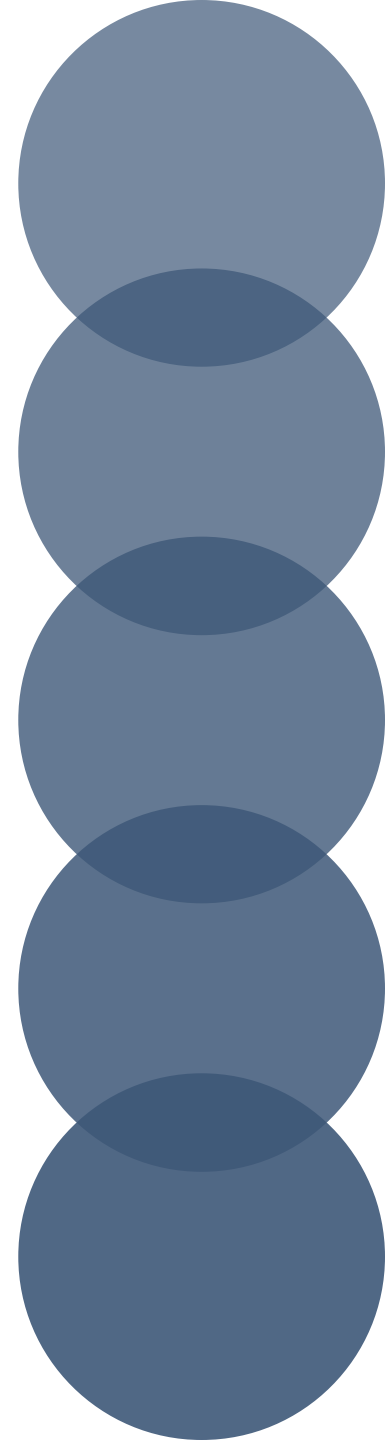


Arms Transfers to the Middle East and North Africa: Trends and Major Players



Overview

- In 2019-2023, main exporters to the Middle East include the USA, France, Italy and Germany. Main exporters to North Africa include Russia, the USA, France, Germany and China.
- Main importers in the Middle East include Saudi Arabia, Qatar, Egypt, Kuwait, the UAE and Israel.
- Arms transfers and conflicts
- Israel and Türkiye were the largest exporters from the Middle East

Exporters to the MENA region (2019-2023)

Middle East	North Africa
The USA (52%)	Russia (32%)
France (12%)	The USA (28%)
Italy (10%)	France (9.6%)
Germany (7.1%)	Germany (8.6%)

USA

- Largest exporter of arms in the world
- In 2019-2023, the USA supplied 52% of the Middle East's major arms imports and 28% of North Africa's arms imports

Recipient	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
Saudi Arabia	21 %	15 %	18 %	-17%	1
Qatar	2.6%	8.2%	5.6%	271%	4
UAE	6.6%	3.2%	4.8%	-43%	6
Israel	3.6%	3.6%	3.6%	16%	8
Kuwait	2.4%	4.5%	3.5%	117%	9
Iraq	4.9%	0.1%	2.3%	-99%	16
Turkiye	3.7%	0.6%	2.0%	-83%	17
Morocco	2.2%	1.3%	1.7%	-33%	18
Egypt	2.5%	0.6%	1.5%	-71%	19
Bahrain	0.1%	1.5%	0.8%	1983%	25
Oman	1.4%	0.0%	0.7%	-99%	27
Jordan	0.8%	0.3%	0.6%	-50%	32
Lebanon	0.2%	0.3%	0.3%	41%	40
Tunisia	0.4%	0.1%	0.2%	-73%	45
Algeria	0.0%	0.1%	0.1%	243%	53
Total imports from United States	100 %	100 %		17%	

France

- Became the 2nd largest arms exporter worldwide for the first time in 2019-2023.
- France supplied 12% of the Middle East's arms imports and 9.6% of North Africa's arms imports in 2019-2023
- 2nd and 3rd largest export partners in the last decade have been Egypt and Qatar

Recipient	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
Egypt	28 %	6.4%	15 %	-66%	2
Qatar	0.1%	17 %	10 %	43767%	3
Saudi Arabia	9.4%	5.8%	7.3%	-9%	4
UAE	5.5%	2.0%	3.4%	-46%	7
Morocco	6.3%	1.0%	3.2%	-77%	8
Kuwait	0.3%	2.1%	1.4%	970%	16
Algeria	0.3%	0.9%	0.6%	419%	20
Oman	0.6%	0.0%	0.3%	-100%	34
Iraq	0.0%	0.2%	0.1%	100%	49
Turkiye	0.1%	0.1%	0.1%	88%	52
Lebanon	0.1%	0.0%	0.1%	0%	59
Total imports from France	100 %	100 %		47%	98

Italy

- Italy was the 6th largest arms exporter in the world in 2019-2023, exporting 86% more arms compared with 2014-2018.
- Italy supplied 10% of the Middle East's arms imports in 2019-2023
- In 2014-2023, the 5 largest arms export partners were in the MENA region.

