# China's Rise as an Arms Exporter: Implications for India

Anil Chopra

#### Abstract

The Chinese arms industry today is the world's second-largest producer of munitions. It has overtaken Russia in arms production, a country that was once a major supplier of arms to China. Currently, three of the world's top 10 arms companies are Chinese. China is also becoming a significant exporter of arms around the world. It has emerged as a supplier of weapon platforms to over 50 countries, and is now the world's fifth largest arms exporter. Its main customers are relatively poor countries in South and East Asia, Africa, and Latin America. In each case the sales are linked to lower costs, sometimes cheap loans, and political leveraging. Around 75 per cent went to Asia, with Pakistan being the destination for over 50 per cent of Chinese exports. Defence exports to others in Asia, like Bangladesh, Myanmar, Sri Lanka, and Iran are also of concern to India. Close military ties with Pakistan pose a twofront war to India. In this context, the paper examines the trends in China's defence exports, with special attention to Asia. Furthermore, it analyses the implications it holds for India.

#### Introduction

Chinese supreme leader Deng Xiaoping had advised the Communist Party

Air Marshal **Anil Chopra** (Retd) was head of Flight Test Centre ASTE and IAF in J&K and retired as Air Officer Personnel.

of China (CPC) to 'hide capability and bide time.' It must gain economic and military strength first and only when must China start looking for a place on the head table of comity of nations. Since as early as 1950s, China has dreamt of being a superpower. It also believed, and openly articulated, that the power flows from the barrel of the gun as exemplified in China's unilateral actions in South China Sea and East China Sea; the expansionist 'debt trap diplomacy' under the Belt and Road Initiative (BRI), and China's recent actions against India in Eastern Ladakh. What calls for China's military activism is its rapid military modernisation. Wherein, one of the important aspects to note are investments in defence technology and procurement, which has resulted into an exponential growth in Chinese Arms Industry.

The Chinese arms industry is now the world's second-largest producer of munitions—a clear shift from the trend decade ago, when China was a major arms importer.<sup>1</sup> It has overtaken Russia in arms production, a country that was once a major supplier of arms to China. Today, three of the world's top 10 arms companies are Chinese. While lack of transparency and state-controlled media hype continues to confuse facts, but as estimated US\$ 70-80 billion worth of Chinese munitions are consumed by the Chinese People's Liberation Army (PLA).

China is also becoming a significant exporter of arms around the world. As per latest estimates China has emerged as a supplier of weapon platforms to over 50 countries. In general, between the period of 1998 and 2017, Chinese arms sales developed in volume exponentially by 211 percent, as per *SIPRI* data. China is today launching home-designed aircraft carriers and conducting research in quantum-technology communications. Besides, China also is the world's fifth largest weapons exporter. Its entry into weapon sales is of special concern since Beijing has not signed many arms control regulations, and it only became a signatory to the Arms Trade Treaty,<sup>2</sup> in July 2020.<sup>3</sup> Its main customers are relatively poor countries in South and East Asia, Africa and Latin America. In each

case, the sales are linked to lower costs, sometimes cheap loans, and political leveraging—with an intention initially aimed at establishing a foothold in the local defence market. For instance, Chinese Unmanned Aerial Vehicles (UAV), or drones, are being extensively used in conflicts in both Libya and Yemen.

# China and Arms Sales: Hiking Exports versus Shrinking Imports

In 2017, of the 20 largest companies listed in the SIPRI Top 100, 11 were based in the USA; 6 in Western Europe; and 3 in Russia. Interestingly as per the 2020 SIPRI data, four Chinese arms companies rank among the World's top 20, with combined estimated arms sales totalling US\$ 54.1 billion, of which three of the companies were ranked in the top 10.5 Amongst China's defence industry, Aviation Industry Corporation of China (AVIC) ranks as the country's largest arms company. It mostly produces aircraft and avionics, with arms sales totalling US\$ 20.1 billion, and is ranked sixth largest in the world.<sup>6</sup> While China North Industries Group Corporation (NORINCO) is eighth in the Top 100 with sales of US\$ 17.2 billion, and is the world's largest producer of land systems as per the SIPRI report.<sup>7</sup> The other two industries include China Electronics Technology Group Corporation (CETC) and China South Industries Group Corporation (CSGC). Owing to these trends, one can rightly suggest that the Chinese defence firms have started giving a tough competition to their American counterparts.

