CAMPAIGN AGAINST ARMS TRADE

Trends in UK arms exports in 2023

March 2025

Contents

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.

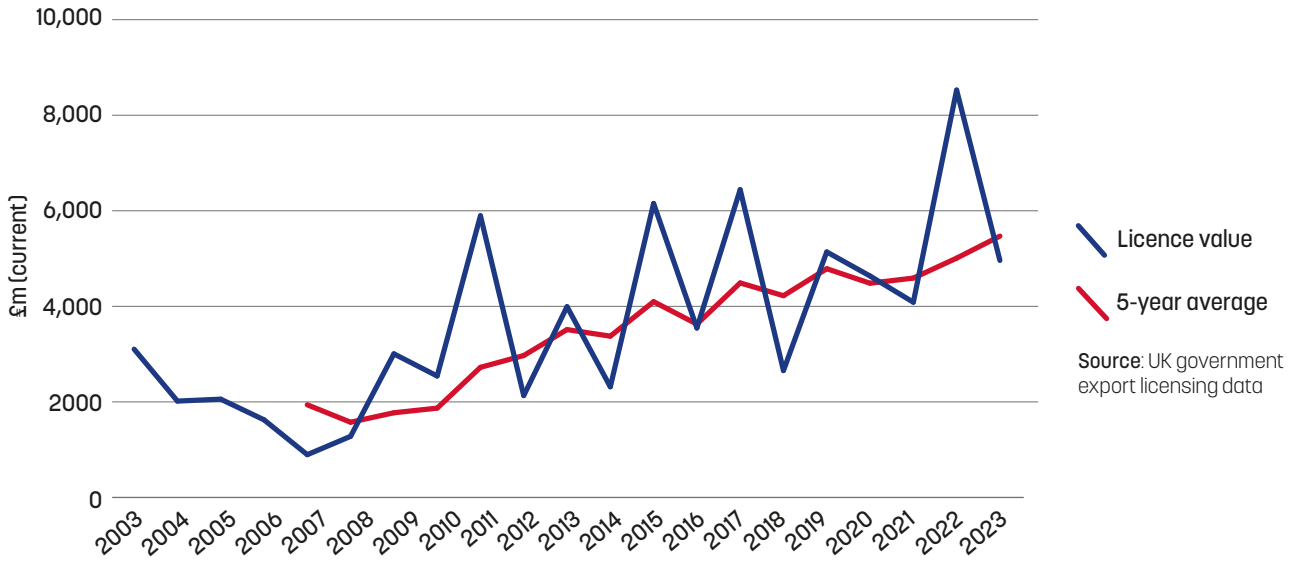
For data and discussion on the UK's arms trade with Israel, see our December 2023 briefing.

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.

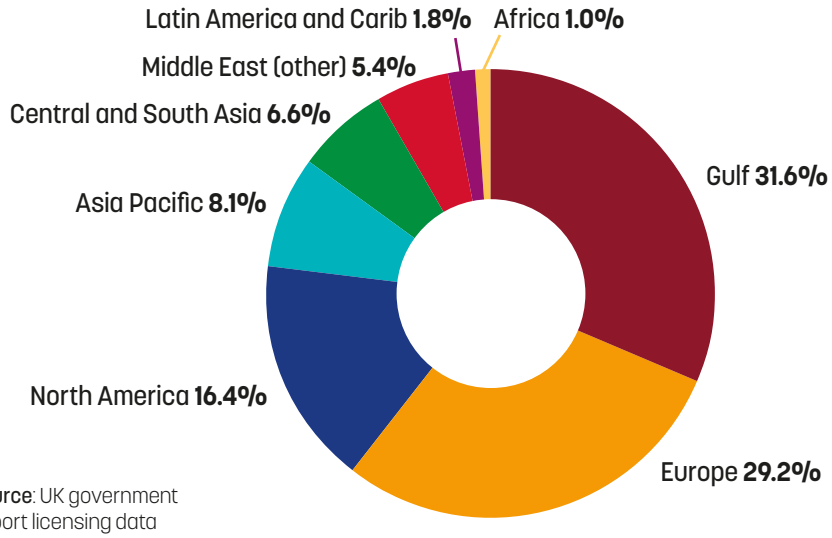
- In comparison with recent years, this represents a large reduction in the share of licences to the Middle East, a smaller reduction to Asia and the Pacific, and substantial increases to Europe, the US and Canada.
- The figures for licences to Ukraine do not include donations of military equipment by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

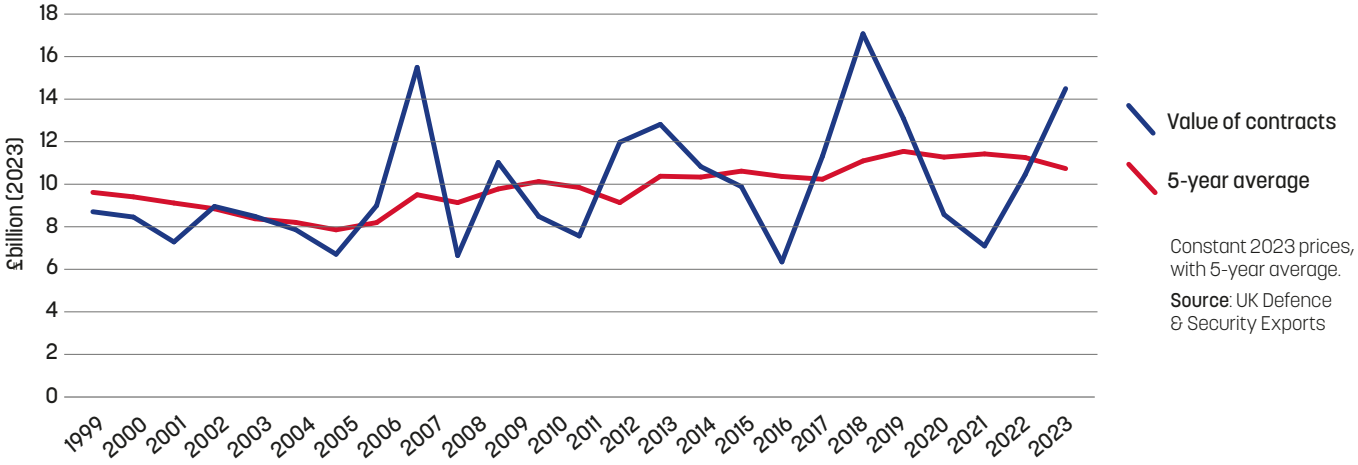


Source: UK government export licensing data

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.

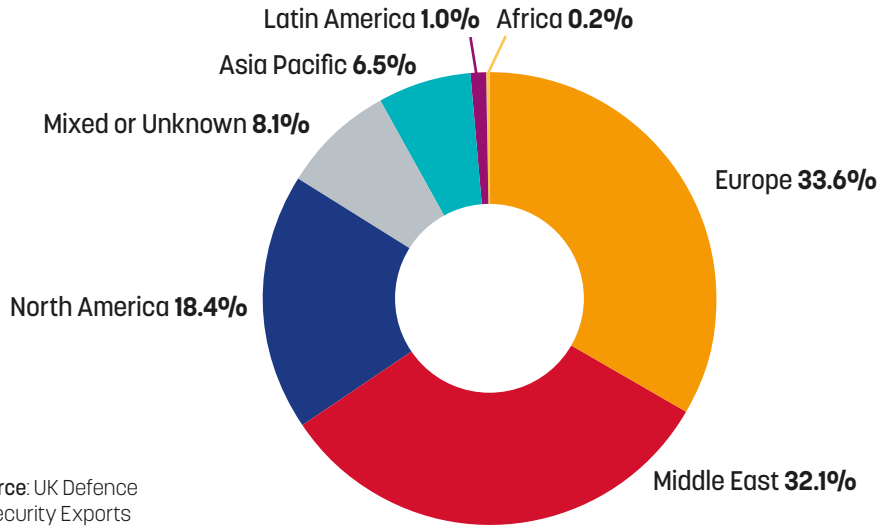
Figure 3 UK arms exports contract value 1999–2023



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

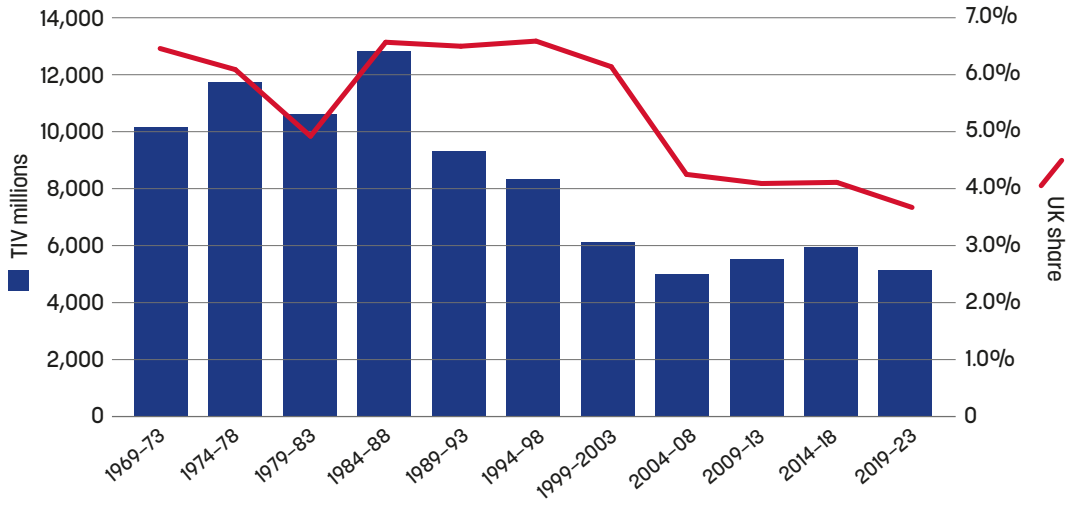
The Joint Economic Data Hub (JEDHub)

