CAMPAIGN
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ARMS
TRADE

Trends in UK arms exports in 2023

EXECUTIVE SUMMARY

March 2025

Executive Summary

This report summarises key quantitative and qualitative trends in UK arms exports in 2023, and in the 5–10 year periods up to 2023, using a variety of sources of information, official and otherwise. This follows on from CAAT's previous Annual Report on UK arms exports in 2022, published in October 2023. The report covers 2023 rather than 2024 as some of the data for 2023 was not released until December 2024.

The arms trade in general is seriously lacking in transparency. Data on the UK arms trade comes from numerous sources, measuring different things and each with their own issues and exclusions. This report seeks to provide an overall picture for UK arms exports by presenting and discussing data from all reliable sources. It is the only place where all such information on UK arms exports is presented and discussed together.

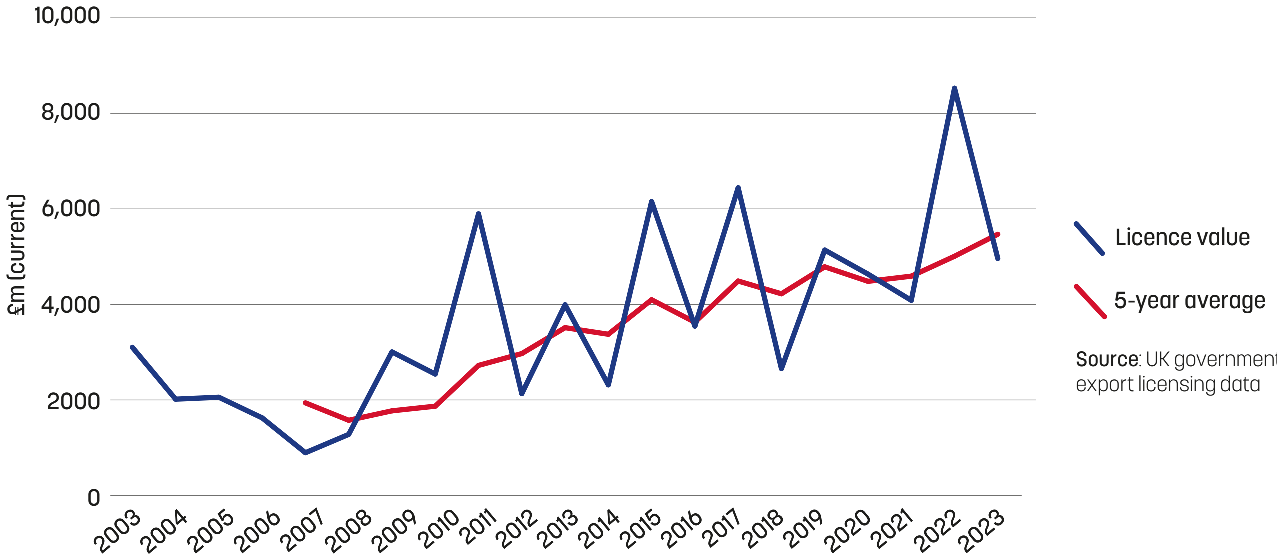
For data and discussion on the UK's arms trade with Israel, see our December 2023 briefing.

Arms export licences

- **The value of Single Individual Export Licences (SIELs) issued in 2023 for items on the Military List was £5.0 billion, a fall of 42% on the record figure of £8.5b for 2022.**
- However, the value of SIELs over the period 2019–23, £27.3 billion, was the highest level recorded for a 5-year period, an increase of 5.8% in real terms compared to 2018–22.
- These figures do not include 'open' export licences, which allow for unlimited deliveries, and have no financial value attached. CAAT estimates that, on average, roughly half of UK arms exports are conducted using open licences.
- The top 5 recipient countries for single licences in 2023 by value were:
  - United States: £984 million (19.8% of the total)
  - Saudi Arabia: £515m (10.4%)
  - Ukraine: £411m (8.3%)
  - Qatar: £351m (7.1%)
  - France: £349m (7.0%)
- For the 5-year period 2019–2023, the top 5 recipients were:
  - Saudi Arabia: £4,012 million (14.7%)
  - United States: £3,724m (13.6%)
  - Qatar: £3,691m (13.5%)
  - India: £1,327m (4.9%)
  - Italy: £1,249m (4.6%)
  - By region, 38% of the value of SIELs were for export to Europe, 25% to the Middle East, 24% to the US and Canada, 11.5% to Asia & the Pacific, 1.0% to Latin America & the Caribbean, and 0.7% to Africa.

