



New Security Trends in the Caucasus and Central Asia: Sales of Russian Arms Decline

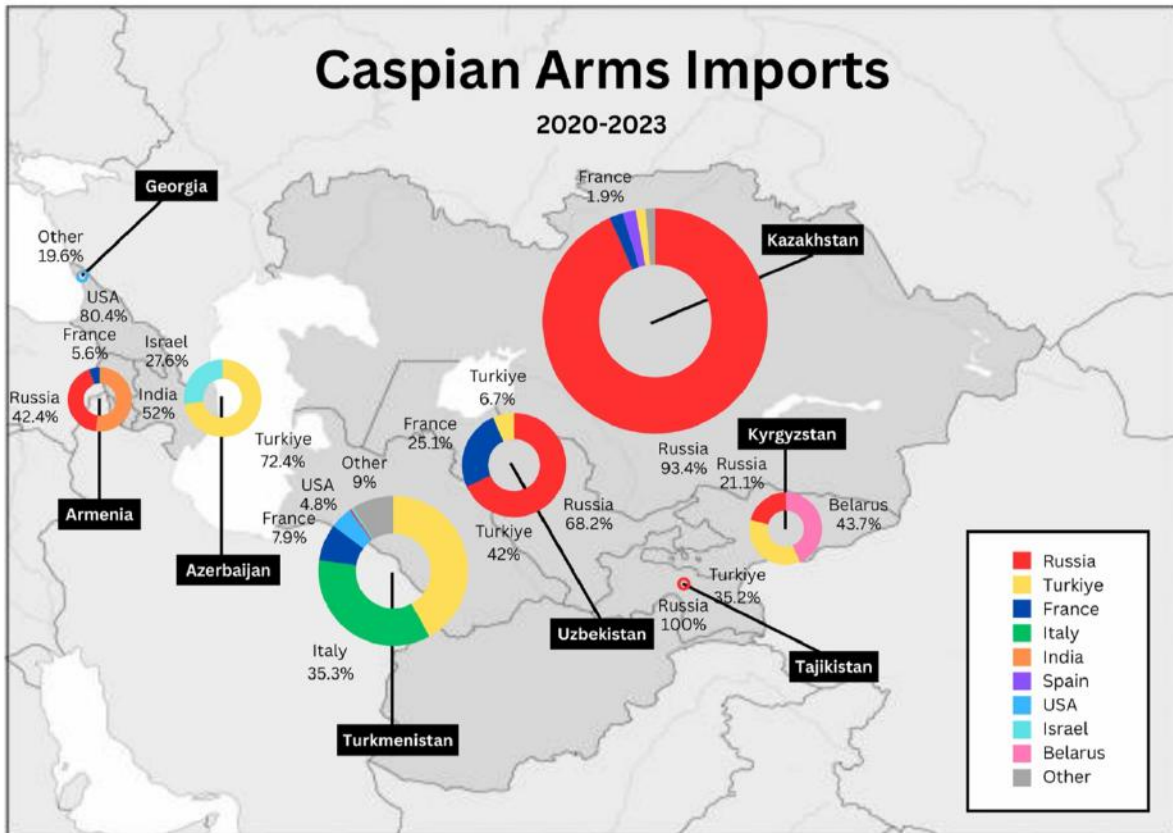
By Joshua Bernard-Pearl



Cover Photo: © Baykar Tech

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Percentage of arms imported by country of origin scaled by volume of arms

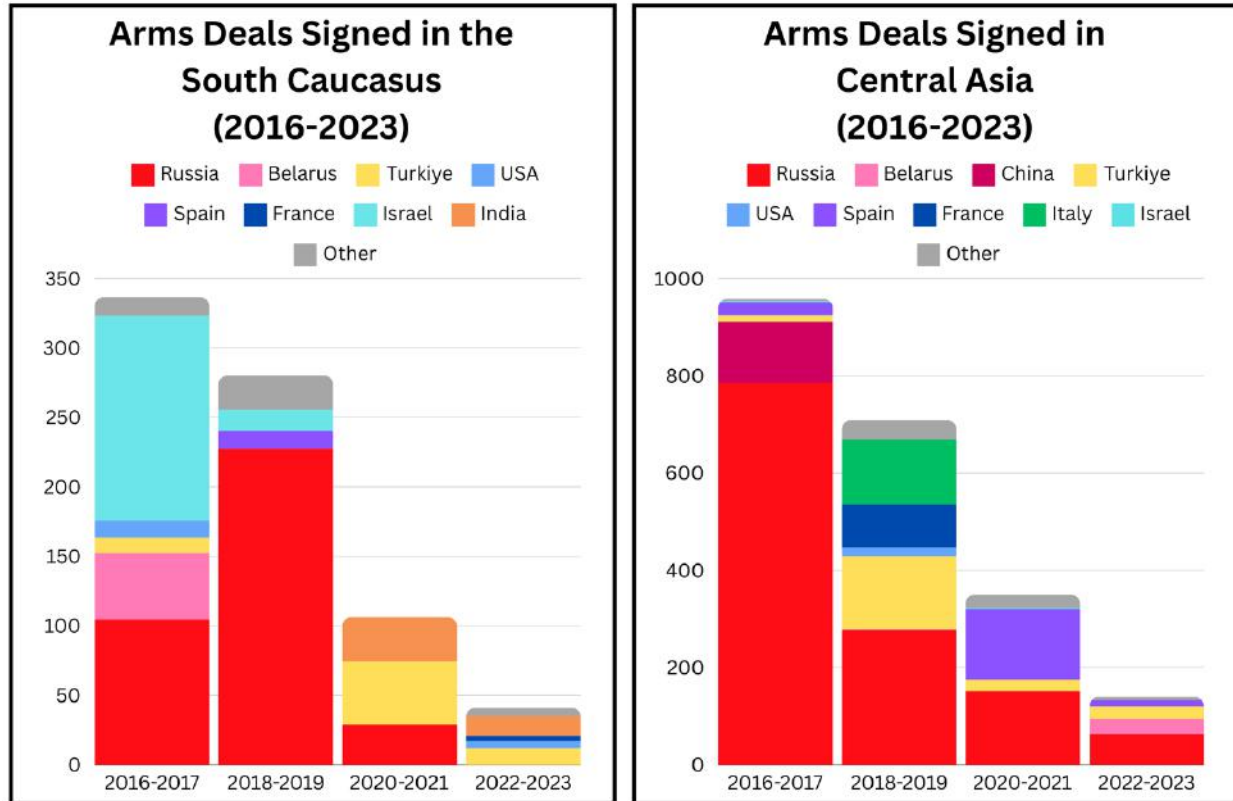
*Scale measured in SIPRI trend-indicator value (TIV)

