	800	24,187
China	988	846	1,053	1,122	1,410	2,109	2,150	1,800	11,479
Germany	371	967	936	337	976	633	1,331	1,000	6,550
Italy	247	121	117	112	217	316	102	300	1,533
All Other European	2,347	1,934	1,287	1,459	1,302	1,477	1,535	900	12,241
All Others	1,853	1,209	2,106	1,796	759	633	409	900	9,665
TOTAL	23,261	26,429	29,235	23,084	23,830	19,844	20,494	17,005	183,183
Dollar Inflation index: (2009=1)*	0.8095	0.8273	0.8548	0.891	0.9219	0.9481	0.9769	1	

Source: U.S. Government

*Based on Department of Defense Price Deflator

Table 16. Arms Deliveries to Developing Nations, by Supplier, 2002-2009

	2002	2003	2004	2005	2006	2007	2008	2009
United States	33.09%	26.82%	29.57%	39.71%	36.27%	38.34%	36.57%	43.55%
Russia	18.59%	18.75%	21.21%	15.07%	25.95%	26.58%	28.47%	20.58%
France	4.78%	8.69%	20.81%	9.72%	1.82%	4.25%	3.00%	2.35%
United Kingdom	18.59%	26.53%	9.60%	14.59%	16.39%	4.78%	4.99%	4.70%
China	4.25%	3.20%	3.60%	4.86%	5.92%	10.63%	10.49%	10.59%
Germany	1.59%	3.66%	3.20%	1.46%	4.10%	3.19%	6.49%	5.88%
Italy	1.06%	0.46%	0.40%	0.49%	0.91%	1.59%	0.50%	1.76%
All Other European	10.09%	7.32%	4.40%	6.32%	5.46%	7.44%	7.49%	5.29%
All Others	7.97%	4.57%	7.20%	7.78%	3.19%	3.19%	2.00%	5.29%
[Major West European*]	26.02%	39.33%	34.01%	26.25%	23.21%	13.82%	14.98%	14.70%]
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: U.S. Government

* Major West European category includes France, United Kingdom, Germany, and Italy.

Table 17. Regional Arms Deliveries by Supplier, 2002-2009

(in millions of current U.S. dollars)

	Asia		Near East		Latin America		Africa	
	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009
United States	9,319	8,565	17,649	19,976	609	1,290	75	78
Russia	13,400	11,400	1,800	5,100	100	3,300	700	100
France	1,500	2,200	8,400	400	400	200	100	0
United Kingdom	1,600	1,200	13,600	4,500	100	300	300	400
China	2,000	3,100	900	2,900	0	400	500	900
Germany	2,800	2,600	300	300	0	200	600	900
Italy	100	200	0	100	200	100	100	500
All Other European	2,400	2,500	3,000	1,200	700	800	600	700
All Others	3,300	1,700	1,500	500	800	400	400	200
[Major West European*]	6,000	6,200	22,300	5,300	700	800	1,100	1,800]
TOTAL	36,419	33,465	47,149	34,976	2,909	6,990	3,375	3,778

Source: U.S. Government

Note: All foreign data are rounded to the nearest \$100 million.

* Major West European category includes France, United Kingdom, Germany, and Italy.

Table 18. Percentage of Supplier Deliveries Value by Region, 2002-2009

	Asia		Near East		Latin America		Africa		TOTAL 2002- 2005	TOTAL 2006- 2009
	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009		
United States	33.70%	28.64%	63.83%	66.79%	2.20%	4.31%	0.27%	0.26%	100.00%	100.00%
Russia	83.75%	57.29%	11.25%	25.63%	0.63%	16.58%	4.38%	0.50%	100.00%	100.00%
France	14.42%	78.57%	80.77%	14.29%	3.85%	7.14%	0.96%	0.00%	100.00%	100.00%
United Kingdom	10.26%	18.75%	87.18%	70.31%	0.64%	4.69%	1.92%	6.25%	100.00%	100.00%
China	58.82%	42.47%	26.47%	39.73%	0.00%	5.48%	14.71%	12.33%	100.00%	100.00%
Germany	75.68%	65.00%	8.11%	7.50%	0.00%	5.00%	16.22%	22.50%	100.00%	100.00%
Italy	25.00%	22.22%	0.00%	11.11%	50.00%	11.11%	25.00%	55.56%	100.00%	100.00%
All Other European	35.82%	48.08%	44.78%	23.08%	10.45%	15.38%	8.96%	13.46%	100.00%	100.00%
All Others	55.00%	60.71%	25.00%	17.86%	13.33%	14.29%	6.67%	7.14%	100.00%	100.00%
[Major West European*]	19.93%	43.97%	74.09%	37.59%	2.33%	5.67%	3.65%	12.77%]	100.00%	100.00%]
TOTAL	40.53%	42.25%	52.47%	44.16%	3.24%	8.82%	3.76%	4.77%	100.00%	100.00%

Source: U.S. Government

* Major West European category includes France, United Kingdom, Germany, and Italy.

