EU TRADE EXPLORER

Market evolution: Arms and ammunition (CN 93) — 2015–2025

Introduction

This report examines the evolution of extra-European Union trade in **CN 93 — Arms and ammunition; parts and accessories thereof** over the eleven-year window from 2015 to 2025. The product group covers the full range of military and civilian weapons, ammunition, non-firearms, components, and bladed arms, as defined by the Combined Nomenclature. The analysis is based exclusively on the data made available through the trade dashboard.

The period was marked by an extraordinary acceleration of arms trade, deeply influenced by Russia's full-scale invasion of Ukraine in 2022, the subsequent rearmament of EU member states, and a broader restructuring of global defence supply chains. Total EU exports of arms rose from €3.07 billion in 2015 to €7.52 billion in 2025 (+145.3 %), while imports surged even more dramatically from €0.85 billion to €5.92 billion (+596.6 %). As a result, the EU's trade surplus in this sensitive sector shrank from €2.22 billion to €1.61 billion (–27.6 %). Behind these headline figures lie deep shifts in partner composition, product composition, and the internal geography of EU arms trade, which are explored below.

1. Unprecedented expansion of arms trade: exports soar, but imports skyrocket

The first overarching dynamic is the sheer pace of growth, which transformed the EU from a predominantly self-sufficient arms exporter into a massive importer as well, driven overwhelmingly by the security crisis after 2021.

Total trade value more than doubles, yet imports outpace exports several times over

Between 2015 and 2025 the combined extra-EU arms trade flows (exports + imports) climbed from €3.92 billion to €13.44 billion. Exports grew by 145 %, but the expansion on the import side was far steeper, at nearly 600 %. Import growth did not happen smoothly: in 2021 imports still stood at only €1.46 billion, but then soared to €2.40 billion in 2022, €3.73 billion in 2023, and finally €5.92 billion in 2025. The overview shows that export value peaked in 2024 at €7.94 billion before easing slightly, while imports continued to climb through 2025.

Ammunition and military weapons dominate the import surge

The product breakdown reveals that **ammunition (CN 9306)** is by far the largest single component. In 2015 EU imports of ammunition were valued at €262 million; by 2025 they reached €2.40 billion, an increase that alone explains more than one third of the total import bill. Imports of **military weapons (CN 9301)** exploded from €15.3 million to €1.15 billion, while **non-firearms (CN 9304)** rose from €80 million to €904 million. On the export side ammunition also leads, growing from €491 million to €2.76 billion, but the import expansion in these key categories has been proportionally much larger, indicating that the EU is rapidly buying in huge quantities of finished munitions and weapons systems that its own industry could not supply at the required pace.

Unit prices surge, especially for imports, signalling a shift towards more expensive systems

Not only did volumes climb – the average price per unit of traded goods also rose sharply. The import unit value increased by 260.7 %, from €15,658 per tonne in 2015 to €56,477 per tonne in 2025, far outpacing the 89 % rise in export unit prices (from €31,010 to €58,613 per tonne). This points to a qualitative change: member states are importing more sophisticated, high-value items – advanced missiles, modern armoured vehicles, and precision-guided munitions – rather than simply buying larger amounts of low-cost matériel. Consequently, the import quantity rose by 93.4 %, while the export quantity grew by only 30.0 %, further confirming that the rearmament wave is being met substantially through external procurement.

2. Geopolitical turmoil rewires trade partnerships

The decade's violent geopolitical shocks completely reshuffled the EU's main arms trading partners. Traditional destinations and sources gave way to a new set of relationships driven by immediate defence needs and strategic realignments.

Ukraine becomes the premier export market overnight, reflecting direct military support

In 2015 the EU exported a mere €5.1 million worth of arms to Ukraine; by 2025 that figure had jumped to €2.34 billion, an increase of more than 46 000 %. The peak year was 2024, when deliveries reached €3.25 billion. Ukraine thereby displaced the United States as the top destination in value terms for several years, although the US recovered its first place in

2025 with €1.21 billion. A large part of these flows is channelled through the category **“Countries and territories not specified for commercial or military reasons”**, whose exports surged from €727 million (2015) to €2.53 billion (2025), reflecting the sensitivity of some deliveries. These figures illustrate the scale of the EU’s direct military assistance to Ukraine and, to a lesser extent, to other conflict zones. Detailed partner data is available here.

South Korea, Turkey, and India emerge as critical suppliers, diversifying away from traditional sources

On the import side, the shift is equally dramatic. Four partners stand out:

Import partner	2015 (€)	2025 (€)	Change (%)
Korea, Republic of	14 094 206	1 821 289 057	+12 822.3 %
Countries (unspecified)	170 741 994	1 095 294 998	+541.5 %
United States	189 781 036	974 372 188	+413.4 %
Türkiye	47 815 050	607 841 645	+1 171.2 %
India	6 318 044	231 652 919	+3 566.5 %

South Korea’s sudden ascent to the number-one supplier (by 2025) is a direct consequence of large-scale contracts for self-propelled howitzers, tanks, and ammunition signed after 2022. India and Türkiye have also expanded their footprint as competitive, high-capacity producers. Meanwhile, China’s share remained moderate (€46 million to €84 million, +81.5 %), and the United Kingdom’s imports rose to €158 million. The EU thus diversified its supply base away from a heavy reliance on the US towards a broader set of Asian and Middle-Eastern suppliers.

