Order Code RL32547

CRS Report for Congress
Received through the CRS Web

Conventional Arms Transfers to Developing Nations, 1996-2003

August 26, 2004

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Summary

This report is prepared annually to provide unclassified quantitative data on conventional arms transfers to developing nations by the United States and foreign countries for the preceding eight calendar years. Some general data are provided on worldwide conventional arms transfers, 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 1996-2003, the value of arms transfer agreements with developing nations comprised 63.9% of all such agreements worldwide. More recently, arms transfer agreements with developing nations constituted 60.4% of all such agreements globally from 2000-2003, and 53.6% of these agreements in 2003.

The value of all arms transfer *agreements* with developing nations in 2003 was over $13.7 billion. This was a substantial decrease over 2002, and the lowest total, in real terms, for the entire period from 1996-2003. In 2003, the value of all arms *deliveries* to developing nations was nearly $17 billion, the lowest total in deliveries values for the entire period from 1996-2003 (in constant 2003 dollars).

Recently, from 2000-2003, the United States and Russia have dominated the arms market in the developing world, with the United States ranking first and Russia second each of the last four years in the value of arms transfer *agreements*. From 2000-2003, the United States made $35.8 billion in arms transfer agreements with developing nations, in *constant* 2003 dollars, 46.8% of all such agreements. Russia, the second leading supplier during this period, made over $21 billion in arms transfer agreements, or 27.5%.

In 2003, the United States ranked first in arms transfer *agreements* with developing nations with over $6.2 billion or 45.4% of these agreements. Russia was second with $3.9 billion or 23.4% of such agreements. In 2003, the United States ranked first in the value of arms *deliveries* to developing nations at $6.3 billion, or 37.1% of all such deliveries. The United Kingdom ranked second at $4 billion or 23.5% of such deliveries. Russia ranked third at $3.3 billion or 19.4% of such deliveries.

During the 2000-2003 period, China ranked first among developing nations purchasers in the value of arms transfer *agreements*, concluding $9.3 billion in such agreements. The United Arab Emirates (U.A.E.) ranked second at $8.1 billion. Egypt ranked third at $6.8 billion. In 2003, Egypt ranked first in the value of arms transfer *agreements* among all developing nations weapons purchasers, concluding $1.8 billion in such agreements. China ranked second with $1.6 billion in such agreements. Malaysia ranked third with $1.5 billion.

Contents

Introduction 1

Major Findings 3
- General Trends in Arms Transfers Worldwide 3
- General Trends in Arms Transfers to Developing Nations 5
  - United States 6
  - Russia 7
  - China 8
  - Major West European Suppliers 9
- Regional Arms Transfer Agreements 10
  - Near East 11
  - Asia 11
- Leading Developing Nations Arms Purchasers 12
- Weapons Types Recently Delivered to Near East Nations 13
  - United States 13
  - Russia 13
  - China 13
  - Major West European Suppliers 13
  - All Other European Suppliers 14
  - All Other Suppliers 14

Summary of Data Trends, 1996-2003 16

- Total Developing Nations Arms Transfer Agreement Values 16
- Regional Arms Transfer Agreements, 1996-2003 22
  - Near East 22
  - Latin America 27
  - Africa 27

- Arms Transfer Agreements With Developing Nations, 1996-2003:
  Leading Suppliers Compared 28

- Arms Transfer Agreements With Developing Nations in 2003:
  Leading Suppliers Compared 28

- Arms Transfer Agreements With Near East 1996-2003:
  Suppliers And Recipients 29

- Arms Transfers to Developing Nations, 1996-2003:
  Agreements With Leading Recipients 30

- Arms Transfers to Developing Nations in 2003:
  Agreements With Leading Recipients 31

- Developing Nations Arms Delivery Values 31

Regional Arms Delivery Values, 1996-2003 36

Near East 36
Asia 37
Latin America 37
Africa 38

Arms Deliveries to Developing Nations, 1996-2003:
Leading Suppliers Compared 38

Arms Deliveries With Developing Nations in 2003:
Leading Suppliers Compared 38

Arms Deliveries to Near East, 1996-2003: Suppliers and Recipients 39

Arms Deliveries to Developing Nations, 1996-2003:
The Leading Recipients 40

Arms Transfers to Developing Nations in 2003:
Agreements With Leading Recipients 41

Selected Weapons Deliveries to Developing Nations, 1996-2003 64

Regional Weapons Deliveries Summary, 2000-2003 64

Asia 65
Near East 65
Latin America 66
Africa 66

Worldwide Arms Transfer Agreements and Deliveries Values, 1996-2003 72

Total Worldwide Arms Transfer Agreements Values, 1996-2003 72

Total Worldwide Delivery Values 1996-2003 73

Description of Items Counted in Weapons Categories, 1996-2003 85

Regions Identified in Arms Transfer Tables and Charts 86

Regions Identified in Arms Transfer Tables and Charts (Cont.) 87

List of Tables

Figure 1. Worldwide Arms Transfer Agreements, 1996-2003 and Suppliers' Share with Developing World (in millions of constant 2003 U.S. dollars) 21

Figure 2. Worldwide Arms Deliveries, 1996-2003 and Suppliers' Share with Developing World (in millions of constant 2003 U.S. dollars) 35

Table 1. Arms Transfer Agreements With Developing Nations, by Supplier, 1996-2003 (in millions of current U.S. dollars) 42

Table 1A. Arms Transfer Agreements with Developing Nations, by Supplier, 1996-2003 (in millions of constant 2003 U.S. dollars) 43

Table 1B. Arms Transfer Agreements with Developing Nations, by Supplier, 1996-2003 (expressed as a percent of total, by year) 44

Table 1C. Regional Arms Transfer Agreements, by Supplier, 1996-2003 (in millions of current U.S. dollars) 45

Table 1D. Percentage of Each Supplier's Agreements Value by Region, 1996-2003 46

Table 1E. Percentage of Total Agreements Value by Supplier to Regions, 1996-2003 47

Table 1F. Arms Transfer Agreements with Developing Nations, 1996-2003: Leading Suppliers Compared (in millions of current U.S. dollars) 48

Table 1G. Arms Transfer Agreements with Developing Nations in 2003: Leading Suppliers Compared (in millions of current U.S. dollars) 49

Table 1H. Arms Transfer Agreements with Near East, by Supplier (in millions of current U.S. dollars) 50

Table 1I. Arms Transfer Agreements of Developing Nations, 1996-2003: Agreements by the Leading Recipients (in millions of current U.S. dollars) 51

Table 1J. Arms Transfer Agreements of Developing Nations in 2003: Agreements by Leading Recipients (in millions of current U.S. dollars) . . 52

Table 2. Arms Deliveries to Developing Nations, by Supplier, 1996-2003 (in millions of current U.S. dollars) 53

Table 2A. Arms Deliveries to Developing Nations, by Supplier, 1996-2003 (in millions of constant 2003 U.S. dollars) 54

Table 2B. Arms Deliveries to Developing Nations, by Supplier, 1996-2003 (expressed as a percent of total, by year) 55

Table 2C. Regional Arms Deliveries by Supplier, 1996-2003 (in millions of current U.S. dollars) 56

Table 2D. Percentage of Supplier Deliveries Value by Region, 1996-2003 57

Table 2E. Percentage of Total Deliveries Value by Supplier to Regions, 1996-2003 58

Table 2F. Arms Deliveries to Developing Nations, 1996-2003
Leading Suppliers Compared (in millions of current U.S. dollars) 59

Table 2G. Arms Deliveries to Developing Nations in 2003:
Leading Suppliers Compared
(in millions of current U.S. dollars) 60

Table 2H. Arms Deliveries to Near East, by Supplier
(in millions of current U.S. dollars) 61

Table 2I. Arms Deliveries to Developing Nations, 1996-2003:
The Leading Recipients 62

Table 2J. Arms Deliveries to Developing Nations in 2003:
The Leading Recipients (in millions of current U.S. dollars) 63

Table 3. Numbers of Weapons Delivered by Major Suppliers
to Developing Nations 67

Table 4. Number of Weapons Delivered by Major Suppliers
to Asia and the Pacific 68

Table 5. Numbers of Weapons Delivered by Major Suppliers
to Near East 69

Table 6. Numbers of Weapons Delivered by Major Suppliers
to Latin America 70

Table 7. Number of Weapons Delivered by Major Suppliers
to Africa 71

Table 8. Arms Transfer Agreements with the World, by Supplier, 1996-2003
(in millions of current U.S. dollars) 75

Table 8A. Arms Transfer Agreements with the World, by Supplier, 1996-2003
(in millions of constant 2003 U.S. dollars) 76

Table 8B. Arms Transfer Agreements with the World, by Supplier, 1996-2003
(expressed as a percent of total, by year) 77

Table 8C. Arms Transfer Agreements with the World, 1996-2003:
Leading Suppliers Compared (in millions of current U.S. dollars) 78

Table 8D. Arms Transfer Agreements with the World in 2003:
Leading Suppliers Compared (in millions of current U.S. dollars) 79

Table 9. Arms Deliveries to the World, by Supplier, 1996-2003
(in millions of current U.S. dollars) 80

Table 9A. Arms Deliveries to the World, by Supplier, 1996-2003
(in millions of constant 2003 U.S. dollars) 81

Table 9B. Arms Deliveries to the World, by Supplier 1996-2003
(expressed as a percent of total, by year) 82

Table 9C. Arms Deliveries to the World, 1996-2003:
Leading Suppliers Compared (in millions of current U.S. dollars) 83

Table 9D. Arms Deliveries to the World in 2003:
Leading Suppliers Compared (in millions of current U.S. dollars) 84

Conventional Arms Transfers to Developing Nations, 1996-2003

Introduction

This report provides unclassified background data from U.S. government sources on transfers of conventional arms to developing nations by major suppliers for the period 1996 through 2003. It also includes some data on world-wide supplier transactions. It updates and revises the report entitled "Conventional Arms Transfers to Developing Nations, 1995-2002," published by the Congressional Research Service (CRS) on September 22, 2003 (CRS Report RL32084).

The data in the 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 response to changing political, military, and economic circumstances. Nonetheless, the developing world continues to be the primary focus of foreign arms sales activity by conventional weapons suppliers. During the period of this report, 1996-2003, conventional arms transfer agreements (which represent orders for future delivery) to developing nations have comprised 63.9% of the value of all international arms transfer agreements. The portion of agreements with developing countries constituted 60.4% of all agreements globally from 2000-2003. In 2003, arms transfer agreements with developing countries accounted for 53.6% of the value of all such agreements globally. *Deliveries* of conventional arms to developing nations, from 2000-2003, constituted 53.1% of all international arms deliveries. In 2003, arms deliveries to developing nations constituted 59.1% 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 1996-2003 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 notes on page 2). U.S. commercially licensed arms exports are incorporated in the main *delivery* data tables, and noted separately (see box note on page 15). Excluded are arms transfers by any supplier to subnational groups.

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 both 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. (A U.S. *fiscal* year covers the period from October 1 through September 30). 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 for its figures. **Details on data used are outlined in footnotes at the bottom of Tables 1, 2, 8 and 9**.

CONSTANT 2003 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. In many instances, the report converts these dollar amounts (current dollars) into constant 2003 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 1, 2, 8, and 9. Unless otherwise noted in the report, all dollar values are stated in constant terms.** Because all regional data tables are composed of four-year aggregate dollar totals (1996-1999 and 2000-2003), they must be expressed in current dollar terms. 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.

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.

ARMS TRANSFER VALUES

The values of arms transfer agreements (or deliveries) in this report refer to the total values of 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.

Major Findings

General Trends in Arms Transfers Worldwide

The value of all arms transfer agreements worldwide (to both developed and developing nations) in 2003 was over $25.6 billion. This is a significant decrease in arms agreements values over 2002, and is the third consecutive year that total arms agreements have declined **(chart 1)(table 8A**).

In 2003, the United States led in arms transfer *agreements worldwide*, making agreements valued at over $14.5 billion (56.7% of all such agreements), up from $13.6 billion in 2002. Russia ranked second with $4.3 billion in agreements (16.8% of these agreements globally), down from nearly $6 billion in 2002. Germany ranked third, its arms transfer agreements worldwide standing at $1.4 billion in 2003. The United States and Russia collectively made agreements in 2003 valued at over $18.8 billion, 73.5% of all international arms transfer agreements made by all suppliers (**figure 1)(tables 8A, 8B, and 8D)**.

For the period 2000-2003, the total value of all international arms transfer agreements (about $126.9 billion) was lower than the worldwide value during 1996-1999 ($133.7 billion), a decrease of 5.1%. During the period 1996-1999, developing world nations accounted for 67.3% of the value of all arms transfer agreements made worldwide. During 2000-2003, developing world nations accounted for 60.4% of all arms transfer agreements made globally. In 2003, developing nations accounted for 53.6% of all arms transfer agreements made worldwide **(figure 1)(table 8A)**.

In 2003, the United States ranked first in the value of all arms *deliveries worldwide*, making over $13.6 billion in such deliveries or 47.5%. This is the eighth year in a row that the United States has led in global arms deliveries, reflecting, in particular, implementation of arms transfer agreements made during and in the years immediately following the Persian Gulf War of 1990-1991. The United Kingdom ranked second in worldwide arms deliveries in 2003, making $4.7 billion in such deliveries. Russia ranked third in 2003, making $3.4 billion in such deliveries. These top three suppliers of arms in 2003 collectively delivered over $21.7 billion, 75.7% of all arms delivered worldwide by all suppliers in that year. **(Figure 2)(tables 9A, 9B and 9D)**.

The value of all international arms deliveries in 2003 was $28.7 billion. This is a significant decrease in the total value of arms deliveries from the previous year (a fall of over $13.1 billion), and by far the lowest total for the eight years covered by this report. The total value of such arms deliveries worldwide in 2000-2003 ($148.2 billion) was a substantial decrease in the value of arms deliveries by all suppliers worldwide from 1996-1999 ($196.3 billion, a fall of $48.1 billion). **(figure 2)(tables 9A and 9B)(charts 7 and 8)**.

Developing nations from 2000-2003 accounted for 53.1% of the value of all international arms deliveries. In the earlier period, 1996-1999, developing nations accounted for 66.9% of the value of all arms deliveries worldwide. In 2003,

developing nations collectively accounted for 59.1% of the value of all international arms deliveries **(figure 2)(tables 2A, 9A and 9B)**.

The downturn in weapons orders worldwide since 2000 has been notable. Global arms agreement values have fallen from $41 billion in 2000 to $25.6 billion in 2003. Were it not for a few large military aircraft orders in 2003, the total for that year would have been substantially lower. It has been the practice of developed nations in recent years to seek to protect important elements of their national military industrial bases by limiting arms purchases from other developed nations. Instead they have placed greater emphasis on joint production of various weapons systems as a more effective way to preserve a domestic weapons production capability, while sharing costs of new weapons development. Some traditional weapons producers have been forced to consolidate sectors of their domestic defense industry in the face of intense foreign competition, while other supplying nations have chosen to manufacture items for niche arms markets where their specialized production capabilities provide them with important advantages in the evolving international arms marketplace.

The intensely competitive arms market of today has also led supplying states to emphasize sales efforts directed toward regions and nations where individual suppliers have had competitive advantages resulting from well established military support relationships with the prospective customers. In recent years, the potential has developed in Europe for arms sales to nations that have recently become members of NATO. Although there are inherent limitations on these potential sales due to the smaller defense budgets of several of these nations, creative seller financing options, as well as the use of co-assembly, co-production, and counter-trade, to offset costs to purchasers, has resulted in some noteworthy contracts being signed. Most noteworthy in 2003 was a $3.5 billion sales agreement between the United States and Poland for the purchase of 48 F-16 C/D Block 52M fighter aircraft. Elsewhere within NATO, Germany in 2003 concluded a $1.7 billion agreement with Greece for 170 Leopard 2 Main Battle Tanks. It seems likely that competition will continue between the United States and other European countries or consortia over the prospective arms contracts within the European region in the years ahead. Such sales have the potential to compensate for lost contracts due to reduced demand for weapons from traditional clients in the developing world.

In recent years, numerous developing nations have reduced their weapons purchases primarily due to their lack of sufficient funds to pay for such weaponry. Even those prospective arms purchasers in the developing world with significant financial assets have exercised restraint and caution before embarking upon new and costly weapons procurement endeavors. The unsettled state of the global economy has influenced a number of developing nations to emphasize the upgrading of existing weapons systems in their inventories, rather than the purchase of newer ones. Given the substantial arms purchases made in the mid-1990s by a number of nations in the developing world, there has been a notable reduction in new arms agreements by these countries, since several of them are engaged in absorbing and integrating previously purchased weapons systems into their military force structures.

At present, there appears to be fewer large weapons purchases being made by developing nations in the Near East, while a relatively larger increase in purchases

are being made by developing nations in Asia. Nonetheless, these apparent trends are subject to abrupt change based on the strength of either the international or regional economies. The health of the domestic economies in various nations in the developing world continue to be a very significant factor in their arms purchasing decisions.

Although some nations in Latin America, and, to a much lesser extent, in Africa, have shown interest in updating important sectors of their military force structures, many states in these regions also continue to be constrained by their limited financial resources. Limited seller-supplied credit and financing seems likely to continue to be a factor that inhibits the conclusion of major weapons deals in these regions of the developing world.

General Trends in Arms Transfers to Developing Nations

The value of all arms transfer *agreements* with developing nations in 2003 was $13.7 billion, a notable decrease over the $17.4 billion total in 2002. This was the lowest annual total, in real terms, during the 8-year period from 1996-2003. **(chart 1)(figure 1)(table 1A)**. In 2003, the value of all arms *deliveries* to developing nations ($17 billion) was a clear decrease from the value of 2002 deliveries nearly ($18.7 billion), and the lowest total of the last eight years **(charts 7 and 8)(figure 2)(table 2A)**.

Recently, from 2000-2003, the United States and Russia have dominated the arms market in the developing world, with the United States ranking first each of the last four years in the value of arms transfer agreements. From 2000-2003, the United States made over $35.8 billion in arms transfer agreements with developing nations, 46.8% of all such agreements. Russia, the second leading supplier during this period, made nearly $21.1billion in arms transfer agreements or 27.5%. France, the third leading supplier, from 2000-2003 made $3.8 billion or 5% of all such agreements with developing nations during these years. In the earlier period (1996-1999) the United States ranked first with $27.5 billion in arms transfer agreements with developing nations or 30.6%; Russia made $15.6 billion in arms transfer agreements during this period or 17.3%. France made $10.7 billion in agreements or 11.9% **(table 1A)**.

During the period from 1996-1999, most arms transfers to developing nations were made by two to three major suppliers in any given year. The United States has ranked first among these suppliers every year from 1998 through 2003. Russia has been a strong competitor for the lead in arms transfer agreements with developing nations, ranking second every year from 1999 through 2003. Despite the larger traditional client base for armaments held by other Major West European suppliers, Russia's recent successes in securing new arms orders suggests that despite the traditional marketing advantage held by Major West European competitors, Russia is likely to continue to rank higher in the value of new arms agreements than other key European arms suppliers, for the near term. Since Russia's largest value arms transfer agreements in recent years have been with two countries, China and India, continued Russian success in the arms trade with developed nations will depend on its ability to expand its client base. In this regard, Russia has made some strides in Southeast Asia. The Russian government has also stated that it has adopted more

flexible payment arrangements for its prospective customers in the developing world, and is attempting to enhance the quality of its follow-on support services to make Russian products more attractive and competitive.