Table 19. Percentage of Total Deliveries Value by Supplier to Regions, 2002-2009

	Asia		Near East		Latin America		Africa	
	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009	2002-2005	2006-2009
United States	25.59%	25.59%	37.43%	57.11%	20.94%	18.45%	2.22%	2.06%
Russia	36.79%	34.07%	3.82%	14.58%	3.44%	47.21%	20.74%	2.65%
France	4.12%	6.57%	17.82%	1.14%	13.75%	2.86%	2.96%	0.00%
United Kingdom	4.39%	3.59%	28.84%	12.87%	3.44%	4.29%	8.89%	10.59%
China	5.49%	9.26%	1.91%	8.29%	0.00%	5.72%	14.81%	23.82%
Germany	7.69%	7.77%	0.64%	0.86%	0.00%	2.86%	17.78%	23.82%
Italy	0.27%	0.60%	0.00%	0.29%	6.88%	1.43%	2.96%	13.23%
All Other European	6.59%	7.47%	6.36%	3.43%	24.06%	11.44%	17.78%	18.53%
All Others	9.06%	5.08%	3.18%	1.43%	27.50%	5.72%	11.85%	5.29%
[Major West European*	16.47%	18.53%	47.30%	15.15%	24.06%	11.44%	32.59%	47.64%]
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: U.S. Government

* Major West European category includes France, United Kingdom, Germany, and Italy.

Table 20. Arms Deliveries to Developing Nations, 2002-2009 Leading Suppliers Compared
(in millions of current U.S. dollars)

Rank	Supplier	Deliveries Value 2002-2005
1	United States	27,653
2	Russia	16,000
3	United Kingdom	14,700
4	France	10,000
5	China	3,400
6	Germany	2,200
7	Israel	1,900
8	Sweden	1,400
9	Ukraine	1,200
10	Brazil	700
11	Italy	500

Rank	Supplier	Deliveries Value 2006-2009
1	United States	29,909
2	Russia	19,900
3	China	7,200
4	United Kingdom	6,300
5	Germany	3,800
6	France	2,200
7	Israel	1,200
8	Netherlands	1,000
9	Italy	900
10	Ukraine	700
11	Poland	600

Source: U. S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

**Arms Deliveries to Developing Nations, 2002-2009 Leading Suppliers Compared
(Continued)**

(in millions of current U.S. dollars)

Rank	Supplier	Deliveries Value 2002-2009
1	United States	57,562
2	Russia	35,900
3	United Kingdom	21,000
4	France	12,200
5	China	10,600
6	Germany	6,000
7	Israel	3,100
8	Sweden	1,900
9	Ukraine	1,900
10	Italy	1,400
11	Netherlands	1,300

Source: U. S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Table 21. Arms Deliveries to Developing Nations in 2009: Leading Suppliers Compared
(in millions of **current** U.S. dollars)

Rank	Recipient	Deliveries Value 2009
1	United States	7,405
2	Russia	3,500
3	China	1,800
4	Germany	1,000
5	United Kingdom	800
6	Israel	700
7	France	400
8	Italy	300
9	Ukraine	200
10	Sweden	200
11	Poland	200

Source: U.S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Table 22. Arms Deliveries to Near East, by Supplier
(in millions of current U.S. dollars)

Recipient Country	U.S.	Russia	China	Major West European*	All Other European	All Others	Total
2002-2005							
Algeria	0	200	100	0	0	100	400
Bahrain	300	0	0	0	0	0	300
Egypt	6,100	100	400	100	200	0	6,900
Iran	0	100	100	0	100	300	600
Iraq	0	0	0	0	200	100	300
Israel	4,600	0	0	0	100	0	4,700
Jordan	400	0	0	0	100	100	600
Kuwait	800	0	200	100	0	200	1,300
Lebanon	0	0	0	0	0	0	0
Libya	0	100	0	0	100	100	300
Morocco	0	0	0	200	0	100	300
Oman	300	0	0	300	0	0	600
Qatar	0	0	0	0	0	0	0
Saudi Arabia	4,400	0	0	15,700	1,600	100	21,800
Syria	0	300	0	0	100	200	600
Tunisia	0	0	0	100	0	0	100
U.A.E.	500	400	0	5,900	400	100	7,300
Yemen	0	600	0	0	200	100	900

Source: U.S. Government

Notes: 0=data less than \$50 million or nil. All data are rounded to the nearest \$100 million.

* Major West European category included France, United Kingdom, Germany, and Italy totals as an aggregate figure.

Arms Deliveries to Near East, by Supplier (Continued)

(in millions of current U.S. dollars)

Recipient Country	U.S.	Russia	China	Major West European*	All Other European	All Others	Total
2006-2009							
Algeria	0	2,800	500	100	0	0	3,400
Bahrain	300	0	0	100	0	0	400
Egypt	4,400	200	400	0	300	0	5,300
Iran	0	400	100	0	0	0	500
Iraq	1,700	100	0	100	200	0	2,100
Israel	5,200	200	0	0	0	0	5,400
Jordan	800	100	100	0	100	0	1,100
Kuwait	1,500	0	0	0	0	0	1,500
Lebanon	100	0	0	0	0	0	100
Libya	0	100	0	0	100	0	200
Morocco	100	100	0	0	100	0	300
Oman	500	0	0	300	0	0	800
Qatar	0	0	0	0	0	0	0
Saudi Arabia	5,000	0	800	4,300	0	0	10,100
Syria	0	800	1,000	0	100	300	2,200
Tunisia	0	0	0	0	0	0	0
U.A.E.	600	100	0	400	200	0	1,300
Yemen	0	100	0	0	0	0	100

Source: U.S. Government

Notes: 0=data less than \$50 million or nil. All data are rounded to the nearest \$100 million.

* Major West European category included France, United Kingdom, Germany, and Italy totals as an aggregate figure.