**Charts do not display arms transfers of undisclosed amounts or deals to produce undisclosed numbers of foreign designed arms domestically

Source: Created with Data from SIPRI Arms Transfers Database, DefenseNews, Civilnet, Janes, Army Recognition Group, Paramount, Defense Web, Eurasianet, and 24.kg

Trade in arms has been a pivotal factor shaping alliances, conflicts, and local dynamics, particularly in the Caspian Region. Russia has long played a dominant role in this region’s arms market. However, in recent years, especially

following Russia’s 2022 full-scale invasion of Ukraine, Moscow’s dominance has shifted. The volume of Russian arms imports for Central Asia and the South Caucasus between 2021 and 2023 fell by 23% and 44% when compared to levels in



Russia's market share of arms deals is falling across the South Caucasus and Central Asia

Graphs show the annual volume of arms in deals signed by Azerbaijan, Armenia, and Georgia on the left and Kazakhstan, Uzbekistan, Turkmenistan, Tajikistan, and Kyrgyzstan on the right measured in SIPRI trend-indicator values (TIVs) as units.

Source: Created with Data from SIPRI Arms Transfers Database, DefenseNews, Civilnet, Janes, Army Recognition Group, Paramount, Defense Web, Eurasianet, and 24.kg

the previous decade. This shift is even more apparent when looking at new arms deals signed, with the share of Russian arms in weapons promised by volume falling by 35% for Central Asia and 100% for the Caucasus compared with prior levels in the same time periods. This decline is a prime indicator of new security calculations by Caspian countries seeking alternatives to Russian trade, marking the rise of alternative security actors and suppliers such as Türkiye, France, Italy, and India looking to fill the Russian vacuum.

Moreover, the nature of weapons purchased is also changing, with a growing demand for modern systems and new technological capabilities. Unmanned Aerial Vehicles (UAVs) are increasingly seen as

cost-effective weapons for both offensive and defensive purposes. Türkiye is the region's stand-out and dominant supplier. An increasing number of agreements have also been signed to produce foreign-designed weapons systems domestically in the region. The importance of domestic military production capabilities has been highlighted by Ukraine's ongoing struggle to secure foreign weapons systems and could offer a potential explanation for the increase in these deals.

In the wake of the war in Ukraine, Central Asia and the South Caucasus have apparently decided to diversify away from their traditional, post-Soviet arms relationship with Russia, particularly because Russian military equipment had

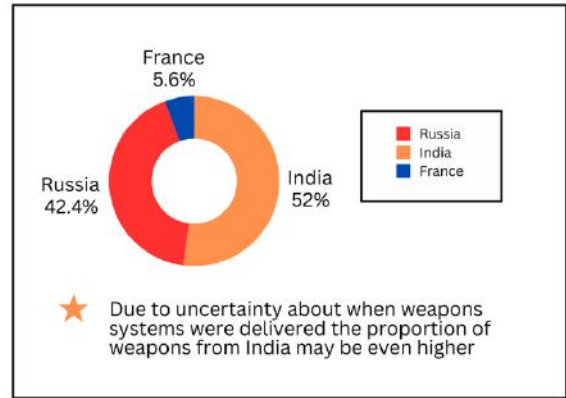
not fared favorably against modern drones and high-tech alternatives. It also seems unlikely that Russian manufacturing can supply heavy equipment outside of the country's own war effort. Not surprisingly, there appears to be an increasing desire for diversification in suppliers and self-sufficiency that could be leading to a more independent security environment in the region with new avenues for Western influence, as Russia's virtual arms-sales monopoly decreases.

