Global Armored Vehicle Exports (2023–2025): A Comprehensive Overview

Global exports of **armored ground vehicles** have surged in recent years, driven by heightened geopolitical tensions and increased defense spending. From **2023** to **2025**, countries worldwide accelerated the trade in tanks, infantry fighting vehicles (IFVs), armored personnel carriers (APCs), and mine-resistant vehicles. This period has reshaped the global arms export landscape, with established suppliers maintaining dominance and new players emerging. Major importers – from **Ukraine** to the **Gulf states** – have rapidly expanded their armored fleets in response to regional conflicts and security needs. Below, we analyze the latest export figures (including **2023–2024** data), identify leading exporters (and their top products), highlight primary importers, and examine key trends such as war-driven procurement shifts and technological advancements. Particular attention is given to **Türkiye's** growing role as an armored vehicle exporter, including its notable platforms like the **Kirpi**, **Vuran**, and **Ejder Yalçın**.

Global Export Trends (2023–2025)

Worldwide transfers of major arms remained relatively stable in recent years, but regional conflicts have altered demand patterns. According to the Stockholm International Peace Research Institute (SIPRI), the overall volume of international arms transfers in **2020–24** was only about *0.6% lower* than in **2015–19** [1]. However, this flat trend masks significant regional shifts. **European** arms imports jumped by **94%** between 2014–18 and 2019–23 [2] – a surge largely attributed to Europe's response to the war in **Ukraine** – while transfers to other regions saw slight declines. In fact, **Ukraine** became the world's single largest arms importer during 2022–2024 as Western nations rushed military aid to counter Russia's invasion [3]. This influx to Ukraine offset lower arms deliveries elsewhere, resulting in a roughly steady global trade volume.

Meanwhile, global defense spending reached record levels (over $2 trillion annually), ensuring robust demand for armored vehicles. **NATO** countries, in particular, boosted military budgets – European NATO members increased spending **11%** in 2023 alone [4] – and launched procurement drives to replace equipment sent to Ukraine and modernize their ground forces. As a result, **Europe now accounts for the largest share** of the world's military land vehicle market (projected ~38% over the next decade), surpassing even North America and Asia-Pacific [5]. The conflict in Eastern Europe "shattered the preconception that big tank battles were a thing of the past," spurring a return to heavy armor investments [6]. Western allies have collectively delivered hundreds of tanks and thousands of other armored vehicles to Ukraine since 2022, prompting a *race to rearm* and refill stocks [7][8].

At the same time, other regions continue to import armored units at high rates. **Asia and the Middle East** remain large markets, reflecting ongoing rivalries (e.g. **India–Pakistan**, **Arab Gulf–Iran**) and internal security needs. In the five-year period to 2024, states in **Asia-Oceania** accounted for about one-third of major arms imports, and the **Middle East** for over one-quarter [9]. Many of these imports consist of armored vehicles, from advanced main battle tanks to light armored cars, sourced from a diversifying set of suppliers. In the sections below, we break down the leading exporters dominating this trade and the biggest importers driving demand.

Leading Exporters of Armored Vehicles (2020s)

The **United States** remains by far the world's top arms exporter, and this extends to armored ground vehicles. The U.S. accounted for approximately **43%** of global major arms exports in 2020–24 [10]. American industry ships a wide range of armored vehicles abroad – from M1 Abrams **main battle tanks** and M2 Bradley fighting vehicles to Stryker and **MRAP** armored troop carriers – often as part of broader arms packages. For example, the U.S. has delivered **116** refurbished M1A1 *Abrams* tanks to **Poland** by mid-2024 and is slated to send 250 brand-new M1A2 SEPv3 Abrams by 2025–2026 [11]. These transfers bolster NATO's eastern flank and exemplify U.S. dominance in the high-end tank market. France has now risen to the **#2** arms exporter globally [12], with a share near 8–11%. French armored vehicle exports include Nexter's **VBCI** 8×8 infantry fighting vehicles (Qatar ordered 490 VBCIs) and a limited number of AMX-56 *Leclerc* **tanks** and **light armored cars** sold to partners in the Middle East and Asia.