Table 23. Arms Deliveries to Developing Nations, 2002-2009: The Leading Recipients
(in millions of current U.S. dollars)

Rank	Recipient	Deliveries Value 2002-2005
1	Saudi Arabia	21,400
2	India	8,100
3	China	7,700
4	U.A.E.	7,300
5	Egypt	6,900
6	Israel	4,700
7	Taiwan	4,000
8	South Korea	3,000
9	Pakistan	2,600
10	Malaysia	1,500

Rank	Recipient	Deliveries Value 2006-2009
1	Saudi Arabia	10,100
2	China	6,700
3	India	6,100
4	Israel	5,400
5	Egypt	5,300
6	South Korea	4,200
7	Taiwan	3,500
8	Venezuela	3,400
9	Algeria	3,400
10	Pakistan	3,400

Source: U.S. Government

Notes: All data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

**Arms Deliveries to Developing Nations, 2002-2009: The Leading Recipients
(Continued)**

(in millions of **current** U.S. dollars)

Rank	Recipient	Deliveries Value 2002-2009
1	Saudi Arabia	31,500
2	China	14,400
3	India	14,200
4	Egypt	12,200
5	Israel	10,100
6	U.A.E.	8,600
7	Taiwan	7,500
8	South Korea	7,200
9	Pakistan	6,000
10	Singapore	3,700

Source: U.S. Government

Notes: All data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Table 24. Arms Deliveries to Developing Nations in 2009: The Leading Recipients
(in millions of **current** U.S. dollars)

Rank	Recipient	Deliveries Value 2009
1	Saudi Arabia	2,700
2	China	1,500
3	South Korea	1,400
4	Egypt	1,300
5	India	1,200
6	Israel	1,200
7	Pakistan	1,000
8	Venezuela	900
9	Algeria	900
10	Iraq	800

Source: U.S. Government

Note: All data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Selected Weapons Deliveries to Developing Nations, 2002-2009

Other useful data for assessing arms transfers are those that indicate who has actually delivered specific numbers of specific classes of military items to a region. These data are relatively “hard” in that they reflect actual transfers of military equipment. They have the limitation of not giving detailed information regarding either the sophistication or the specific name of the equipment delivered. However, these data show relative trends in the delivery of important classes of military equipment and indicate who the leading suppliers are from region to region over time. Data in the following tables set out actual deliveries of fourteen categories of weaponry to developing nations from 2002-2009 by the United States, Russia, China, the four major West European suppliers as a group, all other European suppliers as a group, and all other suppliers as a group. The tables show these deliveries data for all of the developing nations collectively, for Asia, for the Near East, for Latin America, and for Africa.

Care should be taken in using the quantitative data within these specific tables. Aggregate data on weapons categories delivered by suppliers do not provide precise indices of the quality and/or quantity of the weaponry delivered. The history of recent conventional conflicts suggests that quality and/or sophistication of weapons can offset quantitative advantage. Further, these data do not provide an indication of the relative capabilities of the recipient nations to use effectively the weapons delivered to them. Superior training—coupled with good equipment, tactical and operational proficiency, and sound logistics—may, in the last analysis, be a more important factor in a nation’s ability to engage successfully in conventional warfare than the size of its weapons inventory.

Table 25. Numbers of Weapons Delivered by Suppliers to Developing Nations

Weapons Category	U.S.	Russia	China	Major West European*	All Other European	All Others
2002-2005						
Tanks and Self-Propelled Guns	523	300	220	140	620	60
Artillery	177	20	460	80	1,570	190
APCs and Armored Cars	102	350	70	120	1,990	780
Major Surface Combatants	10	3	0	15	3	2
Minor Surface Combatants	19	6	51	61	66	136
Guided Missile Boats	0	0	0	12	0	0
Submarines	0	5	0	3	4	0
Supersonic Combat Aircraft	91	240	50	70	50	40
Subsonic Combat Aircraft	17	0	0	10	0	0
Other Aircraft	64	30	110	40	120	180
Helicopters	68	240	0	80	60	50
Surface-to-Air Missiles	1,893	1,660	600	140	380	620
Surface-to-Surface Missiles	0	0	0	0	0	50
Anti-Ship Missiles	336	170	120	170	80	60
2006-2009						
Tanks and Self-Propelled Guns	446	420	100	230	210	50
Artillery	223	40	435	10	170	1,060
APCs and Armored Cars	597	340	640	160	1,870	280
Major Surface Combatants	0	2	1	8	6	2
Minor Surface Combatants	6	4	48	37	26	36
Guided Missile Boats	0	0	0	0	9	1
Submarines	0	3	0	6	1	0
Supersonic Combat Aircraft	68	120	40	30	50	50
Subsonic Combat Aircraft	0	0	20	30	10	30
Other Aircraft	33	20	130	10	60	40
Helicopters	64	160	0	80	20	30
Surface-to-Air Missiles	836	7,370	1,210	830	840	90
Surface-to-Surface Missiles	0	10	0	0	0	10
Anti-Ship Missiles	161	250	60	50	70	40

Source: U.S. Government

Note: Developing nations category excludes the U.S., Russia, Europe, Canada, Japan, Australia, and New Zealand. All data are for calendar years given. * Major West European includes France, United Kingdom, Germany, and Italy totals as an aggregate figure. Data relating to surface-to-surface and anti-ship missiles by foreign suppliers are estimates based on a variety of sources having a wide range of accuracy. As such, individual data entries in these two weapons delivery categories are not necessarily definitive.

