SDI BRIEF

GLOBAL DEFENSE MARKETS

#1

UKRAINE

🇺🇦 Europe

Import Share (2021–25): 9.7%

Trend vs 2016–20: +9,600%+

Defense Budget: ~$64bn (2024, inc. aid)

GDP on Defense: ~34% of GDP (2024)

Strategic Defense Intelligence
2025–26 Edition

From negligible importer to the world's #1 arms recipient — Ukraine's procurement story is defined entirely by existential conflict.

GLOBAL RANK	GLOBAL SHARE
#1	9.7%

DEFENSE BUDGET	GDP ON DEFENSE
$64bn (2024, inc. aid)	34%

Source: SIPRI Arms Transfers Database, March 2026

🇺🇦 UKRAINE — DEFENSE MARKET CONTEXT

Ukraine received 9.7% of total global arms imports in 2021–25, up from just 0.1% in 2016–20. Prior to Russia's February 2022 invasion, Ukraine imported very few major weapons. The full-scale war triggered one of the largest international military aid mobilisations in modern history.

At least 35 countries supplied major arms to Ukraine as part of military aid. SIPRI counts these aid transfers as the exporting nation's arms exports to Ukraine — which is why the USA, Germany, and Poland figure as the top three suppliers.

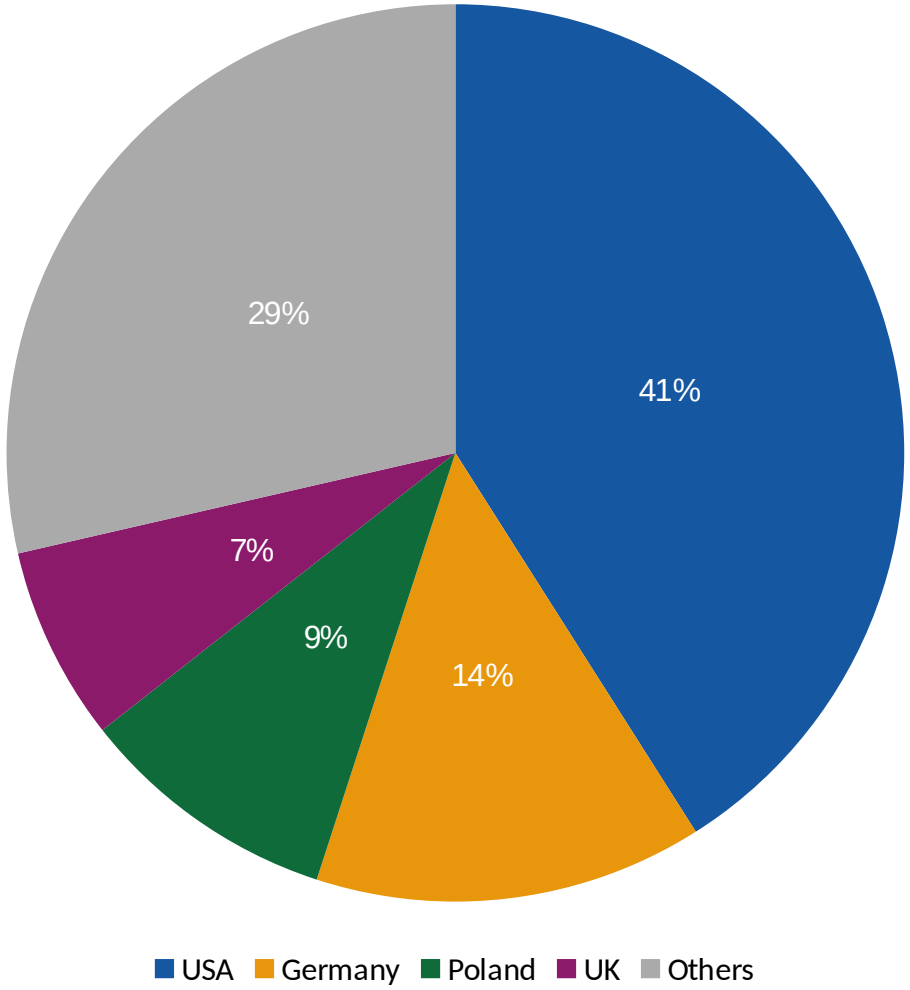
GLOBAL RANK	IMPORT SHARE	TREND	POPULATION
#1	9.7%	+9,600%+	~37 million