Recipient	2014-2018	2019-2023	Percentage of total	% change between periods	Ranking
Qatar	1.2%	27 %	18 %	3988%	1
Egypt	0.3%	21 %	14 %	11200%	2
Turkiye	16 %	8.5%	11 %	2%	3
Kuwait	0.0%	13 %	8.3%	100%	4
Algeria	9.7%	1.9%	4.6%	-63%	5
Israel	7.9%	0.4%	3.1%	-89%	7
Saudi Arabia	7.0%	0.2%	2.6%	-95%	10
Iraq	4.6%	0.0%	1.6%	-100%	15
UAE	3.7%	0.2%	1.5%	-87%	17
Jordan	0.0%	1.2%	0.8%	7100%	23
Chad	1.0%	0.0%	0.3%	-100%	34
Bahrain	0.3%	0.3%	0.3%	100%	38
Oman	0.4%	0.0%	0.1%	-100%	45
Morocco	0.3%	0.0%	0.1%	-100%	51
Lebanon	0.2%	0.0%	0.1%	-100%	54
Total imports from Italy	100 %	100 %		86%	

Germany

- Germany was the 5th largest arms exporter in the world in 2019-2023
- Germany supplied 7.1% of the Middle East's arms imports, and 8.6% of North Africa's arms imports, in 2019-2023
- Germany's exports to Israel are mostly in the form of ships, including frigates and submarines.

Recipient	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
Egypt	5.3%	20 %	12 %	220%	2
Israel	8.8%	12 %	10 %	12%	3
Algeria	7.4%	3.1%	5.4%	-64%	6
Qatar	5.0%	1.0%	3.2%	-83%	10
Turkiye	1.2%	4.2%	2.6%	197%	12
Saudi Arabia	3.8%	1.1%	2.6%	-76%	13
UAE	1.3%	0.6%	1.0%	-57%	23
Jordan	0.7%	0.4%	0.5%	-56%	30
Iraq	0.4%	0.0%	0.2%	-100%	39
Morocco	0.1%	0.2%	0.1%	280%	46
Oman	0.1%	0.1%	0.1%	-17%	51
Kuwait	0.1%	0.0%	0.0%	-100%	62
Total imports from Germany	100 %	100 %		-14%	74

Russia

- Russia was the 3rd largest arms exporter in the world in 2019-2023.
- In 2019-2023, Russia supplied just 4.6% of the Middle East's arms imports, and exported 61% less arms to the Middle East compared with 2014-2018.
- In 2014-2018, Russia supplied 49% of North Africa's imports. In 2019-2023, Russia's supplied 32% of North Africa's arms imports.

Recipient	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
Algeria	15 %	5.2%	12 %	-83%	3
Egypt	7.7%	7.5%	7.6%	-54%	5
Iraq	5.7%	0.9%	4.1%	-93%	7
Iran	1.4%	0.2%	1.0%	-94%	12
Syria	0.8%	0.8%	0.8%	-52%	14
Turkiye	0.0%	2.3%	0.7%	100%	18
UAE	0.1%	1.1%	0.4%	300%	21
Libya HoR*	0.0%	1.3%	0.4%	100%	22
Jordan	0.2%	0.4%	0.2%	0%	29
Kuwait	0.2%	0.0%	0.1%	-100%	41
Qatar	0.1%	0.1%	0.1%	0%	44
Bahrain	0.1%	0.0%	0.1%	-100%	46
Saudi Arabia	0.0%	0.1%	0.0%	100%	54
Total imports from Russia	100 %	100 %		-53%	

China

- In 2019-2023, China supplied 0.5% of arms imports to the Middle East and 7.4% of arms imports to North Africa
- Between 2014-2018 and 2019-2023, China's arms exports to the Middle East decreased by 68%, and to North Africa decreased by 81%
- In 2019-2023, the bulk of China's arms exports went to states in Asia and Oceania. Over half went to Pakistan alone.