According to the SIPRI data, China's conventional arms sales surged from US\$ 645 million in 2008 to US\$ 1.04 billion in 2018.8 Over this period, the lion's share of these exports of around 75 per cent went to Asia; and an additional 20 per cent flowed into Africa. Although China has established itself as a leading arms exporter, the overall value of its trade still pales in comparison to the United States (US), whose exports averaged over US\$ 9 billion annually during the last ten years. Countries

in Asia purchased 82.8 per cent of China's arms exports; while African states imported around 20 per cent. Pakistan is the destination for over 50 per cent of Chinese exports; while other top importers of Chinese arms in Asia include Bangladesh, Myanmar, Sri Lanka and Iran.

As China's arms exports are on the rise, its imports are exhibiting a reverse trend exemplifying China's growing capability to produce weapons, which in many cases are through reverse engineering of existing foreign technology. For instance, the Shenyang J-11 fighter was adopted from the Russia Su-27K that Beijing first purchased in 1992. Similarly, China's HQ-9 surface-to-air missiles were inspired by Russia's S-300 platform. In fact, most Chinese weapon platforms seem to have link with some Western or Russian original design. What is important to note that China's economic growth has provided a boost to the spending on research and development, thus adding to China's military-industrial build up.

Another trend to note is Beijing's concentration on emerging technologies, which has enabled it to fill the void left by other suppliers. The US has put restrictions on sale of many high end equipments, including UAVs. China has made its UAVs available to countries such as Pakistan, the UAE, Saudi Arabia, and Egypt. Moreover, in September 2019, Serbia announced that it will buy nine Wing Loong drones from China,12—first time ever that a European country has purchased Chinese UAVs. To add, Chinese weapons have also found their way into various conflict zones. What makes it so is the fact that Chinese arms are cost-effective as compared to its American and European counterparts. As the US Department of Defense notes, "Chinese arms are less expensive than those offered by the top international arms suppliers, yet have advanced capabilities."13 To cite an example, the low-cost K-8 jet trainer is estimated to make up 80 per cent of all jet trainer aircraft in Africa<sup>14</sup>—similarly, the JF-17 may finally get sold to more countries.

## Chinese Arms Exports: A Regional Assessment

#### Latin America

China has historically supplied weapons to countries that are on the United Nation's bad books. These include rogue states such as North Korea and Iran. China's leap forward came when Venezuela's President, the late Hugo Chavez, went to China to diversify arms imports because of an uncomfortable relationship with the United States. It bought the K-8 trainers and air search radars in 2008, and later bought transport aircraft, armoured personnel carriers and self-propelled artillery. China's ability and willingness to supply modern military gear at a highly competitive price makes purchases from it very appealing.

In this regard, the major markets for China are countries that are abandoned by the United States for political reasons, such as Venezuela and Bolivia. Chinese arms exports in Latin America are concentrated in Venezuela, which attracted 87.3 per cent of Beijing's regional weapons sales over the last decade. China is ready to offer financing as an extra incentive. Chinese conventional weapons make up just 3 per cent of the combined North and South American arms import market, which is dominated by the United States (19 per cent), Russia (13 per cent), and Germany (12 per cent).

## Africa

The increasing Chinese arms sales throughout Africa is in parallel to its ever-increasing numbers to peacekeepers deployed in Africa. China is now the largest single contributor of personnel to United Nations Peacekeeping.<sup>17</sup> It is also building infrastructure in Africa at knock-down prices. The Chinese-Pakistani made K-8 Karakorum jet trainer is now in service with Egypt, Ghana, Zambia, Zimbabwe, Namibia, and Sudan. China claims with pride that K-8s comprise 80 per cent of the jet trainer aircraft in Africa. The K-8 is particularly notable due to the ease with

which it can be converted over to a light-attack role for counterinsurgency operations. China is actively working to strengthen its foothold in certain markets, such as Algeria. The sales include C-28A frigates. China has sold offshore patrol vessels and other complex naval vessels to nations, including Algeria, Nigeria, Angola, Ghana and Cameroon.<sup>18</sup>

Chinese arms have been used during conflicts in the Democratic Republic of Congo, Côte d'Ivoire, Sudan and Somalia. In July 2014, China North Industries Corporation delivered 100 guided missile systems, over 9,000 automatic rifles, and 24 million rounds of ammunition to the South Sudanese government, whose actions have been widely criticised by the international community.<sup>19</sup>