PRIMARY THREAT ENVIRONMENT	Russian Federation (full-scale invasion)

"From negligible importer to the world's #1 arms recipient — Ukraine's procurement story is defined entirely by existential conflict."

🇺🇦 UKRAINE — SUPPLIER BREAKDOWN

MAJOR ARMS SUPPLIERS — % SHARE OF IMPORTS (2021–25)



SUPPLIER PROFILE DETAIL

Supplier	Share	Key Systems Supplied
USA	41%	Combat aircraft, missiles, air defence, helicopters, tanks
Germany	14%	Leopard tanks, howitzers, armoured vehicles
Poland	9.4%	Various platforms
UK	7%	Typhoons, guided weapons, Type 26 frigates
Others	28.6%	Various — multiple supplier nations

🇺🇦 UKRAINE — KEY ARMS ACQUISITIONS

MAJOR PLATFORMS & SYSTEMS ACQUIRED / ON ORDER (2021–25)

AIR SYSTEMS

F-16 Fighting Falcon fighters

USA, Netherlands, Denmark, Belgium

M1 Abrams, Leopard 2, Challenger 2 main battle tanks

HIMARS & M270 MLRS rocket artillery systems

Patriot, NASAMS, IRIS-T air-defence systems

LAND · SEA · MISSILE

M113, Bradley, Stryker, Marder armoured vehicles

155mm howitzers: M777, M109, PzH 2000, Caesar, Krab

Storm Shadow / SCALP-EG cruise missiles

Javelin, NLAW, Stugna-P anti-tank missiles

🇺🇦 UKRAINE — DEFENSE MARKET DRIVERS

KEY FORCES SHAPING ARMS PROCUREMENT DECISIONS

01 CONFLICT NECESSITY

Every procurement decision is dictated by front-line operational need — not long-term strategic planning cycles.

02 AID ARCHITECTURE

Western military aid bypasses normal procurement; government-to-government transfers dominate supply flows.

03 RUSSIAN THREAT

A nuclear-armed neighbour with 600,000+ troops deployed creates unlimited demand across all capability domains.

04 NATO INTEGRATION

Interoperability with NATO systems is a precondition — driving Western-standard equipment adoption across all services.

🇺🇦 UKRAINE — MARKET OPPORTUNITIES

▲ COMMERCIAL & STRATEGIC OPPORTUNITIES FOR DEFENSE SUPPLIERS

1

Post-war reconstruction

Ukraine will require the world's largest military rebuild — potentially $100bn+ in procurement over a decade.

2

Air Force modernisation

F-16s represent a generational platform shift; trainers, simulators and MRO ecosystems are urgently needed.

3

Air defence

chronic shortage of interceptor missiles across Patriot, NASAMS, IRIS-T systems creates persistent and growing demand.

4

Naval rebuild

Black Sea fleet reconstruction will require corvettes, fast attack craft and maritime uncrewed systems.

5

Artillery & ammunition

sustained high-intensity warfare means annual ammunition demand in the hundreds of millions of rounds.

🇺🇦 UKRAINE — MARKET RISKS & CONSTRAINTS

▼ KEY RISKS, BARRIERS & CONSTRAINTS FOR DEFENSE MARKET PARTICIPANTS

⚠️

Conflict outcome uncertainty

any ceasefire or peace deal would sharply alter procurement priorities and aid flows.