- 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

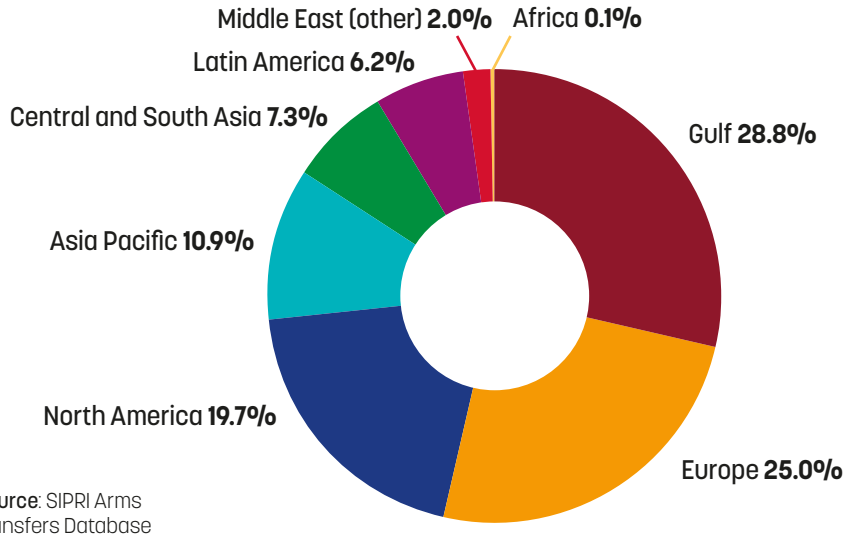
- **According to the SIPRI Arms Transfers Database, the UK accounted for 3.7% of global deliveries of major conventional weapons between 2019–23, an increase from the 2018–22 figure of 3.2%. The UK remained in 7th place among the world's major exporters,**
- **In absolute terms, the volume of UK exports 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.

Trends in UK arms exports in 2023

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 a lot of data on arms exports is released well after the end of the year; full export licence data for 2024 is not likely to be available till June, while data on arms export contracts for 2023 was not released until December 2024.

Globally, the arms trade is generally an area of poor transparency. Data on the arms trade, including for the UK, comes in many different forms, measuring different things. Due to the lack of transparency, even the best sources (such as SIPRI) cannot give a complete picture. Some sources measure export licences, some contracts, some deliveries, etc. Thus, different types of data for the same country may give quite different pictures, which can make it quite difficult to get a complete picture. This report seeks to provide such an overall picture for UK arms exports by presenting and discussing data from all the available reliable sources, making clear what each one includes and does not include. It is the only place where all such information on UK arms exports is presented and discussed together.

Public debate and concern over the arms trade over the past year or more has been dominated by the issue of UK arms supplies to Israel, in the context of Israel's ongoing genocide in Gaza, and its brutal invasion and bombing of Lebanon. Israel is far from the UK's largest arms customer, but the human impact and the political significance of UK arms supplies to Israel, in particular critical components of the F-35 combat aircraft, are far out of proportion to their financial value. Moreover, a large proportion of UK arms supplies to Israel are not captured either in UK government export licensing data or in SIPRI data – firstly because they go through non-transparent open licences, and secondly because they are components rather than the major conventional weapons that SIPRI tracks.

Therefore, alongside this overall statistical report on UK arms exports, in December we published a revised version of our briefing detailing what we know about UK arms supplies to Israel, as well as the limited measures the government has taken to stop them.

1 Overall patterns and trends

Aside from Israel, many of the UK's major arms export customers raise serious concerns relating to human rights and repression, armed conflict, and/or corruption. Typically, most UK arms exports go to the US (itself a problematic destination in many ways), Europe, and – most of all – to the Middle East. The Gulf states especially, notably Saudi Arabia, Oman, Qatar, and to a lesser extent the UAE are major recipients with which the UK has long-standing political and military relationships. The UK strongly supports these repressive regimes, and invests considerable political and diplomatic effort in promoting major arms sales to them, including Prime Ministerial and Royal visits. The UK has repeatedly shown willingness to bend or break the rules on both arms export controls and anti-corruption efforts to ensure the smooth continuance of arms sales to Saudi Arabia in particular. Another significant Middle Eastern/European arms customer is Türkiye, also a highly repressive regime engaged in armed conflict internally and in Iraq and Syria, occupying part of the latter's territory as part of its conflict with Kurdish groups.

Ukraine has become a major recipient of UK arms since the Russian invasion of the country in 2022. However Ukraine does not appear as highly in rankings of UK customers as the sheer pace and volume of arms supplies might suggest, for two reasons: first, most of the equipment supplied to Ukraine is second hand, and thus of lower value than comparable new equipment, and second, most is either donated by the UK MOD from its own stocks – which does not require an export licence and therefore does not appear in export licensing data – or is procured by the MOD on the international market, which again does not show up in UK export licensing data (or UK corporate contract and revenue data). Only a minority of UK arms supplies to Ukraine come from production and export by UK companies.

The war in Ukraine has nonetheless contributed to a shift in patterns of UK arms exports, as it has led to large and ongoing rises in military spending across Europe, and major arms purchases, from which UK arms companies, as well as others, have profited. Combined with a recent relative lull in major new arms deals with the Middle East (which may be coming to an end), this has shifted the balance in recent years of UK arms exports, to some extent, from the Middle East to Europe.

The different sources of data on UK arms exports provide varying pictures in the trend in the overall level of arms sales, with some showing an increase in 2023 and others a decrease – bearing in mind that these different sources measure different things and vary in their timings (for example, typically contracts come before export licences which come before deliveries). Furthermore, the one-year figures for some data sources – which can often be 'lumpy', showing large increases and decreases from one year to another – are often going in different directions to, for example, 5-year average trends.

Overall, it is hard to say whether the total value of the UK arms trade is increasing or decreasing at present, or remaining roughly level; however, all measures show it to be at a decidedly *high* level by historical standards, with the exception of SIPRI figures

for transfers of major conventional weapons. This is due to the fact that components, subsystems, and services such as maintenance and logistics, not captured by SIPRI, have increased in their importance to the UK arms trade.

The sources of data discussed in this report, and what they cover, are shown in the box below. Section 2 covers export licensing data, section 3 data on contracts from UKD&SE, section 4 data on arms company export revenue from the Joint Economic Data Hub (JEDHub), section 5 information on arms supplies to Ukraine from research reports published by the House of Commons Library, section 6 SIPRI data on deliveries of major conventional weapons, and section 7 other sources of data. Section 8 concludes.

What types of data are there on the UK arms trade?

- Data from the government on *export licences* issued to UK companies. This is the most detailed data, with qualitative and quantitative information on what is licenced to which country. However this only gives a partial picture of the value of the UK arms trade, as only 'single' licences have a financial value attached. 'Open' licences, allowing an unlimited quantity and value of exports, do not. CAAT estimates that about half of UK arms exports are made using such open licences.
- Data from the government's arms export promotion unit, UK Defence & Security Exports, on the value of *contracts* for arms exports won by UK companies each year. This gives a fuller picture of the value of UK arms sales, as it doesn't depend on what type of export licence is used, but has very little detail, including no breakdown by country, only by region.
- Survey data by the Joint Economic Data Hub (JEDHub) on major UK arms companies' *revenue* from arms exports. This uses a more rigorous methodology, and is also more comprehensive, but doesn't include smaller companies, and also has limited detail.
- Data on exports of 'major conventional weapons' by the Stockholm International Peace Research Institute (SIPRI). This provides detailed qualitative and quantitative information on arms trade by and between all countries. However, it excludes small arms and light weapons, most exports of components and subsystems, and military services. A large proportion of the UK arms trade involves components and services in particular.
- Other sources, such as company annual reports, specific government reports on e.g. arms to Ukraine, and annual reports to the UN Register of Conventional Arms, may give some additional information, but are not systematic sources of data.

More discussion of these sources are presented in CAAT's annual report for 2022.

2 Arms export licences

Data on the quantity and value of military and dual-use export licences issued by the government, along with the types of equipment licences to each destination, are published by the Export Control Joint Unit within the Department for Business and Trade. They are published in annual and quarterly reports, and in an online database. The information is reproduced by CAAT in our online data browser, where the data is presented in a far more fine-grained and user-friendly fashion. Information on the different types of licence, the meaning of the data, and the categories of equipment on the UK military list are discussed in the previous annual report. A summary is shown below in box 2, and some information on these is also available on CAAT's export licences browser.

2.1 About export licensing

The export of *controlled goods*, i.e. military goods and dual-use goods, requires an *export licence* from the government to be legal. This includes equipment, software, and technology. "Military" goods refer to goods that are specifically designed or adapted for military use, while "Dual-Use" goods refer to certain categories of goods that have both military and civilian applications.

Other types of licences, called *trade control licences* (sometimes called brokerage licences), are required for individuals or companies based in the UK, or who are UK citizens, who wish to arrange the sale of military or dual-use goods from one country to another, without the goods ever being in the UK. This report focuses primarily on export licences rather than trade control licences.