Traditional arms suppliers such as France, the United Kingdom and Germany occasionally conclude large orders with developing countries, based on either long-term supply relationships or their having specialized weapons systems they can readily provide. Nevertheless, the United States continues to appear best equipped to secure new arms agreements with developing nations that are able to afford major new arms purchases. The purchase of new and highly expensive weapons by many developing countries, however, seems likely to be limited in the near term, given the tenuous state of the international economy, and the lack of sufficient funding for such undertakings. The overall level of the arms trade with developing nations, which has been generally declining in the years since 2001, is likely either to remain static or continue to decline in the near term, even though a few wealthier developing nations have been able to make some significant purchases more recently.

Other suppliers in the tier below the United States and Russia, such as China, other European, and non-European suppliers, have participated in the arms trade with developing nations at a much lower level. Yet these suppliers are capable of making an occasional arms deal of significance. Most of their annual arms transfer agreements values totals during 1996-2003 have been relatively low, and are based upon generally smaller transactions of less sophisticated military equipment. It is unlikely that many of these countries will be capable of rising to the status of a major supplier of advanced weaponry on a consistent basis **(tables 1A, 1F, 1G, 2A, 2F and 2G)**.

United States.

In 2003, the total value — in real terms — of United States arms transfer agreements with developing nations fell notably to $6.2 billion from nearly $8.9 billion in 2002. The U.S. share of the value of all such agreements was 45.4% in 2003, down from a 51% share in 2002 **(charts 1, 3 and 4)(figure 1)(tables 1A and 1B)**.

In 2003, the value of U.S. arms transfer agreements with developing nations was primarily attributable to purchases by key U.S. clients in the Near East and in Asia. These arms agreement totals also reflect a continuation of well established defense support arrangements with these and other purchasers worldwide. U.S. agreements with its clients in 2003 include not only some sales of major weapons systems, but also a continuation of the upgrading of some previously provided. The U.S. totals also reflect agreements for a wide variety of spare parts, ammunition, ordnance, training, and support services. Among major weapons systems agreements the United States concluded in 2003 were: with Egypt for a co-production program involving 125 M1A1 Abrams Main Battle Tank kits for $790 million; with Saudi Arabia for a number of light infantry vehicles (LAWS) for $316 million; with South Korea for 3 MK41 Vertical Launch Systems for $191 million; with Taiwan for a number of Assault Amphibious Vehicles (AAVs) for $150 million; with Israel for 1 AH-64D Apache Longbow helicopter; with Oman for 2 Reconnaissance Systems; and with Pakistan for 6 C-130E aircraft. The United States also concluded

agreements for the sale of various missile systems to nations in both the Near East and in Asia. Among these agreements concluded were: with Egypt for 414 AIM-9M Sidewinder missiles as well as Harpoon Block II missiles; with Israel for AGM-114 Hellfire missiles; and with Taiwan for 144 Standard SM2 III missiles.

Apart from weapons themselves, it must be emphasized that, the sale of munitions, upgrades to existing systems, spare parts, training and support services to developing nations worldwide account for a very substantial portion of the total value of U.S. arms transfer agreements. This fact reflects the large number of countries in the developing, and developed, world that have acquired and continue to utilize a wide range of American weapons systems, and have a continuing requirement to support, to modify, as well as to replace, these systems.

Russia.

The total value of Russia's arms transfer agreements with developing nations in 2003 was $3.9 billion, a notable decline from $5.3 billion in 2002, but it still placed a strong second in such agreements with the developing world. Russia's share of all developing world arms transfer agreements decreased, falling from 30.7% in 2002 to 23.4% in 2003 **(charts 1, 3 and 4)(figure 1)(tables 1A, 1B and 1G)**.

Russian arms transfer agreements totals with developing nations have been notable during the last four years. During the 2000-2003 period, Russia ranked second among all suppliers to developing countries, making $21 billion in agreements. Russia's status as the second leading supplier of arms to developing nations stems from an increasingly successful effort to overcome the significant economic and political problems associated with the dissolution of the former Soviet Union. The traditional arms clients of the former Soviet Union were generally less wealthy developing countries prized as much for their political support in the Cold War, as for their desire for Soviet weaponry. Many of these traditional Soviet client states received substantial military aid grants and significant discounts on their arms purchases. After the breakup of the Soviet Union in December 1991 these practices were greatly curtailed. The Russia that emerged in 1991 consistently placed a premium on obtaining hard currency for the weapons it sold. Faced with stiff competition from Western arms suppliers in the 1990s, Russian gradually adapted its selling practices in an effort to regain and sustain an important share of the developing world arms market.

In recent years, Russian leaders have made efforts to provide more flexible and creative financing and payment options for prospective arms clients. It has also agreed to engage in counter-trade, offsets, debt-swapping, and, in key cases, to make significant licensed production agreements in order to sell its weapons. The willingness to license production has been a central element in several cases involving Russia's principal arms clients, China and India. Russia's efforts to expand its arms customer base have been met with mixed results. In the early 1990s, Russia developed a supply relationship with Iran, providing that country with Mig-29 fighter aircraft, Su-24 fighter-bombers, T-72 Main Battle Tanks, and Kilo-class attack submarines. Although new Russian sales to Iran were suspended for a period from 1995-2000 in accordance with an agreement with the United States, Russia now asserts its option to sell arms to Iran should it choose to do so. Although discussions

have been held between Russia and Iran on prospective future arms purchases, there have not been, as of this date, major new Iranian procurements of advanced weapons systems, comparable to the types and quantities obtained in the early 1990s. Russia's arms sales efforts, apart from those with China and India seem focused on Southeast Asia, where it has had some success in securing arms agreements with Malaysia, Vietnam and Indonesia. Similarly, Russian combat fighter aircraft sales have been made in recent years to Algeria and Yemen. Elsewhere in the developing world Russian military equipment still holds attractions because it ranges from the most basic to the highly advanced, and can be less expensive than similar arms available from other major suppliers.

Yet Russia continues to confront a significant obstacle in breaking into arms markets traditionally dominated by Western suppliers, namely, its perceived inability to provide consistent high-quality follow-on support, spare parts, and training for the weapons systems it sells. There is an almost ingrained reluctance on the part of many developing nations to purchase advanced armaments from a supplier like Russia that is still engaged in reorganization and rationalization of its defense production base, when more stable, well-known, and established sources of such weapons exist. And though Russia may now be embarked on some programs of advanced military research and development, the other major arms suppliers in the West are currently in the process of producing weaponry much more advanced than those programs that may, at some future point, be available from Russia.

Despite these difficulties, Russia continues to have major on-going arms transfer programs involving China and India, which should provide it with sustained business through this decade. Since the mid-1990s, Russia has sold major combat fighter aircraft, and main battle tanks to India, and has provided other major weapons systems though lease or licenced production. China, however, remains a lynchpin of Russia's arms export program, particularly in aircraft and naval systems. Since 1996, Russia has sold China Su-27 fighter aircraft and agreed to licensed production of them. It has also 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 submarines. Russia has also sold the Chinese a variety of other weapons systems and missiles. Most recently, in 2003, Russia sold China an additional 24 Su-30 MKK multi-role fighter aircraft for $1 billion.

Other notable arms sales by Russia in 2003 include: a sale of 18 Su30 MKM multi-role fighter aircraft to Malaysia for $900 million; a sale of 10 Mi-171Sh utility helicopters to Malaysia for $71 million; a sale of 4 Su-30 MK fighter aircraft to Vietnam for $110 million; a sale of 10 Project 12418 Molniya-class missile attack boats to Vietnam for $120 million; a sale of 2 batteries of S-300 PMU air defense systems to Vietnam for $250 million; and a sale of 2 Su-30 multi-role fighter aircraft, 2 Su-27 fighter aircraft, and 2 Mil Mi-35 attack helicopters to Indonesia for about $192 million.

China.

China was an important arms supplier to certain developing nations in the 1980s, primarily through arms agreements with both combatants in the Iran-Iraq war. From 2000-2003, the value of China's arms transfer agreements with developing

nations has averaged about $580 million annually. During the period of this report, the value of China's arms transfer agreements with developing nations peaked in 1999 at $2.6 billion. Its sales figures that year resulted generally from several smaller valued weapons deals in Asia, Africa, and the Near East, rather than one or two especially large sales of major weapons systems. Similar arms deals with small scale purchasers in these regions continue. In 2003, China's arms transfer agreements total was $300 million, its lowest agreements total for the entire 1996-2003 period. For most of the mid-1990s on, China's principal focus has not been on selling arms but on advancing a significant military procurement program, aimed at modernizing its military forces, with Russia serving as its principal supplier of advanced combat aircraft, surface combatants, air defense systems, and submarines **(tables 1A, 1G and 1H)(chart 3)**.

In recent years, few clients for weapons with financial resources have sought to purchase Chinese military equipment, much of which is less advanced and sophisticated than weaponry available from Western suppliers or Russia. China does not appear likely to be a major supplier of conventional weapons in the international arms market in the foreseeable future. Its likely clients are states in Asia and Africa seeking quantities of small arms and light weapons, rather than major combat systems. At the same time, China is 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, a long-standing client. Iran and North Korea have also reportedly received Chinese missile technology. Credible reports of this nature 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. Given its continuing need for hard currency, and the fact that it has some military products (especially missiles) that some developing countries would like to acquire, China can present an important 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 asymmetric military capabilities.

Major West European Suppliers.

The four major West European suppliers (France, United Kingdom, Germany, and Italy), as a group, registered a decline in their collective share of all arms transfer agreements with developing nations between 2002 and 2003. This group's share fell from 6.5% in 2002 to 5.8% in 2003. The collective value of this group's arms transfer agreements with developing nations in 2003 was $800 million compared with a total of $1.1 million in 2002. Of these four nations, France was the leading supplier with $500 million in agreements in 2003, an increase from $411 million in 2002. A notable portion of the French total in 2003 was attributable to a production arrangement with the United Arab Emirates (U.A.E.) for light corvette vessels. Italy increased its arms transfer agreements with the developing world from essentially nil in 2002 to $300 million in 2003. Germany and the United Kingdom registered effectively no new developing world arm orders in 2003. **(charts 3 and 4)(tables 1A and 1B)**.

Collectively, the four major West European suppliers held a 17.7% share of all arms transfer agreements with developing nations during the period from 1996-2003. Soon after the Persian Gulf war, the major West European suppliers generally maintained a notable share of arms transfer agreements. More recently this share has declined. For the 2000-2003 period, they collectively held 8.4% of all arms transfer agreements with developing nations ($6.5 billion). Individual suppliers within the major West European group have had notable years for arms agreements, especially France in 1997 and 1998 ($5.3 billion and $2.7 billion respectively). The United Kingdom also had a large agreement year in 1996 ($3.2 billion), and at least $1 billion in 1997, 1998, and 1999. Germany concluded arms agreements totaling $1.7 billion in 1998, with its highest total at $2.2 billion in 1999. For each of these three nations, large agreement totals in one year have usually reflected the conclusion of very large arms contracts with one or more major purchasers in that particular year (**table 1A and 1B)**.

The Major West European suppliers have traditionally had their competitive position in weapons exports strengthened through strong government marketing support for their foreign arms sales. Since they 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, and with Russia, which has sold to nations not traditional customers of either the West Europeans or the U.S. The 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 large new contracts with developing nations on a sustained basis. Furthermore, with the decline in demand by key Near East countries for major weapons purchases, the levels of new arms agreements by Major West European suppliers have fallen off notably.

Consequently, some of these suppliers have begun to phase out production of certain types of weapons systems, and have increasingly sought to join 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. The Eurofighter project is one key example. Other European suppliers have also adopted the strategy of cooperating in defense production ventures with the United States such as the Joint Strike fighter, to both meet their own requirements for advanced combat aircraft, and to share in profits resulting from future sales of this aircraft.

Regional Arms Transfer Agreements

A major stimulus to reaching arms transfer agreements with Near East nations was the Persian Gulf crisis of August 1990-February 1991. This crisis, culminating in a 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. Egypt and Israel continued their modernization and increased their weapons purchases from the United States. The Gulf states' arms purchase demands were not only a response to Iraq's aggression against Kuwait, but a reflection of concerns regarding perceived threats from a potentially hostile Iran. It remains to be determined whether Gulf

states' assessments of the future threat environment, in the post-Saddam Hussein era in Iraq, will lead to declines in their arms purchases. However, in recent years, the position of Saudi Arabia as principal arms purchaser in the Persian Gulf has notably receded. In the period from 1996-1999, Saudi Arabia's total arms agreements were valued at $6 billion. For the period from 2000-2003, Saudi Arabia's total arms agreements had declined to $3.4 billion, a decline of over 43%. In Asia, efforts in several developing nations have been focused on upgrading and modernizing defense forces, and this has led to important new conventional weapons sales in that region. Since the mid-1990s, Russia has become the principal supplier of advanced conventional weaponry to China, while maintaining its position as principal arms supplier to India. Russia has also made some progress in expanding its client base in Asia with aircraft orders from Malaysia, Vietnam, and Indonesia. The data on regional arms transfer agreements from 1996-2003 continue to reflect that Near East and Asian nations are the primary sources of orders for conventional weaponry in the developing world.

Near East.

The Near East has generally been the largest arms market in the developing world. In 1996-1999, it accounted for nearly 44% of the total value of all developing nations arms transfer agreements ($34.1 billion in current dollars), ranking it first ahead of Asia which ranked second with 36.8% of these agreements. However, during 2000-2003, the Near East region accounted for 37% of all such agreements ($24.6 billion in current dollars), placing it second to Asia in arms agreements with the developing world. **(tables 1C and 1D)**.

The United States dominated arms transfer agreements with the Near East during the 1996-2003 period with 59.5% of their total value ($34.9 billion in current dollars). France was second during these years with 12.6% ($7.4 billion in current dollars). Recently, from 2000-2003, the United States accounted for 75.6% of arms agreements with this region ($18.6 billion in current dollars), while Russia accounted for 8.1% of the region's agreements ($2 billion in current dollars) **(chart 5)(tables 1C and 1E)**.

Asia.

Asia has generally been the second largest developing world arms market. Yet in 2000-2003, Asia ranked first, accounting for 50.8% of the total value of all arms transfer agreements with developing nations ($33.8 billion in current dollars). In the earlier period, 1996-1999, the region accounted for 36.8% of all such agreements ($28.6 billion in current dollars), ranking second. **(tables 1C and 1D)**.

In the earlier period (1996-1999), Russia ranked first in the value of arms transfer agreements with Asia with 35.4%($10.1 billion in current dollars). The United States ranked second with 21.6% ($6.2 billion in current dollars). The major West European suppliers, as a group, made 23.5% of this region's agreements in 1996-1999. In the later period (2000-2003), Russia ranked first in Asian agreements with 48.8% ($16.5 billion in current dollars), primarily due to major combat aircraft sales to India and China. The United States ranked second with 20.6% ($7.1 billion

in current dollars). The major West European suppliers, as a group, made 13% of this region's agreements in 2000-2003. **(Chart 6)(table 1E)**.

Leading Developing Nations Arms Purchasers

The United Arab Emirates (U.A.E.) was the leading developing world arms purchaser from 1996-2003, making arms transfer *agreements* totaling $15.7 billion during these years (in current dollars). In the 1996-1999 period, the United Arab Emirates (UAE) ranked first in arms transfer agreements at $7.6 billion (in *current* dollars). In 2000-2003, however, China ranked first in arms transfer agreements, with a dramatic increase to $9.3 billion from $4.4 billion in the earlier period (in *current* dollars). This increase reflects the military modernization effort by China in the 1990s, based primarily on major arms agreements with Russia. The total value of all arms transfer agreements with developing nations from 1996-2003 was $150.6 billion in *current* dollars. Thus the United Arab Emirates alone was responsible for 10.4% of all developing world arms transfer agreements during these eight years. In the most recent period, 2000-2003, China made $9.3 billion in arms transfer agreements (in *current* dollars). This total constituted 12.8% of all arm transfer agreements with developing nations during these years, which totaled $72.9 billion during these years. The United Arab Emirates (U.A.E.) ranked second in arms transfer agreements during 2000-2003 with $8.1 billion (in *current* dollars), or 11.8% of the value of all developing world arms transfer agreements. **(tables 1, 1H, 1I and 1J)**.

The values of the arms transfer *agreements* of the top ten developing world recipient nations in both the 1996-1999 and 2000-2003 periods accounted for the largest portion of the total developing nations arms market. During 1996-1999, the top ten recipients collectively accounted for 62.6% of *all* developing world arms transfer agreements. During 2000-2003, the top ten recipients collectively accounted for 71.7% of all such agreements. Arms transfer *agreements* with the top ten developing world recipients, as a group, totaled $9 billion in 2003 or 65.5% of all arms transfer agreements with developing nations in that year. This reflects the continued concentration of major arms purchases by developing nations within a few countries **(tables 1, 1I and 1J)**.

Egypt ranked first among all developing world recipients in the value of arms transfer *agreements* in 2003, concluding $1.8 billion in such agreements. China ranked second in agreements in 2003 at $1.6 billion. Malaysia ranked third with $1.5 billion in agreements. Six of these top ten recipients were in the Asian region, four were in the Near East **(table 1J)**.

Saudi Arabia was the leading recipient of arms *deliveries* among developing world recipients in 2003, receiving $5.8 billion in such deliveries. Saudi Arabia alone received 34.1% of the total value of all arms deliveries to developing nations in 2003. Egypt ranked second in arms deliveries in 2003 with $2.1 billion. India ranked third with $2 billion **(tables 2 and 2J)**.

Arms *deliveries* to the top ten developing nation recipients, as a group, were valued at nearly $17 billion, or 89.4% of all arms deliveries to developing nations in

2003. Six of these top ten recipients were in Asia; four were in the Near East **(tables 2 and 2J)**.

Weapons Types Recently Delivered to Near East Nations

Regional weapons delivery data reflect the diverse sources of supply of conventional weaponry available 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 3-7)** (pages 67-71).

Weapons deliveries to the **Near East**, historically the largest purchasing region in the developing world, reflect the substantial 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 **2000-2003** from **table 5** (page 67):

United States.

- 276 tanks and self-propelled guns
- 46 APCs and armored cars
- 2 major surface combatants
- 2 minor surface combatants
- 26 supersonic combat aircraft
- 14 helicopters
- 374 surface-to-air missiles
- 63 anti-ship missiles

Russia.

- 70 tanks and self-propelled guns
- 150 APCs and armored cars
- 30 supersonic combat aircraft
- 50 helicopters
- 880 surface-to-air missiles
- 30 anti-ship missiles

China.

- 50 Artillery pieces
- 40 APCs and armored cars
- 1 guided missile boat
- 20 anti-ship missiles

Major West European Suppliers.

- 290 tanks and self-propelled guns
- 20 APCs and armored cars
- 4 major surface combatants
- 27 minor surface combatant
- 4 guided missile boats
- 1 submarine

- 30 helicopters
- 90 anti-ship missiles

All Other European Suppliers.
- 420 tanks and self-propelled guns
- 220 APCs and armored cars
- 1 major surface combatant
- 9 minor surface combatants
- 20 supersonic combat aircraft
- 380 surface-to-air missiles

All Other Suppliers.
- 10 tanks and self-propelled guns
- 120 APCs and armored cars
- 48 minor surface combatants
- 20 helicopters
- 20 surface-to-surface missiles
- 20 anti-ship missiles

Large numbers of major combat systems were delivered to the Near East region from 2000-2003, specifically, tanks and self-propelled guns, armored vehicles, major and minor surface combatants, supersonic combat aircraft, helicopters, air defense and anti-ship missiles. The United States and Russia made significant deliveries of supersonic combat aircraft and anti-ship missiles to the region. Russia, the United States, and European suppliers in general were 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 an important portion of the dollar values of arms deliveries by the United States, Russia, and European suppliers to the Near East region during the 2000-2003 period.