This trend has varied slightly between countries in the region, however. Per the following country arms-sales analyses, Armenia is in the midst of a clear shift away from Russia by increasing arms from other sources and seemingly ceasing all new Russian deals. Azerbaijan and Turkmenistan have already fully diversified away from Russian arms. Kazakhstan is still heavily reliant on Russia but has shown a recent willingness to diversify. Other countries have been resistant to transition away from Russian weapons. Tajikistan and Kyrgyzstan are expanding new UAV capabilities with other suppliers but still buying some systems from Russia. Uzbekistan has actively increased its sourcing from Russia. Georgia is on the cusp of a potential shift away from Western arms, currently its sole supplier, but it is unclear where the country might turn next.

This report uses published data from a variety of open-source defense databases and media reports. While not absolute or comprehensive due to the opaque nature of arms sales reporting, significant data is available through these sources and reflects the ongoing shifts in procurement and general trends in the region. Sales reporting is generally complete through 2023, but any 2024 data used here is incomplete and used only as an indicator of change.

Armenia

Armenia Arms Imports By Country (2020-2023)



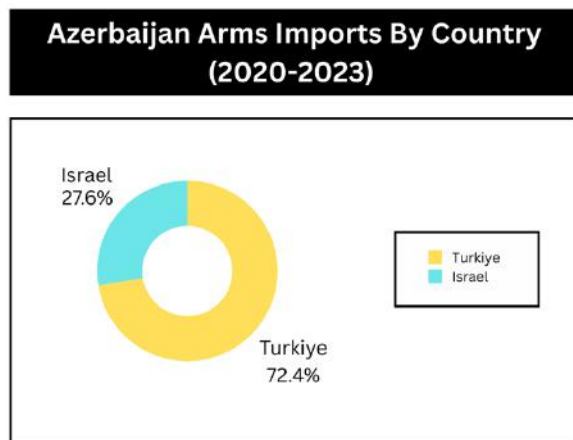
Source: Created with Data from SIPRI Arms Transfer Database and Civil Net

Armenia has made one of the most recent and dramatic shifts away from Russian arms imports in the region. From the breakup of the Soviet Union in 1991 until 2020, Russia [supplied](#) 87% of Armenian arms imports by volume. These Russian weapons were used in the Armenian occupation of Nagorno-Karabakh, an internationally recognized region of Azerbaijan. Following Azerbaijan's victory in the Second Karabakh War in 2020, Armenian officials pointed towards Russia's [failure](#) to intervene with Russia's peacekeeping forces present in the region as a sign that Russian support was unreliable. The [sale](#) of advanced Russian military hardware from Belarus to Azerbaijan during the conflict, likely with Russian permission, was potentially also [seen](#) by Yerevan as proof of Russia's unreliability as a security partner. India and France have since begun to replace Russia's market share.

In [weapons imports](#) delivered from 2020 to 2023, India supplied Armenia with

over 52% of its arms by volume. Recent, Indian deals [include](#) self-propelled multiple rocket launchers, artillery locating radar, anti-aircraft missiles, self-propelled howitzers, and an anti-drone system. In the same period, France signed agreements, including 24 [bastion](#) armored personnel carriers delivered in 2023 and three [radar](#) systems delivered in 2024. France has expanded these defense ties further in 2024, signing deals to provide Armenia with French-made [assault rifles](#) and CAESAR self-propelled [howitzers](#) in February and June respectively. It is notable, however, that following the Second Karabakh War in 2020, Russia did continue to supply some arms from past deals, with the [delivery](#) of four Russian Mi-17 transport helicopters in 2022.