Russia, historically the second-largest supplier of tanks and armored vehicles, has seen its export stock fade. Russian arms exports plummeted by about **64%** in recent years [10], as Moscow diverted production for its own war needs and faced international sanctions. Even so, Russia continues to fulfill some contracts – for instance, deliveries of **T-90** tanks and **BMP-3** IFVs to longtime clients like India and Algeria – but its once-dominant presence in markets like Southeast Asia has been partially supplanted by others (China, South Korea, Turkey). **China** has solidified itself among the top five arms exporters (roughly 5–6% of global exports [13]) with competitive armored offerings. Chinese defense firms (NORINCO, AVIC) have exported **VT4** main battle tanks, **VN-series** fighting vehicles, and other armor to countries such as **Pakistan** (which contracted for hundreds of VT4 tanks) and **Thailand**. **Germany** also remains a leading vehicle exporter, known for its **Leopard 2** tanks and joint European programs like the **Boxer** armored carrier. German-made Leopard 2A7+ tanks were delivered to **Qatar** and **Hungary** in recent years, and the Boxer 8×8 is being adopted by multiple NATO armies (UK, Lithuania, etc.).

Crucially, a group of *emerging exporters* is now claiming a larger share of the armored vehicle market:

- **South Korea** – thanks to major deals in Europe – and
- **Türkiye** – with its booming armored vehicle industry –

have significantly increased their export volumes. South Korea, in particular, has leveraged its K2 **Black Panther** tank and K9 **Thunder** self-propelled howitzer to win multi-billion dollar contracts. In **2022**, South Korea exported about **$244 million** worth of tanks and armored vehicles [14], placing it among the top 5–6 exporters by value. This figure jumped with the 2023–2024 deliveries of K2 tanks and K9 armored howitzers to **Poland** (which is acquiring **1,000+** K2/K9 units in total) and orders from Norway, Estonia, and others. Meanwhile, Türkiye's ascent is explored in detail in a later section.

To summarize the competitive landscape, the table below compares **key armored vehicle exporters**, their global ranking, notable platforms, and main client countries:

Key Exporters of Armored Fighting Vehicles (Approx. 2020–2024)

Exporter	Global Arms Export Rank	Notable Armored Platforms	Primary Importing Countries
United States	#1 (43% of global exports) [10]	M1A2 *Abrams* MBT, Stryker IFV, Oshkosh JLTV, MRAPs	Saudi Arabia, Iraq, Europe (e.g. Poland – 116 Abrams delivered by 2024 [11])

Exporter	Global Arms Export Rank	Notable Armored Platforms	Primary Importing Countries
France	#2 [12]	VBCI 8×8 IFV, AMX-56 *Leclerc* MBT, Arquus VAB/ APC	India, Qatar, UAE (e.g. 490 VBCI IFVs for Qatar)
Russia	#3 [12]	T-90 MBT, BMP-3 IFV, BTR-80 APC	India, Algeria, Egypt (exports down sharply −64% [10])
China	#4 [15] [16]	VT4/VT2 MBTs, VN-1 8×8 IFV, CS/V-4 MRAP	Pakistan, Thailand, Nigeria (e.g. 679 VT4 tanks for Pakistan [17])
Germany	#5 [15]	Leopard 2A7 MBT, Boxer 8×8 IFV, Leopard 1A5 (used)	Qatar, Indonesia, Hungary (Leopard tanks; Boxer vehicles)
South Korea	#6–7 (rising) [14]	K2 *Black Panther* MBT, K9 *Thunder* SPH, K21 IFV	Poland, Norway, Finland (major new tank/SPH contracts)
Türkiye	#11 (rising) [18]	BMC *Kirpi* MRAP, Otokar *Cobra II* APC, Nurol *Ejder Yalçın* 4×4	UAE, Saudi Arabia, Tunisia, Central Asia (1000+ vehicles exported 2022–23 [19])

Sources: SIPRI Arms Transfers Database; World Bank WITS trade data; official defense reports.

South Korea's K2 Black Panther main battle tank on display. The K2 – combining advanced firepower and active protection – has become a successful export product, with Poland ordering over 200 units as part of a broader arms deal [20] . South Korea has rapidly risen in the global armor market, exporting about $244 million in tanks and armored vehicles in 2022 [14] .