A complete list of goods subject to strategic export controls (military and dual use) is available here. They are divided into various categories, of which some of the most frequently used are:

ML1 Small arms, including rifles, handguns, sub-machine guns, and volley guns
ML2 Light weapons, including larger guns, howitzers, cannon, mortars, anti-tank weapons, projectile launchers, etc.
ML3 Ammunition and fuse-setting devices
ML4 Bombs, torpedoes, rockets, missiles, grenades etc., and countermeasures
ML5 Radars, sensors, fire control equipment, targeting equipment, and countermeasures.
ML6 Military land vehicles
ML9 Military naval vessels and naval equipment, including surface ships and submarines
ML10 Military aircraft, including fixed-wing aircraft, helicopters, and UAVs
ML11 Military electronic equipment, and spacecraft
ML13 Armoured or protective goods and constructions for military use (e.g. armoured plate)
ML21 Software for military use
ML22 Technology for military goods
PL5001 Security and paramilitary goods, e.g. riot shields, other riot-control equipment and vehicles

Each category also includes components and related equipment for the main items in the category

There are three main types of export licence:

1. Single Individual Export Licences (SIELs). These authorise the transfer of a fixed quantity of specified equipment to an end-user in a particular country, up to a maximum value. Usually valid for 2 years. These are the only type of export licence to which a financial value is attached.
2. Open Individual Export Licences (OIELs). These authorise the transfer of unlimited quantities of specified goods to end-users in one or more destination countries, with no limit on value. Generally valid for 3 or 5 years.
3. Open General Export Licences (OGELs). These are pre-issued licences, covering one or more destinations and a specified list of goods or categories of goods. Companies may register for these OGELs, after which, subject to certain conditions, they can export unlimited quantities and values of goods covered by the licence to the listed destinations.

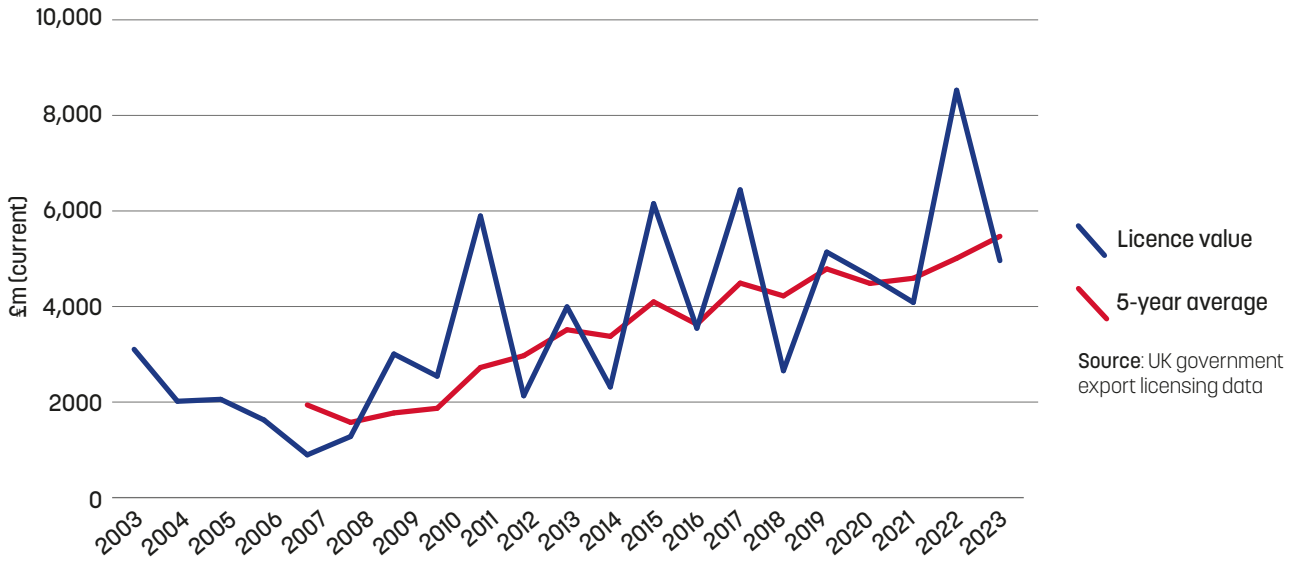
Some OGELs relate to specific programmes (e.g. Eurofighter Typhoon or the F-35 combat aircraft). Others relate to specific, limited purposes, such as for display at an exhibition. Others cover a wide range of equipment to a long list of countries. A full list of valid OGELs can be found here.

For more information, see CAAT's previous annual report, or the government's Annual Report on Strategic Export Controls.

2.2 Licensing data for 2023

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. As SIELs are only one type of licence, not too much weight should be placed on the value of single licences in one year. As figure 1 shows, the value of SIELs issued often fluctuates dramatically from year to year. Nonetheless, the total value of SIELs over the period 2019–23, of £27.3 billion, was once again the highest level recorded for a 5-year period, and represented an increase of 5.8% in real terms compared to 2018–22. Generally, this figure has shown a steady increasing trend since 2008. This remains the case when accounting for inflation, although the trend is more uneven.

Figure 1 UK single export licence value 2003–23



Source: UK government export licensing data

A total of 1180 Open Individual Export Licences (OIELs) were issued in 2023 for items on the Military List, a fall of 18% from 2022.[1] The number of OIELs issued should be treated with caution, as no information is provided on the value of exports conducted under an individual OIEL; some may be used frequently to export high value equipment, while others may be used only occasionally to export low-value equipment. Evidence from FOIs suggests that many OIELs go to fairly small or medium-sized companies which, given their overall level of revenues, cannot be making huge levels of exports, even if the OIELs they hold theoretically permit them to. Moreover, as OIELs are valid for 3–5 years, exports will most likely have been conducted in 2023 using OIELs issued as far back as 2018.

157 Trade Control licences (SITCLs and OITCLs) were issued in 2023, compared to 91 in 2022.[2]

A significant, but unknown, proportion of UK arms exports is also conducted using Open General Export Licences. The number of OGELs that are valid at any one time for military list items is fairly steady, and changes do not give any indication of an increase or decrease in the level of exports.

The top 10 destinations for SIELs by value in 2023, and the top ten for the 5-year period 2019–2023, are shown in tables 1 and 2. The **United States** was the top destination for SIELs in 2023, overtaking the Gulf states, followed by **Saudi Arabia**, **Ukraine**, **Qatar**, and **France**. Over the five-year period 2019–2023, the top destinations were **Saudi Arabia**, **the USA**, **Qatar**, **India**, and **Italy**. The value of SIELs issued to the USA has remained consistently high over the past decade, although the majority of UK arms exports to the US are conducted using open licences.

Ukraine continued to rise up the rankings, although most UK arms supplies are donations from the MOD which are not subject to export licensing, and are reported elsewhere. Exports to **Saudi Arabia** using SIELs were considerably reduced in 2023, as there were far fewer licences for bombs and missiles and their components, which typically require SIELs rather than open licences. This is likely the result of the truce in the war in Yemen, which has seen an end to Saudi air strikes, and thus a reduction in their demand for munitions. Over the period 2019–23, however, £3.0 billion out of the £4.0 billion total value of SIELs to Saudi Arabia were for the ML4 category of bombs and missiles etc. The overwhelming majority of the value of licences to **Qatar** in 2023 was for ML4 items, chiefly air-to-air missiles for the UK-supplied Eurofighter Typhoons that began to be delivered in 2023. It seems likely that the licence issued in May 2022 for "combat aircraft", worth £2.4 billion, covered all 16 aircraft to be delivered to Qatar, of which 8 were delivered in 2022 and 8 in 2023 (see SIPRI data below).

Both in 2023 and in the period 2019–2023, open licences have been most commonly issued for export to 'western' recipients, although some other recipients such as India, Brazil, and Oman have also been the destination of a substantial number of OIELs.

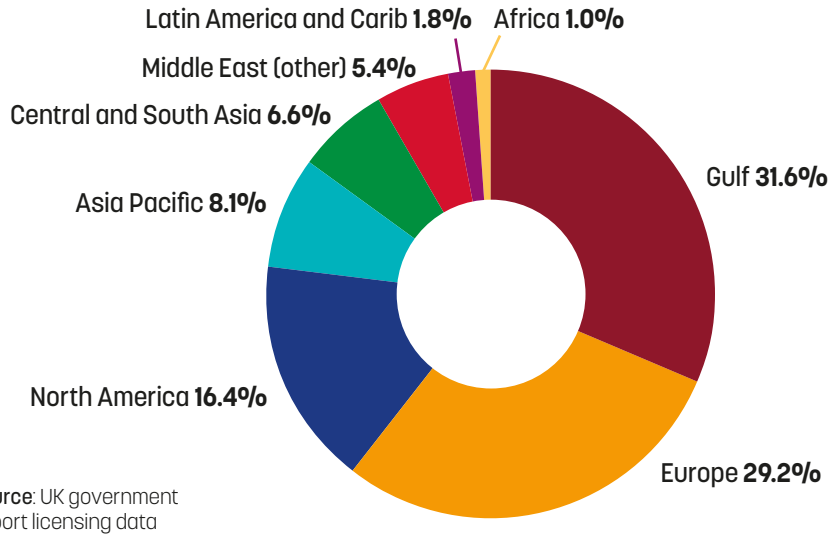
Breaking down the figures by region (See figure 2), 38% of the value of SIELs in 2023 were for exports to Europe, 25% to the Middle East, 24% to the US and Canada, 11.5% to the Asia & Pacific region, 1.0% to Latin America and the Caribbean, and

1 The figures given here are for the number of OIEL destinations; OIELs frequently authorise exports to multiple destinations, so, for example, a single OIEL with 10 destinations included is counted here as 10 towards the total.

