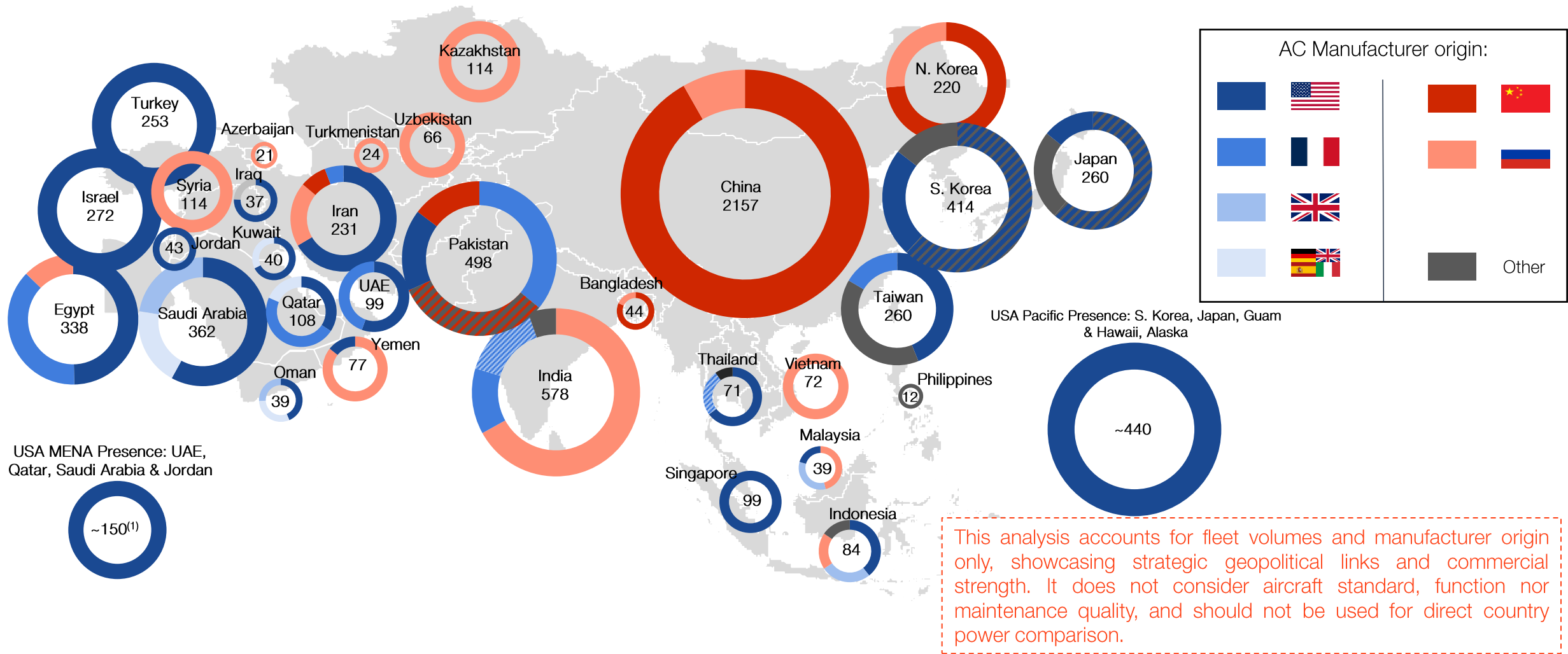


# Fleets' origins display both legacy and current alignments of the region with China/Russia vs Europe/US, with Chinese fleet size dominating the region

FIGHTER JETS STATIONED IN ASIA & MIDDLE EAST: BREAKDOWN BY COUNTRY, BY MANUFACTURER'S COUNTRY OF ORIGIN



# The SCO Summit 2025 showed shared interests against an US/EU-dominated world, but recent fighter orders result of rising tensions between Asian powers

## ASIA & MIDDLE EAST: 2025 AND POTENTIAL 2026 ORDERS

Country	Aircraft	Manufacturer (Country)	Contract amount	Discussion phase (Latest update)
South Korea	20 KF-21	KAI (South Korea)	\$1.8 Bn	Firm order (June 2025)
Thailand	4 + 8 Gripen E/F	Saab (Sweden)	\$550 M	Firm order + Intention (June 2025)
Azerbaijan	40 JF-17 Block III	Chengdu (China & Pakistan)	\$4.6 Bn	Firm order (June 2025)
Philippines	12 FA-50	KAI (South Korea)	\$700 M	Firm order (June 2025)
India	26 Rafale Marine	Dassault (France)	\$7 Bn	Firm order (April 2025)
India	114 Rafale	Dassault (France)	Potential 2026: MRFA <sup>(1)</sup> tender in response to Pakistan's and China's threats	
Pakistan	40 J-35	Shenyang (China)	Potential 2026: Announced by press but denied by Pakistan in June 2025	

- Border and territory tensions between **India** and **Pakistan** lead both countries to renew their respectively MiG-29 and J-7 / Mirage III fighter fleets
- **India** also considers the Chinese threat and is still willing to fulfil the Multi-Role Fighter Aircraft tender for ~110 fighter aircraft. Already integrated in the forces, Dassault's Rafale holds a head start in the contest, and August 2025 reveals announced a future direct deal at state level by the end of 2025.
- **Japan** is currently receiving their first F-35Bs and considers committing more to the program amid UK & Italy's lack of urgency into the Tempest programme.
- Facing strong pressure from China, **Taiwan** expects to receive their last batch of 10 F-16 by the end of 2025, concluding a 66 aircraft order.