As shown above, the U.S., France, and a few others still dominate by sheer value, but newer suppliers are grabbing market share. Notably, **Canada** (not listed in the table) briefly ranked #2 globally in armored vehicle export value in 2022, due to its multi-billion-dollar sale of LAV VI armored vehicles to Saudi Arabia [14] . Similarly, **Switzerland**'s exports of *MOWAG Piranha* APCs (through GDELS-Mowag)

made it a top-five exporter in 2022 [14] despite the country's neutral stance. These cases underscore how single large contracts can elevate a country's export profile in a given year. Overall, a handful of Western producers and rising Asian players are now leading the armored vehicle export arena.

Major Importers and Procurement Highlights

On the other side of the ledger, a relatively small group of countries accounts for the bulk of armored vehicle imports. According to SIPRI, the **five largest arms-importing countries** in the world during 2020–2024 were **Ukraine, India, Qatar, Saudi Arabia, and Pakistan** [21] – all of which have made substantial recent acquisitions of tanks and armored vehicles. Nine of the top ten importers are located in Asia or the Middle East [22], reflecting the concentration of defense build-ups in those regions.

- **Ukraine**'s situation is unique: it became the *largest* arms importer globally by 2022–23, receiving massive quantities of armored vehicles as aid. Since Russia's February 2022 invasion, Ukraine's allies have supplied or pledged **800+ tanks** (including modern Western models like the Leopard 2, Challenger 2, and M1 Abrams) and thousands of other armored vehicles [23]. These deliveries – most often from existing NATO stockpiles – were urgent, leading to Ukraine alone representing **8.8%** of global arms imports in 2020–24 [3]. By late 2024 Ukraine had taken delivery of hundreds of ex-Soviet **T-72** tanks (donated by Poland, Czechia and others), scores of German-made **Leopard** 2A4/A6 tanks from various European countries, British **Challenger 2** tanks, American **M2 Bradley** IFVs, **Stryker** APCs, and countless MRAPs and armored trucks – essentially building a new mechanized army overnight. This unprecedented support to Ukraine is a major factor in the current global arms transfers picture.

- **India** has long been a top importer of armored platforms, traditionally sourcing from Russia. India's Army deploys large numbers of Russian-designed **T-90S Bhishma** and **T-72M1** tanks and BMP-series IFVs – many produced under license – which were acquired over past decades. In recent years, India has started diversifying its suppliers and emphasizing domestic production. It purchased batches of **K9 "Vajra"** 155mm tracked howitzers (a variant of South Korea's K9 Thunder) [24], ordered lightweight mountain tanks from domestic programs, and evaluated Western IFVs. Still, Russia remains a key provider (e.g. India has over 450 T-90s delivered or on order). India's continued high volume of imports (ranked #2 globally) is driven by its need to replace aging armor and equip for a potential two-front war scenario against neighboring Pakistan and China.

- **Qatar** has rapidly expanded its armored forces, reflecting regional ambitions and security concerns in the Persian Gulf. It was the third-largest arms importer globally in 2019–24 [25]. Qatar has invested heavily in European armor: it received a shipment of **Leopard 2A7+** main battle tanks from Germany (first delivered in 2015–2016) and has been acquiring the French **Nexter VBCI** 8×8 IFV (Qatar signed for 490 units) for its mechanized infantry [26] [27]. Qatar has also bought Turkish armored vehicles (e.g. **Nurol Yörük** and **Ejder Yalçın** 4×4 vehicles for internal security). These procurements are part of Qatar's efforts to develop a capable military deterrent in a volatile region and to host FIFA World Cup 2022 security (for which many armored vehicles were acquired).

- **Saudi Arabia**, another top importer, possesses one of the largest armored fleets in the Middle East. The Kingdom has received over **370** U.S.-built **M1A2 Abrams** tanks (plus more older models from U.S. excess stocks) and fields thousands of American-made LAV and M-ATV armored vehicles [14]. A significant deal with Canada for **LAV 6** armored combat vehicles (GDLS) worth ~$14 billion has been a cornerstone of Saudi imports in recent years, with deliveries ongoing

[14]. Saudi Arabia also acquired European armor (e.g. French **AMX-10RC** armored cars, when it intervened in Yemen) and is reportedly interested in modern IFVs. Its import pattern is closely tied to its military operations and rivalry with Iran; the war in Yemen, for instance, drove Saudi demand for mine-resistant vehicles and armor upgrades.