Table 26. Number of Weapons Delivered by Suppliers to Asia and the Pacific

Weapons Category	U.S.	Russia	China	Major West European*	All Other European	All Others
2002-2005						
Tanks and Self-Propelled Guns	0	290	220	0	80	0
Artillery	105	0	270	10	290	70
APCs and Armored Cars	48	190	10	0	870	60
Major Surface Combatants	6	3	0	1	1	1
Minor Surface Combatants	6	4	10	13	25	16
Guided Missile Boats	0	0	0	0	0	0
Submarines	0	5	0	2	3	0
Supersonic Combat Aircraft	8	180	40	40	10	20
Subsonic Combat Aircraft	17	0	0	0	0	0
Other Aircraft	11	30	10	10	30	60
Helicopters	42	110	0	20	10	0
Surface-to-Air Missiles	1,374	440	600	0	100	580
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	190	170	20	60	70	0
2006-2009						
Tanks and Self-Propelled Guns	115	150	80	30	50	0
Artillery	44	40	225	10	80	30
APCs and Armored Cars	21	180	80	120	410	0
Major Surface Combatants	0	2	1	5	3	1
Minor Surface Combatants	0	4	21	2	2	9
Guided Missile Boats	0	0	0	0	0	0
Submarines	0	3	0	2	0	0
Supersonic Combat Aircraft	0	50	20	10	0	30
Subsonic Combat Aircraft	0	0	20	20	0	20
Other Aircraft	9	10	40	0	40	20
Helicopters	16	60	0	20	0	0
Surface-to-Air Missiles	497	1,440	1,210	430	30	90
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	147	230	30		0	0

Source: U.S. Government

Note: Developing nations category excludes the U.S., Russia, Europe, Canada, Japan, Australia, and New Zealand. All data are for calendar years given. * Major West European includes France, United Kingdom, Germany, and Italy totals as an aggregate figure. Data relating to surface-to-surface and anti-ship missiles by foreign suppliers are estimates based on a variety of sources having a wide range of accuracy. As such, individual data entries in these two weapons delivery categories are not necessarily definitive.

Table 27. Numbers of Weapons Delivered by Suppliers to Near East

Weapons Category	U.S.	Russia	China	Major West European*	All Other European	All Others
2002-2005						
Tanks and Self-Propelled Guns	523	10	0	140	320	0
Artillery	72	0	20	50	60	40
APCs and Armored Cars	54	120	0	60	800	580
Major Surface Combatants	2	0	0	5	1	0
Minor Surface Combatants	4	0	0	35	34	106
Guided Missile Boats	0	0	0	11	0	0
Submarines	0	0	0	0	0	0
Supersonic Combat Aircraft	75	30	0	30	10	0
Subsonic Combat Aircraft	0	0	0	0	0	0
Other Aircraft	41	0	70	20	50	80
Helicopters	26	60	0	30	20	20
Surface-to-Air Missiles	519	1,170	0	130	260	0
Surface-to-Surface Missiles	0	0	0	0	0	50
Anti-Ship Missiles	146	0	100	90	10	30
2006-2009						
Tanks and Self-Propelled Guns	331	270	0	0	30	10
Artillery	78	0	120	0	50	50
APCs and Armored Cars	566	160	150	20	1,360	170
Major Surface Combatants	0	0	0	0	0	0
Minor Surface Combatants	6	0	0	30	2	20
Guided Missile Boats	0	0	0	0	9	0
Submarines	0	0	0	0	0	0
Supersonic Combat Aircraft	62	50	0	10	40	0
Subsonic Combat Aircraft	0	0	0	0	0	0
Other Aircraft	6	0	60	10	10	0
Helicopters	32	10	0	10	0	20
Surface-to-Air Missiles	339	5,430	0	400	520	0
Surface-to-Surface Missiles	0	10	0	0	0	10
Anti-Ship Missiles	4	20	30	50	60	40

Source: U.S. Government

Note: Developing nations category excludes the U.S., Russia, Europe, Canada, Japan, Australia, and New Zealand. All data are for calendar years given. * Major West European includes France, United Kingdom, Germany, and Italy totals as an aggregate figure. Data relating to surface-to-surface and anti-ship missiles by foreign suppliers are estimates based on a variety of sources having a wide range of accuracy. As such, individual data entries in these two weapons delivery categories are not necessarily definitive.

Table 28. Numbers of Weapons Delivered by Suppliers to Latin America

Weapons Category	U.S.	Russia	China	Major West European*	All Other European	All Others
2002-2005						
Tanks and Self-Propelled Guns	0	0	0	0	0	20
Artillery	0	0	10	0	0	0
APCs and Armored Cars	0	0	0	0	0	0
Major Surface Combatants	2	0	0	5	1	0
Minor Surface Combatants	9	0	12	0	2	2
Guided Missile Boats	0	0	0	0	0	0
Submarines	0	0	0	1	1	0
Supersonic Combat Aircraft	8	0	0	0	10	10
Subsonic Combat Aircraft	0	0	0	0	0	0
Other Aircraft	12	0	0	0	20	30
Helicopters	0	0	0	10	0	10
Surface-to-Air Missiles	0	30	0	0	0	40
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	0	0	0	10	0	30
2006-2009						
Tanks and Self-Propelled Guns	0	0	0	200	10	0
Artillery	101	0	0	0	30	0
APCs and Armored Cars	10	0	30	0	20	0
Major Surface Combatants	0	0	0	3	3	1
Minor Surface Combatants	0	0	0	5	2	0
Guided Missile Boats	0	0	0	0	0	0
Submarines	0	0	0	1	1	0
Supersonic Combat Aircraft	6	20	0	10	10	10
Subsonic Combat Aircraft	0	0	0	0	0	10
Other Aircraft	18	10	0	0	0	10
Helicopters	16	60	0	10	0	10
Surface-to-Air Missiles	0	500	0	0	0	0
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	10	0	0	0	10	0