Recipient	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
Algeria	11 %	2.7%	7.2%	-78%	3
Saudi Arabia	2.3%	2.0%	2.2%	-18%	6
Morocco	2.3%	0.1%	1.2%	-96%	10
UAE	1.5%	0.5%	1.0%	-70%	13
Qatar	1.4%	0.0%	0.7%	-100%	16
Iraq	1.0%	0.0%	0.5%	-100%	19
Egypt	0.5%	0.0%	0.2%	-100%	29
Jordan	0.3%	0.0%	0.2%	-100%	35
Chad	0.0%	0.3%	0.1%	100%	38
Iran	0.2%	0.0%	0.1%	-100%	43
Syria	0.1%	0.0%	0.0%	-100%	54
Bahrain	0.1%	0.0%	0.0%	-100%	55
Total imports from China	100 %	100 %		-5%	

The Importers of the MENA regions

Middle East:

- Saudi Arabia (28%)
- Qatar (25%)
- Egypt (13%)
- Kuwait (8.8%)
- UAE (7.8%)
- Israel (7.1%)

North Africa:

- Algeria (53%)
- Morocco (35%)

Saudi Arabia

- Saudi Arabia was the 2nd largest arms importer in the world in 2019-2023.
- Saudi Arabia received 15% of US arms exports in 2019-2023, and the USA supplied 75% of Saudi Arabia's arms imports in 2019-2023.

Supplier	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
United States	66 %	75 %	70 %	-17%	1
United Kingdom	16 %	2.3%	10 %	-90%	2
France	6.0%	7.6%	6.7%	-9%	3
Spain	0.4%	7.0%	3.2%	1087%	4
Canada	1.4%	2.9%	2.0%	46%	5
Germany	2.2%	0.7%	1.6%	-76%	6
China	1.2%	1.4%	1.3%	-18%	7
Switzerland	1.7%	0.4%	1.2%	-82%	8
Italy	1.4%	0.1%	0.8%	-95%	9
Sweden	1.0%	0.0%	0.6%	-100%	10
Turkiye	0.9%	0.0%	0.5%	-97%	11
Total exports to Saudi Arabia	100 %	100 %		-28%	

Qatar

- 3rd largest arms importer in the world in 2019-2023
- Arms imports increased by 396% between 2014-2018 and 2019-2023
- Main suppliers in 2019-2023 were the USA (45%), France (25%), Italy (15%) and the UK (11%). Türkiye was the 5th largest supplier during this time.

Supplier	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
United States	60 %	45 %	48 %	271%	1
France	0.3%	25 %	21 %	43767%	2
Italy	1.9%	15 %	13 %	3988%	3
United Kingdom	0.0%	11 %	9.1%	100%	4
Germany	21 %	0.7%	4.2%	-83%	5
Turkiye	3.0%	2.7%	2.8%	351%	6
Switzerland	5.6%	0.0%	1.0%	-96%	7
China	5.5%	0.0%	0.9%	-100%	8
Russia	0.9%	0.2%	0.3%	0%	9
Ukraine	0.7%	0.2%	0.3%	50%	10
Canada	0.6%	0.0%	0.1%	-58%	11
Pakistan	0.1%	0.0%	0.0%	-100%	12
Total exports to Qatar	100 %	100 %		396%	13

Egypt

- Egypt's arms imports decreased by 26 per cent between 2014–18 and 2019–23, having previously increased by 209 per cent between 2009–13 and 2014–18.
- It moved from being the third largest importer globally in 2014–18 to the seventh in 2019–23.

Supplier	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
France	38 %	17 %	29 %	-66%	1
Russia	31 %	20 %	26 %	-54%	2
Germany	6.4%	27 %	15 %	220%	3
United States	16 %	6.5%	12 %	-71%	4
Italy	0.1%	22 %	9.5%	11200%	5
UAE	2.6%	1.9%	2.3%	-46%	6
Spain	2.6%	0.0%	1.5%	-100%	7
Netherlands	0.5%	1.7%	1.0%	151%	8
United Kingdom	0.0%	1.8%	0.8%	100%	9
Jordan	0.0%	1.3%	0.6%	100%	10
South Korea	0.8%	0.1%	0.5%	-92%	11
China	0.5%	0.0%	0.3%	-100%	12
Canada	0.3%	0.0%	0.2%	-100%	13
Finland	0.3%	0.0%	0.2%	-100%	14
South Africa	0.0%	0.0%	0.0%	-100%	15
Total exports to Egypt	100 %	100 %		-26%	

Kuwait

- In 2019-2023, the US supplied most of Kuwait's arms imports (70%) followed by Italy (20%)
- The most significant imports by Kuwait in 2019-2023 were for aircraft (64%) and armored vehicles (32%).