2 This is based on counting each destination approved within the same overall licence as a separate case. The number of trade control licences issued appears to be reported in the government database in a variety of different ways. It is therefore not particularly meaningful to compare numbers of trade control licences from year to year.

0.7% to Africa. After Saudi Arabia, and Qatar. Other significant Middle Eastern recipients were Türkiye (£98.6m), and the UAE (£56.5m). The value of SIELs to Israel was £18.2m, but as discussed in section 5, most UK arms exports to Israel go through open licences, frequently indirectly through the USA or other F-35 partner countries. In Europe, after Ukraine the largest recipients were France (£349m), Poland (£229m), Romania (£139m), and Italy (£129m). Within the Asia Pacific region, India (£114m), South Korea (£112m), and Bangladesh (£106m) were the largest recipients.

Figure 2 Arms export licence value by region 2019–23



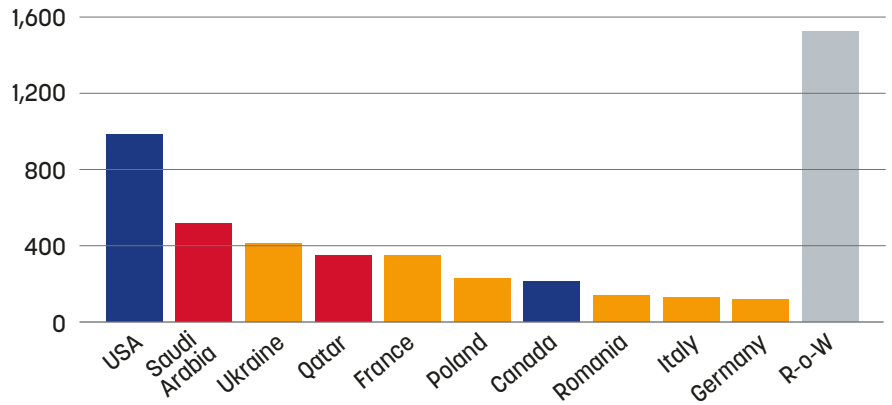
Source: UK government export licensing data

Over the 5-year period 2019–23, 31.6% of the value of SIELs were for exports to the Gulf states (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE – chiefly the latter 4), 29.2% were to Europe, 16.4% to North America, 8.1% to East Asia and the Pacific, 6.6% to South and Central Asia, 5.4% to the rest of the Middle East (not including the Gulf), 1.8% to Latin America and the Caribbean, and 1.0% to Africa. A similar picture emerges over the 10-year period 2014–23. Thus, in highlighting the Middle East as one of the largest recipient regions for UK arms exports, it is relevant to specify that the Gulf states in particular are the key UK market; indeed, outside its NATO allies, the Gulf states receive a clear majority of UK arms exports.

In terms of the categories of equipment on the military list represented by SIELs, ML10 (aircraft and components) remains the largest category by value, at £1,185 million in 2023, though this is way down on the figure for 2022, when the licences for the Qatari Eurofighters was issued, followed by by ML4 (bombs, missiles, and countermeasures) at £791 million also well down. ML5, covering radars, target acquisition systems, and other sensors, was not far behind at £637m, followed by ML11 (military electronic equipment) at £321m, ML14 (training and simulation equipment) at £284m, and ML9 (warships and components) at £275m. There was also an unusually high value of £269m in the ML17 ”miscellaneous” category, the great majority of which (£231.3m) was for a single licence to Ukraine for ”goods treated for signature suppression for military use”, i.e. for masking the electromagnetic signatures of military systems and the signals they send and receive.

Table 1 Top 10 destinations for SIELs by value 2023

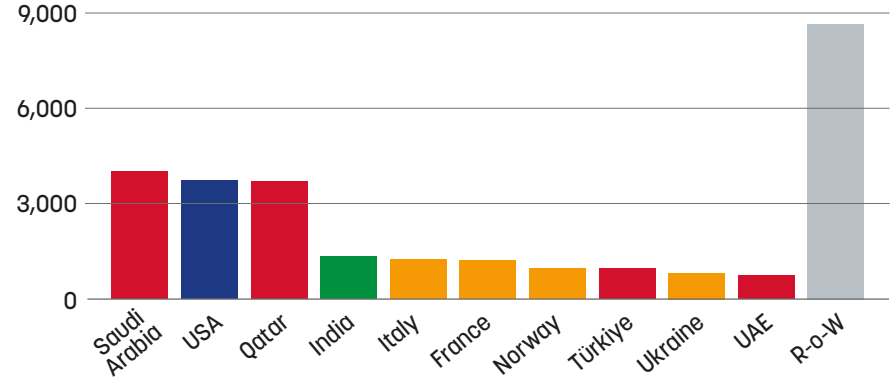
Rank	Recipient	SIELs 2023 Value (£m)	% of total
1	USA	983	19.8
2	Saudi Arabia	515	10.4
3	Ukraine	411	8.3
4	Qatar	351	7.1
5	France	349	7.0
6	Poland	229	4.6
7	Canada	214	4.3
8	Romania	139	2.8
9	Italy	129	2.6
10	Germany	119	2.4



Source: UK government export licensing data

Table 2 Value of SIELs by destination 2019–23

Rank	Recipient	SIELs 2019–23 Value (£m)	% of total
1	Saudi Arabia	4,012	14.7
2	United States	3,724	13.6
3	Qatar	3,691	13.5
4	India	1,327	4.9
5	Italy	1,249	4.6
6	France	1,212	4.4
7	Norway	970	3.5
8	Türkiye	955	3.5
9	Ukraine	820	3.0
10	UAE	733	2.7



Source: UK government export licensing data

3 Data from UK Defence & Security Exports

UK Defence & Security Exports (UKDSE) is the government's arms and security export promotion unit, which sits within the Department for Business and Trade (DBT). Every year, UKDSE publishes the results of a survey of arms companies, showing the value of their arms export contracts sealed during the previous year. This is a very different type of data from the export licensing data, as it includes the value of contracts regardless of what type of export licence – single or open – they may use to conduct exports. For the long-running, large-scale government-to-government arms export contracts (in particular the UK-Saudi contracts for the supply and subsequent support and maintenance of combat aircraft, bombs and missiles, and other equipment), the figures include the value of tasks carried out under the umbrella contract in each year.

These figures are therefore more comprehensive than those for the financial value of Single export licences, as they also include exports conducted under open licences. However, they are far less detailed, with no breakdown even by country, only by region, and no information on the types of equipment to be exported, other than a breakdown into four very broad categories: Aerospace, Land, Sea, and Mixed or Unknown.

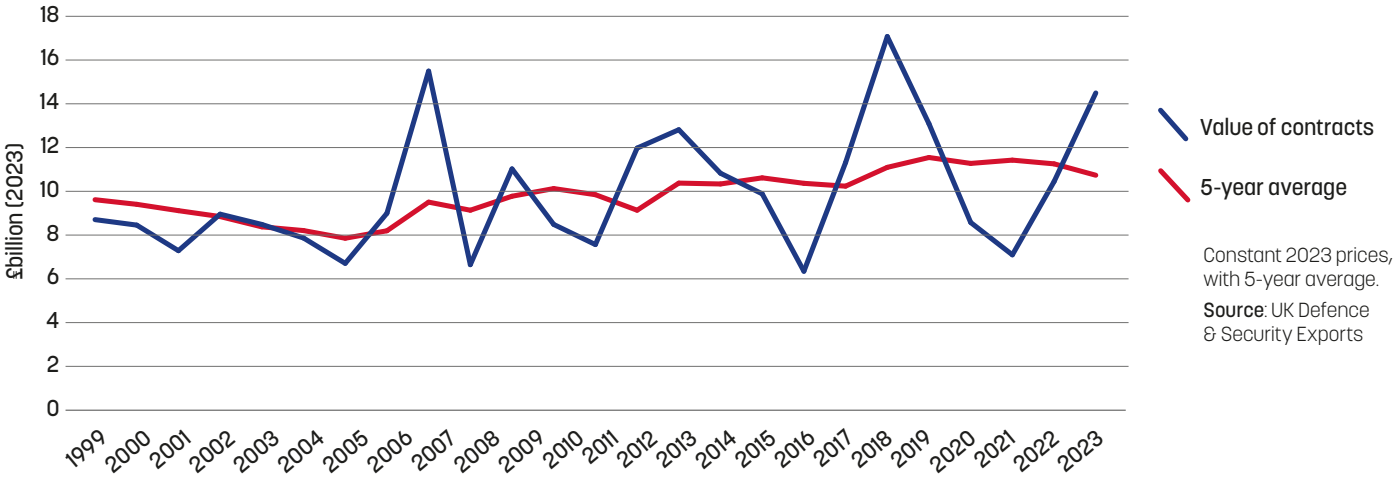
UKD&SE figures on Defence Exports for 2022 were published on 17 November 2023,[3] after the publication of CAAT's Annual Report on UK arms exports in 2022. The figures for 2023 were published on 17 December 2024.[4]

According to the latest figures, the value of arms export contracts obtained by UK companies in 2023 was £14.5 billion, a large increase on the figure for 2022, which was £9.7 billion. The figures for 2013–22 were revised downwards, due to the exclusion of certain additional sources to the annual company survey, which had been included in previous reports, but which are now considered to be insufficiently comparable. The revisions amounted to a reduction of £4 billion over 10 years, but the reduction in some individual years was substantial; in particular, the figure for 2022 was revised downwards from £11.2b to £9.7b.