The cost of naval combatants is also generally high, and 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 deadly and can create important security threats within the region. In particular, from 2000-2003, China delivered to the Near East region 20 anti-ship missiles, the major West European suppliers delivered 90, while the United States delivered 63, and Russia 30. China also delivered one guided missile boat to the Near East, while the major West European suppliers collectively delivered 4 guided missile boats, and 27 minor surface combatants. Other non-European suppliers delivered 48 minor surface combatants, as well as 20 surface-to-surface missiles, a weapons category not delivered by any of the other major weapons suppliers during this period.

UNITED STATES COMMERCIAL ARMS EXPORTS

The United States *commercial deliveries* data set out below in this report are *included in the main data tables* for *deliveries* worldwide and for *deliveries* to developing nations collectively. They are presented separately here to provide an indicator of their overall magnitude in the U.S. aggregate *deliveries* totals to the world and to all developing nations. 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 approval, 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 *commercial deliveries* data are obtained from shipper's export documents and completed licenses returned from ports of exit by the U.S. Customs Service to the Office of Defense Trade Controls (PM/DTC) of the State Department, which makes the final compilation of such data. This process for obtaining commercial *deliveries* data is much less systematic and much less timely than that taken by the Department of Defense for government-to-government FMS transactions. Recently, efforts have been initiated by the U.S. government to improve the timeliness and quality of U.S. commercial deliveries data. The values of U.S. commercial arms *deliveries* to all nations and *delivery*es to *developing nations* for *fiscal* years 1996-2003, in *current* dollars, according to the U.S. State Department, were as follows:

Fiscal Year	Commercial Deliveries (Worldwide)	Commercial Deliveries (to Developing Nations)
1996	**$1,563,000,000**	**$696,000,000**
1997	**$1,818,000,000**	**$1,141,000,000**
1998	**$2,045,000,000**	**$798,000,000**
1999	**$654,000,000**	**$323,000,000**
2000	**$478,000,000**	**$233,000,000**
2001	**$821,000,000**	**$588,000,000**
2002	**$341,000,000**	**$213,000,000**
2003	**$2,727,000,000**	**$342,000,000**

Summary of Data Trends, 1996-2003

Tables 1 through 1J (pages 42-52) present data on arms transfer *agreements* with developing nations by major suppliers from 1996-2003. These data show the most recent trends in arms contract activity by major suppliers. *Delivery* data, which reflect implementation of sales decisions taken earlier, are shown in **tables 2 through 2J** (pages 53-63). **Tables 8, 8A, 8B, 8C and 8D** (pages 75-79) provide data on *worldwide* arms transfer *agreements* from 1996-2003, while **tables 9, 9A, 9B, 9C and 9D** (pages 80-84) 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. These data sets reflect the comparative order of magnitude of arms transactions by arms suppliers with recipient nations expressed in *constant* dollar terms, unless otherwise noted.

What follows is a detailed summary of data trends from the tables in the report. The summary statements also reference tables and/or charts pertinent to the point(s) noted. Where graphic representations of some major points are made in individual charts, their underlying data is taken from the pertinent tables of this report.

Total Developing Nations Arms Transfer Agreement Values

Table 1 shows the annual *current* dollar values of arms transfer agreements with developing nations. Since these figures do not allow for the effects of inflation, they are, by themselves, of somewhat limited use. They provide, however, the data from which **table 1A** (*constant* dollars) and **table 1B** (supplier percentages) are derived. Some of the more noteworthy facts reflected by these data are summarized below.

- The value of all arms transfer agreements with developing nations in 2003 was $13.7 billion. This was a substantial decrease over 2002, but still the lowest total, in real terms, for arms transfer agreements with developing nations for the 8-year period from 1996-2003 **(tables 1 and 1A)(chart 1)**.

- The total value of United States agreements with developing nations fell notably from $8.9 billion in 2002 to $6.2 billion in 2003. The United States' share of all developing world arms transfer agreements fell from 51% in 2002 to 45.4% in 2003 **(tables 1A and 1B)(chart 3)**.

- In 2003, the total value, in real terms, of Russian arms transfer agreements with developing nations declined notably from the previous year, falling from $5.3 billion in 2002 to $3.9 billion in 2003. The Russian share of all such agreements declined from 30.7% in 2002 to 23.4% in 2003 **(charts 3 and 4)(tables 1A and 1B)**.

Chart 1. Arms Transfer Agreements Worldwide, 1996-2003
Developed and Developing Worlds Compared

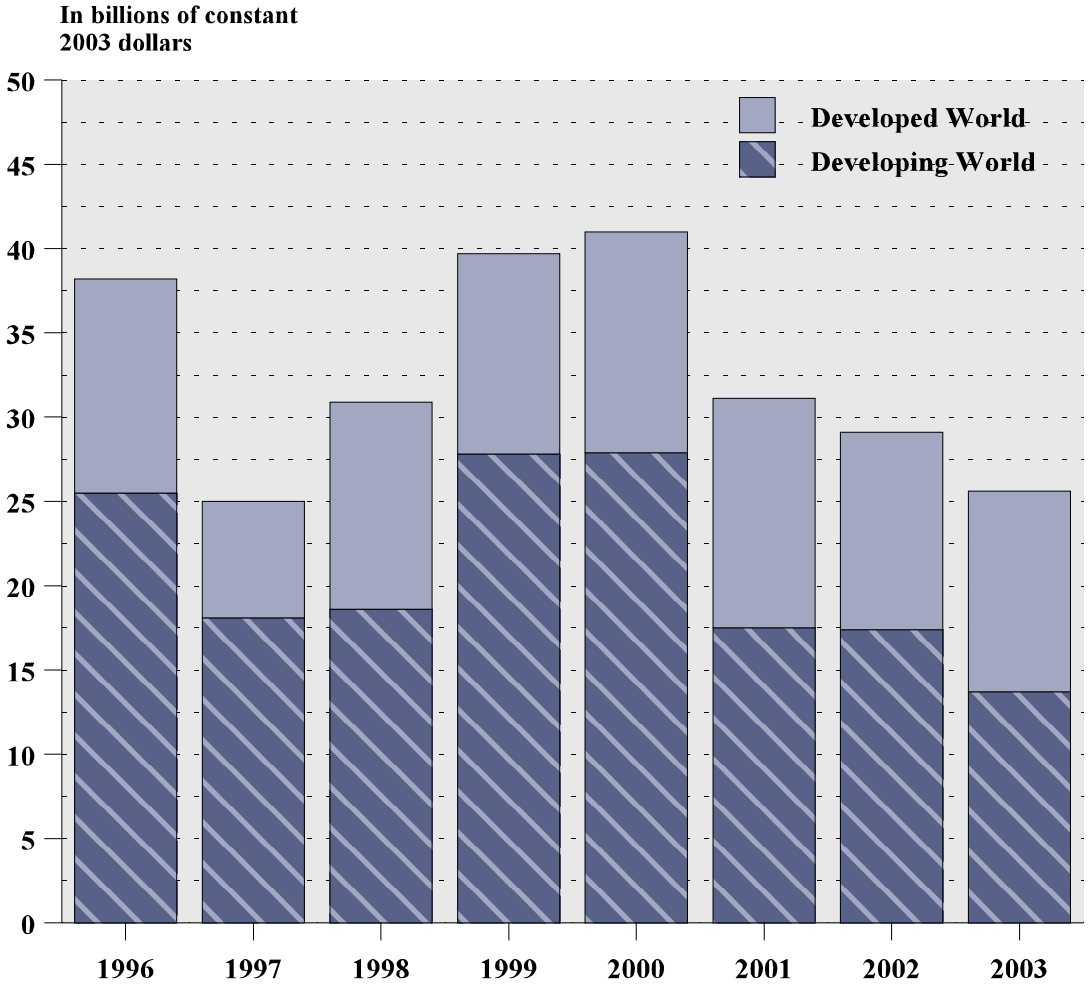
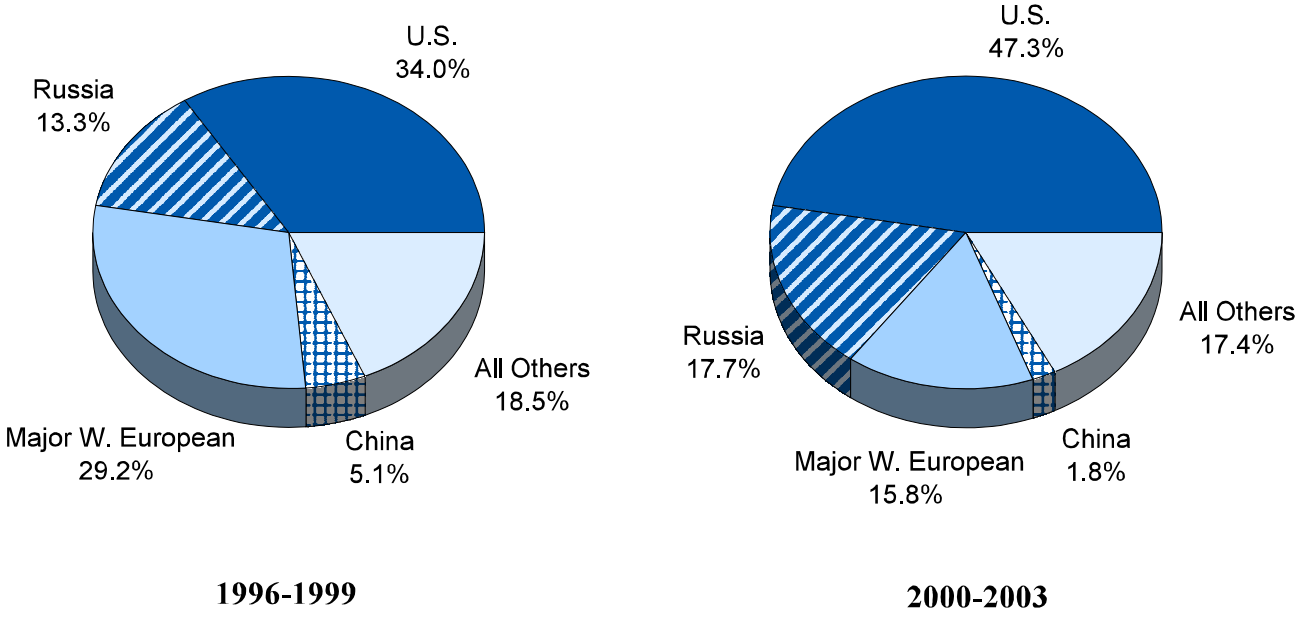
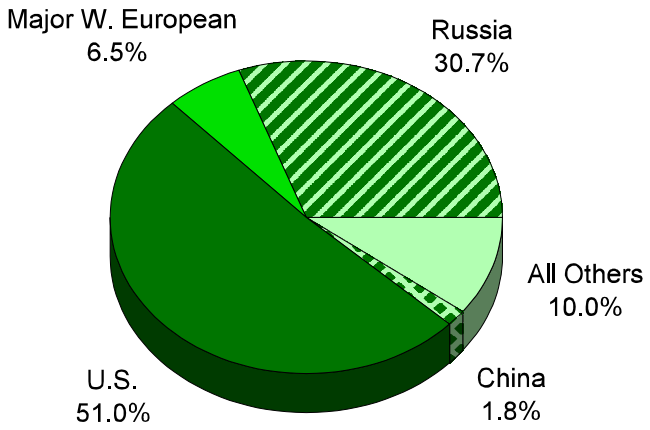


Chart 2. Arms Transfer Agreements Worldwide (supplier percentage of value)

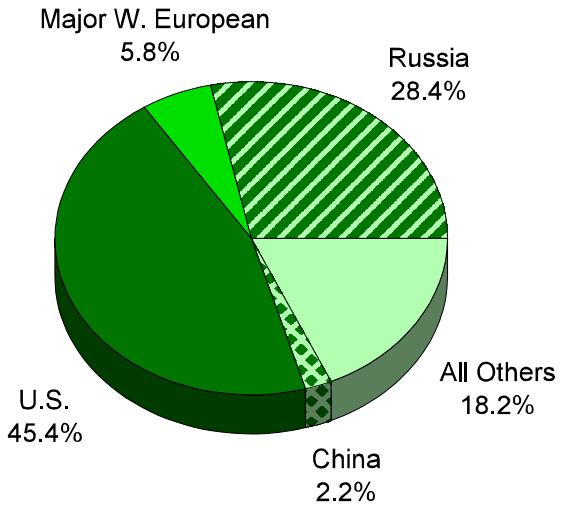


1996-1999 **2000-2003**

Chart 3. Arms Transfer Agreements With Developing Nations (supplier percentage of value)



2002



2003

Chart 4. Arms Transfer Agreements With Developing Nations by Major Supplier, 1996-2003 (billions of constant 2003 dollars)

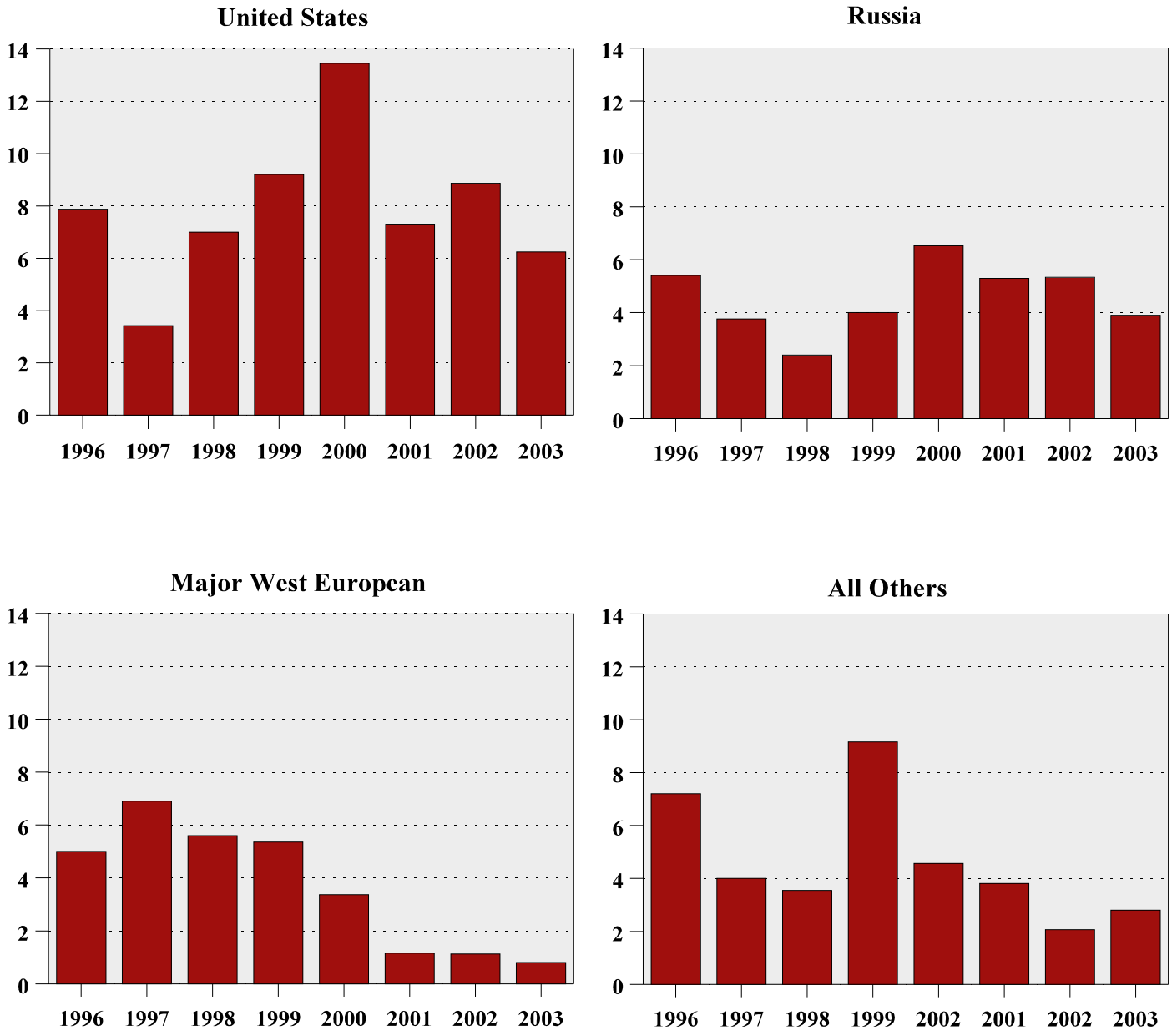


Figure 1. Worldwide Arms Transfer Agreements, 1996-2003 and Suppliers' Share with Developing World
(in millions of constant 2003 U.S. dollars)

Supplier	Worldwide Agreements Value 1996-1999	Percentage of Total with Developing World
United States	45,405	60.60
Russia	17,766	87.70
France	14,207	75.30
United Kingdom	10,909	62.20
China	6,790	86.50
Germany	11,583	36.20
Italy	2,301	55.30
All Other European	15,577	73.40
All Others	9,190	71.80
TOTAL	**133,728**	**67.30**

Supplier	Worldwide Agreements Value 2000-2003	Percentage of Total with Developing World
United States	59,995	59.70
Russia	22,504	93.60
France	10,213	37.50
United Kingdom	2,104	39.30
China	2,318	100.00
Germany	5,105	23.30
Italy	2,586	24.00
All Other European	15,116	39.40
All Others	6,933	71.50
TOTAL	**126,874**	**60.40**

Supplier	Worldwide Agreements Value 2003	Percentage of Total with Developing World
United States	14,543	42.90
Russia	4,300	90.70
France	1,000	50.00
United Kingdom	100	0.00
China	300	100.00
Germany	1,400	0.00
Italy	600	50.00
All Other European	2,300	73.90
All Others	1,100	72.70
TOTAL	**25,643**	**53.60**

- The four major West European suppliers, as a group (France, United Kingdom, Germany, Italy), registered a decline in their collective share of all arms transfer agreements with developing nations between 2002 and 2003. This group's share fell from 6.5% in 2002 to 5.8% in 2003. The collective value of this group's arms transfer agreements with developing nations in 2003 was $800 million compared with a total of $1.1 billion in 2002 **(tables 1A and 1B)(charts 3 and 4)**.

- France registered a slight increase in its share of all arms transfer agreements with developing nations, rising from 2.4% in 2002 to 3.6% in 2003. The value of its agreements with developing nations rose from $411 million in 2002 to $500 million in 2003 **(tables 1A and 1B)**.

- In 2003, the United States ranked first in arms transfer agreements with developing nations at $6.2 billion. Russia ranked second at $3.9 billion. **(charts 3 and 4)(tables 1A, 1B and 1G)**.