Azerbaijan



Source: Created with Data from SIPRI Arms Transfer Database

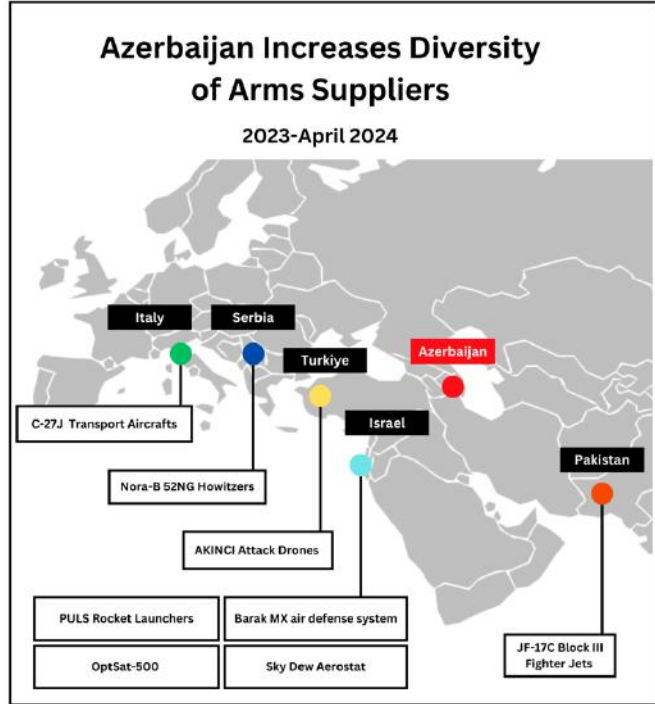
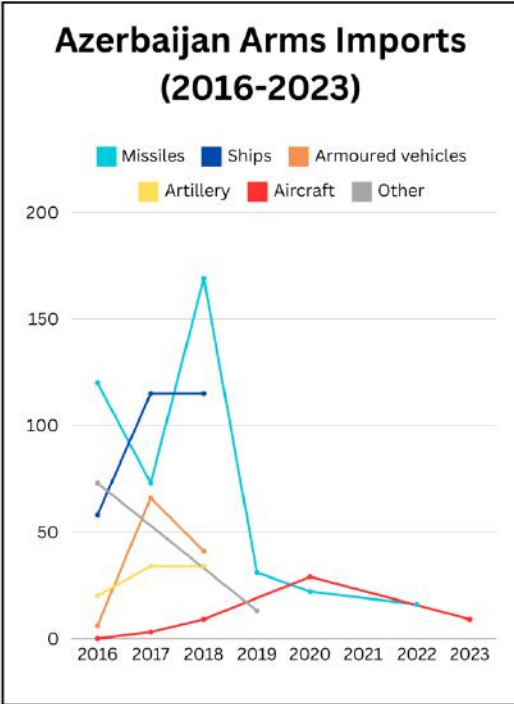
Azerbaijan has also shifted away from Russian arms, officially cutting out Russian arms imports completely by 2018. However, [news reports](#) indicate there was a transfer of Russian artillery targeting equipment and counter-drone mobile warfare stations from Belarus to Azerbaijan from 2018 to 2022, which is generally assumed to have been made with Russian

permission. From 2006 to 2016 Russia [accounted](#) for roughly 22% of Azerbaijan's imports yet no new weapons deals have been signed between the countries since 2017.

Israel and Türkiye have, instead, [dominated](#) Azeri arms imports, accounting for 60% and 14% respectively of weapons deliveries by volume from 2018 to 2023. Before 2020, arms imports primarily consisted of missiles, ships, armored vehicles, and artillery, likely in preparation for Azerbaijan's 2020 offensive in Nagorno-Karabakh. More recent purchases have largely focused on bolstering Azeri air capabilities. This includes the [purchase](#) of two Italian C-27J Spartan transport aircraft in June of 2023, the [rumored purchase](#) of an undisclosed number of Chinese Pakistan-made JF-17C fighter jets from Pakistan in 2024, and an [agreement](#) with Türkiye to join its TF Kaan fifth-generation fighter development program in July 2023.

Azerbaijan is also expanding its arsenal of Turkish-made UAVs. The country [purchased](#) two of Türkiye's most advanced Bayraktar Akinci combat drones in 2022 and signed a [memorandum](#) in 2023 to produce the drone domestically after witnessing the effectiveness of the less advanced Bayraktar TB2 model in 2020.

Israel has remained an important arms partner in recent years. Azerbaijan expanded its military presence in space with the [purchase](#) of two Israeli-made spy satellites to be launched in 2026 and 2028. The country signed additional [deals](#) with Israel to purchase the Barak MX air defense system for \$1.2 billion in November 2023, Precise and Universal Launching Systems (PULS) rocket launchers for \$150 million in July 2023, and a [Sky Dew](#) high-altitude



Azerbaijan provides the best example of two trends in the region. Analysis of the types of weapons purchased by Azerbaijan from 2016 to 2023 and new purchases in 2024 demonstrates a focus on modern aerial capabilities and a diversification of suppliers.

Source: Created with Data from Civilnet, Defense News, SIPRI Arms Transfers Database, European Security & Defense,

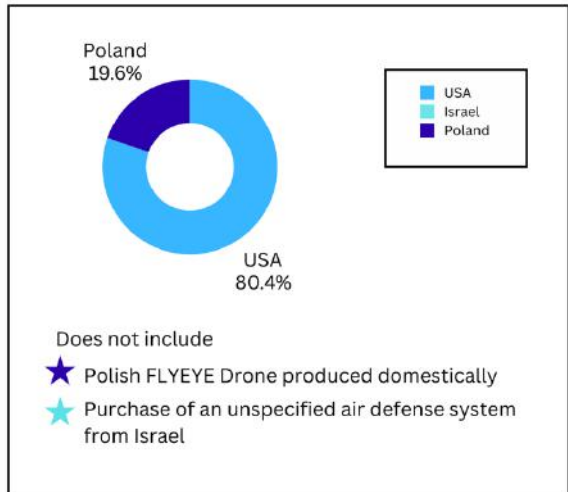
balloon long-range missile and aircraft detection system in March of 2024.

In February 2024, Azerbaijan also purchased 48 units of Nora-B 52NG self-propelled howitzers from Serbia. These howitzers notably fire 155-millimeter caliber NATO standard shells, the first artillery piece in Azerbaijan’s arsenal to use NATO-standard shells.

