

Pakistan's Shopping Spree: New Weapons, New Allies and New Risks



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Introduction

Operation *Sindoor* was more than a military confrontation for Pakistan. It was a force-structure diagnostic. The May 2025 conflict showed that the India-Pakistan equation has been permanently altered. The manoeuvring space between sub-conventional and nuclear conflict has suddenly expanded, giving both sides additional kinetic options. Precision strike, long-range air-to-air missiles, integrated air defence (AD), electronic warfare (EW), unmanned systems, persistent surveillance and networked command-and-control (C2) have become essential cogs in the war-making machinery. While platforms remain important, their effectiveness increasingly depends on how well they integrate into a larger system. Pakistan appears to have drawn its own conclusions.

Post Op *Sindoor*, Pakistan's response has been characterised by a noticeable acceleration in defence expenditure, an expansion of its conventional missile architecture, renewed emphasis on air power, interest in fifth-generation fighters and airborne early warning, greater incorporation of unmanned systems, and the creation of a dedicated Army Rocket Force Command (ARFC). Alongside this military response has emerged a new strategic layer comprising deeper defence, industrial and security ties with China and Türkiye, and, importantly, the [Makkah Joint Defence Agreement](#) (MJDA) with Saudi Arabia and Türkiye.¹ The result is not simply a larger and more modern Pakistani military. It is the beginning of an entirely different military architecture. The critical

question for India, therefore, is not what Pakistan is buying, but what military system it is trying to build.

The Force-Structure Diagnostic: 88 Hours of Introspection

During Op *Sindoor*, Pakistan Air Force (PAF) had a reasonably sophisticated air-defence and air-combat architecture. The PAF possessed J-10CE fighters, JF-17s, F-16s, airborne early warning and control (AEW&C) aircraft, ground-based air-defence systems (HQ-9, HQ-16) and Chinese-origin long-range air-to-air missiles. Yet the conflict highlighted a fundamental problem. Pakistan could contest the air domain, but contesting it is not the same as controlling it. Its dependence on a relatively small number of high-value platforms meant that attrition, stand-off engagement and the degradation of sensors or command networks could have disproportionate effects. While Pakistan attempted to generate mass through Unmanned Aerial Vehicles (UAVs) and small drones, they were more of a nuisance value than being tactically effective. The conflict has thus reinforced several imperatives for Pakistan: -

- The need for greater stand-off ranges.
- Larger inventories of precision weapons.
- Increased number of fighters and sensors.
- More effective Unmanned Aerial System (UAS) strike options.
- A more resilient and networked air defence (AD).
- Persistent unmanned surveillance and effective strike capability.
- An independent conventional deep-strike capability.
- Greater redundancy in command and control (C2).
- Better integration of sensors, shooters, electronic warfare and decision-making.

The answer emerging from Islamabad is increasingly a system-of-systems approach. The fighter is no longer being viewed in isolation. The fighter, missile, Airborne Early Warning and Control (AEW&C) aircraft, UAVs, ground-based AD systems, electronic-warfare assets, sensors, and C2 networks are becoming components of a larger operational architecture. This is the most important aspect of Pakistan's post-*Sindoor* modernisation.

Crunching the Numbers

Evidence suggests Pakistan has consistently increased the resources available for this transformation. The [Stockholm International Peace Research Institute](#) (SIPRI) estimates that Pakistan's military expenditure has increased by [11 per cent in 2025 to USD 11.9 billion](#).² SIPRI also notes that the increase was partly linked to new aircraft and missile orders from China following the May 2025 conflict, along with payments for earlier procurement programmes.³ The Pakistani budget provides an even more revealing indicator. For the Financial Year (FY) 2025–26, Pakistan increased its defence allocation to PKR 2.55 trillion, a 20.2 per cent increase over the preceding year's PKR 2.122 trillion.⁴ Of this, PKR 663.1 billion was allocated for physical assets—arms and equipment—a rise of approximately 21 per cent.⁵ During the current FY, the increase has become more apparent. Pakistan's FY2026–27 defence allocation rose to approximately PKR 3.01 trillion, while the allocation for physical assets increased from PKR 663.1 billion to PKR 925.8 billion, a 39.6 per cent increase.⁶ Notably, the allocation towards physical assets has risen sharply over the past three years. However, SIPRI data should be interpreted carefully because its figures are calendar-year estimates and do not isolate expenditure before and after May 2025. Pakistan's fiscal-year budgets are therefore a better indicator of the immediate post-Op *Sindoor* response.

The Shopping Cart

Pakistan's shopping cart (Table 1) is fairly interesting and reveals a clear pattern. Pakistan's focus is not just on numbers but on contemporary and futuristic technology.