Source: U.S. Government

Note: Developing nations category excludes the U.S., Russia, Europe, Canada, Japan, Australia, and New Zealand. All data are for calendar years given. * Major West European includes France, United Kingdom, Germany, and Italy totals as an aggregate figure. Data relating to surface-to-surface and anti-ship missiles by foreign suppliers are estimates based on a variety of sources having a wide range of accuracy. As such, individual data entries in these two weapons delivery categories are not necessarily definitive.

Table 29. Number of Weapons Delivered by Suppliers to Africa

Weapons Category	U.S.	Russia	China	Major West European*	All Other European	All Others
2002-2005						
Tanks and Self-Propelled Guns	0	0	0	0	220	40
Artillery	0	20	160	20	1,220	80
APCs and Armored Cars	0	40	60	60	320	140
Major Surface Combatants	0	0	0	4	0	1
Minor Surface Combatants	0	2	29	13	5	12
Guided Missile Boats	0	0	0	1	0	0
Submarines	0	0	0	0	0	0
Supersonic Combat Aircraft	0	30	10	0	20	10
Subsonic Combat Aircraft	0	0	0	10	0	0
Other Aircraft	0	0	30	10	20	10
Helicopters	0	70	0	20	30	20
Surface-to-Air Missiles	0	20	0	10	20	0
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	0	0	0	10	0	0
2006-2009						
Tanks and Self-Propelled Guns	0	0	20	0	120	40
Artillery	0	0	90	0	10	980
APCs and Armored Cars	0	0	380	20	80	110
Major Surface Combatants	0	0	0	0	0	0
Minor Surface Combatants	0	0	27	0	20	7
Guided Missile Boats	0	0	0	0	0	1
Submarines	0	0	0	3	0	0
Supersonic Combat Aircraft	0	0	20	0	0	10
Subsonic Combat Aircraft	0	0	0	10	10	0
Other Aircraft	0	0	30	0	10	10
Helicopters	0	30	0	40	20	0
Surface-to-Air Missiles	0	0	0	0	290	0
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	0	0	0	0	0	0

Source: U.S. Government

Note: Developing nations category excludes the U.S., Russia, Europe, Canada, Japan, Australia, and New Zealand. All data are for calendar years given. * Major West European includes France, United Kingdom, Germany, and Italy totals as an aggregate figure. Data relating to surface-to-surface and anti-ship missiles by foreign suppliers are estimates based on a variety of sources having a wide range of accuracy. As such, individual data entries in these two weapons delivery categories are not necessarily definitive.

Worldwide Arms Transfer Agreements and Deliveries Values, 2002-2009

Ten tables follow. **Table 30**, **Table 31**, **Table 32**, **Table 35**, **Table 36** and **Table 37** provide the total dollar values for arms transfer agreements and arms deliveries *worldwide* for the years 2002-2009. These tables use the same format and detail as **Table 3**, **Table 4**, **Table 5**, **Table 14**, **Table 15**, and **Table 16**, which provide the total dollar values for arms transfer *agreements* with and arms deliveries to *developing nations*. **Table 33**, **Table 34**, **Table 38**, and **Table 39** provide a list of the top eleven arms suppliers to the world based on the total values (in **current** dollars) of their arms transfer agreements and arms deliveries worldwide during calendar years 2002-2005, 2006-2009, and 2009. These tables are set out in the same format and detail as **Table 9** and **Table 10** for arms transfer agreements with, and **Table 20** and **Table 21** for arms deliveries to developing nations, respectively.

- **Total Worldwide Arms Transfer Agreements Values, 2002-2009**

Table 30 shows the annual **current** dollar values of arms transfer *agreements* worldwide. Since these figures do not allow for the effects of inflation, they are, by themselves, of limited use. They provide, however, the data from which **Table 31** (**constant** dollars) and **Table 32** (supplier percentages) are derived.

- **Total Worldwide Delivery Values 2002-2009**

Table 35 shows the annual **current** dollar values of arms *deliveries* (items actually transferred) worldwide by major suppliers from 2002-2009. The utility of these data is that they reflect transfers that have occurred. They provide the data from which **Table 36** (**constant** dollars) and **Table 37** (supplier percentages) are derived.