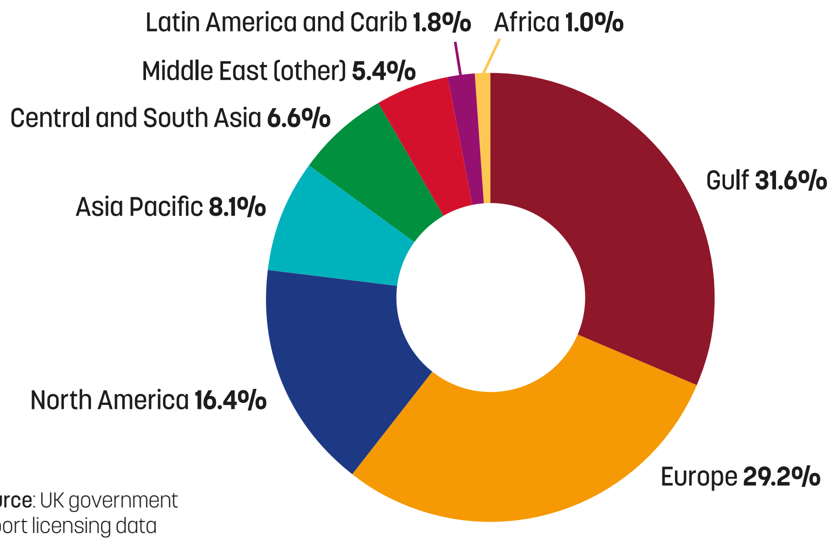
- In comparison with recent years, this represents a large reduction in the share of licences to the Middle East, a smaller reduction to Asia and the Pacific, and substantial increases to Europe, the US and Canada.
- The figures for licences to Ukraine do not include donations of military equipment by the UK MOD, which do not require an export licence.

Figure 1 UK single export licence value 2003–23



Source: UK government export licensing data

Figure 2 Arms export licence value by region 2019–23

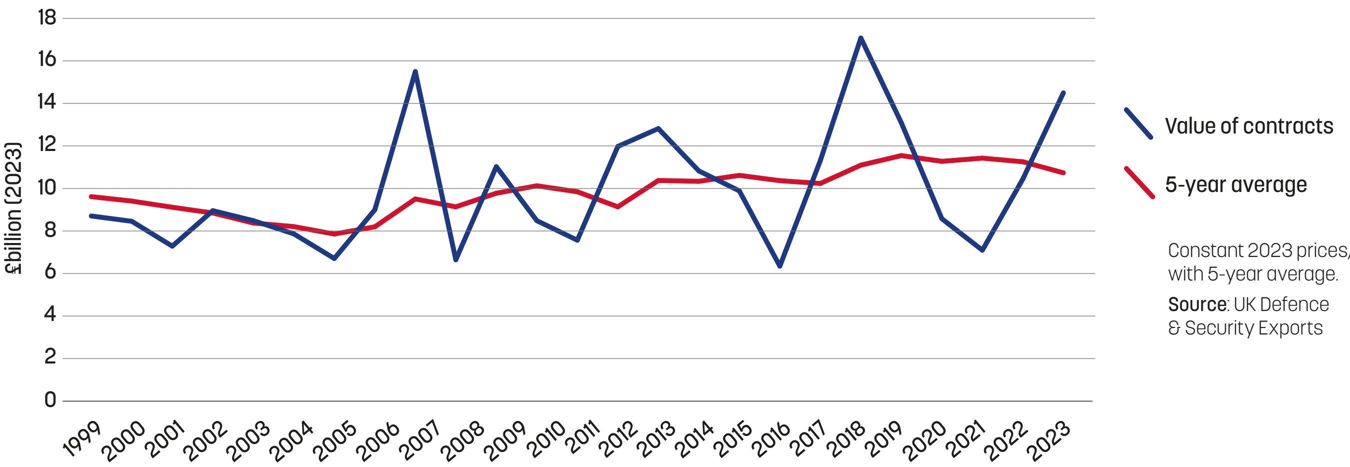


Source: UK government export licensing data

Arms export contracts statistics from UK Defence & Security Exports (UKDSE)