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Aid fatigue

US reductions in 2025 under Trump administration signal political risk in the supply chain.

📉

Corruption risk

Ukraine's procurement ecosystem, despite reforms, carries elevated integrity and compliance risk.

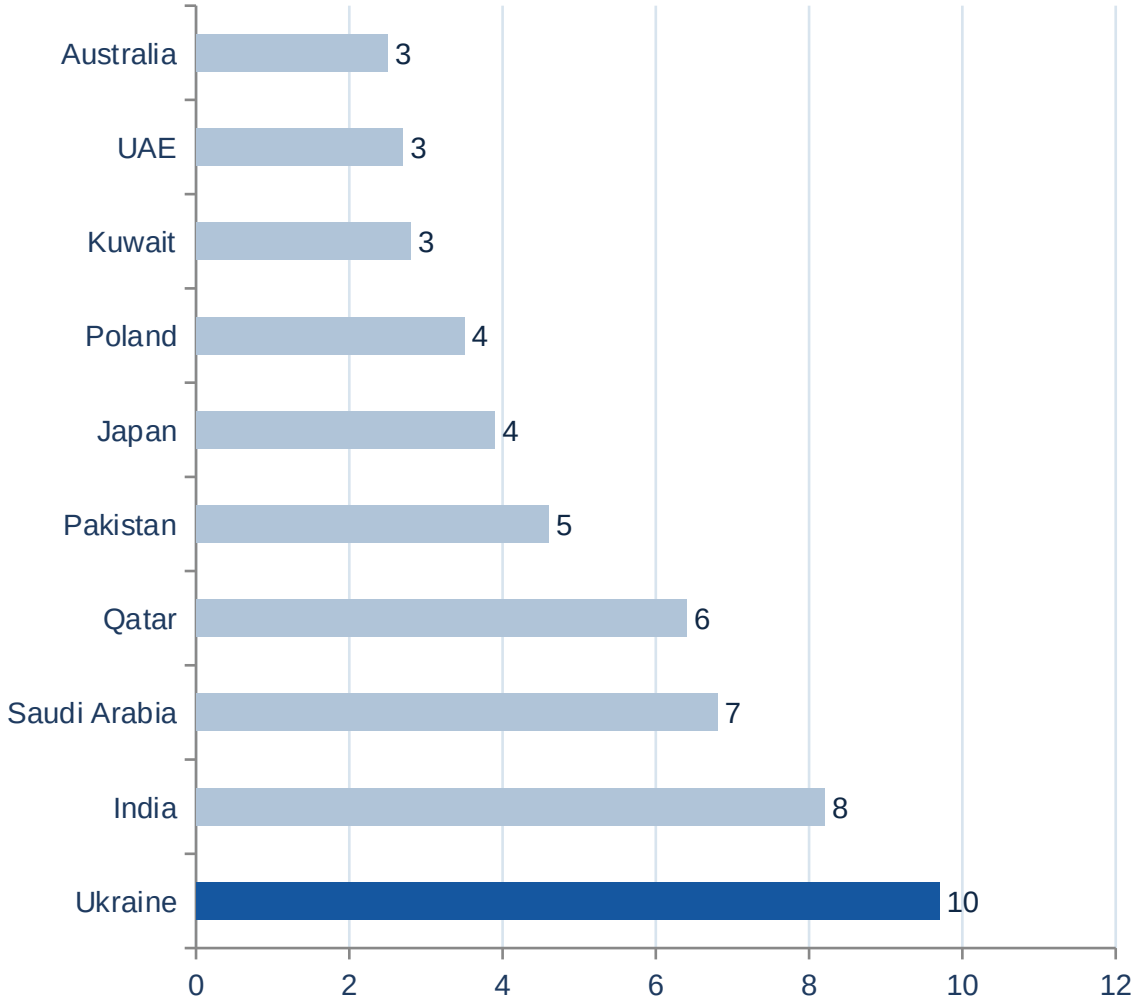
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Sanctions & dual-use controls

