



National  
Foreign  
Assessment  
Center

Secret



# Sub-Saharan Africa: Fast Growing Arms Market

An Intelligence Assessment

Secret

ER 78-10629  
October 1978

Copy 10

**Page Denied**

STATOHR  
STATOHR

SECRET

25X11

## Sub-Saharan Africa: Fast Growing Arms Market

Central Intelligence Agency  
National Foreign Assessment Center

October 1978

### Key Judgments

The Angolan civil war in 1975—in which the rival factions drew support from various Communist and non-Communist nations—touched off a rapid escalation of foreign arms transfers to Sub-Saharan Africa.\* Arms sales topped \$3 billion in 1976-77, more than the entire amount committed to the region in the previous 16 years. Deliveries rose in parallel fashion, and both sales and deliveries continued strong in the first eight months of 1978.

	Million US \$	
	Sales	Deliveries
1960-72 .....	1,480	1,260
1973 .....	320	180
1974 .....	550	250
1975 .....	515	410
1976 .....	1,465	835
1977 .....	1,605	1,050

Despite this upsurge, Black Africa accounted for less than 10 percent of the \$40 billion in total military sales to the Third World in 1976-77.

Communist military sales to the Sub-Sahara have overtaken Western sales in the past several years and in 1977 made up two-thirds of the total. The USSR alone supplied almost one-half the military goods sold and delivered to the area in the last two years. In contrast, the single largest Western supplier, the United States, sold about 10 percent of the total in 1976-77, while France accounted for 8 percent of the market and West Germany 7 percent.

In every major combat weapons category save naval vessels and utility aircraft the USSR has been delivering more pieces of equipment than all Western suppliers combined. The Soviets also lead in the introduction of relatively advanced weapon systems into the area.

\* *Sub-Saharan Africa*, or the *Sub-Sahara*, or *Black Africa*, is used in this report to include all continental African countries except South Africa, Namibia, and the nations of Arab North Africa (Morocco, Algeria, Tunisia, Libya, and Egypt). Also included are the islands of Madagascar, Mauritius, Seychelles, Comoros, Sao Tome and Principe, and the Cape Verde Islands.

SECRET

SECRET



The bulk of foreign-supplied arms have gone to 10 Sub-Saharan nations, which together made up 85 percent of regional purchases in 1976-77. Of these, Angola and Ethiopia have taken more than one-half of all hardware delivered, mostly from the USSR. Insurgent groups aligned against Rhodesia have also benefited from the renewed Soviet interest in Africa. Moscow transferred, in relatively smooth fashion, an estimated one-half billion dollars worth of armored vehicles, artillery, jet fighters, and other equipment into Ethiopia between April 1977 and May 1978. In return, the USSR gained Ethiopian permission to develop a naval support facility for exclusive Soviet use.

The near-term trend in arms sales and deliveries to Sub-Saharan Africa will be largely determined by the number and scope of military clashes in the area. In the absence of major new military action, we would expect arms sales to the area to recede from their recent peak, with the USSR retaining its new position as the ranking supplier. A sizable backlog of orders, including purchases already made in 1978, will sustain a considerable flow of arms into Ethiopia for the next several years. The continuing civil war in Angola and military buildups in Tanzania, Mozambique, and Zambia suggest a steady flow of Soviet weapons and equipment into these countries for the next year or so. At the same time, Western suppliers should see moderately increased sales as a result of the availability of recent additional Saudi financial assistance, particularly to Somalia and Sudan. The perceptible rise in the lethality of weapons introduced into the Sub-Sahara almost certainly will continue, with the Soviets taking the lead in supplying new, more deadly weapons.

**Page Denied**

Next 8 Page(s) In Document Denied

**Secret**

**Secret**