Table 30. Arms Transfer Agreements with the World, by Supplier, 2002-2009
(in millions of current U.S. dollars)

	2002	2003	2004	2005	2006	2007	2008	2009	TOTAL 2002-2009
United States	12,914	14,447	12,670	12,773	15,955	24,387	37,186	22,610	152,942
Russia	5,600	4,300	8,200	8,200	14,700	10,600	5,400	10,400	67,400
France	600	2,800	2,900	5,900	7,700	2,000	3,100	7,400	32,400
United Kingdom	800	3,000	4,200	2,900	4,200	9,800	200	1,500	26,600
China	400	600	1,000	2,900	1,500	2,400	2,100	1,700	12,600
Germany	1,100	700	4,000	2,000	1,600	1,900	3,100	3,700	18,100
Italy	400	600	400	1,500	1,200	1,300	3,700	2,700	11,800
All Other European	4,500	2,200	5,400	7,600	5,900	5,300	4,100	4,500	39,500
All Others	2,100	1,900	3,300	1,800	3,400	2,300	2,500	3,000	20,300
TOTAL	28,414	30,547	42,070	45,573	56,155	59,987	61,386	57,510	381,642

Source: U.S. Government

Note: All data are for the calendar year given, except for U.S. MAP (Military Assistance Program) and IMET (International Military Education and Training), excess defense articles, which are included for the particular fiscal year. All amounts given include the values of all categories of weapons and ammunition, military spare parts, military construction, excess defense articles, military assistance and training programs, and all associated services. Statistics for foreign countries are based upon estimated selling prices. All foreign data are rounded to the nearest \$100 million.

Table 31. Arms Transfer Agreements with the World, by Supplier, 2002-2009

(in millions of constant 2009 U.S. dollars)

	2002	2003	2004	2005	2006	2007	2008	2009	TOTAL 2002-2009
United States	15,953	17,463	14,822	14,336	17,307	25,722	38,065	22,610	166,278
Russia	6,918	5,198	9,593	9,203	15,945	11,180	5,528	10,400	73,965
France	741	3,385	3,393	6,622	8,352	2,109	3,173	7,400	35,175
United Kingdom	988	3,626	4,913	3,255	4,556	10,336	205	1,500	29,380
China	494	725	1,170	3,255	1,627	2,531	2,150	1,700	13,652
Germany	1,359	846	4,679	2,245	1,736	2,004	3,173	3,700	19,742
Italy	494	725	468	1,684	1,302	1,371	3,787	2,700	12,531
All Other European	5,559	2,659	6,317	8,530	6,400	5,590	4,197	4,500	43,752
All Others	2,594	2,297	3,861	2,020	3,688	2,426	2,559	3,000	22,445
TOTAL	35,101	36,924	49,216	51,148	60,912	63,271	62,838	57,510	416,919
Dollar inflation index:(2009=1)*	0.8095	0.8273	0.8548	0.891	0.9219	0.9481	0.9769	1	

Source: U.S. Government

* Based on Department of Defense Price Deflator.

Table 32. Arms Transfer Agreements with the World, by Supplier, 2002-2009

(expressed as a percent of total, by year)

	2002	2003	2004	2005	2006	2007	2008	2009
United States	45.45%	47.29%	30.12%	28.03%	28.41%	40.65%	60.58%	39.31%
Russia	19.71%	14.08%	19.49%	17.99%	26.18%	17.67%	8.80%	18.08%
France	2.11%	9.17%	6.89%	12.95%	13.71%	3.33%	5.05%	12.87%
United Kingdom	2.82%	9.82%	9.98%	6.36%	7.48%	16.34%	0.33%	2.61%
China	1.41%	1.96%	2.38%	6.36%	2.67%	4.00%	3.42%	2.96%
Germany	3.87%	2.29%	9.51%	4.39%	2.85%	3.17%	5.05%	6.43%
Italy	1.41%	1.96%	0.95%	3.29%	2.14%	2.17%	6.03%	4.69%
All Other European	15.84%	7.20%	12.84%	16.68%	10.51%	8.84%	6.68%	7.82%
All Others	7.39%	6.22%	7.84%	3.95%	6.05%	3.83%	4.07%	5.22%
[Major West European*	10.21%	23.24%	27.34%	26.99%	26.18%	25.01%	16.45%	26.60%]
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: U.S. Government

Note: Columns may not total due to rounding.

* Major West European category includes France, United Kingdom, Germany, and Italy.

Table 33. Arms Transfer Agreements with the World, 2002-2009: Leading Suppliers Compared

(in millions of current U.S. dollars)

Rank	Supplier	Agreements Value 2002-2005
1	United States	52,804
2	Russia	26,300
3	France	12,200
4	United Kingdom	10,900
5	Germany	7,800
6	Israel	4,900
7	China	4,900
8	Ukraine	3,600
9	Sweden	3,300
10	Austria	3,100
11	Italy	2,900

Rank	Supplier	Agreements Value 2006-2009
1	United States	100,138
2	Russia	41,100
3	France	20,200
4	United Kingdom	15,700
5	Germany	10,300
6	Italy	8,900
7	China	7,700
8	Israel	6,100
9	Spain	3,800
10	Ukraine	3,400
11	Sweden	2,400

Source: U. S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

**Arms Transfer Agreements with the World, 2002-2009: Leading Suppliers Compared
(Continued)**

(in millions of **current** U.S. dollars)

Rank	Supplier	Agreements Value 2002-2009
1	United States	152,942
2	Russia	67,400
3	France	32,400
4	United Kingdom	26,600
5	Germany	18,100
6	China	12,600
7	Italy	11,800
8	Israel	11,100
9	Ukraine	7,000
10	Sweden	5,600
11	Spain	5,500

Source: U. S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Table 34. Arms Transfer Agreements with the World in 2009: Leading Suppliers Compared

(in millions of current U.S. dollars)