Supplier	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
United States	87 %	70 %	74 %	117%	1
Italy	0.0%	20 %	15 %	100%	2
France	2.2%	8.6%	6.9%	970%	3
Switzerland	2.9%	0.8%	1.4%	-25%	4
Russia	3.5%	0.0%	0.9%	-100%	5
UAE	2.7%	0.0%	0.7%	-100%	6
Turkiye	0.9%	0.0%	0.2%	-100%	7
Norway	0.0%	0.3%	0.2%	1000%	8
Austria	0.8%	0.0%	0.2%	-100%	9
Germany	0.3%	0.0%	0.1%	-100%	10
United Kingdom	0.1%	0.0%	0.0%	-100%	11
Total exports to Kuwait	100 %	100 %		169%	

The UAE

- The US has been the main supplier of major arms to the UAE, supplying a range of systems in 2019-2023. Main exports to the UAE include missiles and air defense systems.
- In 2019-2023, Türkiye rose to be the second largest supplier to the UAE, its exports consisting of infantry fighter vehicles
- The UAE has contracts with South Korea and Israel for air defense systems and missiles

Supplier	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
United States	68 %	57 %	64 %	-43%	1
France	12 %	9.2%	11 %	-46%	2
Turkiye	0.3%	9.9%	4.2%	2087%	3
Sweden	3.0%	3.6%	3.3%	-18%	4
Netherlands	3.5%	1.0%	2.5%	-79%	5
South Africa	2.3%	2.7%	2.5%	-17%	6
Russia	0.8%	4.8%	2.5%	300%	7
Canada	1.2%	4.1%	2.4%	127%	8
China	2.6%	1.2%	2.0%	-70%	9
Germany	2.4%	1.5%	2.0%	-57%	10
Italy	2.5%	0.4%	1.6%	-87%	11
Spain	0.0%	1.9%	0.8%	100%	12
Total exports to UAE	100 %	100 %		-31%	22

Israel

- Main suppliers in 2019-2023 were the USA (69%), Germany (30%) and Italy (0.9%), with other states providing smaller arms, components and other military equipment
- War in Gaza had a marginal effect on arms imports in 2023. Arms imports picked up toward the end of 2023
- May rise in the future, with further aid and contracts e.g. new aid packages, new contracts

Supplier	2014-2018	2019-2023	Percentage of total	% Change between periods
United States	63 %	69 %	66 %	16%
Germany	28 %	30 %	29 %	12%
Italy	8.9%	0.9%	4.8%	-89%
Total exports to Israel	100 %	100 %		5%

Algeria

- Algeria is the largest arms importer in North Africa, but its imports decreased by 77% between 2014-2018 and 2019-2023.
- Across the last decade, Russia has been the largest arms exporter to Algeria. Exports to Algeria accounted for 12% of Russian arms exports across the decade
- Significant decrease in arms imports from Russia

Supplier	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
Russia	66 %	48 %	63 %	-83%	1
China	14 %	14 %	14 %	-78%	2
Germany	9.7%	15 %	11 %	-64%	3
Italy	4.5%	7.2%	5.0%	-63%	4
France	0.4%	8.5%	1.9%	419%	5
UAE	0.9%	2.6%	1.2%	-33%	6
Sweden	1.5%	0.0%	1.2%	-100%	7
United States	0.3%	4.9%	1.2%	243%	8
United Kingdom	1.1%	0.0%	0.9%	-100%	9
Netherlands	0.5%	0.0%	0.4%	-100%	10
Poland	0.4%	0.0%	0.3%	-100%	11
Total exports to Algeria	100 %	100 %		-77%	

Morocco

- The USA and France were the largest arms exporters to Morocco
- 2019-2023 saw the first arms imports by Israel following signing of the Abraham Accords

Supplier	2014-2018	2019-2023	Percentage of total	% Change between periods	Ranking
United States	56 %	69 %	60 %	-33%	1
France	33 %	14 %	27 %	-77%	2
China	9.9%	0.7%	6.7%	-96%	3
Israel	0.0%	11 %	3.8%	100%	4
Turkiye	0.0%	2.9%	1.0%	100%	5
Germany	0.2%	1.8%	0.8%	280%	6
Italy	0.5%	0.0%	0.3%	-100%	7
Ukraine	0.0%	0.5%	0.2%	100%	8
United Kingdom	0.2%	0.0%	0.1%	-100%	9
UAE	0.0%	0.3%	0.1%	100%	10
Qatar	0.0%	0.2%	0.1%	100%	11
Total exports to Morocco	100 %	100 %		-46%	

Arms transfers and conflicts

- Arms imports and aid to Israel
- Major aid to Israel is coming from the USA, but also aid and exports from other states for smaller munitions and other military equipment.
- Arms imports to Saudi Arabia- used against Houthis and for defence against Houthis.
- Iranian arms exports to Russia – drones and potentially missiles for use in Ukraine. Iranian arms exports to Houthis.

Exports from MENA region

- Israel and Türkiye were the largest exporters of major arms in the Middle East in 2019-2023
- The Israeli MoD reported record export sales in 2023 despite operations in Gaza. 9th largest arms exporter worldwide in 2019-2023.
- Türkiye has been investing in and focusing on creating a more independent arms industry. The largest recipients in 2019-2023 were the UAE and Qatar. 11th largest arms exporter worldwide in 2019-2023.