To complement its sales of advanced arms, China has already built a large maintenance base in Africa with more in development. A naval base in Djibouti will soon be joined by aircraft maintenance and training facilities in Tanzania and the Republic of Congo. Nearly 66 per cent of African nations currently utilise arms made by China; from modest duplicates of small weapons to complex maritime vessels. Since 2008, countries in Africa collectively purchased around 20 per cent (US\$ 3.2 billion) of China's overall arms exports; wherein, Northern African countries are the primary destination of Chinese weapons, constituting 49 per cent of Chinese exports to the continent.<sup>20</sup> From 2010 to 2015, China's arms sale expanded by 143 per cent, making it the world's third-biggest exporter of arms. China has taken the market once dominated by Soviet Union or Russia. In terms of trade value with Africa, Russia leads the pack at US\$ 14.6 billion in sales since 2008. The US tallied less than half of that at US\$ 5.6 billion, while China sold around US\$ 3.2 billion.

# North America and Europe

China's major weapons sales in the region are limited. These were initially limited to small arms mostly procured by Canada, but in recent years Mexico has become a more significant market. Chinese weapons

are increasingly finding their way to Mexican cartels. More than 99 per cent of China's total arms imports (US\$ 14.4 billion) come from Europe, while its exports are an insignificant US\$ 17 million of its own weapons.<sup>21</sup> This trend is driven mostly by Russia, which supplies China with 68 per cent of its foreign arms; while France and Ukraine collectively supply an additional 20 per cent of these imports.<sup>22</sup>

Aircraft engines are the main import as China has not yet been successful in producing aircraft engines. Between 2012 and 2019, China purchased over 420 aircraft engines from Russia, and just 24 Sukhoi Su-35 fighter aircraft.<sup>23</sup> Ukraine also provides China with propulsion systems. In 2011, Beijing acquired 250 Ukrainian turbofans for trainer and combat aircraft, along with 50 diesel-powered tank engines and three refurbished IL-78 air-refuelling planes.<sup>24</sup> A sizeable portion of China's orders from France are also for engines. China has sourced French-built diesel engines, such as the 16PC2.5 and 12PA6, for outfitting its naval vessels. There are indications that China has acquired helicopter engines from France. Russian arms sales to China which averaged US\$ 2.6 billion through the 2000s, reached a peak of US\$ 3.2 billion in 2005. This figure dropped significantly, averaging US\$ 816 million between 2010 and 2018. As a result, China's share of Russian arms exports has declined from 47.7 per cent of total sales in 2006 to 13.7 per cent in 2018.25 HROUGH VISION

#### Asia

As accounted, 82.8 per cent of Chinese arms were sold to countries across Asia; wherein, 61.3 per cent of China's conventional weapons sales since 2008 have been to Pakistan, Bangladesh, and Myanmar.<sup>26</sup> Chinese arms sales across South and Southeast Asia grew from US\$ 386 million in 2008 to US\$ 1.3 billion in 2016, with a dip of US\$ 759 million in 2018.27 To note, US exported US\$ 13.8 billion worth of conventional weapons to the same region in the same period.

Of all the countries in Asia, close military ties have paved the way for China to supply Pakistan with more arms than any other country. These exchanges are often tied to political objectives. As a result of the growing cooperation between Beijing and Islamabad, arms sales also surged from US\$ 250 million in 2008 to over US\$ 758 million in 2009; wherein, since 2009, sales to Pakistan have averaged US\$ 584 million.<sup>28</sup> For instance, the co-developed JF-17 aircraft and China's ongoing construction of the Type 054AP class warship for the Pakistani Navy, are significant contributions to Pakistan's inventory.

In case of Bangladesh, between 2008 and 2018, China sold US\$ 1.93 billion of weapons to Dhaka. This constitutes 71.8 per cent of Bangladesh's military acquisitions over this period, making China the biggest supplier of arms to Dhaka. Pchina supports these procurements by offering generous loans. Bangladesh's entire tank fleet is of Chinese origin although 44 of these tanks were supplied through Pakistan. Similarly, small arms (16,000 rifles), artillery and air defence weapons are sourced from China. Again, a reasonable number of naval equipment, including its submarines are sourced from China. For instance, in 2016, Bangladesh Navy acquired two used Type-035G Ming-class submarines from China for nearly US\$ 203 million. Since 2006, China has also supplied Bangladesh with the majority of its small arms, totalling over 16,000 rifles and 4,100 pistols.