Rank	Supplier	Agreement Value 2009
1	United States	22,610
2	Russia	10,400
3	France	7,400
4	Germany	3,700
5	Italy	2,700
6	Israel	2,100
7	China	1,700
8	United Kingdom	1,500
9	Ukraine	1,200
10	Spain	1,000
11	Austria	700

Source: U. S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Table 35. Arms Deliveries to the World, by Supplier, 2002-2009

(in millions of current U.S. dollars)

	2002	2003	2004	2005	2006	2007	2008	2009	TOTAL 2002-2009
United States	9,744	10,845	11,620	11,778	12,350	12,328	11,956	14,383	95,004
Russia	3,600	4,200	5,500	3,300	6,000	5,100	5,900	3,700	37,300
France	1,500	2,400	5,600	2,700	1,700	2,300	1,600	1,200	19,000
United Kingdom	5,000	6,800	3,200	3,700	4,800	2,000	2,200	2,200	29,900
China	900	800	900	1,100	1,300	2,100	2,100	1,800	11,000
Germany	1,200	2,500	2,000	1,900	2,400	2,900	3,800	2,800	19,500
Italy	600	400	200	1,000	300	800	600	600	4,500
All Other European	3,100	4,100	2,500	3,100	3,700	4,200	4,700	4,700	30,100
All Others	2,900	2,400	3,200	3,000	2,200	3,100	3,000	3,700	23,500
TOTAL	28,544	34,445	34,720	31,578	34,750	34,828	35,856	35,083	269,804

Source: U.S. Government

Note: All data are for the calendar year given, except for U.S. MAP (Military Assistance Program) and IMET (International Military Education and Training), excess defense articles, which are included for the particular fiscal year. All amounts given include the values of all categories of weapons and ammunition, military spare parts, military construction, excess defense articles, military assistance and training programs, and all associated services. Statistics for foreign countries are based upon estimated selling prices. All foreign data are rounded to the nearest \$100 million.

Table 36. Arms Deliveries to the World, by Supplier, 2002-2009

(in millions of constant U.S. dollars)

	2002	2003	2004	2005	2006	2007	2008	2009	TOTAL 2002-2009
United States	12,037	13,109	13,594	13,219	13,396	13,003	12,239	14,383	104,979
Russia	4,447	5,077	6,434	3,704	6,508	5,379	6,040	3,700	41,289
France	1,853	2,901	6,551	3,030	1,844	2,426	1,638	1,200	21,443
United Kingdom	6,177	8,220	3,744	4,153	5,207	2,109	2,252	2,200	34,061
China	1,112	967	1,053	1,235	1,410	2,215	2,150	1,800	11,941
Germany	1,482	3,022	2,340	2,132	2,603	3,059	3,890	2,800	21,328
Italy	741	484	234	1,122	325	844	614	600	4,964
All Other European	3,830	4,956	2,925	3,479	4,013	4,430	4,811	4,700	33,144
All Others	3,582	2,901	3,744	3,367	2,386	3,270	3,071	3,700	26,021
TOTAL	35,261	41,635	40,618	35,441	37,694	36,735	36,704	35,083	299,171
Dollar inflation index:(2009=1)*	0.8095	0.8273	0.8548	0.891	0.9219	0.9481	0.9769	1	

Source: U.S. Government

* Based on Department of Defense Price Deflator.

Table 37. Arms Deliveries to the World, by Supplier 2002-2009

(expressed as a percent of total, by year)

	2002	2003	2004	2005	2006	2007	2008	2009
United States	34.14%	31.48%	33.47%	37.30%	35.54%	35.40%	33.34%	41.00%
Russia	12.61%	12.19%	15.84%	10.45%	17.27%	14.64%	16.45%	10.55%
France	5.26%	6.97%	16.13%	8.55%	4.89%	6.60%	4.46%	3.42%
United Kingdom	17.52%	19.74%	9.22%	11.72%	13.81%	5.74%	6.14%	6.27%
China	3.15%	2.32%	2.59%	3.48%	3.74%	6.03%	5.86%	5.13%
Germany	4.20%	7.26%	5.76%	6.02%	6.91%	8.33%	10.60%	7.98%
Italy	2.10%	1.16%	0.58%	3.17%	0.86%	2.30%	1.67%	1.71%
All Other European	10.86%	11.90%	7.20%	9.82%	10.65%	12.06%	13.11%	13.40%
All Others	10.16%	6.97%	9.22%	9.50%	6.33%	8.90%	8.37%	10.55%
Major West European*	29.08%	35.13%	31.68%	29.45%	26.47%	22.97%	22.87%	19.38%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: U.S. Government

* Major West European category includes France, United Kingdom, Germany, and Italy.

Table 38. Arms Deliveries to the World, 2002-2009: Leading Suppliers Compared
(in millions of **current** U.S. dollars)

Rank	Supplier	Deliveries Value 2002-2005
1	United States	43,987
2	United Kingdom	18,700
3	Russia	16,600
4	France	12,200
5	Germany	7,600
6	Israel	3,800
7	China	3,700
8	Ukraine	2,900
9	Sweden	2,700
10	Canada	2,900
11	Italy	2,200

Rank	Supplier	Deliveries Value 2006-2009
1	United States	51,017
2	Russia	20,700
3	Germany	11,900
4	United Kingdom	11,200
5	China	7,300
6	France	6,800
7	Israel	4,400
8	Canada	3,800
9	Netherlands	2,300
10	Italy	2,300
11	Spain	2,300