Georgia

Since Russia invaded Georgia in 2008, Georgia has exclusively relied on Europe, Türkiye, the United States, and Israel for arms purchases. Its largest individual supplier since 2008 was Ukraine, accounting for 30% of arms by volume. In 2020, Georgia purchased an Israeli air defense system and signed a deal with Israel in 2021 to modernize the Georgian air

Georgia Arms Imports By Country (2020-2023)

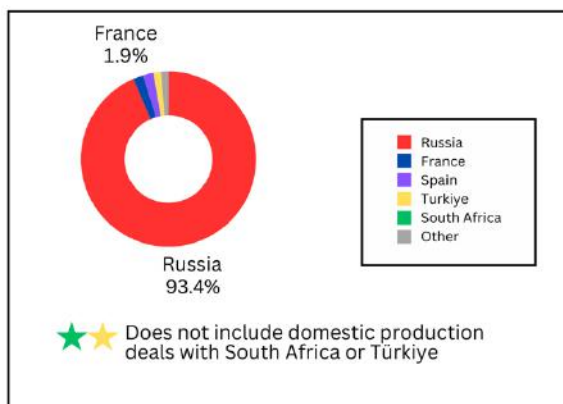


Source: Created with Data from SIPRI Arms Transfer Database, Civil Georgia, Defense and Security Monitor, and Jamestown

force. In 2022, Tbilisi signed a [deal](#) with Poland's WB Group to produce the FLYEYE reconnaissance drone and Warmate, a loitering munition UAV, domestically.

These arms relationships could be changing, however, as Western countries have increasingly raised concerns about Georgia's close relationship with Russia. The European Union (EU) recently [suspended](#) 30 million euros in military aid (\$32 million) in response to Georgia's controversial foreign agent law and subsequent crackdown on human rights. The United States also indefinitely [postponed](#) a planned joint military exercise with Georgia over similar concerns. All [arms delivered](#) to Georgia in the past decade have come from the United States and EU countries, so a breakdown in this relationship could require Georgia to seek new arms suppliers outside of the West and address challenges of equipment interoperability.

**Kazakhstan Arms Imports By Country
(2020-2023)**



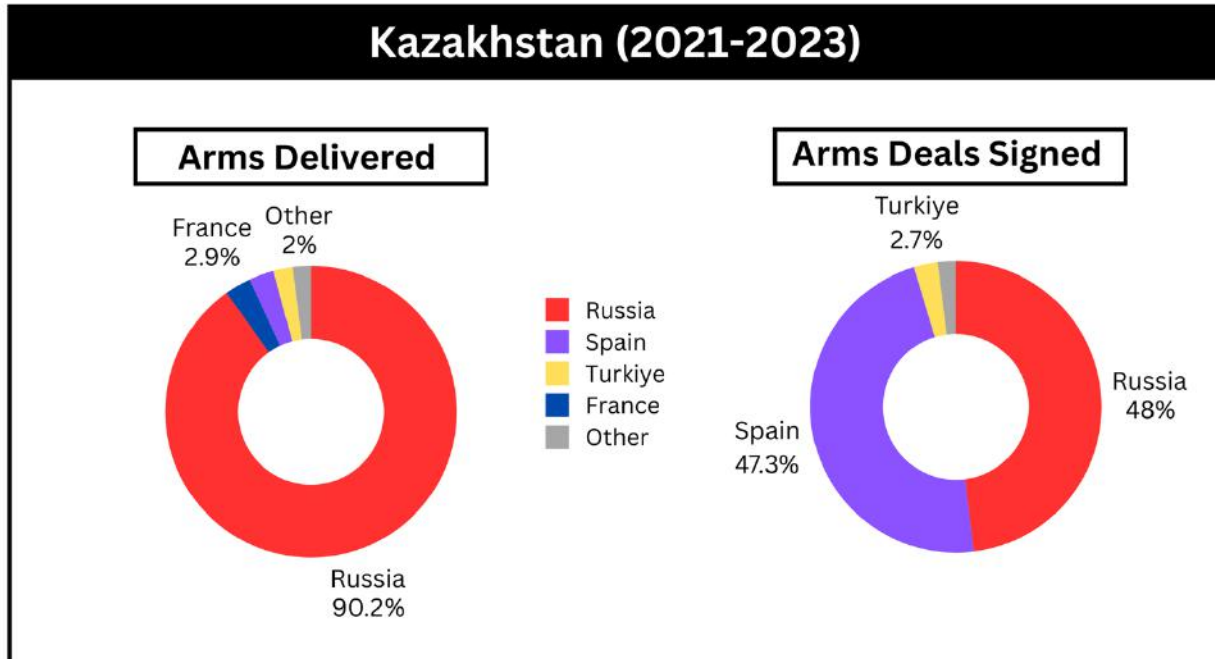
Source: Created with Data from SIPRI Arms Transfer Database, Defense News, Janes, Army Recognition Group, Paramount, and Defense Web

Kazakhstan

Russia is still the largest supplier of Kazakhstani weaponry, accounting for roughly 90% of arms [deliveries](#) from 2021 to 2023. However, many of these shipments appear to have come from older deals signed with Russia. Kazakhstan is now apparently increasingly looking to Spain, Türkiye, and South Africa to build out new capabilities. Due to a long delay between when many Russian arms agreements were signed and the delivery of those weapons systems, [deals](#) signed as far back as 2017 have resulted in shipments as late as 2022. Analyzing what new deals have been signed, rather than just weapons delivered, can reveal insight into the future of Kazakhstan's arms relationships. In [arms deals](#) signed from 2016 to 2019, Russia accounted for 94% of weapons promised by volume. From 2020 to 2023 this figure dropped to 48%. The share of weapons promised by Spain nearly matched Russian arms deals from 2020 to 2023, increasing to just over 47% largely due to the [sale](#) of two A400M Atlas transport aircraft in 2021. The delivery of the first of these aircrafts is [expected](#) this year.