Myanmar is the third largest market for Chinese arms exports in Asia. Since the easing of sanctions against Myanmar in the early 2010s, it has ramped up its acquisition of foreign arms. Since 2013, Myanmar has imported US\$ 720 million in conventional weapons from China. Major equipment includes an assortment of Chinese origin small weapons, tanks, artillery pieces and air defence guns. Lately it has acquired 17 JF-17 Chinese origin aircraft from Pakistan along with 12 Rainbow UAVs, two Type 43 frigates, and 76 Type-92 armoured vehicles.<sup>31</sup>

Sri Lanka operates Chinese tanks, armoured personal carriers (APC), artillery and air defence equipment for its Army. Its Navy operates a frigate

and Shanghai class naval vessels. Its air force still operates old vintage Chinese origin combat and trainer aircraft. Currently, Nepal operates limited Chinese origin military equipment comprising a few APCs and rifles.<sup>32</sup> But increasing proximity to China may entail induction of a fair share of weapons and equipment in future.

### China's Growing Footprints in India's Sphere of Influence

China is systematically building influence in the South Asia region—a challenge for India. China has reportedly committed around US\$ 100 billion in the economies of Afghanistan, Bangladesh, Maldives, Pakistan, Nepal and Sri Lanka.<sup>33</sup> China is now the largest overseas investor in Maldives, Pakistan and Sri Lanka, with investments mainly concentrated in hard infrastructure related to power, roads, railways, bridges, ports and airports; added further with stakes in the Dhaka and Karachi stock exchanges.<sup>34</sup> Given these practices at play, China has been accused of extending excessive credit with the intention of extracting economic or political concessions when countries cannot honour their debts particularly through the BRI. Thus, China's growing foothold in South Asia is calling for concern given its strategic disadvantage for India.

For instance, such fears were amplified after Sri Lanka had to lease out its Hambantota Port to China for 99 years, after being unable to service its debt. Similarly, Pakistan has leased the Gwadar port to China. In addition, strategic experts warn of a Chinese hand behind the strain in India-Nepal ties. What calls for this shift in dynamic is the fact that several South Asian countries seem to be enamoured by the Chinese "generosity", which India is unable to match.<sup>35</sup>

The other aspect to note is the changing dynamic in the bilateral trade. That is, by 2018, China's total trade with Maldives slightly exceeded that of India, while China's trade with Bangladesh is now about twice that of India.<sup>36</sup> Besides, China's trade with Nepal and Sri Lanka still lags behind their bilateral trade; however, the gap has shrunk. Furthermore,

Beijing's active role is also witnessed in its efforts to strengthen the navies of Pakistan, Bangladesh and Sri Lanka, thus enhancing its own footprint in the Bay of Bengal and the Indian Ocean. What can be argued is that, while Pakistan is leaning on China as a low-cost option to neutralise a more powerful India, most other South Asian countries are learning to play India and China against each other—which gives them a greater leverage.

## Pakistan's Inventory—Weapons with Chinese Characteristics

Pakistan Army's almost entire armoured fleet comprises Al Khalid, Al Zarar, T-85 and T-69 series of Chinese manufactured tanks.<sup>37</sup> Pakistan Heavy Industries Taxila (HIT) has set up a production line in collaboration with NORNICO to manufacture the Al Khalid tank which has also been exported to Bangladesh.<sup>38</sup> The artillery weapons with Pakistan Army include towed 122 mm howitzer (NORNICO), 130 Type 59 guns which are supported by 122 mm MBRL and A100 MLRS 300 mm rockets<sup>39</sup>—all 'Made in China'. Besides, the Pakistan Air Defence artillery has deployed Chinese LY-80 Low to Medium Altitude Air Defence System (LOMADS), FM 90 and FN 6 MANPAD missile system in addition to 12.7 and 14.5 mm Air Defence guns.<sup>40</sup>

China's support to Pakistan can be traced since the 1960s, wherein, China started supplying PAF F-6 aircraft (air defence version of MiG-19) in 1965—a total of 253 F-6 aircraft were finally supplied to Islamabad. Furthermore, a squadron of Harbin H-5, a Chinese version of Russian Illyshin IL-28 was formed in early 1970s. China also helped to establish Pakistan's Aeronautical Complex at Kamra in 1973. In mid-1980s, PAF received 55 A-5Cs (Chinese MiG-19 ground attack variants) and 186 Chengdu F-7s (Chinese MiG-21). After the United States froze F-16 deliveries as a result of Pressler amendment in 1990, Pakistan went whole hog to China for all its aerospace needs. In 2007, as a part of a joint-venture project, China rolled-out a 'designed for Pakistan' Fighter JF-17

"Thunder". A much more advanced JF-17 Block III version developed in China is already being delivered- while, finally 50 of these are expected. 41