Regional Arms Transfer Agreements, 1996-2003

Table 1C gives the values of arms transfer agreements between suppliers and individual regions of the developing world for the periods 1996-1999 and 2000-2003. These values are expressed in *current* U.S. dollars.[1] **Table 1D**, derived from **table 1C**, gives the percentage distribution of each supplier's agreement values within the regions for the two time periods. **Table 1E**, also derived from **table 1C**, illustrates what percentage share of each developing world region's total arms transfer agreements was held by specific suppliers during the years 1996-1999 and 2000-2003. Among the facts reflected in these tables are the following:

Near East.

- The Near East has generally been the largest arms market in the developing world. In 1996-1999, it accounted for nearly 44% of the total value of all developing nations arms transfer agreements ($34.1 billion in current dollars), ranking it first ahead of Asia which ranked second with 36.8% of these agreements. However, during 2000-2003, the Near East region accounted for nearly 37% of all such agreements ($24.6 billion in current dollars), placing it second to Asia in arms agreements with the developing world **(tables 1C and 1D)**.

- The United States has dominated arms transfer agreements with the Near East during the 1996-2003 period with 59.5% of their total value ($34.9 billion in current dollars). France was second during these years with 12.6% ($7.4 billion in current dollars). Recently,

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[1] Because these regional data are composed of four-year aggregate dollar totals, they must be expressed in *current* dollar terms.

from 2000-2003, the United States accounted for 75.6% of arms agreements with this region ($18.6 billion in current dollars), while Russia accounted for 8.1% of the region's agreements ($2 billion in current dollars) **(chart 5)(tables 1C and 1E)**.

- For the period 1996-1999, the United States concluded 68.5% of its developing world arms transfer agreements with the Near East. In 2000-2003, the U.S. concluded 67.2% of its agreements with this region **(table 1D)**.

- For the period 1996-1999, the four major West European suppliers collectively made 44.4% of their developing world arms transfer agreements with the Near East. In 2000-2003, the major West Europeans made 18% of their arms agreements with the Near East **(table 1D)** .

- For the period 1996-1999, France concluded 73.1% of its developing world arms transfer agreements with the Near East. In 2000-2003, France made 16.7% of its agreements with the Near East **(table 1D)**.

- For the period 1996-1999, the United Kingdom concluded 24.6% of its developing world arms transfer agreements with the Near East. In 2000-2003, the United Kingdom made 50% of its agreements with the Near East **(table 1D)**.

- For the period 1996-1999, China concluded 34% of its developing world arms transfer agreements with the Near East. In 2000-2003, China made 23.8% of its agreements with the Near East **(table 1D)**.

- For the period 1996-1999, Russia concluded 15.7% of its developing world arms transfer agreements with the Near East. In 2000-2003, Russia made 9.9% of its agreements with the Near East **(table 1D)**.

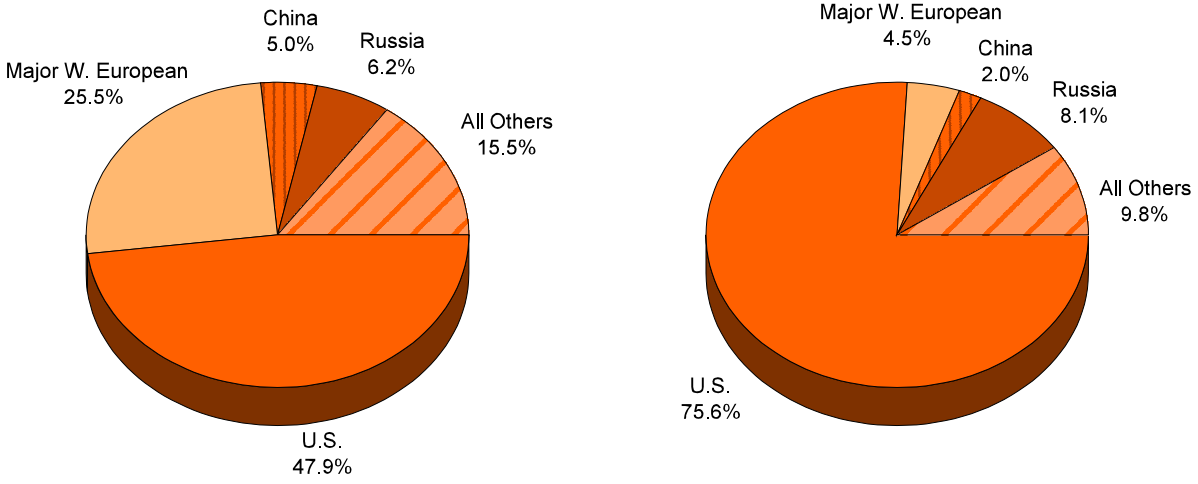
- In the earlier period (1996-1999), the United States ranked first in arms transfer agreements with the Near East with 47.9%. France ranked second with 19.9%. Russia ranked third with 6.2%. The major West European suppliers, as a group, made 25.5% of this region's agreements in 1996-1999. In the later period (2000-2003), the United States ranked first in Near East agreements with 75.6%. Russia ranked second with 8.1%. The major West European suppliers, as a group, made 4.5% of this region's agreements in 2000-2003 **(table 1E)(chart 5)**.

Asia.

- Asia has generally been the second largest arms market in the developing world. Yet in 2000-2003, Asia ranked first, accounting for 50.8% of the total value of all arms transfer agreements with developing nations ($33.8 billion in current dollars). In the earlier period, 1996-1999, the region accounted for 36.8% of all such

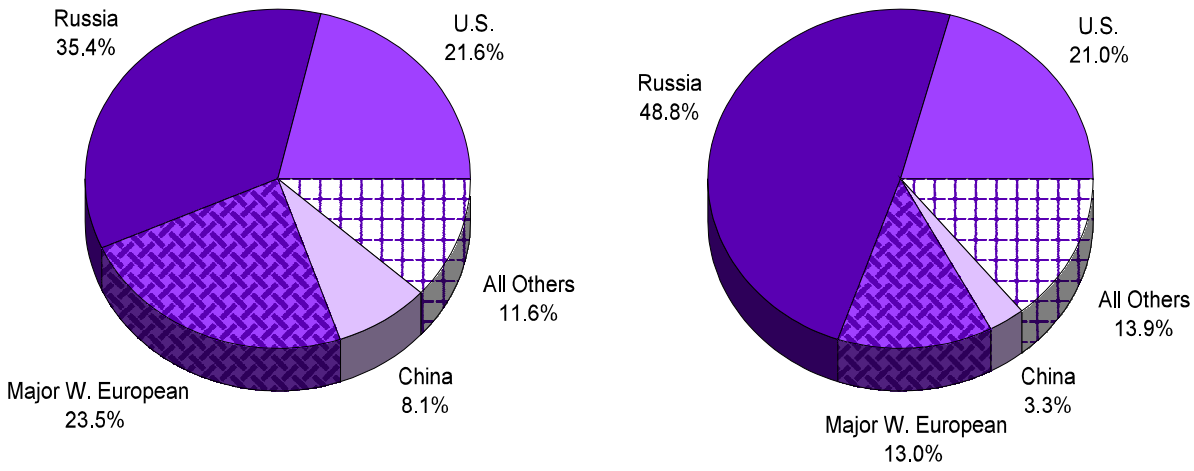
agreements ($28.6 billion in current dollars), ranking second **(tables 1C and 1D).**

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



1996-1999 **2000-2003**

Chart 6. Arms Transfer Agreements With Asia
(supplier percentage of value)



1996-1999 **2000-2003**

- In the earlier period (1996-1999), Russia ranked first in the value of arms transfer agreements with Asia with 35.4% ($10.1 billion in current dollars). The United States ranked second with 21.6% ($6.2 billion in current dollars). The major West European suppliers, as a group, made 23.5% of this region's agreements in 1996-1999. In the later period (2000-2003), Russia ranked first in Asian agreements with 48.8% ($16.5 billion in current dollars), primarily due to major combat aircraft sales to India and China. The United States ranked second with 20.6% ($7.1 billion in current dollars). The major West European suppliers, as a group, made 13% of this region's agreements in 2000-2003. **(Chart 6)(table 1E)**.

Latin America.

- In the earlier period, 1996-1999, the United States ranked first in arms transfer agreements with Latin America with 22.3%. France ranked second with 12.9%. The major West European suppliers, as a group, made 14.7% of this region's agreements in 1996-1999. In the later period, 2000-2003, the United States ranked first with 47.1%. Russia ranked second with 10.1%. All other non-major European suppliers as a group, and all other non-European suppliers collectively each made 17.6% of the region's agreements in 2000-2003. Latin America registered a significant decline in the total value of its arms transfer agreements from 1996-1999 to 2000-2003, falling from $5.4 billion in the earlier period to $4 billion in the latter **(tables 1C and 1E)**.

Africa.

- In the earlier period, 1996-1999, Germany ranked first in agreements with Africa with 15.8% ($1.5 billion in current dollars). Russia, China, and the United Kingdom tied for second with 9.5%. The major West European suppliers, as a group, made 35.8% of the region's agreements in 1996-1999. The United States made 1%. In the later period, 2000-2003, Russia ranked first in agreements with 31.4% ($1.3 billion). China ranked second with 12.1% ($500 million). The major West European suppliers, as a group, made 16.9% of this region's agreements in 2000-2003. All other European suppliers collectively made 29% ($1.2 billion). The United States made 3.3%. Africa registered a substantial decline in the total value of its arms transfer agreements from 1996-1999 to 2000-2003, falling from $9.5 billion in the earlier period to $4.1 billion in the latter (in current dollars). The notable fall in the level of arms agreements reflected, to an important degree, that South Africa's substantial new defense procurement program orders were placed during the earlier time period **(tables 1C and 1E)**.

Arms Transfer Agreements With Developing Nations, 1996-2003: Leading Suppliers Compared

Table 1F gives the values of arms transfer agreements with the developing nations from 1996-2003 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 — 1996-1999, 2000-2003 and 1996-2003. Among the facts reflected in this table are the following:

- The United States ranked first among all suppliers to developing nations in the value of arms transfer agreements from 2000-2003 ($34.1 billion), and first for the entire period from 1996-2003 ($57.9 billion).

- Russia ranked second among all suppliers to developing nations in the value of arms transfer agreements from 2000-2003 ($20.1 billion), and second from 1996-2003 ($33.5 billion).

- France ranked third among all suppliers to developing nations in the value of arms transfer agreements from 2000-2003 ($3.6 billion), and third from 1996-2003 ($12.8 billion).

- China ranked fourth among all suppliers to developing nations in the value of arms transfer agreements from 2000-2003 ($2.2 billion), and fourth from 1996-2003 ($7.3 billion).

- The United Kingdom ranked ninth among all suppliers to developing nations in the value of arms transfer agreements from 2000-2003 ($800 million), and fifth from 1996-2003 ($6.6 billion).

Arms Transfer Agreements With Developing Nations in 2003: Leading Suppliers Compared

Table 1G ranks and gives for 2003 the values of arms transfer agreements with developing nations of the top eleven suppliers in *current* U.S. dollars. Among the facts reflected in this table are the following:

- The United States and Russia, the year's top two arms suppliers — ranked by the value of their arms transfer agreements — collectively made agreements in 2003 valued at $10.1 billion, 73.8% of all arms transfer agreements made with developing nations by all suppliers ($13.7 billion).

- In 2003, the United States ranked first in arms transfer agreements with developing nations, making $6.2 billion in such agreements, or 45.4% of them.

- Russia ranked second and the Netherlands third in arms transfer agreements with developing nations in 2003, making $3.9 billion and $700 million in such agreements respectively.

- France ranked fourth in arms transfer agreements with developing nations in 2003, making $500 million in such agreements, while Poland ranked fifth with $400 million.

Arms Transfer Agreements With Near East 1996-2003: Suppliers And Recipients

Table 1H gives the values of arms transfer agreements with the Near East nations by suppliers or categories of suppliers for the periods 1996-1999 and 2000-2003. These values are expressed in *current* U.S. dollars. They are a subset of the data contained in **table 1 and table 1C**. Among the facts reflected by this table are the following:

- For the most recent period, 2000-2003, the principal purchasers of U.S. arms in the Near East region, based on the value of agreements were: the United Arab Emirates (U.A.E.) ($7.1 billion); Egypt ($6.2 billion), Israel ($5.1 billion), and Saudi Arabia ($2.7 billion). The principal purchasers of Russian arms were: Algeria, the U.A.E, and Yemen($400 million each), Egypt ($300 million), and Iran and Syria ($200 million each). The principal purchasers of arms from China were Egypt and Kuwait ($200 million each), and Iran and Yemen ($100 million each). The principal purchasers of arms from the four major West European suppliers, as a group, were: Saudi Arabia($500 million); Oman, and the U.A.E. ($300 million each). The principal purchasers of arms from all other European suppliers collectively were the U.A.E. ($300 million); Saudi Arabia ($200 million). The principal purchasers of arms from all other suppliers combined were Libya ($300 million), and Kuwait and Jordan ($200 million each).

- For the period from 2000-2003, the United Arab Emirates (U.A.E.) made $8.1 billion in arms transfer agreements. The United States ($7.1 billion), and Russia ($400 million) were its largest suppliers. Egypt made $6.8 billion in arms transfer agreements. Its major supplier was the United States ($6.2 billion). Israel made $5.2 billion in arms transfer agreements. Its principal supplier was the United States ($5.1 billion). Saudi Arabia made $3.4 billion in arms transfer agreements. Its principal suppliers were: the United States ($2.7 billion), and the four major West European suppliers collectively ($500 million).

- The total value of arms transfer agreements by China with Iran fell from $800 million to $100 million during the periods from 1996-1999 to 2000-2003 respectively. The value of Russia's arms transfer

agreements with Iran fell from $400 million in the earlier period to $200 million from 2000-2003.

- The value of arms transfer agreements by the United States with Saudi Arabia fell notably from the 1996-1999 period to the 2000-2003 period, declining from $4.6 billion in the earlier period to $2.7 million in the later period. Saudi Arabia still made 79.4% of all its arms transfer agreements with the United States during 2000-2003. Meanwhile, arms transfer agreements with the United Arab Emirates (U.A.E.) by the major West European suppliers decreased significantly from 1996-1999 to 2000-2003, falling from $6.1 billion to $300 million.

Arms Transfers to Developing Nations, 1996-2003: Agreements With Leading Recipients

Table 1I gives the values of arms transfer agreements made by the top ten recipients of arms in the developing world from 1996-2003 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 — 1996-1999, 2000-2003 and 1996-2003. Among the facts reflected in this table are the following:

- The United Arab Emirates (U.A.E.) was the leading developing world arms purchaser from 1996-2003, making arms transfer *agreements* totaling $15.7 billion during these years (in current dollars). In the 1996-1999 period, the United Arab Emirates (UAE) ranked first in arms transfer agreements at $7.6 billion (in *current* dollars). In 2000-2003, however, China ranked first in arms transfer agreements, with a dramatic increase to $9.3 billion from $4.4 billion in the earlier period (in *current* dollars). This increase reflects the military modernization effort by China in the 1990s, based primarily on major arms agreements with Russia. The total value of all arms transfer agreements with developing nations from 1996-2003 was $150.6 billion in *current* dollars. Thus the United Arab Emirates alone was responsible for 10.4% of all developing world arms transfer agreements during these eight years. In the most recent period, 2000-2003, China made $9.3 billion in arms transfer agreements (in *current* dollars). This total constituted 12.8% of all arm transfer agreements with developing nations during these years, which totaled $72.9 billion during these years. The United Arab Emirates (U.A.E.) ranked second in arms transfer agreements during 2000-2003 with $8.1 billion (in *current* dollars), or 11.1% of the value of all developing world arms transfer agreements **(tables 1, 1H, 1I and 1J)**.

- During 1996-1999, the top ten recipients collectively accounted for 62.6% of *all* developing world arms transfer agreements. During

2000-2003, the top ten recipients collectively accounted for 71.7% of all such agreements **(tables 1 and 1I)**.

Arms Transfers to Developing Nations in 2003: Agreements With Leading Recipients

Table 1J names the top ten developing world recipients of arms transfer agreements in 2003. The table ranks these recipients on the basis of the total *current* dollar values of their respective agreements with *all* suppliers in 2003. Among the facts reflected in this table are the following:

- Egypt ranked first among all developing nations recipients in the value of arms transfer agreements in 2003, concluding $1.8 billion in such agreements. China ranked second with $1.6 billion. Malaysia ranked third with $1.5 billion.

- Six of the top ten developing world recipients of arms transfer agreements in 2003 were in Asia. Four were in the Near East .

- Arms transfer agreements with the top ten developing world recipients, as a group, in 2003 totaled $13.7 billion or 65.5% of all such agreements with the developing world, reflecting a continuing concentration of developing world arms purchases among a few nations **(tables 1 and 1J)**.

Developing Nations Arms Delivery Values

Table 2 shows the annual *current* dollar values of arms *deliveries* (items actually transferred) to developing nations by major suppliers from 1996-2003. The utility of these particular data is that they reflect transfers that have occurred. They provide the data from which **tables 2A** (constant dollars) and **table 2B** (supplier percentages) are derived. Some of the more notable facts illustrated by these data are summarized below.

- In 2003 the value of all arms deliveries to developing nations ($17 billion) was a notable decrease in deliveries values from the previous year, ($18.7 billion in constant 2003 dollars) **(charts 7 and 8)(table 2A)**.

- The U.S. share of all deliveries to developing nations in 2003 was 37.1%, slightly down from 37.8% in 2002. In 2003, the United States, for the eighth year in a row, ranked first in the value of arms deliveries to developing nations ($6.3 billion) (in constant 2003 dollars), reflecting continuing implementation of post Persian Gulf War era arms transfer agreements. The second leading supplier in 2003 was the United Kingdom, at $4 billion. The United Kingdom's share of all deliveries to developing nations in 2003 was 23.5%, up from 18.7% in 2002. Russia, the third leading supplier in 2003, made $3.3 billion in deliveries. Russia's share of all arms deliveries

to developing nations in 2003 was 19.4%, up from 17.1% in 2002. The share of major West European suppliers deliveries to developing nations in 2003 was 32.4%, up from 27% in 2002 **(tables 2A and 2B)**.

- The total value of all arms deliveries by all suppliers to developing nations from 2000-2003 ($78.7 billion in constant 2003 dollars) was dramatically lower than the value of arms deliveries by all suppliers to developing nations from 1996-1999 ($131.4 billion in constant 2003 dollars)**(table 2A)**.

- During the years 1996-2003, arms deliveries to developing nations comprised 61% of all arms deliveries worldwide. In 2003, the percentage of arms deliveries to developing nations was 59.1% of all arms deliveries worldwide **(tables 2A and 9A)(figure 2)**.