- **Pakistan** rounds out the top five importers [21] and has deepened its reliance on Chinese defense equipment. In a landmark recent deal, Pakistan signed a contract to locally produce **679** Chinese **VT-4** main battle tanks (known as "Haider" in Pakistani service) under license [17]. Deliveries of the first batch of VT-4s began around 2020–2022, and Pakistan is expected to field over 300 of these new Chinese tanks by mid-decade. Additionally, Pakistan has acquired hundreds of **Chinese wheeled APCs** (NORINCO *WZ551* variants) and Turkey's **Otokar Arma** 8×8 APC for its Marines. These imports augment Pakistan's existing armored corps (which includes older U.S.-supplied M113 APCs and Al-Zarrar/Al-Khalid tanks developed with China). The heavy tilt toward Chinese armor (China supplied *81%* of Pakistan's total arms imports in the past five years) is a strategic choice by Islamabad [16], ensuring supply continuity amid strained Western ties and budget-friendly deals.

Beyond the top five, other notable armored vehicle importers include **Egypt** (which co-produces Abrams tanks and bought Russian T-90s), **Algeria** (a major buyer of Russian armor in Africa), and **Poland**. Poland, while not yet reflected in five-year rankings, has launched *one of the largest armored procurement programs in Europe's history* in response to the Ukraine war. Poland is buying **366 new tanks – 250** Abrams from the US and **116** K2 from South Korea – along with nearly **600** K9 armored howitzers and hundreds of IFVs [20] [11]. These orders, worth tens of billions of dollars, will make Poland a top-tier armored force in NATO by late 2020s and exemplify the rearmament trend among Eastern European states.

The table below summarizes several **leading importers** of armored vehicles and their recent procurement highlights:

Top Armored Vehicle Importers and Recent Procurements

Importer	**Global Import Rank** (2020–24)	Main Suppliers	Recent Armored Acquisitions
Ukraine	#1 (8.8% of global imports) [3]	US, UK, Germany, Poland (military aid)	*800*+ Western tanks pledged (e.g. Leopard 2, Challenger 2, Abrams) [23]; hundreds of IFVs/ APCs (Bradley, M113, etc.) delivered as aid.
India	#2 [25]	Russia, France, Israel, South Korea	T-90S and T-72M1 tanks (Russia); K-9 *Vajra* SP howitzers (license-built, South Korea); indigenous Arjun MBT and future IFV programs.
Qatar	#3 [25]	Germany, France, Turkey	Leopard 2A7+ tanks (Germany); ordered 490 Nexter VBCI IFVs (France); various Turkish 4×4 armored cars for internal security.

Importer	**Global Import Rank** (2020–24)	Main Suppliers	Recent Armored Acquisitions
Saudi Arabia	#4 [28]	USA, Canada, France	~370 M1A2 *Abrams* tanks (USA) in service; hundreds of LAV 6 IFVs (Canada) [14] ; older AMX-10 armored cars and new orders for APCs to replace losses.
Pakistan	#5 [28]	China, Turkey	679 VT-4 *Haider* tanks on order (China) [17] ; ST-1 tank destroyers and NORINCO APCs (China); Otokar *Arma* 8×8 APCs (Turkey) for Marines.
Poland *(rising)*	*(Top 10 by 2025)*	USA, South Korea, Germany	366 new MBTs ordered: 250 M1A2 SEPv3 Abrams [11] + 116 K2 Black Panther [20] ; ~600 K9 SPHs and 200+ KTO Rosomak (Patria) IFVs; Leopard 2A4/2A5 in service (some given to Ukraine).

Note: Ukraine's imports are largely military aid (grants) rather than commercial purchases, but they are counted as arms transfers. Poland's data reflects ongoing contracts that will significantly boost its import totals by the late 2020s.

