

Can India build a military-industrial complex? Yes

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COUNTRY	SYSTEM	VALUE	SIGNED	STATUS
Philippines	BrahMos anti-ship coastal missile batteries (3)	~US\$375M	Jan 2022	DELIVERED — first batch, Apr 2024
Armenia	Akash-1S air defence system (15 units)	~₹6,000 Cr / \$720M	2022	DELIVERED
Armenia	Pinaka multi-battle rocket system	~₹2,000 Cr	2022	IN PROGRESS — guided-rocket tranche flagged off Jan 2026
Armenia	ATAGS howitzers, Swathi radars, ammunition	Undisclosed	2022-24	ONGOING DELIVERIES
Indonesia	BrahMos supersonic cruise missile	~US\$200M	2026	CONTRACTED
Vietnam	BrahMos (customer confirmed)	Undisclosed	2026	CONTRACTED
France	Pinaka rocket system — evaluation for artillery modernisation	—	2026	UNDER EVALUATION
Egypt / Argentina	HAL Tejas LCA — expressions of interest (20 / 15 aircraft)	—	2023-ongoing	INTEREST, UNCONVERTED
Brazil	Akash co-production — inter-governmental talks	—	2026	TALKS UNDERWAY
Mauritius	Banarjee-class offshore patrol vessel	Undisclosed	Delivered	DELIVERED

Compiled from PIB releases, Business Standard, Outlook, The Statesman, Deccan Herald reporting (2023-2026).
Undisclosed reflects genuinely unpublished figures, not omission.

Can India build a [military-industrial complex](#)? Yes

Without indigenous weapons, all talk of rising India is destined to remain incomplete. The numbers show that India has finally understood this.

India is undergoing a profound strategic transformation, reimagining itself from the world's largest arms importer into a credible exporter of advanced defence systems. At the heart of this ambition lies the BrahMos supersonic cruise missile, a joint Indo-Russian venture that has emerged as the flagship product of India's defence industrial complex. This shift is economic and diplomatic, enabling New Delhi to leverage defence trade as an instrument of statecraft, deepen strategic partnerships, and elevate its global stature as a reliable security partner.

FROM BUYER TO SELLER

The trajectory of India's defence exports over the past decade reveals a dramatic reversal of fortunes. In FY2013-14, defence exports stood at a modest Rs 686 crore. By FY2025-26, this figure had surged to a record Rs 38,424 crore (approximately \$4.6 billion), representing a 56-fold increase in just over a decade. This growth has been underpinned by the Atmanirbhar Bharat (Self-Reliant India) initiative, which has systematically reduced import dependency from 65-70% to under 35%, with domestic manufacturing now accounting for at least 65% of defence equipment.

The policy architecture supporting this transformation includes the Defence Acquisition Procedure 2020, positive indigenisation lists, and the establishment of two defence industrial corridors. The private sector has emerged as a critical driver, contributing Rs 17,353 crore (45.16%) of defence exports in FY2025-26, while Defence Public Sector Undertakings (DPSUs) accounted for the remaining 54.84%. Roughly 145 Indian companies now export to more than 80 countries, with the export basket increasingly comprising sophisticated platforms such as BrahMos missiles, Akash air-defence systems, Pinaka multi-barrel rocket launchers, naval vessels, radars, and electronic warfare systems.

The government has set ambitious targets: Rs 3 lakh crore in annual defence production and Rs 50,000 crore in exports by 2029. This represents not just an industrial policy but a strategic recalibration, positioning India as a net security provider in the Indo-Pacific and beyond.

THE BRAHMOS WAY

No single weapon system embodies India's defence export ambition more than the BrahMos supersonic cruise missile. Jointly developed by India's Defence Research and Development Organisation (DRDO) and Russia's NPO Mashinostroyeniya, the BrahMos travels at nearly Mach 2.8 (three times the speed of sound) and has become one of the fastest cruise missiles in the world. Its combat validation during Operation Sindoor transformed it from a respected system into a globally sought-after weapon, with India now negotiating multi-billion-dollar export deals across Asia, West Asia, and Latin America.

The Philippines became the first export customer in January 2022, signing a \$375 million contract for three shore-based anti-ship BrahMos batteries. Deliveries were successfully executed through 2024 and 2025, establishing BrahMos as India's first major weapon system to secure an export contract. This breakthrough paved the way for subsequent deals: in May 2026, India secured a \$620 million agreement to sell BrahMos batteries to Vietnam, marking a significant expansion of its defence footprint in Southeast Asia.