The 2023 figure of £14.5b was the highest ever in nominal terms, although the (revised) 2018 figure of £13.8b was higher in real terms, i.e. after accounting for inflation. The 10-year total of £91.7 billion for 2014–23 was likewise a record in nominal terms. However, the 5-year moving average was slightly down, by 4.6% in real terms, at £9.1 billion a year (2021 prices). (See figure 3)

3 https://www.gov.uk/government/statistics/uk-defence-export-statistics-2022
4 https://www.gov.uk/government/statistics/uk-defence-export-statistics-2023

Figure 3 UK arms exports contract value 1999–2023



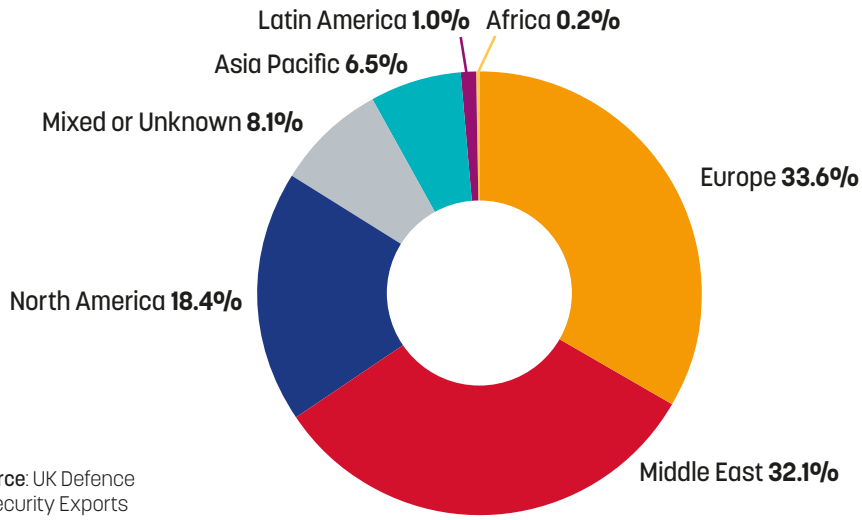
Constant 2023 prices, with 5-year average.

Source: UK Defence & Security Exports

The breakdown for 2019–23 (figure 4) shows the Middle East losing its place as the primary destination region for UK arms exports, with Europe top at 33.6%, followed by the Middle East just behind at 32.1%, and North America (the USA and Canada) at 18.4%. Contracts with Asia and the Pacific were 6.5% of the total (a figure that may increase in 2024 with the huge AUKUS nuclear submarine contract with Australia), and just 1% to Latin America and 0.2% to Africa. 8.1% was to "mixed or unknown" regions. The figures for 2023 were particularly dramatic, with sales to Europe reaching £6.7 billion, more than double the highest previous figure recorded. Sales to the Middle East were still substantial, at £4.0 billion, roughly in line with the long-term average.

This is a major change from 2013–17, when the Middle East accounted for a clear majority, 54% of export contract value, followed by North America at 13.4%, and Europe at just 9.6%, and Asia Pacific at 7.6%. "Mixed or unknown" regions accounted for 15% of the total, and Africa and Latin America just 0.3% each. The reasons for this dramatic switch from sales to the Middle East to Europe are, on the one hand, the Ukraine war and European rearmament,[5] and on the other hand a reduction in sales to the Middle East as deliveries of Eurofighter Typhoons to Saudi Arabia and Oman came to an end.[6]

Figure 4 UK arms export contracts 2019–23 by region



Source: UK Defence & Security Exports

5 Although as most UK arms supplies to Ukraine are UK government gifts, rather than commercial contracts, probably only a small proportion is direct to Ukraine

6 Revenues from arms sales to Saudi Arabia, which are based on UK-Saudi government-government contracts, are counted on the basis of specific annual orders under the programmes, including both new aircraft and ongoing maintenance. The £5 billion contract for Eurofighters to Qatar, on the other hand, appears to have been counted entirely in the year it was signed, 2018, further explaining the decline for 2023.

The increase in sales to Europe is dramatic. Between 2013–17, the total value of arms export contracts with Europe was £3.8 billion, which in 2019–2023 had more than quadrupled to £16.15 billion. Even compared to 2018–22, when the total was £10.3b, the latest figure is a large increase, with £6.6 billion or more in sales in 2023 alone.

However, for the Middle East, the treatment of the revenue of UK arms companies, especially BAE Systems, from the support and maintenance of the Saudi air force, is not entirely clear; although as it comes under the framework of the major government-government UK-Saudi Defence Cooperation agreement and Al-Salam agreement it should in principle be counted, the £12.5b reported by BAE for such revenue from 2019–23 would constitute the great majority of the Middle East total (£15.45b), so that it is hard to see how this could be reconciled given other exports, including those through single licences.

Because the UKD&SE figures include contracts for arms that may be exported using open licences, the figures are consistently significantly higher than those for just the value of single licences. However, the ratio between the two was lower for 2014–23 than in previous years. The value of single licences over the period 2013–22 was £50.2 billion, making the ratio of contracts to licences around 1.83:1, instead of slightly over 2:1 as in the past. The ratio is considerably higher for the Middle East and North America than for other regions.

Moreover, it is clear that even these figures are an underestimate of the total value of arms export contracts – the removal in the 2023 release of data from supplementary sources, while it may be justified on the grounds of having consistent and comparable data, shows that the survey that forms the basis of the UKD&SE figures does not capture all of the arms trade. Previous releases have variously estimated that the figures (including, presumably, the supplementary sources) capture 90% or 92% of total arms sales.

While one should be cautious about comparing the two sets of statistics, as there are timing differences (some contracts signed in 2014–23 may be delivered using licences issued after 2023, while some licences issued may be for contracts signed before 2014), these figures remain consistent with the estimate that roughly half of UK arms exports are conducted using open licences, and more in the Middle East and North America.

4 Revenue data from the Joint Economic Data Hub (JEDHub)

This is a relatively new source of data, that only started being published in 2022. According to its website, "The Joint Economic Data Hub (JEDHub), based in the UK Defence Solutions Centre, is a collaborative initiative to improve understanding of the defence sector's contribution to the UK economy. Designed to provide better, consistent, and impartial data, the JEDHub is supported by government, industry and academia."

The UK Defence Solutions Centre is itself an offshoot of the government-industry forum the Defence Growth Partnership, and is a collaboration between government, arms industry, and universities, aimed at promoting the development of military technology, including exports. While this is clearly not a neutral source of information, they are at least reasonably open about their methodology, and their publications are reviewed by outside defence economics experts, including at least one with a fairly critical approach to the arms industry.

The annual economic reports published by JEDHub provide data on arms industry turnover, employment, value added, and a range of other areas, mostly based on a survey of the 22 largest arms companies. Its data is therefore not comprehensive, but probably covers the great majority of arms industry turnover with external customers (UK MOD, other departments, and export customers), as opposed to supply chain sales within the industry. However, the figures will clearly be underestimates to some degree.

According to the JEDHub economic report for 2024, covering data for 2022, **the value of revenue from international customers from the companies surveyed in 2022 was £7.8 billion, down from £8.1 billion in 2021**, compared to £13.9 billion from domestic customer, of which £12.3 billion was to the MOD.

This figure is not inconsistent with the value of contracts reported by UKD&SE above, even though the true figure is certainly at least somewhat higher. Bearing in mind that not all contracts are ultimately fulfilled, and that the delivery of contracts is often years after their signing, it seems likely that the JEDHub figures capture the great majority of UK arms exports, although a precise figure is not possible to determine.

The JEDHub figures give some breakdown of arms industry sales – domestic and international – by type of equipment. The £7.8b international revenue in 2022 fell into the following categories:

- Combat air – £5.7 billion
- Weapons & ammunition – £660 million (including missile systems)
- Other – £572 million
- Air, rotary wing – £516 million
- Maritime, surface – £338 million
- Land – £208 million
- Submarines – £38 million

Thus, these companies arms exports were dominated by combat aircraft-related sales (including components and related equipment and services). A large proportion of the second-placed weapons and ammunition category also consists of missiles for combat aircraft (based on information on export licences and from SIPRI). Combat aircraft is also the sector that is most heavily export-dependent, with 72% of the companies' revenue in this sector coming from abroad. Next is rotary wing, with 43% of revenue from international sales, and weapons & ammunition, at 33%.

5 Information on military aid to Ukraine from the House of Commons Library

The House of Commons Library publishes regular research briefings on UK and international military aid to Ukraine. The most recent general briefing was in September 2024.[7] **This gives the figure for the value of total UK military aid to Ukraine since the Russian invasion of Match 2022 as £7.8 billion pledged, as well as £5 billion in non-military aid.**

The most recent UK-specific briefing, "A detailed timeline of UK military assistance to Ukraine (February 2022–present)", was published in February 2024.[8] This lists the following key transfers and/or pledges in 2023:

- 14 Challenger II tanks pledged in January 2023, delivered at the end of March
- Also pledged in January 2023 (delivery dates unclear):
  - 30 AS-90 self-propelled guns
  - Hundreds of armoured vehicles, including the Bulldog Armoured Personnel Carrier
  - A manoeuvre support package including minefield breaching and bridge laying capabilities.
  - Unmanned air vehicles – according to the UK's annual report for the Arms Trade Treaty (section 6), 421 of these were delivered in 2023
  - Hundreds of additional missiles, including munitions for the M270 multiple launch rocket system, Starstreak air defence missiles, medium range air defence missiles and 600 Brimstone anti-tank missiles
  - Equipment and spares to refurbish Ukrainian military vehicles
- More than 300,000 artillery shells pledged in April 2023
- An undisclosed number of long-range Storm Shadow air-launched cruise missiles (air-to-surface missiles) was pledged in May 2023
- In June 2023, the UK, the US, the Netherlands and Denmark formed an air defence partnership to procure hundreds of Soviet-era short and medium-range air defence missiles and equipment on the open market, to be delivered to Ukraine
- More than 70 combat and logistic vehicles pledged in July 2023, along with thousands of additional rounds of Challenger II munitions, and a £50m package of spares, technical support, and maintenance training
- An additional 200 air defence missiles pledged in December 2023
- The transfer of two ex-Royal Navy Sandown class minehunters, HMS Grimsby and HMS Shoreham, was confirmed in December 2023
- By November 2023, a training programme announced in mid-2022 had trained 30,000 Ukrainian armed forces personnel

7 https://commonslibrary.parliament.uk/research-briefings/cbp-9477/?os=w&ref=app
8 https://commonslibrary.parliament.uk/research-briefings/cbp-9914/

6 SIPRI data on transfers of major conventional weapons

The SIPRI Arms Transfers Database (ATDB) is the only publicly-available source of comprehensive, comparable, and consistent arms trade data with global coverage.[9] It provides both qualitative and quantitative data, broken down to each supplier-recipient pair.