Market Drivers and Technological Trends

Several **trends** have influenced armored vehicle export and procurement patterns in 2023–2025:

- **Geopolitical conflicts and alliances:** The Russian–Ukraine war is the single biggest driver, causing not only the emergency transfer of thousands of armored vehicles to Ukraine, but also a broad rearmament across Europe. NATO countries have been **donating older equipment** (often Soviet-era tanks and APCs from Eastern members) to Ukraine and ordering advanced replacements from abroad, leading to new export deals for the US, South Korea, and European manufacturers [7] [8] . The war has also effectively frozen Russia out of many arms markets – countries wary of sanctions or uncertain Russian supply (e.g. **Egypt**, **India** to an extent) have postponed or canceled Russian vehicle orders, turning to alternate suppliers or domestic projects. In the Middle East, the **Abraham Accords** and shifting Gulf alignments have opened the door for new defense partnerships – for instance, the UAE and Bahrain have shown interest in Israeli defense tech, and **NATO member Türkiye** has dramatically increased sales to Gulf states as Western export restrictions on those states eased.

- **Diversification of Suppliers:** Many importers are now spreading their orders among multiple countries to reduce dependence on a single source. **Saudi Arabia** and **Qatar**, for example, augment their primarily Western-made armored fleets with Turkish or East European vehicles for specific needs. **Pakistan** balances its mainly Chinese supply with some Turkish additions. **Indonesia** and **Philippines** have bought light armored vehicles from Turkey, France, Russia, and others in small batches. This diversification has lowered barriers for second-tier exporters to enter markets once monopolized by the US or Russia.

- **Rapid procurement and production capacity:** The urgent demand for armor (especially in Europe) has highlighted the importance of defense industrial capacity. South Korea's success in Europe is partly due to its ability to deliver new tanks and howitzers *quickly*, whereas traditional

Western suppliers are facing production backlogs. European nations have also launched the **NATO Defense Production Action Plan** to boost manufacturing of key systems including armored vehicles [29]. Joint procurement initiatives and multi-country projects (like the planned Franco-German **Main Ground Combat System** future tank, or the Eurotank project) aim to ensure long-term supply, though those are still in development. In the short term, countries are investing in expanding assembly lines or licensing foreign designs for local production (e.g. Poland building K2PL tanks, India license-producing Russian T-90s and BMP-2s).

- **Technological advancements:** Modern armored vehicles are far more advanced than those of a generation ago, and importers are keen on platforms with **cutting-edge tech**. Active Protection Systems (APS) have become a sought-after feature – for instance, Israel's **Trophy APS** is being installed on some US Abrams tanks and was purchased by Germany to retrofit its Leopard 2s, to intercept incoming missiles and drones. The prevalence of **anti-tank guided missiles (ATGMs)** and loitering drones in conflicts has driven demand for improved countermeasures, better sensors (360° cameras, UAV reconnaissance integration), and enhanced armor (composite and reactive armors). The war in Ukraine has shown the value of features like **thermal sights**, secure digital communications, and remote weapon stations, even on older vehicles – upgrades that many importers are now prioritizing. There is also growing interest in **uncrewed ground vehicles (UGVs)** and robotic combat vehicles; Turkey, Israel, the US, and Russia have developed armed UGV prototypes. While these have not yet been exported at scale, some have seen limited use (Russia reportedly tested a few UGVs in Syria and Ukraine). In coming years, we may see UGVs supplementing manned armored vehicles for roles like reconnaissance and logistics in export offerings.

- **Shifts in doctrine and vehicle preferences:** Many armies are recalibrating their mix of armored fleets. There is a noticeable trend toward highly mobile, **wheeled 8×8 and 6×6 armored vehicles** for rapid deployment forces – as seen in French, Italian, and Japanese procurement – while heavy tracked tanks and IFVs are still valued for high-intensity combat (particularly in Europe and Asia). Countries that can't afford top-of-the-line tanks are opting for cheaper alternatives like turreted 8×8 assault guns or upgraded older tanks (for example, some African states buying refurbished T-72s, or the Philippines acquiring Sabrah light tanks based on ASCOD 2 chassis). The export market thus ranges from state-of-the-art MBTs to affordable second-hand vehicles. Notably, **used armored vehicle sales** have increased: European nations have been offloading surplus Leopard 2A4 tanks, Marder IFVs, and M113 APCs – either to Ukraine or to third countries – creating a secondary market that competes with new-built vehicles. For instance, **Slovenia** sent 28 modernized M-55S tanks (upgraded T-55s) to Ukraine in exchange for Germany's support [30], and those older tanks effectively re-entered active use. Such cascading transfers may become more common as newer equipment enters service.