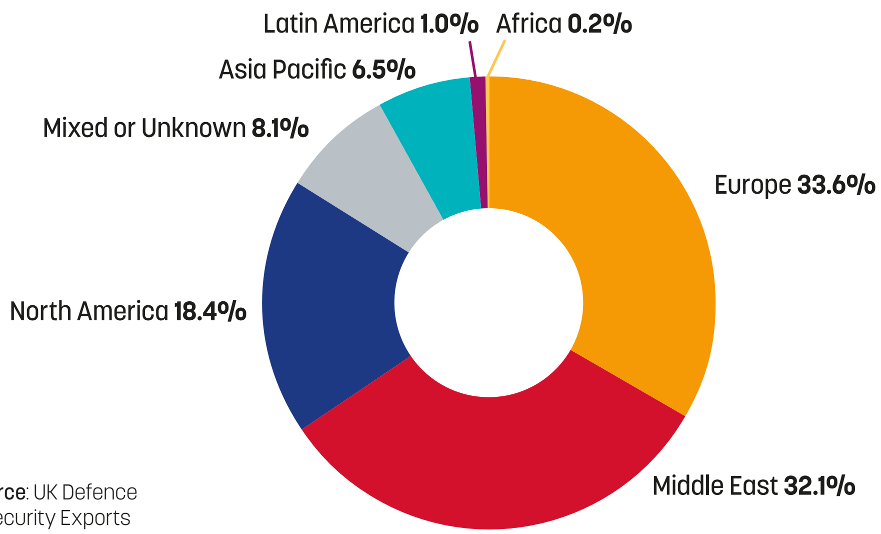
- **The value of arms export contracts obtained by UK companies in 2023 was £14.5 billion, according to the UKDSE survey, a large increase on the £9.7 billion figure for 2022.**
- The value of contracts for the 10-year period 2012–23 was £91.7 billion, a record in nominal terms. However, the 5-year moving average was slightly down, at £9.1b (in 2021 prices), a fall of 4.6% in real terms.
- Europe was the largest customer region during 2019–23, with 33.6% of the value of contracts, followed by the Middle East at 32.1%, the US and Canada at 18.4%, and Asia Pacific at 6.5%, with just 1.0% to Latin America and 0.2% to Africa.
- As with the export licence data, this represents a substantial shift in recent years from sales to the Middle East to Europe. The value of sales to Europe has more than quadrupled between 2013–17 and 2019–23, from £3.8 billion to £16.15b.
- Unlike the export licence data, these figures do not depend on the type of licence that may be used to conduct the exports. They are therefore more inclusive, and thus significantly higher, than the figures for Single Individual Export Licences.

Figure 3 UK arms exports contract value 1999–2023



Constant 2023 prices, with 5-year average.
Source: UK Defence & Security Exports

Figure 4 UK arms export contracts 2019–23 by region



Source: UK Defence & Security Exports

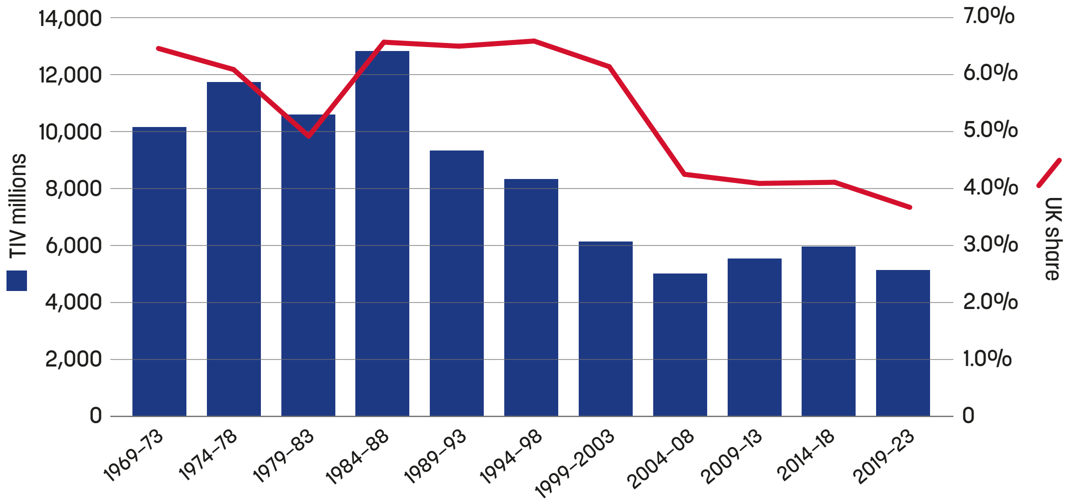
The Joint Economic Data Hub (JEDHub)

- A survey of the 22 largest UK arms companies by the Joint Economic Data Hub (JEDHub), part of the government's UK Defence Solutions Centre, found that revenue for these companies from international customers in 2022 was **£7.8 billion**, down from £8.1b in 2021.
- A large majority of this revenue, £5.7 billion, was in the "combat air" category. Weapons and Ammunition, much of it missiles for combat aircraft, was next at £660m. Combat air was also the most export dependent sector, with 72% of company revenues coming from exports.