Source: U. S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained

Arms Deliveries to the World, 2002-2009: Leading Suppliers Compared (Continued)

(in millions of current U.S. dollars)

Rank	Supplier	Deliveries Value 2002-2009
1	United States	95,004
2	Russia	37,300
3	United Kingdom	29,900
4	Germany	19,500
5	France	19,000
6	China	11,000
7	Israel	8,200
8	Canada	6,700
9	Sweden	6,600
10	Italy	4,500
11	Ukraine	3,800

Source: U. S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Table 39. Arms Deliveries to the World in 2009: Leading Suppliers Compared
(in millions of current U.S. dollars)

Rank	Supplier	Deliveries Value 2009
1	United States	14,383
2	Russia	3,700
3	Germany	2,800
4	United Kingdom	2,200
5	China	1,800
6	France	1,200
7	Sweden	1,200
8	Canada	1,200
9	Austria	700
10	Israel	600
11	Italy	600

Source: U. S. Government

Notes: All foreign data are rounded to the nearest \$100 million. Where rounded data totals are the same, the rank order is maintained.

Description of Items Counted in Weapons Categories, 2002-2009

Tanks and Self-propelled Guns: This category includes light, medium, and heavy tanks; self-propelled artillery; self-propelled assault guns.

Artillery: This category includes field and air defense artillery, mortars, rocket launchers and recoilless rifles—100 mm and over; FROG launchers—100mm and over.

Armored Personnel Carriers (APCs) and Armored Cars: This category includes personnel carriers, armored and amphibious; armored infantry fighting vehicles; armored reconnaissance and command vehicles.

Major Surface Combatants: This category includes aircraft carriers, cruisers, destroyers, frigates.

Minor Surface Combatants: This category includes minesweepers, subchasers, motor torpedo boats, patrol craft, motor gunboats.

Submarines: This category includes all submarines, including midget submarines.

Guided Missile Patrol Boats: This category includes all boats in this class.

Supersonic Combat Aircraft: This category includes all fighter and bomber aircraft designed to function operationally at speeds above Mach 1.

Subsonic Combat Aircraft: This category includes all fighter and bomber aircraft designed to function operationally at speeds below Mach 1.

Other Aircraft: This category includes all other fixed-wing aircraft, including trainers, transports, reconnaissance aircraft, and communications/utility aircraft.

Helicopters: This category includes all helicopters, including combat and transport.

Surface-to-air Missiles: This category includes all ground-based air defense missiles.

Surface-to-surface Missiles: This category includes all surface-surface missiles without regard to range, such as Scuds and CSS-2s. It excludes all anti-tank missiles. It also excludes all anti-ship missiles, which are counted in a separate listing.

Anti-ship Missiles: This category includes all missiles in this class such as the Harpoon, Silkworm, Styx and Exocet.

Regions Identified in Arms Transfer Tables and Charts

ASIA

Afghanistan
Australia
Bangladesh
Brunei
Burma (Myanmar)
China
Fiji
India
Indonesia
Japan
Cambodia
Kazakhstan
Kyrgyzstan
Laos
Malaysia
Nepal
New Zealand
North Korea
Pakistan
Papua New Guinea
Philippines
Pitcairn
Singapore
South Korea
Sri Lanka
Taiwan
Tajikistan
Thailand
Turkmenistan
Uzbekistan
Vietnam

NEAR EAST

Algeria
Bahrain
Egypt
Iran
Iraq
Israel
Jordan
Kuwait
Lebanon
Libya
Morocco
Oman
Qatar
Saudi Arabia
Syria
Tunisia
United Arab Emirates
Yemen

EUROPE

Albania
Armenia
Austria
Azerbaijan
Belarus
Bosnia/Herzegovina
Bulgaria
Belgium
Croatia
Czechoslovakia/
Czech Republic
Cyprus
Denmark
Estonia
Finland
France
FYR/Macedonia
Georgia
Germany
Greece
Hungary
Iceland
Ireland
Italy
Latvia
Liechtenstein
Lithuania
Luxembourg
Malta
Moldova
Netherlands
Norway
Poland
Portugal
Romania
Russia
Slovak Republic
Slovenia
Spain
Sweden
Switzerland
Turkey
Ukraine
United Kingdom
Yugoslavia/Serbia/Montenegro

AFRICA

Angola
Benin
Botswana
Burkina Faso
Burundi
Cameroon
Cape Verde
Central African Republic
Chad
Congo
Côte d'Ivoire
Djibouti
Equatorial Guinea
Ethiopia
Gabon
Gambia
Ghana
Guinea
Guinea-Bissau
Kenya
Lesotho
Liberia
Madagascar
Malawi
Mali
Mauritania
Mauritius
Mozambique
Namibia
Niger
Nigeria
Réunion
Rwanda
Senegal
Seychelles
Sierra Leone
Somalia
South Africa
Sudan
Swaziland
Tanzania
Togo
Uganda
Zaire
Zambia
Zimbabwe

LATIN AMERICA

Antigua
Argentina
Bahamas
Barbados
Belize
Bermuda
Bolivia
Brazil
British Virgin Islands
Cayman Islands
Chile
Colombia
Costa Rica
Cuba
Dominica
Dominican Republic
Ecuador
El Salvador
French Guiana
Grenada
Guadeloupe
Guatemala
Guyana
Haiti
Honduras
Jamaica
Martinique
Mexico
Montserrat
Netherlands Antilles
Nicaragua
Panama
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