In summary, the armored vehicle export landscape in the mid-2020s is shaped by urgent geopolitical demands and rapid innovation cycles. Exporters that can offer **combat-proven** platforms with modern defenses (and deliver them quickly) are highly competitive. Importers are more discerning about capabilities like active protection, digitized command systems, and multi-role versatility, having observed recent conflicts. These factors will likely continue to drive the market in the near future, even as some regions stabilize and others (e.g. East Asia) potentially see arms races.

Türkiye’s Rising Role in Armored Vehicle Exports

Turkish BMC Kirpi mine-resistant vehicles on the move. The Kirpi MRAP is one of Türkiye’s export success stories – Tunisia alone received 100 Kirpi vehicles (along with Ejder Yalçın and Vuran models) in 2014–2019 [31]. Over the past decade, Turkish armored vehicles like the Kirpi have been fielded by militaries across Africa, the Middle East, and Central Asia.

Türkiye has rapidly **solidified its position** as a key exporter of armored ground vehicles. Once a net importer of tanks and APCs, Turkey now designs and produces a wide array of wheeled and tracked platforms that compete globally on cost and quality. According to its official report to the United Nations Register of Conventional Arms, **Türkiye exported 549 armored combat vehicles in 2022 and 501 in 2023**, reaching a total of **1,050+ vehicles over two years** [19] [32]. This marks a dramatic growth from just 259 vehicles exported in 2019 [32]. By volume, this output places Turkey among the world’s top armored vehicle suppliers in recent years. In fact, Turkish defense exports (all categories) jumped 29% in 2024 to reach **$7.1 billion**, making Turkey the **11th largest arms exporter** globally; armored **land vehicles** rank among its most exported product groups [18] [33].

Key Turkish platforms have found eager buyers in **Asia, Africa, and the Middle East**. Turkey specializes in **4×4 and 6×6 tactical armored vehicles** – offering battle-tested designs at competitive prices. For example, the **BMC Kirpi** (a 4×4 MRAP) and **Nurol Ejder Yalçın** (4×4 armored combat vehicle) have been exported to dozens of countries, often for counter-insurgency and peacekeeping roles. *Tunisia* was an early customer, receiving **100 Kirpi MRAPs**, **71 Ejder Yalçın 4×4s**, and a number of **BMC Vuran** 4×4 APCs by 2019 [31]. These vehicles bolstered Tunisia’s forces for border security and UN missions. Other notable clients include:

- **United Arab Emirates (UAE):** At least **400** Otokar *Rabdan* 8×8 IFVs (a Turkish-developed variant of the AMV) were delivered to the UAE by 2023 [34], in addition to earlier purchases of Emirati-designed **NIMR** vehicles co-produced with Turkey. The UAE’s large order showcased confidence in Turkish armor for frontline mechanized infantry units.

- **Qatar:** A close defense partner, Qatar has purchased scores of 4×4 armored vehicles from Turkey. These likely include **Ejder Yalçın** and **Otokar Cobra II** vehicles used by Qatari internal

security forces (exact figures are not publicly disclosed). Qatar's first use of Turkish armored vehicles was notably to help secure the 2022 World Cup venues.

- **Saudi Arabia:** In 2023, Saudi Arabia was the third-biggest recipient of Turkish armored vehicles (66 units) [35]. Saudi Arabia has evaluated various Turkish models; reports indicate deliveries of Otokar **Cobra II** APCs as part of a 2023 defense deal [36]. Turkish vehicles likely fill niche roles for Saudi forces and National Guard, complementing their heavier American armor.