Chart 7. Arms Deliveries Worldwide 1996-2003
Developed and Developing Worlds Compared

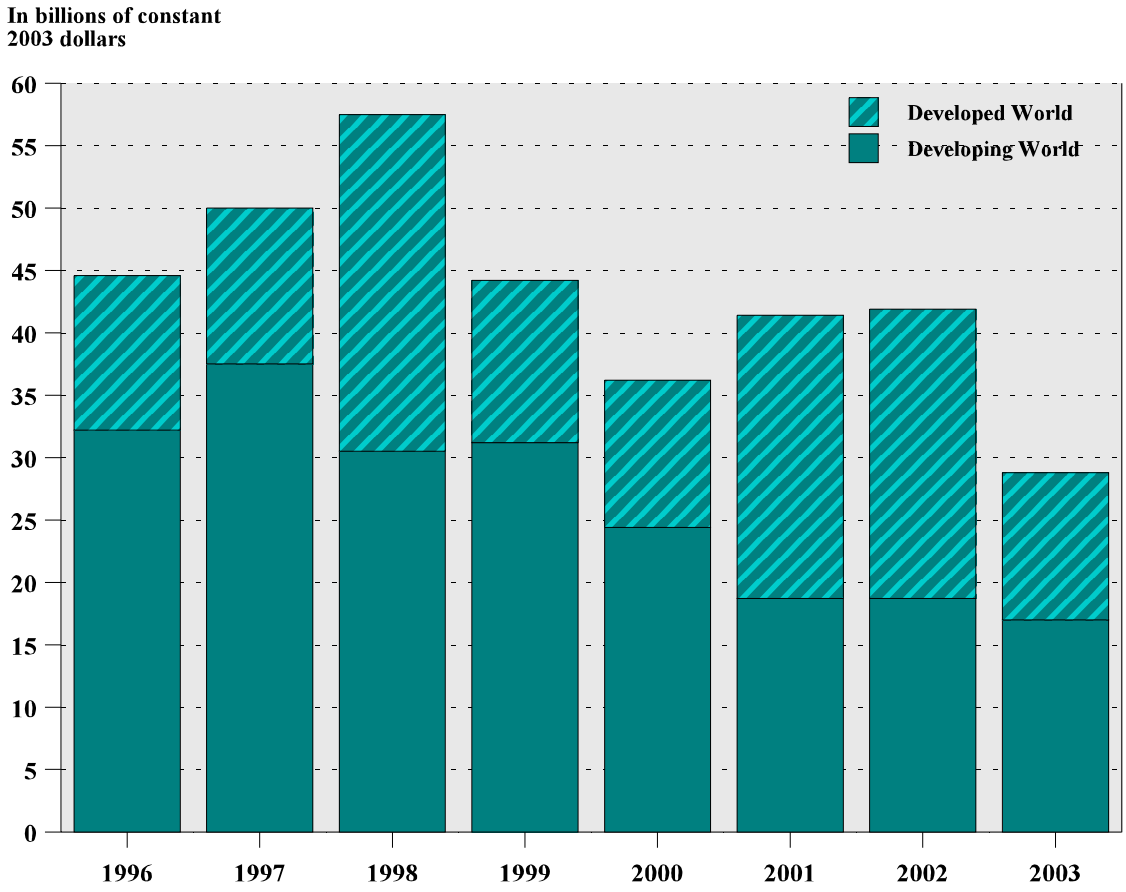


Chart 8. Arms Deliveries to Developing Countries by Major Supplier, 1996-2003 (in billions of constant 2003 dollars)

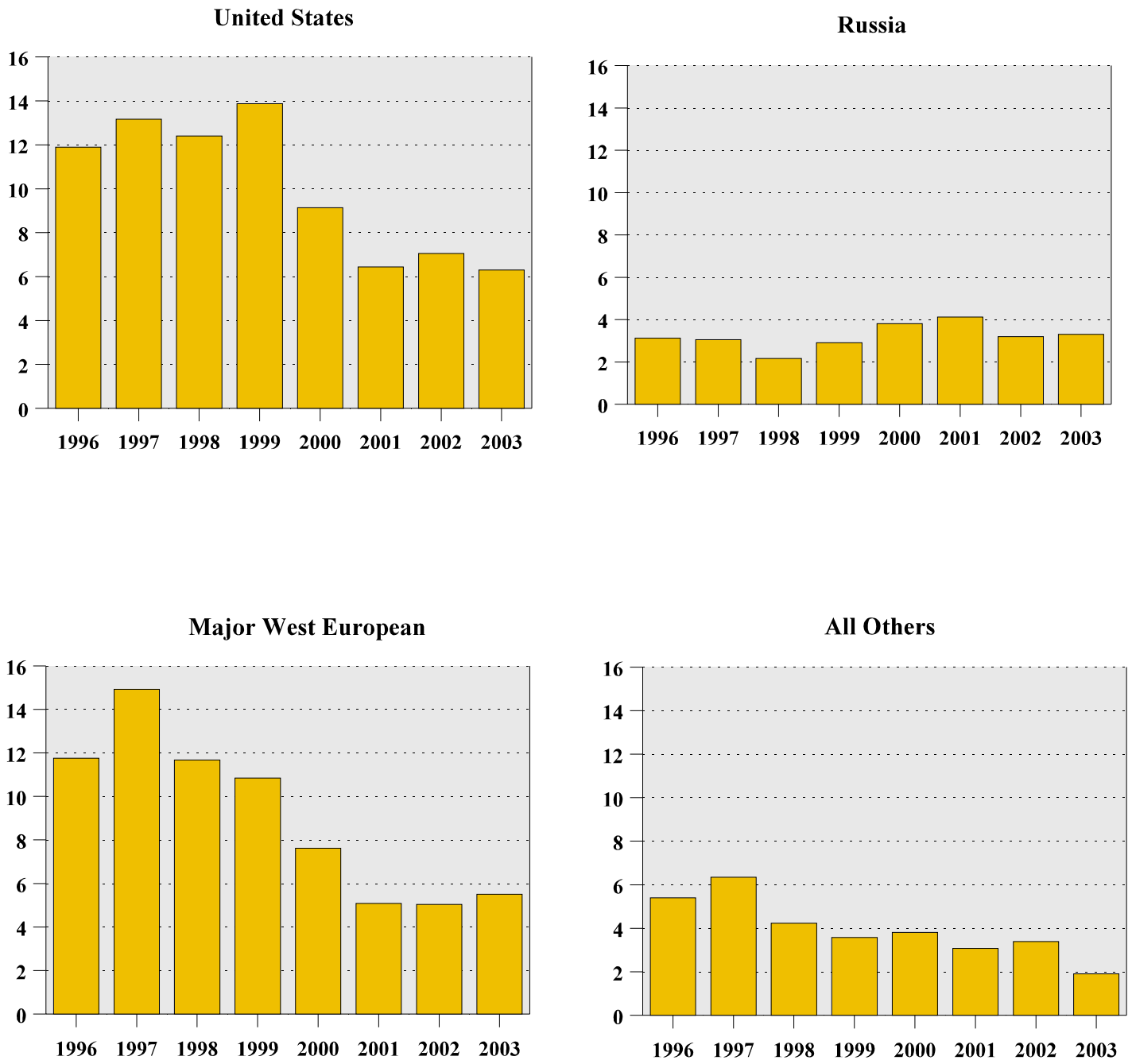


Figure 2. Worldwide Arms Deliveries, 1996-2003 and Suppliers' Share with Developing World (in millions of constant 2003 U.S. dollars)

Supplier	Worldwide Deliveries Value 1996-1999	Percentage of Total to Developing World
United States	91,133	56.30
Russia	12,987	86.60
France	26,161	87.60
United Kingdom	26,543	85.10
China	3,381	93.30
Germany	7,865	29.50
Italy	1,601	86.10
All Other European	16,390	69.50
All Others	10,203	49.10
TOTAL	**196,264**	**66.90**

Supplier	Worldwide Deliveries Value 2000-2003	Percentage of Total to Developing World
United States	76,083	38.00
Russia	15,693	91.90
France	7,984	65.90
United Kingdom	21,136	78.20
China	2,824	96.20
Germany	4,177	29.70
Italy	1,363	15.30
All Other European	9,934	50.90
All Others	8,989	48.80
TOTAL	**148,183**	**53.10**

Supplier	Worldwide Deliveries Value 2003	Percentage of Total to Developing World
United States	13,648	46.20
Russia	3,400	97.00
France	1,200	43.80
United Kingdom	4,700	85.10
China	500	100.00
Germany	1,200	58.30
Italy	100	0.00
All Other European	2,400	29.20
All Others	1,600	43.80
TOTAL	**28,748**	**59.10**

Regional Arms Delivery Values, 1996-2003

Table 2C gives the values of arms deliveries by suppliers to individual *regions* of the developing world for the periods 1996-1999 and 2000-2003. These values are expressed in *current* U.S. dollars.[2] **Table 2D**, derived from **table 2C**, gives the percentage distribution of each supplier's deliveries values within the regions for the two time periods. **Table 2E**, also derived from **table 2C**, illustrates what percentage share of each developing world region's total arms delivery values was held by specific suppliers during the years 1996-1999 and 2000-2003. Among the facts reflected in these tables are the following:

Near East.

- The Near East has generally led in the value of arms deliveries received by the developing world. In 1996-1999, it accounted for 57.2% of the total value of all developing nations deliveries ($63.9 billion in current dollars). During 2000-2003 the region accounted for 50.7% of all such deliveries ($41.4 billion in current dollars) **(tables 2C and 2D)**.

- For the period 1996-1999, the United States made 63.6% of its developing world arms deliveries to the Near East region. In 2000-2003, the United States made 47.4% of its developing world arms deliveries to the Near East region **(table 2D)**.

- For the period 1996-1999, the United Kingdom made 81% of its developing world arms deliveries to the Near East region. In 2000-2003, the United Kingdom made 91.3% of its developing world arms deliveries to the Near East region **(table 2D)**.

- For the period 1996-1999, 46.2% of France's arms deliveries to the developing world were to the Near East region. In the more recent period, 2000-2003, 93.9% of France's developing world deliveries were to nations of the Near East region **(table 2D)**.

- For the period 1996-1999, Russia made 29.4% of its developing world arms deliveries to the Near East region. In 2000-2003, Russia made 9.5% of such deliveries to the Near East **(table 2D)**.

- In the earlier period, 1996-1999, the United States ranked first in the value of arms deliveries to the Near East with 42.7% ($27.3 billion in current dollars). The United Kingdom ranked second with 25.4% ($16.2 billion in current dollars). France ranked third with 14.4% ($9.2 billion in current dollars). The major West European suppliers, as a group, held 41% of this region's delivery values in 1996-1999. In the later period (2000-2003), the United States

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[2] Because these regional data are composed of four-year aggregate dollar totals, they must be expressed in *current* dollar terms.

ranked first in Near East delivery values with 39.6% ($16.4 billion in current dollars). The United Kingdom ranked second with 34.8% ($14.4 billion in current dollars). France ranked third with 11.1% ($4.6 billion in current dollars).The major West European suppliers, as a group, held 46.9% of this region's delivery values in 2000-2003 **(tables 2C and 2E)**.

Asia.

- The Asia region has generally ranked second in the value of arms deliveries from most suppliers in both time periods. In the earlier period, 1996-1999, 35.8% of all arms deliveries to developing nations were to those in Asia ($39.9 billion in current dollars). In the later period, 2000-2003, Asia accounted for 42.6% of such arms deliveries ($35.4 billion in current dollars). For the period 2000-2003, Russia made 84.7% of its developing world arms deliveries to Asia. Germany made 53.9% of its developing world deliveries to Asia. China made 52% of its developing world deliveries to Asia, while the United States made 47.3% **(tables 2C and 2D)**.

- In the period from 1996-1999, the United States ranked first in the value of arms deliveries to Asia with 34.9% ($13.9 billion in current dollars). France ranked second with 26% ($10.4 billion in current dollars). Russia ranked third with 13.5% ($5.4 billion in current dollars). The major West European suppliers, as a group, held 38.8% of this region's delivery values in 1996-1999 ($15.5 billion). In the period from 2000-2003, the United States ranked first in Asian delivery values with 47.1% ($16.4 billion in current dollars). Russia ranked second with 33.4% ($11.6 billion in current dollars) **(tables 2C and 2E)**.

Latin America.

- In the earlier period, 1996-1999, the value of all arms deliveries to Latin America was $4.3 billion. The United States ranked first in the value of arms deliveries to Latin America with 36.9% ($1.7 billion in current dollars). The United Kingdom and Russia tied for second with 7.2% ($100 million each in current dollars). The major West European suppliers, as a group, held 18.7% of this region's delivery values in 1996-1999. In the later period, 2000-2003, the United States ranked first in Latin American delivery values with 65.8% ($1.7 billion in current dollars). Russia and France tied for second with 3.8% each. The major West European suppliers, as a group, held 3.8% of this region's delivery values in 2000-2003. During 2000-2003, the value of all arms deliveries to Latin America was $2.6 billion, a substantial decline from the $4.3 billion deliveries total for 1996-1999 **(tables 2C and 2E)**.

Africa.

- In the earlier period, 1996-1999, the value of all arms deliveries to Africa was over $3.5 billion. Russia ranked first in the value of arms deliveries to Africa with 22.7% ($800 million in current dollars). China ranked second with 14.2% ($500 million in current dollars).The major West European suppliers, as a group, held 11.3% of this region's delivery values in 1996-1999. The United States held 3.6%. In the later period, 2000-2003, Russia ranked first in African delivery values with 24.2% ($700 million in current dollars). China ranked second with 13.8% ($400 million in current dollars). The United States held 3.3%. The other non-major European suppliers collectively held 27.6% ($800 million in current dollars). All other non-European suppliers collectively held 20.7% ($600 million in current dollars). During this later period, the value of all arms deliveries to Africa decreased notably from $3.5 billion in 1996-1999 to $2.9 billion (in current dollars) **(Tables 2C and 2E)**.

Arms Deliveries to Developing Nations, 1996-2003: Leading Suppliers Compared

Table 2F gives the values of arms deliveries to developing nations from 1996-2003 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 — 1996-1999, 2000-2003 and 1996-2003. Among the facts reflected in this table are the following:

- The United States ranked first among all suppliers to developing nations in the value of arms deliveries from 2000-2003 ($27.6 billion), and first for the entire period from 1996-2003 ($72 billion).

- The United Kingdom ranked second among all suppliers to developing nations in the value of arms deliveries from 2000-2003 ($15.8 billion), and second for the entire period from 1996-2003 ($35.8 billion).

- Russia ranked third among all suppliers to developing nations in the value of arms deliveries from 2000-2003 ($13.8 billion), and fourth for the entire period from 1996-2003 ($23.1 billion).

Arms Deliveries With Developing Nations in 2003: Leading Suppliers Compared

Table 2G ranks and gives for 2003 the values of arms deliveries to developing nations of the top ten suppliers in *current* U.S. dollars. Among the facts reflected in this table are the following:

- The United States, the United Kingdom and Russia — the year's top three arms suppliers — ranked by the value of their arms deliveries

— collectively made deliveries in 2003 valued at $13.6 billion, 80% of all arms deliveries made to developing nations by all suppliers.

- In 2003, the United States ranked first in the value of arms deliveries to developing nations, making $6.3 billion in such agreements, or 37.1% of them.

- The United Kingdom ranked second and Russia third in deliveries to developing nations in 2003, making $4 billion and $3.3 billion in such deliveries respectively.

- France ranked fourth in arms deliveries to developing nations in 2003, making $800 million in such deliveries, while Germany ranked fifth with $700 million in deliveries.

Arms Deliveries to Near East, 1996-2003: Suppliers and Recipients

Table 2H gives the values of arms delivered to Near East nations by suppliers or categories of suppliers for the periods 1996-1999 and 2000-2003. These values are expressed in *current* U.S. dollars. They are a subset of the data contained in **table 2 and table 2C**. Among the facts reflected by this table are the following:

- For the most recent period, 2000-2003, the principal arms recipients of the United States in the Near East region, based on the value of their arms deliveries were Saudi Arabia ($6.3 billion), Egypt ($4.8 billion), Israel ($2.9 billion), and Kuwait ($1.1 billion). The principal arms recipients of Russia were Algeria ($300 million , Iran, Egypt and Yemen ($200 million each). The principal arms recipients of China were Kuwait ($400 million), Egypt ($200 million), and Algeria, and Yemen ($100 million each). The principal arms recipients of the four major West European suppliers, as a group, were Saudi Arabia ($16.6 billion), the U.A.E. ($1.9 billion), Israel and Kuwait ($300 million each). The principal arms recipient of all other European suppliers collectively was Saudi Arabia ($1 billion). The principal arms recipient of all other suppliers, as a group, was Iran ($400 million).

- For the period 2000-2003, Saudi Arabia received $23.9 billion in arms deliveries. Its principal suppliers were the United States ($6.3 billion), and the four major West Europeans, as a group ($16.6 billion). Egypt received $5.4billion in arms deliveries. Its principal supplier was the United States ($4.8 billion). Israel received $3.2 billion in arms deliveries. Its principal supplier was the United States ($2.9 billion). The U.A.E. received $2.6 billion in arms deliveries. Its principal suppliers were the four major West Europeans, as a group ($1.9 billion). Kuwait received $2.1 billion in arms deliveries. Its principal suppliers were the United States ($1.1 billion). Iran received $600 million in arms deliveries. Its principal

suppliers were Russia ($200 million) and all other non-European suppliers ($400 million).

- The value of United States arms deliveries to Saudi Arabia declined dramatically from $16.6 billion in 1996-1999 to $6.3 billion in 2000-2003, as implementation of major orders placed during the Persian Gulf war era continued to be concluded.

- The value of Russian arms deliveries to Iran declined dramatically from the 1996-1999 period to the 2000-2003 period. Russian arms deliveries fell from $900 million to $200 million.

- Chinese arms deliveries to Iran dropped substantially from 1996-1999 to 2000-2003, falling from $700 million in 1996-1999 to nil in 2000-2003.

Arms Deliveries to Developing Nations, 1996-2003: The Leading Recipients

Table 2I gives the values of arms deliveries made to the top ten recipients of arms in the developing world from 1996-2003 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 — 1996-1999, 2000-2003 and 1996-2003. Among the facts reflected in this table are the following:

- Saudi Arabia and Taiwan were the top two developing world recipients of arms from 1996-2003, receiving *deliveries* valued at $61.1 billion and $19.4 billion, respectively, during these years. The total value of all arms deliveries to developing nations from 1996-2003 was $188.7 billion in *current* dollars (see **table 2**). Thus, Saudi Arabia and Taiwan were responsible for 32.4% and 10.3%, respectively, of all developing world deliveries during these eight years — together 32.7% of the total. In the most recent period — 2000-2003 — Saudi Arabia and China ranked first and second in the value of arms received by developing nations ($23.9 billion and $6.9 billion, respectively, in *current* dollars). Together, Saudi Arabia and China accounted for 41% of all developing world arms deliveries ($30.8 billion out of $75.2 billion — the value of all deliveries to developing nations in 2000-2003 (in *current* dollars).

- For the 2000-2003 period, Saudi Arabia alone received $23.9 billion in arms deliveries (in *current* dollars), or 31.8% of all deliveries to developing nations during this period.

- During 1996-1999, the top ten recipients collectively accounted for 74.5% of *all* developing world arms deliveries. During 2000-2003, the top ten recipients collectively accounted for 75.6% of all such deliveries **(tables 2 and 2I)**.

Arms Transfers to Developing Nations in 2003: Agreements With Leading Recipients

Table 2J names the top ten developing world recipients of arms transfer agreements in 2003. The table ranks these recipients on the basis of the total *current* dollar values of their respective agreements with *all* suppliers in 2003. Among the facts reflected in this table are the following:

- Saudi Arabia was the leading recipient of arms deliveries in 2003 among developing nations, receiving $5.8 billion in such deliveries, or 34.1% of all deliveries to developing nations. Egypt ranked second with $2.1 billion. India ranked third with $2 billion **(tables 2 and 2J)**.

- Arms deliveries in 2003 to the top ten developing nation recipients, collectively, constituted $15.2 billion, or 89.4% of all developing nations deliveries. Six of the top ten arms recipients in the developing world in 2003 were in the Asian region; four were in the Near East region **(tables 2 and 2J)**.