Currently, PAF has 120 aircraft (numbers likely to increase to 300); 6 ZDK-03 Chinese AWACS (Air borne Warning and Control System); 60 Chinese designed K-8 Karakorum intermediate jet trainers; four CH-4 Recce-cum-strike drones (which can carry up to 4 PGMs and reportedly have endurance of 30 hours) and others. 42 PAF has bought Chinese SD-10 (ShanDian-10) radar-guided, mid-range homing air-to-air missiles to equip the JF-17 fighters. China has transferred 34 M-11, road-mobile, short range ballistic missiles (SRBM) with related technology, and manufacturing capability to Pakistan.<sup>43</sup> In terms of long-range ballistic missiles, Hatf, Shaheen and Anza series of missiles have been built using Chinese assistance—adding to the nearly 150 nuclear warheads. Besides, China has supplied Burraq and Shahpar series UAV to Pakistan, and plans to allow license production of Wing Loong UAVs.44 Chinese J-7 and J-17 Thunder fighter aircraft continue to front line platforms of PAF. While on the naval front, the platforms in the pipeline include Type 054A/Jiangkai II-class frigates, Yuan class submarines and anti-ship cruise missiles. 45 This only brings into perspective, the way China is building Pakistan's inventory.

# Challenges and Options for India

Success of Chinese arms industry is commendable on one side and of concern to the world on the other side given the change in the status quo that it brings with it. India had a reasonably big defence industry at the time of independence in 1947, while China literally started from scratch in 1949. Strong Communist leadership under Mao Zedong was clear that "power flows from barrel of the gun" and that being self-reliant in defence production was crucial to become a significant power. By 1950s China was already making fighter aircraft, bombers and tanks—some through licensed production, and others by reverse engineering of foreign designs.

Today, China is among the top defence equipment producers, and have two-fifth generation stealth fighters, three aircraft carriers, and a variety of tanks and guns under development or production. Beijing is now already a net-exporter and its defence industry is expanding significantly.

The deteriorating ties between the US and Pakistan, stem from the perception that Islamabad is not doing enough to combat terrorism in Afghanistan. This has resulted in a sharp decline in the US arms supplies to Pakistan on the one hand; however, on the other, it has pushed Pakistan into the Chinese arms. Besides, in case of India, there is a perception of a 'two-front war'; to which, India's Chief of Defence Staff has clearly stated that India needs to prepare for such eventuality. In view of this, in 2018, Indian Air Force conducted a major exercise Gagan Shakti simulating a two-front war. What is important to note is that commonality of equipment between Chinese and Pakistani armed forces, who exercise regularly makes things more complex for India. Pakistan is the key to success of Chinese BRI, and in a way for China to boost its military presence can be called the 21st-century version of the East India Company. Thereby, the changed South Asian dynamic (with China rapidly expanding its footprint) necessitates India to adopt an actionoriented approach on an urgent basis.

India on the other side continues to be dependent heavily on imports. Rising Chinese power in Indo-Pacific region has resulted in the US courting India as a counter-balance against China. It has also been in India's interest to secure alliances against the Chinese belligerence. Since 2008, India has acquired many major defence platforms from the US, such as the Boeing P-8I, Lockheed C-130, Boeing C-17, Chinook heavy-lift and Apache Attack helicopters. India also procured M777 towed 155 mm artillery howitzers. Indian Armed Forces continue to have significant Russian inventory which includes top end fighter aircraft like the SU-30 MKI and upgrade MiG-29s. Russia supports India in building tanks, ships and submarines. India has had a close French connection, earlier with

Mirage 2000 and now Rafale. Israel has been supplying UAVs, radars, and other systems, and also supporting indigenisation.

Today, Indian and Chinese armed forces are face-to-face on the LAC. While Chinese armed forces are large in overall numbers, but how much China can bring to bear in the Ladakh region has its limitations. Indian armed forces have the advantage of years of regular deployment and operations at those heights and region—with the Indian Army having a secured critical vantage ground. Also, with just three major Chinese airbases, India has a clear advantage to deploy air power.

Democratic India has been moving very slow in defence production and indigenisation, while China is gradually taking a lead at the global stage. India needs to speed up its defence production act under its 'Make in India' (now *Atmanirbharta*) initiative. Indigenisation should be the key and this requires India to improve its project management approach. There is no alternative to defence indigenisation if India wants to be a significant global player. For as China uses arms sales along with BRI as a tool to encircle and weaken India, it is time for India to take appropriate measures, lest it becomes too late.

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