Indonesia has also signed a cooperation agreement on the BrahMos Missile System during Prime Minister Narendra Modi's visit, sharpening focus on India's widening defence export reach across ASEAN. Once these agreements are concluded, Vietnam and Indonesia will become the second and third ASEAN countries to induct the high-speed precisionstrike missile, following the Philippines. The missile's appeal lies in its ability to bolster coastal defences, a critical capability for nations seeking to counter maritime threats in an increasingly contested Indo-Pacific.

Export revenue from BrahMos sales is being reinvested into research and development, funding the next-generation BrahMosNG (Next Generation), which is 50% lighter, three metres shorter, and compatible with smaller platforms. Flight testing for BrahMosNG began in 2026, ensuring India remains at the cutting edge of missile technology.

AN INDIAN MILITARYINDUSTRIAL COMPLEX

India's emergence as a defence exporter carries profound implications for its global standing. Historically, India's status as the world's largest arms importer constrained its strategic autonomy and diplomatic leverage. By reversing this dynamic, New Delhi is

recasting itself as a reliable security partner capable of supplying advanced technology to friendly nations. This transformation enhances India's credibility as a net security provider in the Indo-Pacific, a role increasingly valued by countries seeking alternatives to Chinese and Russian defence equipment.

The BrahMos deal with the Philippines, for instance, has deepened bilateral ties and positioned India as a counterbalance to China's maritime assertiveness in the South China Sea. Similarly, the Vietnam and Indonesia agreements signal India's willingness to support ASEAN nations in strengthening their coastal defences, aligning with New Delhi's Act East Policy and its vision of a free, open, and inclusive Indo-Pacific. These transactions are not merely commercial; they are strategic investments in long-term partnerships, creating interdependencies that enhance India's diplomatic influence.

Moreover, defence exports enable India to project soft power through technology transfer and capacity building. Unlike traditional aid or diplomatic overtures, defence sales create enduring relationships grounded in mutual security interests. Countries that induct Indian systems become stakeholders in India's strategic success, fostering alignment on issues ranging from maritime security to counterterrorism. This is particularly evident in India's growing defence ties with Armenia, which has emerged as a significant buyer of Indian weapons amid its tensions with Azerbaijan and Pakistan.

DIPLOMACY THROUGH DEFENCE

India's defence export strategy is inextricably linked to its broader diplomatic objectives. By supplying advanced systems like BrahMos, New Delhi is signalling its readiness to support partners in deterring aggression and maintaining regional stability. This approach resonates with countries wary of over-reliance on traditional suppliers like Russia or the United States, both of which come with [political](#) strings attached. India, by contrast, offers technology without overt ideological conditions, making it an attractive partner for nations seeking strategic autonomy.

The diversification of India's export basket beyond missiles to include naval systems (which now account for nearly 55% of defence exports), artillery guns, radars, and armoured vehicles further underscore its growing capabilities. This breadth enables India to cater to a wider range of security needs, from maritime domain awareness to border defence, enhancing its appeal as a comprehensive defence partner.

Defence exports also serve as a tool for deepening ties with key regions. In Southeast Asia, BrahMos sales reinforce India's commitment to ASEAN centrality and its role as a stabilising force. In West Asia and Latin America, ongoing negotiations for BrahMos and other systems signal India's ambition to expand its strategic footprint beyond its traditional neighbourhood. This global outreach aligns with India's aspiration to be a leading power in a multipolar world, capable of shaping outcomes rather than merely reacting to them.

WHAT'S NEXT?

Despite remarkable progress, challenges remain. India's defence exports, while growing rapidly, still represent a small fraction of the global arms market, dominated by the United States, Russia, France, and China. Scaling up production capacity, ensuring timely deliveries, and maintaining quality standards will be critical to sustaining momentum.

Additionally, geopolitical sensitivities—such as the continued Russian involvement in BrahMos—could complicate exports to certain markets, particularly those under Western sanctions.

Nevertheless, the trajectory is clear. With exports reaching Rs 38,424 crore in FY2025-26 and targeting Rs 50,000 crore by 2029, India is on track to become a top10 global defence exporter. The BrahMos missile, as the vanguard of this effort, has already demonstrated its diplomatic and strategic value, transforming India from a passive buyer into an active shaper of global security dynamics.

India's reimagining as a defence exporter, led by the BrahMos missile, represents a watershed moment in its strategic evolution. This shift is not merely about economic gains but about redefining India's role in the international order. By supplying advanced weapons systems to partners across the Indo-Pacific and beyond, New Delhi is enhancing its global stature, deepening diplomatic ties, and asserting itself as a net security provider. The BrahMos, with its combat-proven capabilities and growing export footprint, stands as a symbol of this transformation—a testament to India's technological prowess and its ambition to be a leading power in the 21st century.

As India continues to scale its defence industrial base, the BrahMos will remain at the forefront, enabling New Delhi to wield defence trade as a potent instrument of statecraft and diplomacy.

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