The percentage of Russian arms imports above also does not account for the increasing number of weapons systems produced domestically with support from foreign partners.

South Africa has been a long-term partner in these efforts, largely through ventures of the Kazakh subsidiary of Paramount Engineering, a South African defense manufacturer. Under Paramount's portable production model, Kazakhstan signed [deals](#) in [2013](#) and [2018](#) resulting in the production of 131 South African Marauder Armored Personnel Carriers and has also begun to produce the [Barys 6x6](#)



Time lag in Russian arm transfer and shift to alternate suppliers demonstrated in difference between arms delivered and new arms deals signed

Source: Created with Data from SIPRI Arms Transfers Database, Defense News, Janes, Army Recognition Group, Paramount, and Defense Web

Infantry Fighting Vehicle and [Mbombe 6](#) armored fighting vehicle.

Türkiye has been the most significant recent partner in building out these domestic capabilities, providing Kazakhstan with expanded drone and naval production capabilities. The countries agreed to jointly produce the Turkish Anka Military Drones in Kazakhstan in a 2023 [memorandum](#), the first production base of the drone outside of Türkiye. Kazakhstan's Zenit Shipbuilding plant also signed a deal with a Turkish shipyard to build [warships](#). This expansion of Astana's fleet is significant given that a capable Kazakhstani navy could challenge the long-standing naval dominance of Russia in the Caspian Sea.

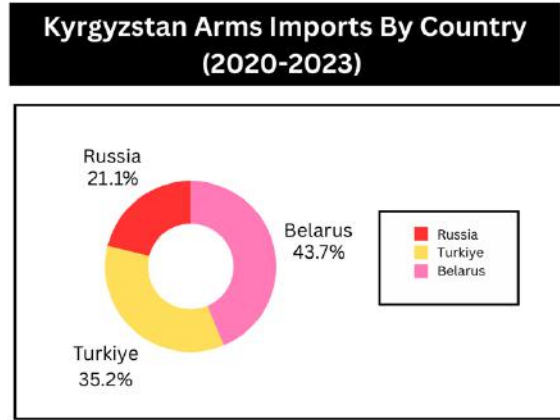
This year, Kazakhstan embarked on a military modernization program, [purchasing](#) over 500 pieces of new

equipment in the first half of 2024 alone and spending 36.8% more than in 2023. These purchases have fallen in line with recent trends in diversification, domestic production, naval expansion, and UAV capabilities. The new equipment [includes](#) Arlan armored wheeled vehicles produced domestically by Kazakhstan Paramount Engineering, the COBRA II armored vehicle and ANKA heavy drone from Türkiye, the EVOMax unmanned quadcopter currently produced by China, the "SUNQAR" tactical UAV, and fireproof boats [designed](#) for coastal protection.

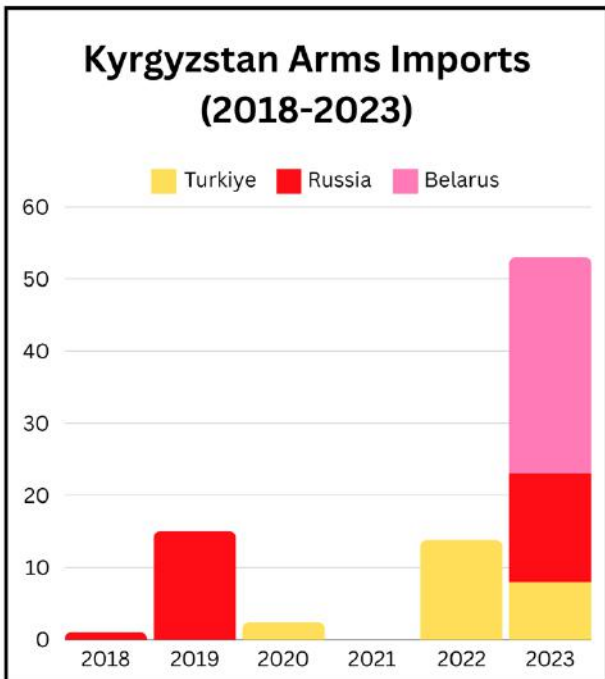
Although it is clear Russia remains the most dominant arms partner for Kazakhstan, the recent purchases from Spain and ongoing partnerships with South Africa and Türkiye indicate a potential desire to diversify away from Russian arms supplies in the future.