Table 1. Arms Transfer Agreements With Developing Nations, by Supplier, 1996-2003 (in millions of current U.S. dollars)

	1996	1997	1998	1999	2000	2001	2002	2003	1996-2003
United States	6,568	2,913	6,119	8,238	12,358	6,872	8,635	6,242	57,945
Russia	4,500	3,200	2,100	3,600	6,000	5,000	5,200	3,900	33,500
France	1,100	4,500	2,400	1,200	2,100	600	400	500	12,800
United Kingdom	2,700	1,000	1,000	1,100	0	200	600	0	6,600
China	1,000	1,300	500	2,300	600	1,000	300	300	7,300
Germany	100	100	1,500	2,000	900	100	100	0	4,800
Italy	300	300	0	500	100	200	0	300	1,700
All Other European	3,000	1,500	1,400	4,000	1,700	1,300	1,000	1,700	15,600
All Others	2,000	600	1,200	1,900	1,900	1,300	700	800	10,400
TOTAL	**21,268**	**15,413**	**16,219**	**24,838**	**25,658**	**16,572**	**16,935**	**13,742**	**150,645**
*Dollar inflation Index:(2003=1.00)	0.8332	0.8507	0.874	0.8949	0.919	0.9458	0.9732	1	

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. The United States total in 2000 includes a $6.432 billion licensed commercial agreement with the United Arab Emirates for 80 F-16 aircraft. *Based on Department of Defense Price Deflator.

Table 1A. Arms Transfer Agreements with Developing Nations, by Supplier, 1996-2003 (in millions of constant 2003 U.S. dollars)

	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL 1996-2003
United States	7,883	3,424	7,001	9,205	13,447	7,266	8,873	6,242	63,341
Russia	5,401	3,762	2,403	4,023	6,529	5,287	5,343	3,900	36,648
France	1,320	5,290	2,746	1,341	2,285	634	411	500	14,527
United Kingdom	3,241	1,176	1,144	1,229	0	211	617	0	7,618
China	1,200	1,528	572	2,570	653	1,057	308	300	8,188
Germany	120	118	1,716	2,235	979	106	103	0	5,377
Italy	360	353	0	559	109	211	0	300	1,892
All Other European	3,601	1,763	1,602	4,470	1,850	1,374	1,028	1,700	17,388
All Others	2,400	705	1,373	2,123	2,067	1,374	719	800	11,561
TOTAL	**25,526**	**18,119**	**18,557**	**27,755**	**27,919**	**17,520**	**17,402**	**13,742**	**166,540**

Table 1B. Arms Transfer Agreements with Developing Nations, by Supplier, 1996-2003 (expressed as a percent of total, by year)

	1996	1997	1998	1999	2000	2001	2002	2003
United States	30.88%	18.90%	37.73%	33.17%	48.16%	41.47%	50.99%	45.42%
Russia	21.16%	20.76%	12.95%	14.49%	23.38%	30.17%	30.71%	28.38%
France	5.17%	29.20%	14.80%	4.83%	8.18%	3.62%	2.36%	3.64%
United Kingdom	12.70%	6.49%	6.17%	4.43%	0.00%	1.21%	3.54%	0.00%
China	4.70%	8.43%	3.08%	9.26%	2.34%	6.03%	1.77%	2.18%
Germany	0.47%	0.65%	9.25%	8.05%	3.51%	0.60%	0.59%	0.00%
Italy	1.41%	1.95%	0.00%	2.01%	0.39%	1.21%	0.00%	2.18%
All Other European	14.11%	9.73%	8.63%	16.10%	6.63%	7.84%	5.90%	12.37%
All Others	9.40%	3.89%	7.40%	7.65%	7.41%	7.84%	4.13%	5.82%
[Major West European*	19.75%	38.28%	30.21%	19.33%	12.08%	6.64%	6.50%	5.82%]
TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

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

Table 1C. Regional Arms Transfer Agreements, by Supplier, 1996-2003 (in millions of current U.S. dollars)

	Asia		Near East		Latin America		Africa	
	1996-99	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**
United States	6,166	7,084	16,335	18,583	1,238	1,871	98	137
Russia	10,100	16,500	2,100	2,000	300	400	900	1,300
France	1,200	2,900	6,800	600	700	0	600	100
United Kingdom	3,400	400	1,400	400	0	0	900	0
China	2,300	1,100	1,700	500	100	0	900	500
Germany	1,600	1,000	400	0	0	100	1,500	0
Italy	500	100	100	100	100	200	400	200
All Other European	1,400	2,200	3,500	1,300	1,800	700	3,200	1,200
All Others	1,900	2,500	1,800	1,100	1,200	700	1,000	700
*[Major West European**	*6,700*	*4,400*	*8,700*	*1,100*	*800*	*300*	*3,400*	*300]*
TOTAL	**28,566**	**33,784**	**34,135**	**24,583**	**5,438**	**3,971**	**9,498**	**4,137**

Source: U.S. Government

Note: All foreign data are rounded to the nearest $100 million. The United States total for Near East in 1999-2002 includes a $6.432 billion licensed commercial agreement with the United Arab Emirates in 2000 for 80 F-16 aircraft. *Major West European category included France, United Kingdom, Germany, Italy.

Table 1D. Percentage of Each Supplier's Agreements Value by Region, 1996-2003

	Asia		Near East		Latin America		Africa		TOTAL	
	1996-99	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**
United States	25.87%	25.60%	68.53%	67.15%	5.19%	6.76%	0.41%	0.50%	100.00%	100.00%
Russia	75.37%	81.68%	15.67%	9.90%	2.24%	1.98%	6.72%	6.44%	100.00%	100.00%
France	12.90%	80.56%	73.12%	16.67%	7.53%	0.00%	6.45%	2.78%	100.00%	100.00%
United Kingdom	59.65%	50.00%	24.56%	50.00%	0.00%	0.00%	15.79%	0.00%	100.00%	100.00%
China	46.00%	52.38%	34.00%	23.81%	2.00%	0.00%	18.00%	23.81%	100.00%	100.00%
Germany	45.71%	90.91%	11.43%	0.00%	0.00%	9.09%	42.86%	0.00%	100.00%	100.00%
Italy	45.45%	16.67%	9.09%	16.67%	9.09%	33.33%	36.36%	33.33%	100.00%	100.00%
All Other European	14.14%	40.74%	35.35%	24.07%	18.18%	12.96%	32.32%	22.22%	100.00%	100.00%
All Others	32.20%	50.00%	30.51%	22.00%	20.34%	14.00%	16.95%	14.00%	100.00%	100.00%
[*Major West European**]	*34.18%*	*72.13%*	*44.39%*	*18.03%*	*4.08%*	*4.92%*	*17.35%*	*4.92%*	100.00%	100.00%
TOTAL	**36.79%**	**50.82%**	**43.97%**	**36.98%**	**7.00%**	**5.97%**	**12.23%**	**6.22%**	**100.00%**	**100.00%**

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

Table 1E. Percentage of Total Agreements Value by Supplier to Regions, 1996-2003

	Asia		Near East		Latin America		Africa	
	1996-99	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**
United States	21.59%	20.59%	47.85%	75.59%	22.77%	47.12%	1.03%	3.31%
Russia	35.36%	48.84%	6.15%	8.14%	5.52%	10.07%	9.48%	31.42%
France	4.20%	8.58%	19.92%	2.44%	12.87%	0.00%	6.32%	2.42%
United Kingdom	11.90%	1.18%	4.10%	1.63%	0.00%	0.00%	9.48%	0.00%
China	8.05%	3.26%	4.98%	2.03%	1.84%	0.00%	9.48%	12.09%
Germany	5.60%	2.96%	1.17%	0.00%	0.00%	2.52%	15.79%	0.00%
Italy	1.75%	0.30%	0.29%	0.41%	1.84%	5.04%	4.21%	4.83%
All Other European	4.90%	6.51%	10.25%	5.29%	33.10%	17.63%	33.69%	29.01%
All Others	6.65%	7.40%	5.27%	4.47%	22.07%	17.63%	10.53%	16.92%
[*Major West European**	23.45%	13.02%	25.49%	4.47%	14.71%	7.55%	35.80%	7.25%]
TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

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

Table 1F. Arms Transfer Agreements with Developing Nations, 1996-2003: Leading Suppliers Compared (in millions of current U.S. dollars)

Rank	Supplier	Agreements Value 1996-1999
1	United States	23,838
2	Russia	13,400
3	France	9,200
4	United Kingdom	5,800
5	China	5,100
6	Germany	3,700
7	Sweden	2,400
8	Israel	1,700
9	Ukraine	1,600
10	Belarus	1,600
11	Italy	1,100

Rank	Supplier	Agreements Value 2000-2003
1	United States*	34,107
2	Russia	20,100
3	France	3,600
4	China	2,200
5	Israel	1,500
6	Ukraine	1,500
7	Germany	1,100
8	Spain	800
9	United Kingdom	800
10	Netherlands	800
11	Italy	600

Rank	Supplier	Agreements Value 1996-2003
1	United States*	57,945
2	Russia	33,500
3	France	12,800
4	China	7,300
5	United Kingdom	6,600
6	Germany	4,800
7	Israel	3,200
8	Ukraine	3,100
9	Sweden	2,500
10	Belarus	1,900
11	Italy	1,700

Source: U.S. Government.

Note: All foreign data are rounded to the nearest $100 million. Where rounded data totals are the same, the actual rank order is maintained. *The United States total includes a $6.432 billion licensed commercial agreement with the United Arab Emirates in 2000 for 80 F-16 aircraft.

Table 1G. Arms Transfer Agreements with Developing Nations in 2003: Leading Suppliers Compared (in millions of current U.S. dollars)

Rank	Supplier	Agreements Value 2003
1	United States	6,242
2	Russia	3,900
3	Netherlands	700
4	France	500
5	Poland	400
6	Israel	400
7	Ukraine	300
8	China	300
9	Italy	300
10	Czech Republic	100
11	Spain	100

Source: U.S. Government.

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

Table 1H. 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
1996-1999							
Algeria	0	500	200	0	800	0	1,500
Bahrain	600	0	0	0	0	0	600
Egypt	5,800	400	400	100	100	0	6,800
Iran	0	400	800	100	100	300	1,700
Iraq	0	0	0	0	0	0	0
Israel	4,300	0	0	100	0	300	4,700
Jordan	300	0	0	300	0	100	700
Kuwait	500	0	200	100	0	100	900
Lebanon	0	0	0	100	0	0	100
Libya	0	0	0	0	100	600	700
Morocco	0	0	0	200	200	200	600
Oman	0	0	0	300	0	0	300
Qatar	0	0	0	800	0	0	800
Saudi Arabia	4,600	0	0	500	900	0	6,000
Syria	0	300	0	100	100	0	500
Tunisia	0	0	0	0	0	0	0
U.A.E.	200	400	0	6,100	800	100	7,600
Yemen	0	0	0	200	300	200	700
2000-2003							
Algeria	0	400	0	0	100	0	500
Bahrain	400	0	0	0	0	0	400
Egypt	6,200	300	200	100	0	0	6,800
Iran	0	200	100	0	100	100	500
Iraq	0	0	0	0	100	100	200
Israel	5,100	0	0	0	100	0	5,200
Jordan	700	0	0	0	100	200	1,000
Kuwait	1,700	100	200	0	0	200	2,200
Lebanon	0	0	0	0	0	0	0
Libya	0	100	0	0	100	300	500
Morocco	0	0	0	0	0	100	100
Oman	900	0	0	300	0	0	1,200
Qatar	0	0	0	0	0	0	0
Saudi Arabia	2,700	0	0	500	200	0	3,400
Syria	0	200	0	100	0	100	300
Tunisia	0	0	0	0	0	0	0
U.A.E.**	7,100	400	0	300	300	0	8,100
Yemen	0	400	100	0	100	0	600

Source: U.S. Government.

Note: 0=data less than $50 million or nil. All data are rounded to nearest $100 million. *Major West European includes France, United Kingdom, Germany, and Italy totals as an aggregate figure. **The United States total for 2000-2003 includes a $6.432 billion licensed commercial agreement with the United Arab Emirates in 2000 for 80 F-16 aircraft.

Table 1I. Arms Transfer Agreements of Developing Nations, 1996-2003: Agreements by the Leading Recipients (in millions of current U.S. dollars)

Rank	Recipient	Agreements Value 1996-1999
1	U.A.E.	7,600
2	Egypt	6,800
3	Saudi Arabia	6,000
4	India	6,000
5	South Africa	5,200
6	Israel	4,700
7	China	4,400
8	South Korea	3,900
9	Pakistan	2,300
10	Malaysia	1,900
Rank	**Recipient**	**Agreements Value 2000-2003**
1	China	9,300
2	U.A.E.*	8,100
3	Egypt	6,800
4	India	6,600
5	Israel	5,200
6	South Korea	4,900
7	Saudi Arabia	3,400
8	Malaysia	3,000
9	Singapore	2,800
10	Kuwait	2,200
Rank	**Recipient**	**Agreements Value 1996-2003**
1	U.A.E.*	15,700
2	China	13,700
3	Egypt	13,600
4	India	12,600
5	Israel	9,900
6	Saudi Arabia	9,400
7	South Korea	8,800
8	South Africa	5,300
9	Malaysia	5,000
10	Pakistan	3,800

Source: U.S. Government. **Note:** All foreign data are rounded to the nearest $100 million. Where rounded data totals are the same, the actual rank order is maintained. *The U.A.E. total includes a $6.432 billion licensed commercial agreement with the United States in 2000 for 80 F-16 aircraft.

Table 1J. Arms Transfer Agreements of Developing Nations in 2003: Agreements by Leading Recipients (in millions of current U.S. dollars)

Rank	Recipient	Agreements Value 2003
1	Egypt	1,800
2	China	1,600
3	Malaysia	1,500
4	Indonesia	900
5	Saudi Arabia	700
6	Israel	700
7	South Korea	600
8	India	400
9	Jordan	400
10	Taiwan	400

Source: U.S. Government.

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

Table 2. Arms Deliveries to Developing Nations, by Supplier, 1996-2003 (in millions of current U.S. dollars)

	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL 1996-2003
United States	9,915	11,204	10,834	12,415	8,398	6,090	6,859	6,299	72,014
Russia	2,600	1,900	2,200	2,600	3,500	3,900	3,100	3,300	23,100
France	3,200	6,100	6,500	4,000	1,900	900	1,400	800	24,800
United Kingdom	5,800	6,400	3,300	4,500	4,700	3,700	3,400	4,000	35,800
China	700	1,100	600	300	700	600	800	500	5,300
Germany	700	400	200	700	400	100	0	700	3,200
Italy	100	400	200	500	0	100	100	0	1,400
All Other European	2,500	3,100	2,100	2,100	1,900	1,000	1,200	700	14,600
All Others	1,300	1,200	1,000	800	900	1,300	1,300	700	8,500
TOTAL	**26,815**	**31,804**	**26,934**	**27,915**	**22,398**	**17,690**	**18,159**	**16,999**	**188,714**
Dollar inflation index: (2003=1.00)*	0.8332	0.8507	0.874	0.8949	0.919	0.9458	0.9732	1	

Source: U.S. Government.

Note: Developing nations category *excludes* the United States, Russia, 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), excess defense articles, and commercially licensed deliveries, 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, 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. *Based on Department of Defense Price Deflator.

Table 2A. Arms Deliveries to Developing Nations, by Supplier, 1996-2003
(in millions of constant 2003 U.S. dollars)

	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL 1996-2003
United States	11,900	13,170	12,396	13,873	9,138	6,439	7,048	6,299	80,263
Russia	3,120	3,056	2,174	2,905	3,808	4,123	3,185	3,300	25,671
France	3,841	7,171	7,437	4,470	2,067	952	1,439	800	28,177
United Kingdom	6,961	6,818	3,776	5,028	5,114	3,912	3,494	4,000	39,103
China	840	1,293	686	335	762	634	822	500	5,872
Germany	840	470	229	782	435	106	0	700	3,562
Italy	120	470	229	559	0	106	103	0	1,587
All Other European	3,000	3,644	2,403	2,347	2,067	1,057	1,233	700	16,451
All Others	1,560	1,411	1,144	894	979	1,374	1,336	700	9,398
TOTAL	**32,182**	**37,503**	**30,474**	**31,193**	**26,370**	**18,703**	**18,660**	**16,999**	**210,084**

Table 2B. Arms Deliveries to Developing Nations, by Supplier, 1996-2003 (expressed as a percent of total, by year)

	1996	**1997**	**1998**	**1999**	**2000**	**2001**	**2002**	**2003**
United States	36.98%	35.23%	40.22%	44.47%	37.49%	34.43%	37.77%	37.06%
Russia	9.70%	5.97%	8.17%	9.31%	15.63%	22.05%	17.07%	19.41%
France	11.93%	19.18%	24.13%	14.33%	8.48%	5.09%	7.71%	4.71%
United Kingdom	21.63%	20.12%	12.25%	16.12%	20.98%	20.92%	18.72%	23.53%
China	2.61%	3.46%	2.23%	1.07%	3.13%	3.39%	4.41%	2.94%
Germany	2.61%	1.26%	0.74%	2.51%	1.79%	0.57%	0.00%	4.12%
Italy	0.37%	1.26%	0.74%	1.79%	0.00%	0.57%	0.55%	0.00%
All Other European	9.32%	9.75%	7.80%	7.52%	8.48%	5.65%	6.61%	4.12%
All Others	4.85%	3.77%	3.71%	2.87%	4.02%	7.35%	7.16%	4.12%
*[Major West European**	*36.55%*	*41.82%*	*37.87%*	*34.75%*	*31.25%*	*27.13%*	*26.98%*	*32.35%*
TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

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

Table 2C. Regional Arms Deliveries by Supplier, 1996-2003
(in millions of current U.S. dollars)

	Asia		Near East		Latin America		Africa	
	1996-99	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**
United States	13,944	16,360	27,300	16,400	1,584	1,732	126	95
Russia	5,400	11,600	2,700	1,300	300	100	800	700
France	10,400	200	9,200	4,600	200	100	100	0
United Kingdom	3,300	1,200	16,200	14,400	300	0	200	0
China	1,200	1,300	800	800	100	0	500	400
Germany	1,000	700	700	400	300	0	0	200
Italy	800	700	100	0	0	0	100	100
All Other European	1,900	1,100	5,600	2,100	1,000	400	1,000	800
All Others	2,000	2,200	1,300	1,400	500	300	700	600
*[Major West European**	*15,500*	*2,200*	*26,200*	*19,400*	*800*	*100*	*400*	*300]*
TOTAL	**39,944**	**35,360**	**63,900**	**41,400**	**4,284**	**2,632**	**3,526**	**2,895**

Source: U.S. Government.

Note: All foreign data are rounded to the nearest $100 million.
*Major West European category includes France, United Kingdom, Germany, Italy.