The SIPRI ATDB covers only "major conventional weapons" (MCW) – this largely consists of complete weapons and weapons systems, such as military aircraft, naval vessels (surface and submarine), tanks and armoured vehicles, missiles, air defence systems, and artillery. However it covers some major subsystems, such as military radars (e.g. for surveillance or targeting), and engines for military aircraft, ships, and vehicles.[10]

What the ATDB does not cover is small arms and light weapons, components and subsystems (except those mentioned above), military command, control, and communications systems, and military services. Since a large proportion of UK arms exports are in the form of military services, this tends to understate the size of the UK arms trade.

To provide a comparable quantitative measure of the volume of arms transfers between each supplier and recipient and in total, SIPRI constructs its own bespoke "Trend Indicator Value" (TIV) measure. This is necessary because price information is not always publicly available. The TIV is not a financial measure, and should never be cited as if it is a dollar figure. Rather, it attempts in some sense to measure the military value of equipment transferred. The TIV assigned to a weapon system is, for US systems, based on its unit cost, and for non-US systems, on SIPRI's assessment of the nearest equivalent US system in terms of capabilities. For example, a Eurofighter Typhoon is given about the same TIV as a US F-35 Joint Strike Fighter.[11]

Data for 2019–23

According to SIPRI's most recent data release, **the UK accounted for 3.7% of global deliveries of major conventional weapons between 2019–23, as measured by the TIV. This was an increase from the 2018–22 figure of 3.2%. The UK remained in 7th place among the world's major exporters**, behind the US, France, Russia, China, Germany, and Italy.

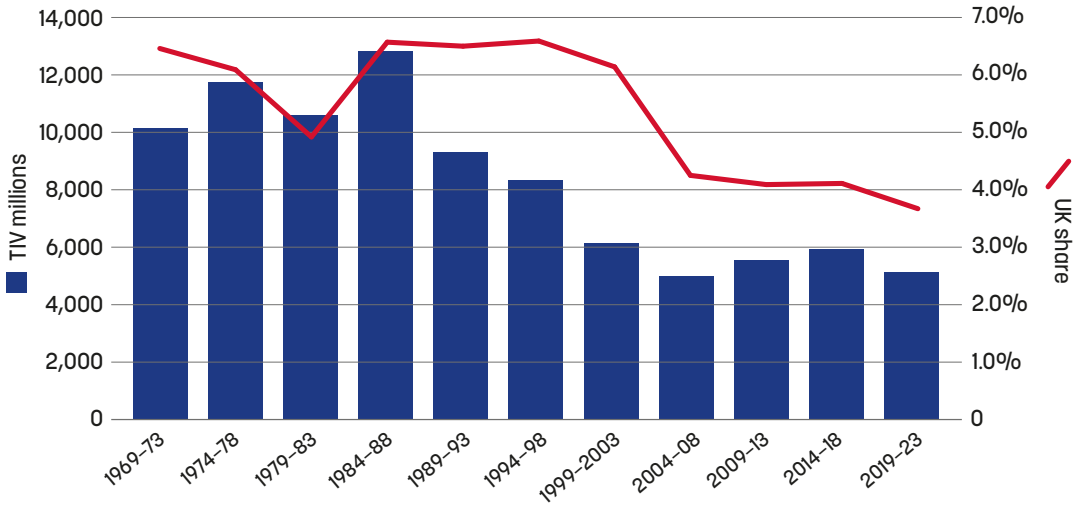
In absolute terms, the TIV of UK exports fell by 14% compared to 2014–18. Looking at more detailed annual data, the 5-year moving average of UK exports peaked in 2017, the result of deliveries of Typhoon aircraft to Saudi Arabia and Oman, then fell sharply up to 2021 (See figure 5), before rising sharply in 2022,

9 https://sipri.org/databases/armstransfers
10 More details of the coverage of the ATDB and its sources and methods at https://sipri.org/databases/armstransfers/sources-and-methods
11 The TIV value of any system of which at least one example has been delivered for export can be found in the Excel download version of the SIPRI ATDB, available at https://armstrade.sipri.org/armstrade/html/tiv/index.php.

then falling in 2023. The figures for 2022 and 2023 were boosted by the delivery of 16 Eurofighter Typhoon aircraft to Qatar, along with Hawk trainers and various missiles, and by substantial military aid to Ukraine.

As has been the case for the past few years, most UK deliveries and orders have not been major platforms such as aircraft and warships, but rather missiles, engines, radars, and air refuelling systems. The Typhoon deliveries are a significant exception. In terms of orders, the AUKUS deal to sell 3 nuclear powered attack submarines to Australia, built in the UK, is by far the biggest.

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



Source: SIPRI Arms Transfers Database

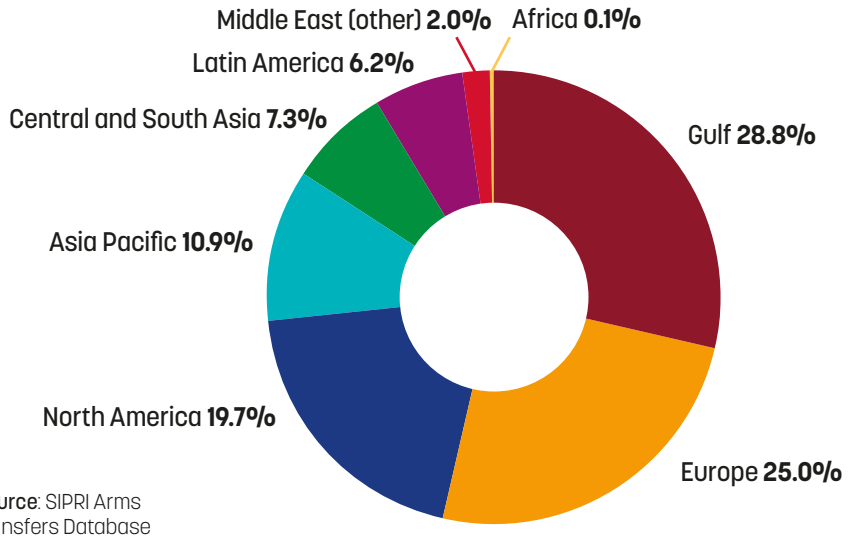
Principle recipients

The top recipient of UK exports of major conventional weapons between 2019–23, according to the SIPRI data was 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 some time, although the value of military service contracts for BAE Systems remains high (see section 7). As noted, the deliveries to Qatar were the remaining 8 Eurofighter Typhoon aircraft, along with further bombs and missiles, and a spare engine. The main deliveries to the USA were 12 air refuelling systems produced under licence in the USA. This is nonetheless counted as a UK export by SIPRI, as it is based on the transfer of UK technology.

Figure 6 shows the breakdown of UK deliveries from 2019–23 by region. While the Middle East is the region of the UK's main arms customers, it is more specifically the Gulf states, especially Oman, Qatar, Saudi Arabia, and the UAE that are the biggest recipients, with 28.8% of UK deliveries (much reduced from 2014–18, but still the highest). The rest of the Middle East only accounts for 2% of UK deliveries. After that, UK exports were primarily to its NATO allies in Europe (25%) and North America (19.7%). However, a significant proportion of deliveries also went to Asia, with 10.9% to the Asia Pacific region, chiefly South Korea, Japan, Singapore, Indonesia and New Zealand, and South Asia (7.3%), mostly to India. Latin America accounted for 6.2%, almost all to Chile and Brazil, while just 0.1% of deliveries went to Africa.

In contrast, during the period 2014–18, a clear majority, 60.6%, of UK deliveries went to the Gulf, chiefly Saudi Arabia, with 21.6% to Asia Pacific and 7.7% to South Asia. Just 6.1% went to Europe and North America combined, with 4% to the rest of the world. Thus, in the last five years, there appears to have been a shift of focus in UK arms exports, at least in terms of deliveries of major conventional weapons, to its western allies. While some of this is explained by Ukraine, this is certainly not the whole story.

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



Source: SIPRI Arms Transfers Database

Table 3 UK deliveries of major conventional weapons in 2023 (SIPRI)

(Not including military aid to Ukraine). Country name in brackets: delivery year uncertain. Numbers in square brackets are estimates.