Stockholm International Peace Research Institute (SIPRI) data on transfers of major conventional weapons

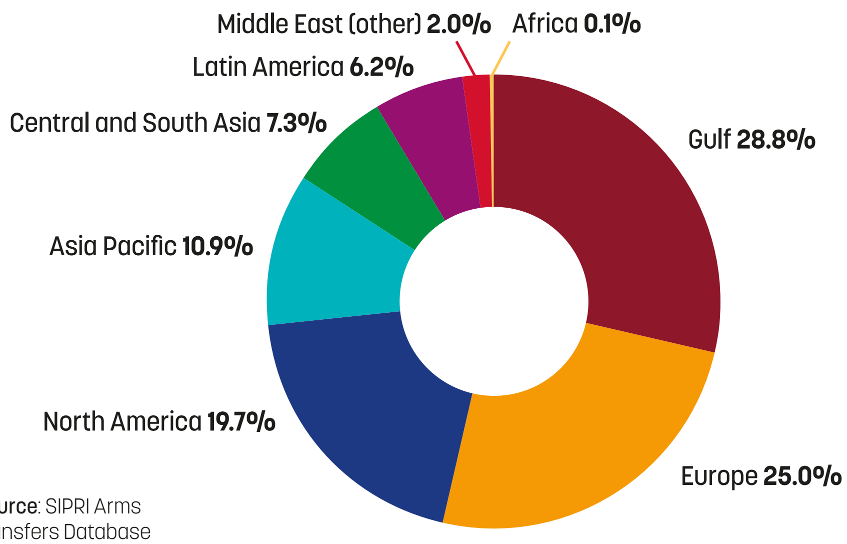
- **According to the SIPRI Arms Transfers Database, the UK accounted for 3.7% of global deliveries of major conventional weapons between 2019–23, an increase from the 2018–22 figure of 3.2%. The UK remained in 7th place among the world's major exporters,**
- **In absolute terms, the volume of UK exports fell by 14% compared to 2014–18.**
- SIPRI figures are measured using their own "Trend Indicator Value" (TIV), which is not a financial measure, but seeks to capture an equivalent value of systems from different countries, regardless of the price paid.
- The SIPRI Arms Transfers Database does not cover small arms and light weapons, most components and subsystems, or military services.
- The top recipients of UK exports over 2019–23 were Qatar, with 22.7% of deliveries by TIV, followed by the USA (19.7%), Ukraine (8.4%), France (6.4%), and India (5.8%). This is the first time Saudi Arabia has been out of the top 5 recipients for many years.
- The Middle East was the largest recipient region for UK exports of major weapons during 2019–23, at 30.8%, followed by Europe (25%), the US and Canada (19.7%), Asia and the Pacific (18.2%), South America (6.2%), and Africa (0.1%).
- The vast majority of UK deliveries to the Middle East were to the Gulf States (28.8% out of 30.8%)
- The shift from the Middle East to Europe is even starker for SIPRI's major conventional weapons data: during 2014–18, 60.4% of UK deliveries were to the Gulf States, with 29.3% to Asia and the Pacific, and just 6.1% to Europe, the US and Canada combined.
- Transfers of major weapons to Ukraine are included in the SIPRI data, including donations of second-hand equipment as military aid, but these are rated at a lower value than equivalent new equipment by SIPRI's TIV measure.

Figure 5 UK exports of major conventional weapons 1969–2023 (SIPRI), with share of world total



Source: SIPRI Arms Transfers Database

Figure 6 UK exports of major conventional weaons by region 2019–23



Source: SIPRI Arms Transfers Database

Conclusions

- The different sources of data show a mixed picture, with some showing an increasing trend while others show a decreasing or steady trend. One-year figures sometimes move in a different direction to longer 5-year trends. Overall, the data is consistent with the level of the UK arms trade remaining fairly steady, at a fairly high level by historical standards.
- What is very clear from all data sources is that there has been a shift in recent years from exports to the UK's traditional customers in the Middle East towards European countries. This is a result of Europe's rapid militarisation in the wake of the Russian invasion of Ukraine, but also something of a lull in major new orders from the Middle East.
- While the trend towards European militarisation, and thus of UK arms sales to Europe, is likely to continue, the lull in sales to the Middle East may be a temporary one, with a new order of Eurofighter Typhoons to Qatar agreed in principle, and potential deals for Typhoons to Türkiye and Saudi Arabia being discussed, with the former seemingly at an advanced stage of negotiations.