Table 2D. Percentage of Supplier Deliveries Value by Region, 1996-2003

	Asia		Near East		Latin America		Africa		TOTAL	TOTAL
	1996-99	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**
United States	32.46%	47.30%	63.56%	47.42%	3.69%	5.01%	0.29%	0.27%	100.00%	100.00%
Russia	58.70%	84.67%	29.35%	9.49%	3.26%	0.73%	8.70%	5.11%	100.00%	100.00%
France	52.26%	4.08%	46.23%	93.88%	1.01%	2.04%	0.50%	0.00%	100.00%	100.00%
United Kingdom	16.50%	7.69%	81.00%	92.31%	1.50%	0.00%	1.00%	0.00%	100.00%	100.00%
China	46.15%	52.00%	30.77%	32.00%	3.85%	0.00%	19.23%	16.00%	100.00%	100.00%
Germany	50.00%	53.85%	35.00%	30.77%	15.00%	0.00%	0.00%	15.38%	100.00%	100.00%
Italy	80.00%	50.00%	10.00%	0.00%	0.00%	0.00%	10.00%	50.00%	100.00%	100.00%
All Other European	20.00%	25.00%	58.95%	47.73%	10.53%	9.09%	10.53%	18.18%	100.00%	100.00%
All Others	44.44%	48.89%	28.89%	31.11%	11.11%	6.67%	15.56%	13.33%	100.00%	100.00%
*[Major West European**	*36.13%*	*10.00%*	*61.07%*	*88.18%*	*1.86%*	*0.45%*	*0.93%*	*1.36%*	*100.00%*	*100.00%]*
TOTAL	**35.77%**	**42.55%**	**57.23%**	**50.68%**	**3.84%**	**3.22%**	**3.16%**	**3.54%**	**100.00%**	**100.00%**

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

Table 2E. Percentage of Total Deliveries Value by Supplier to Regions, 1996-2003

	Asia		Near East		Latin America		Africa	
	1996-99	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**	**1996-99**	**2000-03**
United States	34.91%	47.07%	42.72%	39.61%	36.97%	65.81%	3.57%	3.28%
Russia	13.52%	33.37%	4.23%	3.14%	7.00%	3.80%	22.69%	24.18%
France	26.04%	0.58%	14.40%	11.11%	4.67%	3.80%	2.84%	0.00%
United Kingdom	8.26%	3.45%	25.35%	34.78%	7.00%	0.00%	5.67%	0.00%
China	3.00%	3.74%	1.25%	1.93%	2.33%	0.00%	14.18%	13.82%
Germany	2.50%	2.01%	1.10%	0.97%	7.00%	0.00%	0.00%	6.91%
Italy	2.00%	0.29%	0.16%	0.00%	0.00%	0.00%	2.84%	3.45%
All Other European	4.76%	3.16%	8.76%	5.07%	23.34%	15.20%	28.36%	27.63%
All Others	5.01%	6.33%	2.03%	3.38%	11.67%	11.40%	19.85%	20.73%
*[Major West European**	*38.80%*	*6.33%*	*41.00%*	*46.86%*	*18.67%*	*3.80%*	*11.34%*	*10.36%]*
TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

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

Table 2F. Arms Deliveries to Developing Nations, 1996-2003 Leading Suppliers Compared (in millions of current U.S. dollars)

Rank	Supplier	Deliveries Value 1996-1999
1	United States	44,368
2	United Kingdom	20,000
3	France	19,800
4	Russia	9,300
5	China	2,700
6	Sweden	2,500
7	Germany	2,000
8	Ukraine	1,600
9	Israel	1,300
10	Belarus	1,200
11	Italy	1,200

Rank	Supplier	Deliveries Value 2000-2003
1	United States	27,646
2	United Kingdom	15,800
3	Russia	13,800
4	France	5,000
5	China	2,600
6	Israel	1,200
7	Ukraine	1,200
8	Germany	1,200
9	North Korea	600
10	Sweden	600
11	Belgium	500

Rank	Supplier	Deliveries Value 1996-2003
1	United States	72,014
2	United Kingdom	35,800
3	France	24,800
4	Russia	23,100
5	China	5,300
6	Germany	3,200
7	Sweden	3,100
8	Ukraine	2,800
9	Israel	2,500
10	Belarus	1,700
11	Italy	1,400

Source: U.S. Government.
Note: All foreign data are rounded to the nearest $100 million. Where rounded data totals are the same, the actual rank order is maintained.

Table 2G. Arms Deliveries to Developing Nations in 2003: Leading Suppliers Compared (in millions of current U.S. dollars)

Rank	Supplier	Deliveries Value 2003
1	United States	6,299
2	United Kingdom	4,000
3	Russia	3,300
4	France	800
5	Germany	700
6	China	500
7	Israel	400
8	Ukraine	300
9	Belgium	100
10	South Korea	100

Source: U.S. Government.

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

Table 2H. 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
1996-1999							
Algeria	0	400	100	0	500	200	1,200
Bahrain	300	0	0	0	0	0	300
Egypt	3,500	400	0	100	400	0	4,400
Iran	0	900	700	100	300	0	2,000
Iraq	0	0	0	0	0	0	0
Israel	3,500	0	0	700	0	300	4,500
Jordan	200	0	0	0	0	100	300
Kuwait	2,500	400	0	1,400	100	0	4,400
Lebanon	100	0	0	100	0	0	200
Libya	0	0	0	0	100	100	200
Morocco	100	0	0	200	100	200	600
Oman	0	0	0	400	100	100	600
Qatar	0	0	0	1,800	0	0	1,800
Saudi Arabia	16,600	0	0	17,600	3,000	0	37,200
Syria	0	300	0	100	0	100	500
Tunisia	100	0	0	0	100	0	200
U.A.E.	400	300	0	3,600	700	100	5,100
Yemen	0	0	0	100	200	100	400
2000-2003							
Algeria	0	300	100	0	200	100	700
Bahrain	600	0	0	0	0	0	600
Egypt	4,800	200	200	100	100	0	5,400
Iran	0	200	0	0	0	400	600
Iraq	0	0	0	0	100	100	200
Israel	2,900	0	0	300	0	0	3,200
Jordan	300	0	0	100	100	100	600
Kuwait	1,100	100	400	300	0	200	2,100
Lebanon	0	0	0	0	0	0	0
Libya	0	100	0	0	100	200	400
Morocco	100	0	0	100	100	0	300
Oman	0	0	0	0	0	100	100
Qatar	0	0	0	0	0	0	0
Saudi Arabia	6,300	0	0	16,600	1,000	0	23,900
Syria	0	100	0	0	0	100	200
Tunisia	0	0	0	0	0	0	0
U.A.E.	300	100	0	1,900	200	100	2,600
Yemen	0	200	100	0	200	100	600

Source: U.S. Government.

Note: 0=data less than $50 million or nil. All data are rounded to nearest $100 million. *Major West European includes France, United Kingdom, Germany, and Italy totals as an aggregate figure.

Table 2I. Arms Deliveries to Developing Nations, 1996-2003: The Leading Recipients

(in millions of current U.S. dollars)

Rank	Recipient	Deliveries Value 1996-1999
1	Saudi Arabia	37,200
2	Taiwan	15,300
3	South Korea	5,200
4	U.A.E.	5,100
5	Israel	4,500
6	Egypt	4,400
7	Kuwait	4,400
8	China	3,300
9	Pakistan	3,000
10	Malaysia	2,100
Rank	**Recipient**	**Deliveries Value 2000-2003**
1	Saudi Arabia	23,900
2	China	6,900
3	Egypt	5,400
4	India	4,300
5	Taiwan	4,100
6	Israel	3,200
7	South Korea	3,100
8	U.A.E.	2,600
9	Kuwait	2,100
10	Pakistan	1,300
Rank	**Recipient**	**Deliveries Value 1996-2003**
1	Saudi Arabia	61,100
2	Taiwan	19,400
3	China	10,200
4	Egypt	9,800
5	South Korea	8,300
6	Israel	7,700
7	U.A.E.	7,700
8	Kuwait	6,500
9	India	6,000
10	Pakistan	4,300

Source: U.S. Government

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

Table 2J. Arms Deliveries to Developing Nations in 2003: The Leading Recipients (in millions of current U.S. dollars)

Rank	Recipient	Deliveries Value 2003
1	Saudi Arabia	5,800
2	Egypt	2,100
3	India	2,000
4	Israel	1,900
5	China	1,000
6	South Korea	700
7	Malaysia	600
8	Taiwan	500
9	Kuwait	300
10	Indonesia	300

Source: U.S. Government.

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

Selected Weapons Deliveries to Developing Nations, 1996-2003

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 1996-2003 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 **(tables 3-7)**.

Caution is warranted 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.

Regional Weapons Deliveries Summary, 2000-2003

- The regional weapons delivery data collectively show that the United States was a leading supplier of several major classes of conventional weaponry from 2000-2003. Russia transferred significant quantities of certain weapons classes, although generally fewer than the United States or other supplier groups in most regions, during these years.

- The major West European suppliers were serious competitors in weapons deliveries from 2000-2003 making notable deliveries of certain categories of armaments to every region of the developing world — most particularly to the Near East, Asia, and to Latin America. In Africa, all European suppliers, China and all other non-European suppliers were major sources of weapons delivered.

- Regional weapons delivery data reflect the diverse sources of supply of conventional weaponry available to developing nations. Even though the United States, Russia, and the four major West European suppliers tend to dominate the delivery of the fourteen classes of weapons examined, it is also evident that the other European suppliers, and non-European suppliers, including China, are fully capable of providing specific classes of conventional armaments,

> such as tanks, missiles, armored vehicles, aircraft, artillery pieces, and the various missile categories, surface-to-surface, surface-to-air, and anti-ship, to developing nations, should their systems prove attractive to prospective purchasers.

Noteworthy deliveries of specific categories of weapons to regions of the developing world by specific suppliers from **2000-2003** included the following:

Asia.

Russia delivered 310 tanks and self-propelled guns, 310 APCs and armored cars, 5 major surface combatants, 2 minor surface combatants, 1 submarine, 200 supersonic combat aircraft, 220 helicopters, 1,250 surface-to-air missiles, and 190 anti-ship missiles. The **United States** delivered 88 tanks and self-propelled guns, 108 artillery pieces, 8 major surface combatants, 16 supersonic combat aircraft, 81 helicopters, 2,557 surface-to-air missiles, and 232 anti-ship missiles. **China** delivered 40 tanks and self-propelled guns, 370 artillery pieces, 310 APCs and armored cars, 2 minor surface combatants, 60 supersonic combat aircraft, and 490 surface-to-air missiles. The four major **West European suppliers** as a group delivered 2 major surface combatants, 4 minor surface combatants, 20 helicopters, and 80 anti-ship missiles. **All other European suppliers** collectively delivered 120 tanks and self-propelled guns, 120 APCs and armored cars, 1 major surface combatant, 22 minor surface combatants, 2 submarines, 10 supersonic combat aircraft, 10 helicopters, and 60 surface-to-surface missiles. **All other non-European suppliers** collectively delivered 130 artillery pieces, 80 APCs and armored cars, 3 major surface combatants, 20 minor surface combatants, and 30 supersonic combat aircraft.

Near East.

Russia delivered 70 tanks and self-propelled guns, 150 APCs and armored cars, 30 supersonic combat aircraft, 50 helicopters, 880 surface-to-air missiles, and 30 anti-ship missiles. The **United States** delivered 276 tanks and self-propelled guns, 46 APCs and armored cars, 26 supersonic combat aircraft, 14 helicopters, 374 surface-to-air missiles, and 63 anti-ship missiles. **China** delivered 40 APCs and armored cars, 1 guided missile boat, and 20 anti-ship missiles. The four **major West European suppliers** collectively delivered 290 tanks and self-propelled guns, 4 major surface combatants, 27 minor surface combatants, 4 guided missile boats, 1 submarines, 30 helicopters, and 90 anti-ship missiles. **All other European suppliers** as a group delivered 420 tanks and self-propelled guns, 220 APCs and armored cars, 1 major surface combatant, 9 minor surface combatants, 20 supersonic combat aircraft, and 380 surface-to-air missiles. **All other suppliers** collectively delivered 120 APCs and armored cars, 48 minor surface combatants, 20 helicopters, 20 surface-to-surface missiles, and 20 anti-ship missiles.

Latin America.

Russia delivered 10 helicopters, and 60 surface-to-air missiles. The **United States** delivered 24 artillery pieces, 2 major surface combatants, 4 supersonic combat aircraft, 25 helicopters, and 13 anti-ship missiles. **China** delivered 10 minor surface combatants, and 50 surface-to-air missiles. The four **major West European suppliers** collectively delivered 30 tanks and self-propelled guns, 2 major surface combatants, 1 minor surface combatants, and 50 surface-to-air missiles. **All other European suppliers** collectively delivered 120 tanks and self-propelled guns, 30 helicopters, and 40 surface-to-air missiles. **All other non-European suppliers** as a group delivered 20 artillery pieces, 40 surface-to-air missiles, and 30 anti-ship missiles.

Africa.

Russia delivered 10 tanks and self-propelled guns, 20 artillery pieces, 9 minor surface combatants, and 10 helicopters. The **United States** delivered 8 other aircraft. **China** delivered 60 tanks and self-propelled guns, 10 APCs and armored cars, 9 minor surface combatants, and 10 helicopters. The four **major West European suppliers** collectively delivered 1 major surface combatant, 6 minor surface combatants, and 10 helicopters. **All other European suppliers** collectively delivered 150 tanks and self-propelled guns, 440 artillery pieces, 440 APCs and armored cars, 6 minor surface combatants, 40 supersonic combat aircraft, 40 helicopters, and 90 surface-to-air missiles. **All other non-European suppliers** as a group delivered 60 tanks and self-propelled guns, 380 artillery pieces, 330 APCs and armored cars, 15 minor surface combatants, 20 supersonic combat aircraft, and 60 helicopters, and 20 surface-to-air missiles.

Table 3. Numbers of Weapons Delivered by Major Suppliers to Developing Nations

Weapons Category	U.S.	Russia	China	Major West European	All Other European	All Others
1996-1999						
Tanks and Self-Propelled Guns	1,202	340	240	340	1,250	120
Artillery	199	200	180	110	370	970
APCs and Armored Cars	1,705	720	120	790	2,170	390
Major Surface Combatants	3	1	1	17	11	2
Minor Surface Combatants	33	5	24	42	92	67
Guided Missile Boats	0	0	9	14	0	3
Submarines	0	5	0	9	0	2
Supersonic Combat Aircraft	386	140	80	110	70	70
Subsonic Combat Aircraft	2	10	0	70	30	30
Other Aircraft	51	30	60	80	150	120
Helicopters	169	240	0	70	120	40
Surface-to-Air Missiles	1,021	1,480	770	1,750	2,460	850
Surface-to-Surface Missiles	0	0	0	0	0	30
Anti-Ship Missiles	266	100	250	170	0	10
2000-2003						
Tanks and Self-Propelled Guns	200	390	100	320	810	90
Artillery	203	30	440	90	590	540
APCs and Armored Cars	67	460	360	50	780	530
Major Surface Combatants	12	5	0	9	2	3
Minor Surface Combatants	2	11	21	38	37	83
Guided Missile Boats	0	0	1	4	0	0
Submarines	0	1	0	1	2	0
Supersonic Combat Aircraft	46	230	60	0	70	50
Subsonic Combat Aircraft	15	0	0	30	10	0
Other Aircraft	43	50	90	110	110	110
Helicopters	120	290	10	60	80	90
Surface-to-Air Missiles	2,953	2,190	540	50	570	540
Surface-to-Surface Missiles	0	0	0	0	0	20
Anti-Ship Missiles	308	220	20	170	0	50

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 4. Number of Weapons Delivered by Major Suppliers to Asia and the Pacific

Weapons Category	U.S.	Russia	China	Major West European	All Other European	All Others
1996-1999						
Tanks and Self-Propelled Guns	476	30	100	0	340	0
Artillery	148	60	50	40	40	840
APCs and Armored Cars	58	70	120	180	70	90
Major Surface Combatants	1	1	1	12	1	2
Minor Surface Combatants	8	5	17	13	6	49
Guided Missile Boats	0	0	4	0	0	0
Submarines	0	3	0	6	0	2
Supersonic Combat Aircraft	284	80	60	80	0	70
Subsonic Combat Aircraft	0	10	0	60	10	0
Other Aircraft	15	0	40	10	20	40
Helicopters	56	90	0	10	20	0
Surface-to-Air Missiles	148	1,340	350	1,650	100	80
Surface-to-Surface Missiles	0	0	0	0	0	10
Anti-Ship Missiles	201	100	90	60	0	0
2000-2003						
Tanks and Self-Propelled Guns	88	310	40	0	120	20
Artillery	108	10	370	10	90	130
APCs and Armored Cars	20	310	310	20	120	80
Major Surface Combatants	8	5	0	2	1	3
Minor Surface Combatants	0	2	2	4	22	20
Guided Missile Boats	0	0	0	0	0	0
Submarines	0	1	0	0	2	0
Supersonic Combat Aircraft	16	200	60	0	10	30
Subsonic Combat Aircraft	15	0	0	30	0	0
Other Aircraft	8	20	30	0	40	50
Helicopters	81	220	0	20	10	10
Surface-to-Air Missiles	2,557	1,250	490	0	60	480
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	232	190	0	80	0	0

Source: U.S. Government.

Note: Asia and Pacific category *excludes* 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 5. Numbers of Weapons Delivered by Major Suppliers to Near East

Weapons Category	U.S.	Russia	China	Major West European	All Other European	All Others
1996-1999						
Tanks and Self-Propelled Guns	393	290	0	280	140	0
Artillery	34	40	30	10	110	20
APCs and Armored Cars	1,576	510	0	370	1,820	40
Major Surface Combatants	0	0	0	2	2	0
Minor Surface Combatants	4	0	0	18	8	3
Guided Missile Boats	0	0	5	8	0	0
Submarines	0	2	0	2	0	0
Supersonic Combat Aircraft	102	20	10	30	20	0
Subsonic Combat Aircraft	0	0	0	10	0	0
Other Aircraft	17	10	10	30	40	40
Helicopters	62	50	0	20	30	0
Surface-to-Air Missiles	799	140	300	30	0	20
Surface-to-Surface Missiles	0	0	0	0	0	20
Anti-Ship Missiles	57	0	160	70	0	0
2000-2003						
Tanks and Self-Propelled Guns	276	70	0	290	420	10
Artillery	71	0	50	70	30	10
APCs and Armored Cars	46	150	40	20	220	120
Major Surface Combatants	2	0	0	4	1	0
Minor Surface Combatants	2	0	0	27	9	48
Guided Missile Boats	0	0	1	4	0	0
Submarines	0	0	0	1	0	0
Supersonic Combat Aircraft	26	30	0	0	20	0
Subsonic Combat Aircraft	0	0	0	0	0	0
Other Aircraft	26	0	30	90	40	30
Helicopters	14	50	0	30	0	20
Surface-to-Air Missiles	374	880	0	0	380	0
Surface-to-Surface Missiles	0	0	0	0	0	20
Anti-Ship Missiles	63	30	20	90	0	20

Source: U.S. Government

Note: All data 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 theses two weapons delivery categories are not necessarily definitive.