Heightened partner concentration and volatility underscore strategic dependencies

The Herfindahl-Hirschman Index for imports rose from 1 345 in 2015 to 2 069 in 2025 (+53.9 %), indicating that, despite diversification, a handful of suppliers now dominate the import bill. Export concentration also edged up (HHI 2 444 → 2 852, +16.7 %). The volatility analysis reveals extremely high year-on-year swings for several partners: South Korea’s imports show a coefficient of variation of 1.31, India’s of 1.99, and Ukraine’s exports of 1.33. The shock detection identifies a major price shock on imports from the UK in 2021 (shift of +221 %) and a price shock on exports to Türkiye in 2017 (+160.2 %), both symptomatic of abrupt changes in the type of matériel traded. Such volatility underscores how rapidly geopolitical events can reconfigure trade channels.

3. Rearmament reshapes EU’s internal trade geography

While the external partner map changed, the internal distribution of arms trade among EU member states underwent a structural transformation, with eastern and south-eastern countries playing an increasingly central role.

Eastern member states become dynamic hubs of arms imports and exports

Poland, Romania, Czechia, and Bulgaria have seen their arms trade volumes multiply. According to the reporters table:

- **Poland**’s imports leapt from €83 million in 2015 to €2.34 billion in 2025 (+2 712 %), and its exports from €74 million to €1.28 billion (+1 637.6 %).
- **Czechia**’s imports grew from €22 million to €718 million (+3 152.4 %), making it a major logistics and transhipment hub.
- **Romania**’s imports expanded from €5.4 million to €234 million (+4 235.4 %), and exports from €81 million to €406 million (+399.5 %).
- **Bulgaria**’s exports rose from €387 million to €954 million (+146.3 %), while its imports reached €334 million.

In parallel, traditional large players maintained their weight: Italy remained the EU’s biggest external exporter (€1.52 billion in 2025, +89.1 %), and Sweden’s exports climbed to €618 million (+261.6 %).

Slovakia and Czechia lead in specialisation, while Western Europe’s share dilutes

The specialisation data for 2025 shows Slovakia with a very high revealed symmetric comparative advantage (RSCA) of 0.90 (RCA 19.6), meaning that arms exports represent a share of its total exports that is dramatically higher than the EU average. Czechia follows with an RSCA of 0.57 (RCA 3.65). Other specialised countries include Finland (RSCA 0.43), Croatia (0.35), and Spain (0.28). In contrast, Germany (RSCA –0.45), France (–0.71), the Netherlands (–0.93), and Italy (–0.34) all exhibit negative RSCA values, indicating that, despite large absolute export values, arms are not a disproportionate part of their overall export basket. This pattern reflects the eastward shift of assembly, storage, and transit activities, as well as the rapid rearmament programmes that have channelled large volumes through Poland, Czechia, and Slovakia.

Poland and Romania exemplify the dual role as major importers and emerging exporters

Poland and Romania encapsulate the new dual identity: they have become massive importers of modern weaponry (tanks, fighter jets, missile systems) while at the same time ramping up their exports – either of legacy Soviet-era stock, refurbished equipment, or ammunition produced under new contracts. Poland's simultaneous leap on both sides of the ledger (imports +2 712 %, exports +1 637.6 %) and Romania's comparable trajectory illustrate how rearmament, combined with a burgeoning defence industrial base, can rapidly create major new hubs in the European arms trade.

Conclusion

The period 2015–2025 witnessed a fundamental and likely irreversible transformation of the EU's external trade in arms and ammunition. A sector that in 2015 was characterised by moderate volumes and a large trade surplus had, by 2025, more than tripled in total value, with imports growing far faster than exports due to the urgent demands of collective defence. The war in Ukraine acted as the primary catalyst, instantly turning that country into the EU's top export destination and triggering a wave of purchases from South Korea, Turkey, India and the United States. Ammunition and heavy weaponry dominated the import bill, and soaring unit prices signalled a move towards higher-end systems. Simultaneously, the internal geography of EU arms trade shifted dramatically eastwards, with Poland, Czechia, Slovakia, and Romania emerging as indispensable nodes of import, transit, and export activity. The steep rises in concentration and volatility underline the strategic vulnerability that accompanies such rapid growth, while the persistent, though narrowed, trade surplus confirms that the EU remains a formidable arms exporter even as it arms itself at unprecedented speed.
