

# How Russia's Invasion of Ukraine Is Reshaping the Global Arms Market:

## Implications for the Middle East and Beyond

by [Grant Rumley \(/experts/grant-rumley\)](/experts/grant-rumley), [Louis Dugit-Gros \(/experts/louis-dugit-gros\)](/experts/louis-dugit-gros)

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### ABOUT THE AUTHORS



#### [Grant Rumley \(/experts/grant-rumley\)](/experts/grant-rumley)

Grant Rumley is the Meisel-Goldberger Senior Fellow and Director of the Diane and Guilford Glazer Foundation Program on Great Power Competition and the Middle East at the Washington Institute for Near East Policy.



#### [Louis Dugit-Gros \(/experts/louis-dugit-gros\)](/experts/louis-dugit-gros)

Louis Dugit-Gros, Visiting Fellow at The Washington Institute from 2021-23, is a French diplomat.



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**As Moscow grapples with battlefield losses and other challenges, traditional Russian clients are considering alternative sources, emerging exporters are amplifying their sales pitches, and governments are building up their domestic defense industrial bases.**

**T**he Ukraine war is spurring profound changes in the global arms market as Russia, long a top exporter, grapples with battlefield losses, Western sanctions, and reputational damage to its weaponry. Countries that routinely bought arms from Moscow have started considering alternative sources, emerging exporters have amplified their sales pitches, and governments worldwide are seeking to build up their domestic defense industrial bases to safeguard against market turbulence in the age of intensifying great power competition. The Middle East—long one of the world's principal arms importing regions—sits at the forefront of this new global landscape.

In this timely Policy Note, defense expert Grant Rumley and French diplomat-in-residence Louis Dugit-Gros survey the arms marketplace following the Ukraine invasion. They see both opportunities and potential risks for Western states, and argue for steps such as reinforcing Ukraine's defense industrial base to eventually compete with Russia's, establishing longer-term security cooperation plans with Middle East partners, and taking action to strengthen the European defense industrial base. ❖

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