Table 6. Numbers of Weapons Delivered by Major Suppliers to Latin America

Weapons Category	U.S.	Russia	China	Major West European	All Other European	All Others
1996-1999						
Tanks and Self-Propelled Guns	0	0	0	50	280	20
Artillery	17	0	0	50	70	30
APCs and Armored Cars	71	30	0	160	50	0
Major Surface Combatants	2	0	0	3	8	0
Minor Surface Combatants	18	0	0	3	71	3
Guided Missile Boats	0	0	0	6	0	2
Submarines	0	0	0	1	0	0
Supersonic Combat Aircraft	0	0	0	0	20	0
Subsonic Combat Aircraft	2	0	0	0	20	20
Other Aircraft	19	20	0	30	40	20
Helicopters	51	70	0	30	20	10
Surface-to-Air Missiles	74	0	120	70	1,110	0
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	8	0	0	40	0	10
2000-2003						
Tanks and Self-Propelled Guns	0	0	0	30	120	0
Artillery	24	0	0	10	30	20
APCs and Armored Cars	1	0	0	0	0	0
Major Surface Combatants	2	0	0	2		0
Minor Surface Combatants	0	0	10	1	0	0
Guided Missile Boats	0	0	0	0	0	0
Submarines	0	0	0	0	0	0
Supersonic Combat Aircraft	4	0	0	0	0	0
Subsonic Combat Aircraft	0	0	0	0	0	0
Other Aircraft	1	0	0	20	20	20
Helicopters	25	10	0	0	30	0
Surface-to-Air Missiles	22	60	50	50	40	40
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	13	0	0	0	0	30

Source: U.S. Government.

Note: All data 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 theses two weapons delivery categories are not necessarily definitive.

Table 7. Number of Weapons Delivered by Major Suppliers to Africa

Weapons Category	U.S.	Russia	China	Major West European	All Other European	All Others
1996-1999						
Tanks and Self-Propelled Guns	0	20	140	10	490	100
Artillery	0	100	0	10	150	80
APCs and Armored Cars	0	110	0	80	230	260
Major Surface Combatants	0	0	0	0	0	0
Minor Surface Combatants	3	0	7	8	7	12
Guided Missile Boats	0	0	0	0	0	1
Submarines	0	0	0	0	0	0
Supersonic Combat Aircraft	0	40	10	0	30	0
Subsonic Combat Aircraft	0	0	0	0	0	10
Other Aircraft	0	0	10	10	50	20
Helicopters	0	30	0	10	50	30
Surface-to-Air Missiles	0	0	0	0	1,250	750
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	0	0	0	0	0	0
2000-2003						
Tanks and Self-Propelled Guns	0	10	60	0	150	60
Artillery	0	20	20	0	440	380
APCs and Armored Cars	0	0	10	10	440	330
Major Surface Combatants	0	0	0	1	0	0
Minor Surface Combatants	0	9	9	6	6	15
Guided Missile Boats	0	0	0	0	0	0
Submarines	0	0	0	0	0	0
Supersonic Combat Aircraft	0	0	0	0	40	20
Subsonic Combat Aircraft	0	0	0	0	10	0
Other Aircraft	8	30	30	0	10	10
Helicopters	0	10	10	10	40	60
Surface-to-Air Missiles	0	0	0	0	90	20
Surface-to-Surface Missiles	0	0	0	0	0	0
Anti-Ship Missiles	0	0	0	0	0	0

Source: U.S. Government.

Note: 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, 1996-2003

Ten tables follow. **Tables 8, 8A, and 8B** and **tables 9, 9A and 9B**, provide the total dollar values for arms transfer agreements and arms deliveries worldwide for the years 1996-2003 in the same format and detail as do **tables 1, 1A and 1B** and **tables 2, 2A and 2B** for arms transfer agreements with and arms deliveries to developing nations. Tables **8C, 8D, 9C and 9D** 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 1996-1999, 2000-2003, and 2003. These tables are set out in the same format and detail as tables **1F** and **1G** for arms transfer agreements with, and tables **2F** and **2G** for arms deliveries to developing nations, respectively.

Total Worldwide Arms Transfer Agreements Values, 1996-2003

Table 8 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 **tables 8A** (constant dollars) **and 8B** (supplier percentages) are derived. Some of the more notable facts reflected by these data are summarized below. Unless otherwise noted, dollar values are expressed in *constant* 2003 U.S. dollars.

- The United States ranked first among all suppliers to the world in the value of arms transfer agreements from 2000-2003, and first for the entire period from 1996-2003 **(figure 1) (table 8C)**.

- Russia ranked second among all suppliers to the world in the value of arms transfer agreements from 2000-2003, and second from 1996-2003.

- France ranked third among all suppliers to the world in the value of arms transfer agreements from 2000-2003, and third from 1996-2003.

- In 2003, the value of all arms transfer agreements worldwide was $25.6 billion. This is the lowest total for worldwide arms transfer agreements, in real terms, for any year since 1997.

- In 2003, the United States was the leader in arms transfer agreements with the world, making $14.5 billion in such agreements, or 56.7% of all arms transfer agreements. Russia ranked second with $4.3 billion in arms transfer agreements, or 16.8% of all arms transfer agreements. Germany ranked third with $1.4 billion. United States arms transfer agreements increased from $13.6 billion in 2002 to $14.5 billion in 2003. The U.S. share of agreements rose from 46.8% to 56.7%. Russia's worldwide arms transfer agreements fell about $6 billion in 2002 to $4.3 billion in 2003 (**table 8A**)**(table 8B)**(**table 8D**).

- The United States and Russia, the top two arms suppliers to the world in 2003 — respectively (ranked by the value of their arms transfer agreements) collectively made agreements in 2003 valued at over $18.8 billion, 73.5% of all arms transfer agreements made with the world by all suppliers.

- The total value of all arms transfer agreements worldwide from 2000-2003 ($126.9 billion) was lower than the value of arms transfer agreements by all suppliers worldwide from 1996-1999 ($133.7 billion), a decline of 5.1% **(figure 1)**.

- During the period from 1996-1999, developing world nations accounted for 67.3% of all arms transfer agreements made worldwide. During 2000-2003, developing world nations accounted for 60.4% of all agreements made worldwide **(figure 1)**.

- In 2003, developing nations were recipients of 53.6% of all arms transfer agreements made worldwide **(figure 1)**.

Total Worldwide Delivery Values 1996-2003

Table 9 shows the annual *current* dollar values of arms deliveries (items actually transferred) worldwide by major suppliers from 1996-2003. The utility of these data is that they reflect transfers that have occurred. They provide the data from which **tables 9A** (constant dollars) **and 9B** (supplier percentages) are derived. Some of the more notable facts illustrated by these data are summarized below. Unless otherwise noted the dollar values are expressed in *constant* 2003 U.S. dollars.

- In 2003, the United States ranked first in the value of arms deliveries worldwide, making $13.6 billion in such deliveries. This is the eighth year in a row that United States has led in such deliveries, reflecting continuing implementation of arms agreements concluded during and immediately after the Persian Gulf war. The U.S. total, however, is a significant decline from 2002 when its delivery values totaled over $24.5 billion (**figure 2) (table 9A)(table 9D**).

- The United Kingdom ranked second in arms deliveries worldwide in 2003, making $4.7 billion in such deliveries.

- Russia ranked third in arms deliveries worldwide in 2003, making $3.4 billion in such deliveries.

- In 2003, the top three suppliers of arms to the world, the United States, the United Kingdom, and Russia, collectively delivered over $21.7 billion, 75.7% of all arms deliveries made worldwide by all suppliers **(table 9D)**.

- The U.S. share of all arms deliveries worldwide in 2003 was 47.5%, down notably from its 58.6% share in 2002. The United Kingdom's share in 2003 was 16.4%, up from 11.8% in 2002. Russia's share of world arms deliveries in 2003 was 11.8%, up from 8.1% in 2002 **(table 9B)**.

- In 2003, the value of all arms deliveries worldwide was $28.7 billion, a substantial decline in the total value of deliveries from 2002 ($41.9 billion in constant 2003 dollars), and the lowest deliveries total by far during the entire period from 1996-2003 **(chart 7) (table 9A)**.

- During the period from 1996-1999, developing world nations accounted for 66.9% of all arms deliveries received worldwide. During 2000-2003, developing world nations accounted for 53.1% of all deliveries worldwide **(figure 2)**.

- In 2003, developing nations as recipients of arms accounted for 59.1% of all arms deliveries received worldwide **(figure 2)**.

- The total value of all arms deliveries by all suppliers worldwide from 2000-2003 ($148.2 billion) was a significant decrease from the value of arms deliveries by all

suppliers worldwide from 1996-1999 ($196.3 billion in constant 2003 dollars), a decline of 12.5% **(figure 2)(table 9A)**.

Table 8. Arms Transfer Agreements with the World, by Supplier, 1996-2003 (in millions of current U.S. dollars)

	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL 1996-2003
United States	10,527	7,187	9,652	11,884	17,799	11,786	13,258	14,543	96,636
Russia	4,900	3,400	2,500	4,500	6,200	5,200	5,800	4,300	36,800
France	2,500	4,900	3,100	1,700	4,300	3,900	400	1,000	21,800
United Kingdom	4,900	1,000	2,000	1,400	600	500	800	100	11,300
China	1,000	1,300	700	2,900	600	1,000	300	300	8,100
Germany	200	600	5,000	4,400	1,200	1,200	1,100	1,400	15,100
Italy	400	300	600	700	200	700	1,000	600	4,500
All Other European	4,000	1,900	1,900	5,700	4,600	3,500	4,000	2,300	27,900
All Others	3,400	700	1,500	2,300	2,200	1,600	1,700	1,100	14,500
TOTAL	**31,827**	**21,287**	**26,952**	**35,484**	**37,699**	**29,386**	**28,358**	**25,643**	**236,636**
Dollar inflation index: (2003=1.00)*	0.8332	0.8507	0.874	0.8949	0.919	0.9458	0.9732	1	

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. The U.S. total in 2000 includes a $6.432 billion licensed commercial agreement with the United Arab Emirates for 80 F-16 aircraft. *Based on Department of Defense Price Deflator.

Table 8A. Arms Transfer Agreements with the World, by Supplier, 1996-2003 (in millions of constant 2003 U.S. dollars)

	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL 1996-2003
United States	12,634	8,448	11,043	13,280	19,368	12,461	13,623	14,543	105,400
Russia	5,881	3,997	2,860	5,028	6,746	5,498	5,960	4,300	40,270
France	3,000	5,760	3,547	1,900	4,679	4,123	411	1,000	24,420
United Kingdom	5,881	1,176	2,288	1,564	653	529	822	100	13,013
China	1,220	1,528	801	3,241	653	1,057	308	300	9,088
Germany	240	705	5,721	4,917	1,306	1,269	1,130	1,400	16,688
Italy	480	353	686	782	218	740	1,028	600	4,887
All Other European	4,801	2,233	2,174	6,369	5,005	3,701	4,110	2,300	30,693
All Others	4,081	823	1,716	2,570	2,394	1,692	1,747	1,100	16,123
TOTAL	**38,198**	**25,023**	**30,836**	**39,651**	**41,022**	**31,070**	**29,139**	**25,643**	**260,582**

Table 8B. Arms Transfer Agreements with the World, by Supplier, 1996-2003 (expressed as a percent of total, by year)

	1996	1997	1998	1999	2000	2001	2002	2003
United States	33.08%	33.76%	35.81%	33.49%	47.21%	40.11%	46.75%	56.71%
Russia	15.40%	15.97%	9.28%	12.68%	16.45%	17.70%	20.45%	16.77%
France	7.85%	23.02%	11.50%	4.79%	11.41%	13.27%	1.41%	3.90%
United Kingdom	15.40%	4.70%	7.42%	3.95%	1.59%	1.70%	2.82%	0.39%
China	3.14%	6.11%	2.60%	8.17%	1.59%	3.40%	1.06%	1.17%
Germany	0.63%	2.82%	18.55%	12.40%	3.18%	4.08%	3.88%	5.46%
Italy	1.26%	1.41%	2.23%	1.97%	0.53%	2.38%	3.53%	2.34%
All Other European	12.57%	8.93%	7.05%	16.06%	12.20%	11.91%	14.11%	8.97%
All Others	10.68%	3.29%	5.57%	6.48%	5.84%	5.44%	5.99%	4.29%
*[Major West European**	*25.14%*	*31.94%*	*39.70%*	*23.11%*	*16.71%*	*21.44%*	*11.64%*	*12.09%*
TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

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

Table 8C. Arms Transfer Agreements with the World, 1996-2003: Leading Suppliers Compared (in millions of current U.S. dollars)

Rank	Supplier	Agreements Value 1996-1999
1	United States	39,250
2	Russia	15,300
3	France	12,200
4	Germany	10,200
5	United Kingdom	9,300
6	China	5,900
7	Sweden	3,600
8	Israel	3,300
9	Italy	2,000
10	Ukraine	2,000
11	Belarus	1,600

Rank	Supplier	Agreements Value 2000-2003
1	United States*	57,386
2	Russia	21,500
3	France	9,600
4	Germany	4,900
5	Ukraine	3,600
6	Israel	3,200
7	Spain	2,600
8	Italy	2,500
9	China	2,200
10	United Kingdom	2,000
11	Sweden	1,400

Rank	Supplier	Agreements Value 1996-2003
1	United States*	96,636
2	Russia	36,800
3	France	21,800
4	Germany	15,100
5	United Kingdom	11,300
6	China	8,100
7	Israel	6,500
8	Ukraine	5,600
9	Sweden	5,000
10	Italy	4,500
11	Spain	3,200

Source: U.S. Government. **Note:** All foreign data are rounded to the nearest $100 million. Where rounded data totals are the same, the actual rank order is maintained. *The U.S. total includes a $6.432 billion licensed commercial agreement with the United Arab Emirates in 2000 for 80 F-16 aircraft.

Table 8D. Arms Transfer Agreements with the World in 2003: Leading Suppliers Compared (in millions of current U.S. dollars)

Rank	Supplier	Agreements Value 2003
1	United States	14,543
2	Russia	4,300
3	Germany	1,400
4	France	1,000
5	Netherlands	800
6	Israel	800
7	Italy	600
8	Poland	400
9	Ukraine	400
10	Switzerland	300
11	China	300

Source: U.S. Government.

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

Table 9. Arms Deliveries to the World, by Supplier, 1996-2003 (in millions of current U.S. dollars)

	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL 1996-2003
United States	15,122	16,614	29,061	18,081	13,127	22,342	23,872	13,648	151,867
Russia	3,300	2,300	2,400	3,200	4,100	4,200	3,300	3,400	26,200
France	3,900	6,700	7,300	4,700	2,500	1,900	2,000	1,200	30,200
United Kingdom	6,500	7,300	3,900	5,100	6,200	4,500	4,800	4,700	43,000
China	700	1,100	700	400	700	700	800	500	5,600
Germany	1,900	1,200	1,500	2,200	1,300	700	800	1,200	10,800
Italy	100	400	200	700	300	400	500	100	2,700
All Other European	3,500	4,400	3,300	2,900	2,900	2,100	2,100	2,400	23,600
All Others	2,100	2,500	1,900	2,300	2,100	2,300	2,600	1,600	17,400
TOTAL	**37,122**	**42,514**	**50,261**	**39,581**	**33,227**	**39,142**	**40,772**	**28,748**	**311,367**
Dollar inflation index: (2003=1.00)*	0.8332	0.8507	0.874	0.8949	0.919	0.9458	0.9732	1	

Source: U.S. Government

Note: All data are for the calendar year given, except for U.S. MAP (Military Assistance Program), IMET (International Military Education and Training), excess defense articles, and commercially licensed deliveries, 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.
*Based on Department of Defense Price Deflator.

Table 9A. Arms Deliveries to the World, by Supplier, 1996-2003
(in millions of constant 2003 U.S. dollars)

	1996	1997	1998	1999	2000	2001	2002	2003	TOTAL 1996- 2003
United States	18,148	19,530	33,251	20,204	14,284	23,622	24,529	13,648	167,217
Russia	3,961	2,704	2,746	3,576	4,461	4,441	3,391	3,400	28,680
France	4,681	7,876	8,352	5,252	2,720	2,009	2,055	1,200	34,145
United Kingdom	7,801	8,581	4,462	5,699	6,746	4,758	4,932	4,700	47,679
China	840	1,293	801	447	762	740	822	500	6,205
Germany	2,280	1,411	1,716	2,458	1,415	740	822	1,200	12,042
Italy	120	470	229	782	326	423	514	100	2,964
All Other European	4,201	5,172	3,776	3,241	3,156	2,220	2,158	2,400	26,324
All Others	2,520	2,939	2,174	2,570	2,285	2,432	2,672	1,600	19,192
TOTAL	**44,553**	**49,976**	**57,507**	**44,229**	**36,155**	**41,385**	**41,895**	**28,748**	**344,448**

Table 9B. Arms Deliveries to the World, by Supplier 1996-2003 (expressed as a percent of total, by year)

	1996	1997	1998	1999	2000	2001	2002	2003
United States	40.74%	39.08%	57.82%	45.68%	39.51%	57.08%	58.55%	47.47%
Russia	8.89%	5.41%	4.78%	8.08%	12.34%	10.73%	8.09%	11.83%
France	10.51%	15.76%	14.52%	11.87%	7.52%	4.85%	4.91%	4.17%
United Kingdom	17.51%	17.17%	7.76%	12.88%	18.66%	11.50%	11.77%	16.35%
China	1.89%	2.59%	1.39%	1.01%	2.11%	1.79%	1.96%	1.74%
Germany	5.12%	2.82%	2.98%	5.56%	3.91%	1.79%	1.96%	4.17%
Italy	0.27%	0.94%	0.40%	1.77%	0.90%	1.02%	1.23%	0.35%
All Other European	9.43%	10.35%	6.57%	7.33%	8.73%	5.37%	5.15%	8.35%
All Others	5.66%	5.88%	3.78%	5.81%	6.32%	5.88%	6.38%	5.57%
*[Major West European**	*33.40%*	*36.69%*	*25.67%*	*32.09%*	*31.00%*	*19.16%*	*19.87%*	*25.05]*
TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

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

Table 9C. Arms Deliveries to the World, 1996-2003: Leading Suppliers Compared (in millions of current U.S. dollars)

Rank	Supplier	Deliveries Value 1996-1999
1	United States	78,878
2	United Kingdom	22,800
3	France	22,600
4	Russia	11,200
5	Germany	6,800
6	Sweden	3,900
7	China	2,900
8	Israel	2,000
9	Ukraine	1,800
10	Italy	1,400
11	Netherlands	1,300
Rank	**Supplier**	**Deliveries Value 2000-2003**
1	United States	72,989
2	United Kingdom	20,200
3	Russia	15,000
4	France	7,600
5	Germany	4,000
6	Ukraine	3,400
7	China	2,700
8	Israel	2,100
9	Italy	1,300
10	Sweden	1,000
11	North Korea	600
Rank	**Supplier**	**Deliveries Value 1996-2003**
1	United States	151,867
2	United Kingdom	43,000
3	France	30,200
4	Russia	26,200
5	Germany	10,800
6	China	5,600
7	Ukraine	5,200
8	Sweden	4,900
9	Israel	4,100
10	Italy	2,700
11	Belarus	1,800

Source: U.S. Government.

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

Table 9D. Arms Deliveries to the World in 2003: Leading Suppliers Compared (in millions of current U.S. dollars)

Rank	Supplier	Deliveries Value 2003
1	United States	13,648
2	United Kingdom	4,700
3	Russia	3,400
4	Ukraine	1,500
5	France	1,200
6	Germany	1,200
7	China	500
8	Israel	400
9	Italy	100
10	Belgium	100
11	Norway	100

Source: U.S. Government.

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

Description of Items Counted in Weapons Categories, 1996-2003

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
Kampuchea (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
Canada
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/Federal Republic(Serbia/Mont.)

Regions Identified in Arms Transfer Tables and Charts (Cont.)

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
Paraguay
Peru
St. Kitts & Nevis
St. Lucia
St. Pierre & Miquelon
St. Vincent
Suriname
Trinidad
Turks & Caicos
Venezuela