Kyrgyzstan

Türkiye and Russia have been Kyrgyzstan’s primary arms partners in recent years with Türkiye notably [increasing](#) its involvement to account for 62% of weapons imported by volume in the past two years since Türkiye started exporting weapons to Kyrgyzstan in 2022. These Turkish weapons systems have all been armored UAVs consisting of the Akinci, Aksunger, Anka, and Bayraktar TB2 models. Kyrgyzstan also reportedly received a [shipment](#) of surface-to-air missiles from Belarus in April 2023. In May 2024, Kyrgyz officials confirmed that the country would soon [obtain](#) the Russian S-300 air defense system.



Source: Created with Data from SIPRI Arms Transfer Database and EurasiaNet

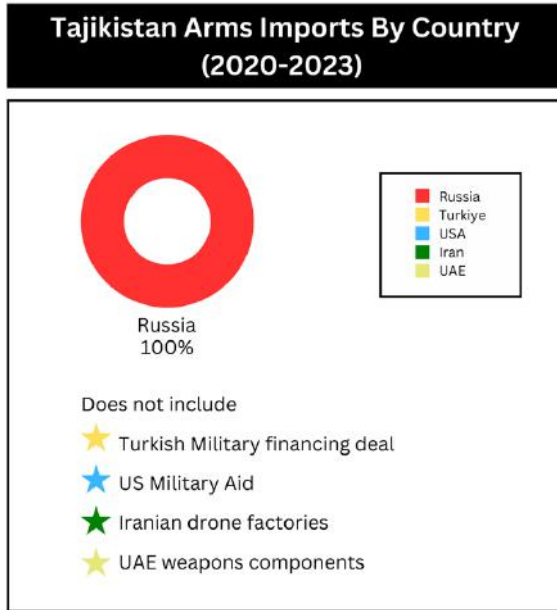


Kyrgyzstan increases arms deals and imports from Türkiye without cutting out Russia

Graphs show volume of arms deals signed and arms transfers measured in SIPRI trend-indicator values (TIVs). The method used for the SIPRI TIV is described on the SIPRI Arms Transfers Database web page.

Source: Created with Data from SIPRI Arms Transfers Database, Eurasianet, and 24.kg

Tajikistan



Source: Created with Data from SIPRI Arms Transfer Database, The Cradle, EurasiaNet, U.S. Embassy in Tajikistan, and Defense and Security Monitor

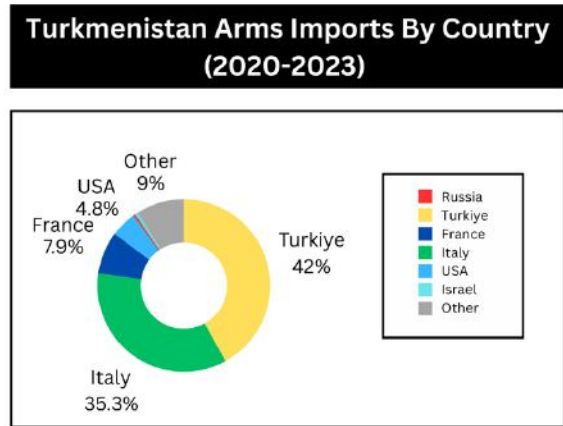
Drones have been the centerpiece of the majority of recent Tajik arms deals. Iran, Tajikistan’s most significant security partner, has produced Ababil-2 UAVs in a [factory](#) opened in the Tajik capital Dushanbe since May 2022. Paradoxically, despite Iran’s influence, the United States has long supplied Tajikistan with [military aid](#) adding up to \$330 million since 1992. This includes a \$20 million [package](#) announced in 2022 to provide American Puma reconnaissance drones to monitor the country's border. It is unclear whether these drones have been delivered.

Türkiye also agreed to provide \$1.5 million over five years to support Tajikistan’s purchase of Turkish military products, including UAVs, in a deal [ratified](#) by the Tajik parliament in April of 2024. The two countries were reportedly in [negotiations](#) in April of 2022 over the sale of Turkish Bayraktar TB2 drones however the deal was heavily opposed by neighboring

Kyrgyzstan who pushed for Ankara to cancel the talks.

Outside of these drone deals, Russia has provided the majority of arms supplies with the most recent deal [involving](#) the sale of four Soviet TOS-1 self-propelled Multiple Rocket launcher Systems and four accompanying loader-transport vehicles. The UAE has also emerged as a key [parts supplier](#) for Tajik military vehicle production. Overall, the volume of Tajik direct purchases has been relatively small when compared to other countries in the region.