Recipient	Producer	Equipment delivered	Notes
Brazil	Leonardo	3 Raven ES-05 combat aircraft radars	For 36 Gripen-E (Gripen-NG) combat aircraft from Sweden
Egypt	Second-hand	2 replenishment ships	–
France	Rolls-Royce	6 Trent-700 turbofan engines	For 15 A330 MRTT tanker/transport aircraft produced in France
France	Mission Systems Wimborne	[5] Air refuelling systems	For A400 and 15 A330 MRTT tanker/transport aircraft produced in France
(Germany)	Mission Systems Wimborne	[1] Air refuelling system	For A400M tanker/transport aircraft produced in Germany
Greece	MBDA	[18] Meteor BVRAAM air-air missiles	For Rafale combat aircraft; ordered via France
(Indonesia)	Thales	[1] Forceshield surface-air missile system	Deal for 10 systems worth $165m
(Indonesia)	Thales	[100] Starstreak surface-air missiles	For the Forceshield SAM system
Japan	Rolls-Royce	2 MT-30 gas turbine engines	For 12 Mogami (FFM or 30DDX) frigates produced in Japan; probably assembled or produced under licence in Japan
(Oman)	MBDA	[24] ASRAAM air-air missiles	For Eurofighter Typhoons
(Poland)	MBDA	[50] CAMM surface-air missiles	For mala NAREW and Pilica+ air defence systems; delivery planned 2022–2029
Poland	Leonardo	4 AW101-111 anti-submarine warfare helicopters	PLN1.7 b ($415-450 m deal ($104 m offsets)
Qatar	BAE Systems	[8] Eurofighter Typhoon combat aircraft	Including 4 Typhoon-T trainer/combat version
Qatar	Rolls-Royce	[1] EJ-200 turbofan engine	Spare for Eurofighter Typhoons
(Qatar)	MBDA	[70] ASRAAM air-air missiles	ASRAAM Block-6 version; for Typhoon combat aircraft
Qatar	Raytheon UK	[150] Paveway guided bombs	Paveway-4 version; for Typhoon combat aircraft
Romania	second-hand	1 Sandown minehunter ship	Delivery planned 2023–24
South Korea	Rolls-Royce	3 MT-30 gas turbine engines	For 4 FFX-2 (Daegu) frigates produced in South Korea
(Spain)	Mission Systems Wimborne	[1] air refuelling system	For modification of 3 Spanish A330 transport aircraft to A330 MRTT tanker/transport aircraft
USA	Unknown	12 air refuelling systems	Produced under licence in USA; for 179 KC-46 tanker/transport aircraft produced in USA
USA	Rolls-Royce	4 Mt-30 gas turbine engines	For 16 LCS-1 (Freedom) frigates produced in USA

Table 4 Major conventional weapons deliveries to Ukraine, including military aid

(Second hand, military aid, unless otherwise specified). Numbers in square brackets are estimates.

Number	Equipment	Notes
[600]	Brimstone air-surface missiles	For use from land-based launchers
[50]	Storm Shadow air-surface cruise missiles	Probably 2nd-hand.
10	Bronco APCs	Financed by German aid; Warthog ambulance version
14	Challenger-2 tanks	
[100]	FV-432 APCs	
[33]	FV-432 APCs	Financed with private donations
32	AS-90B Mallet 155mm self-propelled guns	
2	Challenger Armoured Recon Vehicles	
[100]	Starstreak surface-air missiles	For Stormer HVM SAM system and portable launchers
[25]	AIM-120C AMRAAM air-air missiles	For NASAMS SAM systems
3	Sea King HAR-3 helicopters	Sea King HU-5 version; for Search & Rescue
16	Spartan APCs	Financed with private donations
[100]	GMLRS guided rockets	
23	Spartan APCs	
[100]	ASRAAM air-air missiles	For use as surface-air missiles

Table 5 New orders of major conventional weapons from the UK in 2023

Country name in brackets: order year uncertain, or equipment has been selected but contract not yet signed.. Numbers in square brackets are estimates.

Recipient	Producer	Equipment ordered	Notes
(Australia)	BAE Systems	[3] AUKUS nuclear submarines	Part of 'AUKUS' agreement; delivery planned from late-2030s; includes 2 produced under licence in Australia; selected 2023 but not ordered by end-2023
Canada	Mission Systems Wimborne	[9] Air refuelling systems	For 4 A-330 MRTT tanker/transport aircraft from France and modification of 5 second-hand A330 transport aircraft to A330 MRTT tanker/transport aircraft
Canada	Rolls-Royce	8 Trent-700 turbofan engines	Trent-772B version for 4 A-330 MRTT tanker/transport aircraft from France
(Germany)	MBDA	274 Brimstone air-surface missiles	For use on Typhoon combat aircraft
Japan	Leonardo	2 AW-101 transport helicopters	Assembled in Japan; MCH-101 MCM version
Poland	MBDA	[1000] CAMM-ER surface-air missiles	For 'NAREW' programme SAM system; delivery planned 2027–2035
Poland	MBDA	[300] CAMM-MR surface-air missiles	For Type-31 (Arrowhead-140 or Miecznik) frigates
Poland	MBDA	??? CAMM-MR surface-air missiles	For 'NAREW' programme SAM system
Romania	2nd hand	2 Sandown minehunter ships	Delivery planned 2023–24
Saudi Arabia	MBDA	[400] CAMM surface-air missiles	For MMSC frigates
Sweden	MBDA	??? CAMM surface-air missiles	For use with Sea Ceptor SAM system on 5 Visby corvettes
(Sweden)	MBDA	5 Sea Ceptor surface-air missile systems	For modernization of 5 Visby corvettes; selected but not yet ordered by end-2023
Taiwan	BAE Systems	2 Artisan-3D air search radars	For 2 frigates produced in Taiwan

7 Other sources of information

7.1 BAE Systems Annual Report

BAE Systems' Annual Report for 2023 was published on 6 March 2024.[12] On p163 of the report, **it reports the company's revenue from the Kingdom of Saudi Arabia Ministry of Defence and Aviation in 2023 as being £2,607 million, up from £2,425 million in 2022**. BAE's revenue from the Saudi MOD has been broadly steady since 2018, following the final deliveries of Typhoon aircraft in 2017. The continuing revenue of around £2.4–2.6b a year likely reflects the ongoing supply of components, maintenance, support, and training for the Hawk, Tornado and Typhoon aircraft supplied under previous contracts. Between 2015, the year in which Saudi Arabia entered the Yemen war, and 2022, BAE has received £25 billion in revenue from the Saudi MOD.

The report also gives figures for revenue from Qatar, of £450m in 2023, down from £885m in 2022. As with the revenue from Saudi Arabia, this is likely to be all or almost all from BAE's UK operations. The report also lists sales to the USA, Australia, and Canada, but these are likely to be mostly from BAE's US and Australian operations, rather than exports from the UK.

The report also provides information on BAE Systems' revenue from the F-35 combat aircraft programme, for which the UK makes critical components, around 15% of the plane's total value. The F-35 is used by around 20 countries, including the US and the UK, as well as Israel, who have been using the F-35 in their genocidal assault on Gaza, as well as their brutal bombing campaign in Lebanon. According to the report, 15% of the sales from BAE's largely US-based Electronic Systems division, or around £818 million, were from the F-35 (p37), as well as 14% of the sales of the UK-based Air division, or around £1,128 million (p41). The F-35 was thus worth around £1.9 billion in sales to the company in 2023.

12 https://annualreport.baesystems.com/2023

7.2 UK government Annual Report on Strategic Export Controls

The government's Annual Report on Strategic Export Controls for 2023 was published on 17 December 2023.13 This does not contain details of export licences issued and refused, which are presented separately (see section 1), but there are a number of elements that are relevant for monitoring UK arms exports:

- Data on refusals of export licences, and the criteria under which they were refused
- Brief case studies of particular countries and issues, and how these were dealt with under the export licensing process
- Data on enforcement actions for export control violations by HMRC
- Information on UK government gifts of military equipment to other countries, and disposals (through sale) to foreign governments of surplus MOD equipment.

The Annual Report also acts in some ways as the clearest permanent record of the export licensing process and criteria in any given year.

The case studies in the 2023 report discuss the ECJU's response to mass protests and police repression in Chile in 2019–20; the case of Lebanon, and how the ECJU ensures that UK government arms supplies, and other UK arms sales, to the Lebanese Armed Forces, do not risk being diverted to Hezbollah or other armed groups; and the response to military coups in Mali in 2020 and 2021, and the subsequent serious deterioration of the human rights situation. In the case of Mali, the report states that the government identified a number of export licences that were no longer consistent with the export licensing criteria, and would need to be revoked; however, on informing the companies concerned of the intention to revoke, these companies surrendered the licences voluntarily. This arguably represents a gap in transparency, as while licence revocations are reported in the government's quarterly export licensing data, the surrender of licences by companies is not.

In relation to gifted equipment and MOD disposals, excluding Ukraine, the most significant items were the disposal (presumably by sale) by the MOD of an Apache helicopter and 150 Hellfire missiles to Australia, and of the former HMS Blythe and HMS Pembroke Minehunter ships to Romania.

7.3 UK annual report for the Arms Trade Treaty/submission to UNROCA

Each year, all UN member states are invited to submit a report to the UN Register of Conventional Arms (UNROCA),[14] detailing their exports and, optionally, imports and holdings, of certain classes of major conventional weapons, as well as transfers of small arms and light weapons (SALW). The UK usually submits these reports annually. Additionally, states parties to the Arms Trade Treaty (ATT) are required by the Treaty to submit an annual report with similar information on exports and imports. Many states submit the same report to both.

13 https://www.gov.uk/government/publications/uk-strategic-export-controls-annual-report-2023
14 https://www.unroca.org/

The UK report is not currently available on the UNROCA website: however, they did submit their annual report for the ATT, which is also headed UNROCA, so is presumably intended to fulfil both purposes.[15] While the report is supposed to cover actual transfers, in keeping with the UK government's policy of not monitoring deliveries, the UK report is based on export licences instead.