- **Central Asia: Kazakhstan** received 68 Turkish armored vehicles in 2023 [37] and has expressed interest in a much larger acquisition – potentially **800 vehicles** including the **Tulpar** IFV, **ARMA** 8×8, and Cobra II [38]. A joint production agreement has been discussed, which would further cement Turkey's footprint in Central Asia. **Azerbaijan** (a close ally) also operates Turkish vehicles, such as the Otokar **Cobra** and **Cobra II** used in border security and during the 2020 Nagorno-Karabakh conflict [39].

- **Africa:** Turkish armored vehicles have proliferated across Africa due to their affordability and reliability in harsh conditions. **Côte d'Ivoire** uses Cobra II and Nurol **Ilgaz** vehicles for internal security [40]; **Chad** has fielded Nurol **NMS 4×4** and Ejder Yalçın vehicles (seen in 2022 convoy footage) [41]; **Morocco** and **Libya** have reportedly obtained Kirpi or similar MRAPs for counter-insurgency; **Nigeria** and **Kenya** have also explored Turkish MRAP offerings for their militaries. In total, Turkey's defense authority states that exports in 2024 reached **185 countries** – an immense global footprint [42], with armored vehicle deals playing a major part.

It is worth noting that Turkey's success rides on several factors: *cost-effectiveness*, fast delivery, and adaptability of designs. Turkish armored vehicles are generally cheaper than Western equivalents, yet offer modern features (V-shaped hulls for mine protection, remote weapon stations, etc.). Turkey often customizes vehicles to client requirements, and in some cases sets up local production or support, as seen with Pakistan's assembly of Turkish Akıncı APCs and Indonesia's partnership on medium tanks. Ankara has also capitalized on geopolitical neutrality to sell to countries under Western arms embargoes or those wanting to avoid over-reliance on great powers. For instance, Turkey filled a void in Tunisia's needs when other suppliers were hesitant [43], and it continues to export to conflict zones with careful calibration (e.g. armored vehicles to Somalia's government forces).

Turkey's rise in this sector has not gone unnoticed. Industry analysts describe Turkey as a "**rising star**" in the armored vehicle market [44], increasingly competing with established exporters. Its companies (Otokar, BMC, FNSS, Nurol Makina) regularly showcase new models at international defense exhibitions, such as the **PARS** 6×6/8×8, **Kaplan** MT light tank (codeveloped with Indonesia), and **Altay** main battle tank (which is entering Turkish service and has drawn interest abroad, though no export sale is confirmed yet). As Turkey continues to invest in defense R&D and expand production, it aims to sustain export growth. Turkish officials set an ambitious target to **surpass $10 billion** in defense exports by 2025 [45] – a goal that, if reached, would likely be buoyed by even greater armored vehicle sales across new markets.

Conclusion

In summary, the period **2023–2025** has been pivotal for the **global armored ground vehicle trade**. Heightened security threats – from the plains of **Ukraine** to the deserts of the **Middle East** – have driven a spike in demand for modern tanks, IFVs, and armored carriers. The **United States** remains the preeminent supplier, but competitors like **France** and an embattled **Russia** (now diminished) continue to vie for market share alongside rising powers including **China**, **South Korea**, and **Türkiye**. The largest

importers, notably **Ukraine**, **India**, and wealthy Gulf states, have bolstered their arsenals with both cutting-edge Western armor and cost-effective alternatives. Key trends such as Europe's rearmament, supply chain bottlenecks, and rapid adoption of new technologies (like active protection and drones) are reshaping how and what armored vehicles are exported.

Looking ahead, the global armored vehicle market is projected to grow steadily (analysts forecast it could reach ~$46–60 billion by 2030) [46] [24]. Continued **geopolitical uncertainty** – including NATO's posture against Russia, China–Taiwan tensions, and regional conflicts – suggests sustained demand for armored protection. At the same time, **innovation** in automation, survivability, and firepower will define next-generation exports. Countries that can deliver capable vehicles quickly (as seen with South Korea's timely deliveries to Poland) will have an edge. Türkiye's remarkable ascent exemplifies how a nation can leverage quality and diplomacy to carve out a niche in this competitive arena. As defense budgets remain high and older vehicle fleets cycle out, armored vehicle exports will remain a dynamic and crucial segment of the global defense industry.

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