Turkmenistan

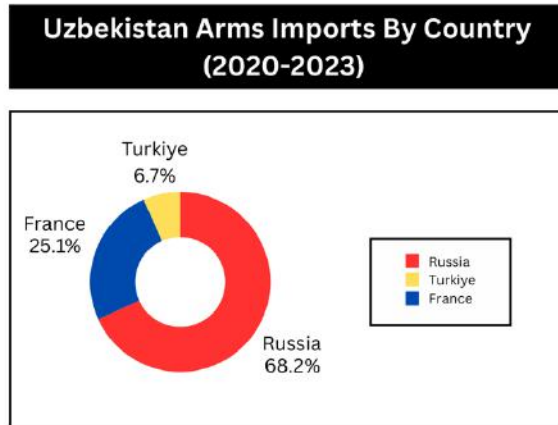


Source: Created with Data from SIPRI Arms Transfer Database

Turkmenistan's largest weapons supplier has long been Türkiye. Turkmenistan was the [largest buyer](#) of Turkish weapons from 2013 to 2017. Except for 2021, Turkmenistan has [not officially received](#) any foreign weapons systems from any nation since 2017. In the 2021 [arms deliveries](#), however, Türkiye continued to make up the largest share at 42% of imported weapons by volume, largely due to the sale of a C-92 frigate. Italy was also a notable supplier at 35% of arms by volume, supplying aircrafts and anti-ship missiles, among other systems. By contrast, Russia accounted for less than 0.005% of weapons

delivered, with the sale of one armored fighting vehicle and two turrets. This most recent round of Turkmen weapons acquisitions largely [focused](#) on ships and aircraft, accounting for 40% and 35% of arms purchases by volume respectively.

Uzbekistan



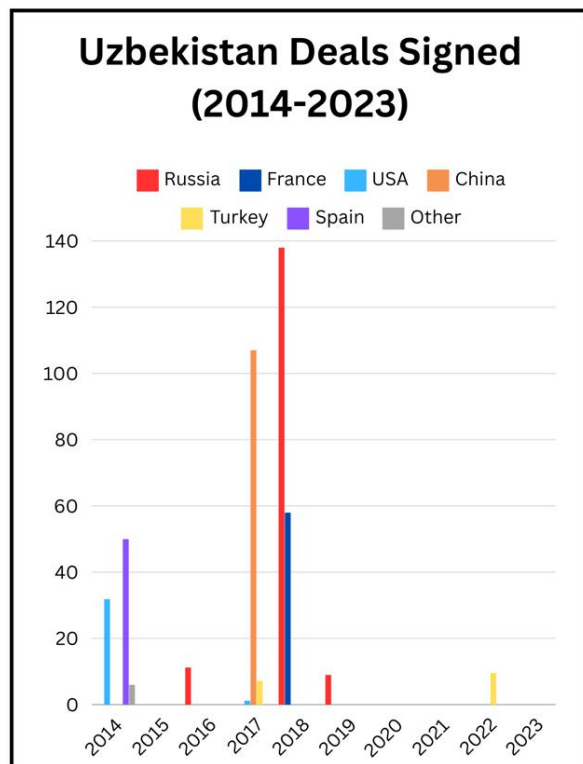
Source: Created with Data from SIPRI Arms Transfer Database

Uzbekistan appears to have doubled down on Russian arms. Over the past five years from 2019 to 2023, Russia has made up 66% of arms [deliveries](#) by volume, compared to only 3.8% in the five years before that. This increase largely came from the [delivery](#) of 12 Russian Mi-35M combat helicopters sold to Uzbekistan in 2018. Uzbekistan is also discussing a new rearmament contract with Russia that would encompass the air force, air defense, and ground forces according to a [statement](#) made by the head of the Federal Service for Military-Technical Cooperation (FSMTC) of Russia in May of 2024. This statement came following Russian President Vladimir Putin's visit to Uzbekistan, after which Putin and Uzbek President Mirziyoyev emphasized continued military cooperation in a joint statement.

Uzbekistan is not completely reliant on Russia, however. Uzbekistan [purchased](#)

eight French AS-532 Cougar transport helicopters in 2018, [accounting](#) for 26% of arms imports by volume delivered to Uzbekistan in the past five years. It is reported that the US also intends to transfer aircrafts once belonging to the Afghan Air Force to Uzbekistan. This is a key example of growing US security cooperation in the region.

Uzbekistan is also expanding its fleet of UAVs. President Mirziyoyev [displayed](#) a number of recent purchases in 2023 including Turkish Bayraktar TB2s, a Chinese-made Wing Loong, and eight Russian Orlan-10 drones in addition to an Uzbek-designed Lochin reconnaissance drone.



Uzbekistan's last major arms deal was signed with Russia in 2018

Graph displays volume of arms in deals signed measured in SIPRI trend-indicator values (TIVs).

Source: Created with Data from SIPRI Arms Transfers Database and Airforce Technology

Overall purchase agreement data show that countries within the Caspian Region are modernizing their weapons systems through non-Russian suppliers. Across Central Asia and the South Caucasus, there is a general shift away from Russia, the historic local arms trade hegemon, and towards new suppliers, including Türkiye, France, Spain, and India. However, this pattern varies across countries. Alongside this trend is a rise in demand for domestic arms manufacturing and drone capabilities. Türkiye has been a dominant actor in supplying these new capabilities to the region.

This trend of expanding new capabilities with non-Russian suppliers will undoubtedly lead to challenges and opportunities in the future. Countries in the Caspian region will have to solve the problem of integrating these new systems into their existing, largely Russian-produced arsenals. At the same time, new production capabilities expand the potential for arms trade between countries within the region rather than looking to external powers. As Western-aligned actors replace Russia's market share, a new avenue for Western influence is being created.

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