As is often the case, the UK report is so riddled with questionable information or items that do not belong in the report as to make it almost useless as a transparency measure. A long list of military vehicles, many of considerable vintage, intended for museums, private collections, or public display are included. Exports of F-35s and UAVs to the US are made which do not correspond to any known exports, with the exact same items listed under imports. The entry for the Protector UAVs simply says "These RPAS (remote piloted air systems) are currently in the USA" – perhaps sent for repair? The export of a combat aircraft to Italy is listed, for which no export licence exists, nor is the UK currently selling combat aircraft to Italy. Under missiles, there are numerous entries which are described as "launching/handling/control equipment for missiles", presumably based on the item descriptions in the government's database. Such auxiliary equipment is not supposed to be covered in the UNROCA/ATT reports, only actual missiles.

However, in at least one case, listed as the export of 500 such "launching/handling/control equipment" to Qatar, the licence in question also includes air-to-air missiles, meaning that this entry presumably is intended to declare the export of 500 such missiles. The report also lists 11 such launching/handling/control equipments to India; there are two such licences to India, one, worth £53.2 million, which also lists "inert air-to-air missiles", and one, worth £806,000, which also lists "air-to-air missiles". It is not clear if the figure of 11 refers to the inert missiles, the regular missiles, or both.

There are also launching/handling/control equipment exports listed to Australia, France, and Poland, but in these cases the corresponding licences do not include actual missiles.

One useful piece of information the report reveals is the transfer of 180 Man Portable Air-Defence Systems (MANPADS) to Saudi Arabia.

The report also enumerates equipment donated to Ukraine. Unlike the rest of the report, this will relate to actual exports, rather than licences, as equipment donated by the MOD does not require an export licence. This information is also regularly provided in research briefings provided by the House of Commons Library, most recently in February 2024 (see section 4).[16] The equipment listed in the report is:

Armoured combat vehicles

5 x Alvis Saracen
2 x CEN B6 TITAN D/S APC BUILT ON FORD F-550 145 CHASSIS
1 x FV104 Samaritan Armoured Ambulance
51 x FV432 Armoured Personal Carrier
5 x FV434
1 x Mercedes Vario Armoured Vehicle
5 x Pinzgauer Vector Amoured Vehicle
6 x Samaritan CVRT Armoured Personnel Carrier
3 x Samson CVRT Armoured Personnel Carrier
6 x Shielder CVRT

15 https://thearmstradetreaty.org/download/50a1e0a1-900c-3684-9c23-7d7ca5a117b0
16 Detailed timeline of UK military assistance to Ukraine (February 2022–present) – House of Commons Library

41 x Spartan CVRT
13 x Stormer CVRT
22 x Sultan CVRT Armoured Personnel Carrier
10 x Warthog Armoured All-Terrain Ambulance

Combat aircraft

421 unmanned air vehicles

Warships

HMS Grimsby and HMS Shoreham Sandown class minehunters (over 2022 and 2023).

As with previous reports to UNROCA, the general impression gained is that the UK does not take this ATT reporting obligation seriously (as it did not take the voluntary UNROCA reporting request in the past), and does little to ensure the accuracy or completeness of these reports.

8 Conclusions and discussion

The combined picture from the various sources of data gives something of a mixed picture. The fall in the value of single export licences belies a generally increasing trend; on the other hand, there was a sharp increase in the value of contracts shown by UK Defence & Security Exports, but with an overall steady trend. This may presage a future upturn in licences and deliveries, however. SIPRI data for major conventional weapons transfers shows the 5-year figure considerably lower than the previous period, but with the last two years showing some upturn from the previous record lows. Considering longer-term trends, however, the pattern seems to be that both licence and contract values are at or near record levels; but exports of major conventional weapons are near to record lows; essentially, UK arms companies have been doing very well through the export of components, subsystems, and services, but in recent years have been less successful winning contracts for major new weapons platforms, although this may be changing.

> **The large increase in sales to European countries is the result of the growing militarisation of Europe in the wake of Russia's all-out invasion of Ukraine in 2022, with substantial increases in military spending and arms purchases in many countries.**

Over the past 5 years or so, the primary focus of UK arms exports seems to have shifted towards its North American and European NATO allies, as well as (since 2022) to Ukraine, with lower levels of sales to its traditional Gulf customers, although these are still high up the list of major customers. The major AUKUS contract for nuclear submarines is a significant boost for BAE's submarine production line, although these deliveries will not take place till the 2040s. This also indicates a shift towards exports primarily to close allies, albeit in the Asia Pacific region in this case.

The large increase in sales to European countries – one of the few trends clearly visible in all sources – is the result of the growing militarisation of Europe in the wake of Russia's all-out invasion of Ukraine in 2022, with substantial increases in military spending and arms purchases in many countries. While the US and domestic arms industries are the main beneficiaries of these increases, arms companies in many other countries are also sharing in the bonanza. South Korea, for example, has concluded some major arms deals with Poland in recent years. The UK arms industry is also profiting, both from increased UK spending, and from sales to European allies. The value of UK companies' arms export contracts to Europe more than quadrupled between 2013–17 and 2019–23, reaching £16.15 billion in the latter period. SIPRI data shows a similar picture: the volume of major conventional weapons deliveries by the UK to Europe in 2019–23 (which, unlike the contract data, includes MOD donations of second-hand equipment to Ukraine) was over 5 times higher than in the previous period 2014–18.

Rapid European rearmament comes in response to the potential military threat to Europe from Russia, whose unprovoked imperial aggression against Ukraine has drastically changed the security situation for Europe, revising assumptions about Russia's intentions for the worse. This is heightened by doubts about the reliability of the US commitment to European security – especially as President Trump has threatened to use economic or even military coercion against NATO allies to gain territory. Questions about the reliability of the US as an ally and a supplier may lead to even higher sales in future for European, including UK, arms companies.

This rush to higher military spending and massive new arms purchases diverts resources from the climate crisis that is by far the greatest security threat to humanity, and risks creating a spiralling arms race that entrenches hostility and increases the chance of war

However, there are serious harms that come with this rush to higher military spending and massive new arms purchases: it diverts resources from other pressing areas, most importantly the climate crisis that is by far the greatest security threat to humanity, and risks creating a spiralling arms race that entrenches hostility and increases the chance of war. Moreover, the drive for remilitarisation in Europe is accompanied by an increased push for arms exports outside Europe, strongly promoted by the EU as well as by individual countries. The EU is essentially pushing for a 'race to the bottom' in terms of export controls, by seeking agreements that partners in collaborative projects – such as the Eurofighter – will not obstruct exports by other partner nations, even if their own arms export rules would not allow them. (The F-35 programme, where several countries including the UK have stopped the direct export of components to Israel, but have allowed indirect supply to continue via the US, is an example of the outsourcing of arms export controls by partners in collaborative programmes to the lead partner). This can only be harmful for global peace and security. Europe, including the UK, must not fall into the trap of seeking to defend itself in ways that end up making the whole world less safe.

The Middle East is also an evergreen source of business, with Gulf dictators ready to spend billions in oil wealth on arms with no accountability

But apart from Europe (and the US and Australia and other 'western' allies) the Middle East is also an evergreen source of business, with Gulf dictators ready to spend billions in oil wealth on arms with no accountability and frequently without a clear security purpose. At present, the UK and BAE Systems are pursuing Eurofighter Typhoon sales to Qatar, Saudi Arabia, and Türkiye – the latter of which would be a new customer for UK fighter aircraft, seeking to ensure continuity of production until the next-generation Tempest programme is ready to enter full production. Thus, the drop in UK exports to the Middle East may well be just a temporary lull – and it is certainly not through any lack of trying by the arms companies or the UK government.

All of these potential customers involve severe concerns over human rights, armed conflict, and/or corruption. Türkiye's continuing occupation of parts of north-east Syria, which has involved serious violations of human rights and international humanitarian law (IHL); and its renewed attacks on Kurdish-led

forces in the Democratic Autonomous Administration of North East Syria (DAANES), along with its militia allies, as well as its ongoing bombing of Kurdish areas of Iraq, raises the real prospect that UK-supplied aircraft could be used in attacks targeting civilians in these regions.

> **For those seeking greater restraint in arms exports and a higher priority given to human rights, conflict prevention, protection of civilians, and anti-corruption, there is an uphill battle**

For those seeking greater restraint in arms exports – in the UK and elsewhere, and a higher priority given to human rights, conflict prevention, protection of civilians, and anti-corruption, there is an uphill battle. The Russian invasion of Ukraine in 2022 drastically changed the geopolitical environment, and the return to power in the US of President Donald Trump, with a more pro-Russian agenda and an open disdain for traditional alliances, has further worsened threat perceptions in Europe. In the face of naked Russian militarism, there has been a strong shift in political opinion, even among more centre-left parties, in favour of a new European militarism as the response.

This approach was being pushed well before the invasion, by a European arms industry which, as in the UK, has achieved a powerful level of access to and influence with not just national governments but also EU institutions. While there is still strong public opinion in the UK and elsewhere against arms sales to countries like Saudi Arabia and Israel, the arms industry very much has the ear of government, political parties, and much of the media, and is able to leverage support for higher arms production for European use into support also for exports outside Europe.

> **The challenge for the anti-militarist movement is to develop a narrative that recognises the very real dangers posed by the Russian invasion and the militaristic ambitions of the Putin regime, but that can come up with better answers than trashing public services and the fight against climate change in favour of massive increases in military spending, a spiralling arms race, and perpetual enmity between Europe and Russia.**

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