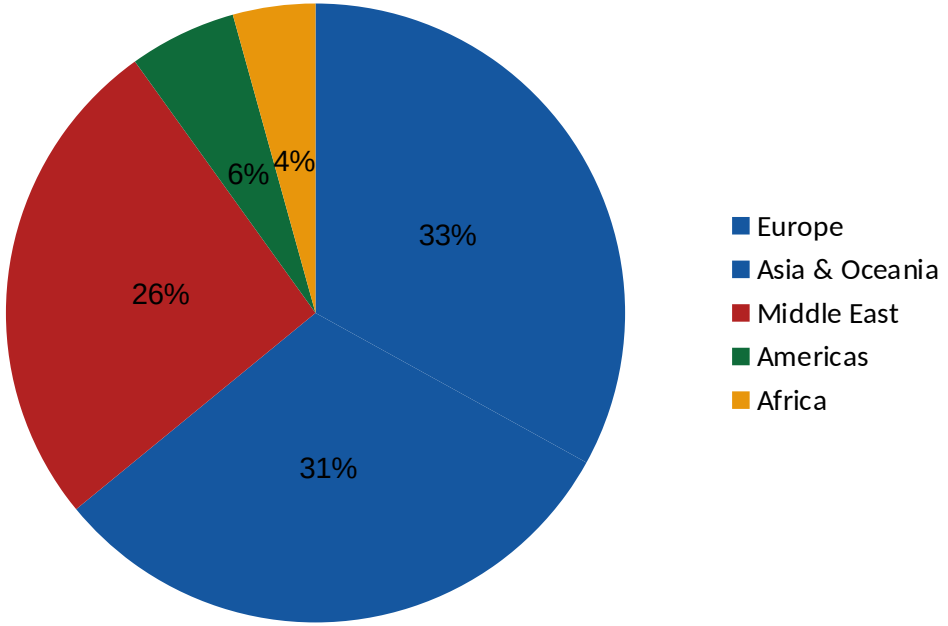
complex export licensing across multiple supplier nations slows critical deliveries.

🇺🇦 UKRAINE — TREND & COMPARATIVE POSITION

TOP 10 ARMS IMPORTERS — GLOBAL SHARE (%) 2021–25



REGIONAL CONTEXT (2021–25)



PERIOD CHANGE	PREV PERIOD SHARE
+9,600%+	0.1%

🇺🇦 UKRAINE — STRATEGIC MARKET OUTLOOK

SDI OUTLOOK: 2025–2030 HORIZON

Ukraine will remain a top-3 global arms importer for the foreseeable future. Post-conflict, the rebuild will be the largest single defence procurement opportunity in Europe since World War II. NATO accession trajectory is the key variable shaping long-term market structure. At least 35 nations have vested interests in Ukraine's rearmament — creating a durable multilateral supply network.

IMPORT TRAJECTORY	MARKET COMPETITION	US SUPPLIER ROLE	OFFSET / JV NEED
→ STABLE	HIGH	SIGNIFICANT	MODERATE

KEY WATCH ITEMS 2026–2030 ► Post-war reconstruction | Air Force modernisation

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🇺🇦 Ukraine Defense Brief

Rank: #1 · Share: 9.7%

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DISCLAIMER

This brief is compiled from open-source data. SIPRI TIV figures are trend-indicator values, not financial values. SDI does not warrant accuracy of third-party data.

DATA SOURCES & REFERENCES

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SIPRI Fact Sheet 2026 — Trends in International Arms Transfers 2025

SIPRI Press Release, 9 Mar. 2026

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▸ WION — 'Global Arms Race 2026: Top 7 Biggest Weapons Importers', April 2026

▸ Khan Global Studies — 'Trends in International Arms Transfers 2025', March 2026

▸ SIPRI Arms Transfers Database (open access) — armstransfers.sipri.org

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