Table 1

Capability	System/Programme	Quantity/Range	Status	Operational Significance
5th-gen Fighters	J-35	40 offered	Offered/under development by China	Stealth, survivability, sensor fusion
4.5-gen Fighters	J-10CE	36 ordered	In service	Long-range Beyond-Visual-Range (BVR) combat
4 plus-gen Fighters	JF-17 Block III	50 planned	In service/induction	Mass, BVR and networked operations
AEW&C	KJ-500	Quantity not confirmed	Offered by China	Extends sensor reach and battle management
Long-range SAMs	HQ-19	Quantity not confirmed	Offered by China	Higher-tier ballistic missile defence
BVR Missiles	PL-15/ PL-15E	Quantity not disclosed	In service	Long-range air combat

Conventional Surface-to-Surface Missiles (SSMs)	Fatah-II	400-450 km	Inducted	Precision stand-off fires
Cruise Missiles	Fatah-IV	750 km stated	Newly inducted/tested	Long-range conventional strike
Rocket Force	Army Rocket Force Command	—	Established Aug 2025	Dedicated conventional missile command
Attack Helicopters	Z-10ME	Quantity undisclosed	First aircraft inducted Aug 2025	Precision battlefield strike
UAVs	Bayraktar TB2 / Turkish systems	Numbers unclear	In service/integration	ISR, targeting and strike
Strategic Alliances	Makkah Joint Defence Agreement (MJDA)	Pakistan, Türkiye, Saudi Arabia	Signed Aug 2026	Collective defence/interoperability

Source: Data collected by the author from various sources.

The table also highlights an important analytical distinction. Not everything appearing after *Op-Sindoor* was necessarily purchased because of the conflict, and several programmes predate it. However, what has changed after May 2025 is the pace of induction and integration, including rapid operationalisation of some systems.

PAF and its Transformation

PAF remains the principal instrument of Pakistan's conventional deterrence. PAF is attempting to convert lessons from *Op-Sindoor* into a more integrated, networked and technologically advanced air force. The immediate emphasis appears to be on layers consisting of the Beyond-Visual-Range (BVR) missiles, next-generation fighters, additional long-range precision strike options, UAVs and new strategic alliances.

(a) PL-15/15E BVR Missile. The PL-15E gives PAF the '[long-stick](#)' advantage. The strategic consequence of possessing a 'long-stick' is significant. A credible 'long-stick' capability can force an adversary to operate farther from defended airspace, constrain its tactics, increase its dependencies on stand-off weapons and supporting assets, and impose psychological pressure and create decision dilemmas. Thus, in modern BVR combat, "who can shoot further" is only the starting point. The real advantage belongs to the force that can create and exploit a larger effective engagement envelope while denying the adversary the same opportunity.

The J-10CE has already become an important component of the PAF's air-combat architecture. Equipped with an Active Electronically Scanned Array (AESA) radar and PL-15E

missiles, and integrated with AEW&C and other ground-based sensors, it poses a significant threat in the aerial domain. In addition, the PAF has publicly displayed [JF-17 Block III aircraft carrying the Chinese PL-15](#). This also gives the PAF a significant boost with respect to mass and numbers. The real capability therefore lies not in the J-10CE or JF-17 individually, but in the combined architecture of AEW&C, ground sensors, AESA radar, datalink, EW, PL-15, and distributed C2. This is precisely why India's response cannot be confined to fighter-versus-fighter comparisons.

(b) The Shenyang J-35: A Qualitative Ambition and a Game Changer. In June 2025, immediately after *Op-Sindoor*, Pakistan announced that China had offered them forty J-35 fifth-generation stealth fighters together with KJ-500 AEW&C and HQ-19 AD systems.⁷ The significance of the J-35 lies less in the aircraft in isolation and more in what it may potentially add to the PAF's existing capabilities. Its stealth features, AESA radar, BVR missiles, conformal weapons carriage, advanced EW suite, and data-linking capability, coupled with the increased numbers of JF-17 Block 3 and J-10CE, could provide Pakistan with a qualitatively different aerial combat architecture. For India, this represents a significant change in the geometry of the air battle. While delivery timelines, quantities, and operationalisation are still some time away, it would serve India well to put on the thinking hat and develop tangible mitigation measures. India's main problem is that the Advanced Medium Combat Aircraft (AMCA) remains on the drawing board, and there is no sign of any other fifth-generation aircraft being acquired by India. The J-35 therefore provides India with a useful forcing function. The question is no longer whether India can eventually build a fifth-generation fighter aircraft; it is whether it can build and operationalise one quickly enough to preserve its qualitative airpower advantage. Acquiring fifth-generation fighter aircraft must become a time-bound national imperative for India to shape the air battles of the future rather than merely react to them.

(c) The Army Rocket Force Command (ARFC). Perhaps the most consequential Pakistani development is not the fighter force. It is the emergence of the Army Rocket Force Command (ARFC). Pakistan announced the creation of the ARFC in August 2025, describing it as a force intended to enhance conventional warfare capabilities.⁸ Pakistan's missile forces have historically been heavily associated with strategic deterrence. Creating a dedicated conventional rocket force begins to separate strategic deterrence from conventional precision fires. The Fatah family is central to this development.

While Fatah-II was inducted into the Pakistan Army in 2024 and has a stated range of 400 km, it is not a post-*Sindoor* acquisition. But the subsequent creation of the ARFC and its training activity gives the system a new operational context. What makes the situation more interesting is the development of [Fatah-IV](#). Pakistan unveiled the missile in August 2025 and later confirmed it in a September 2025 training launch.⁹ With a stated range of 750 km, it is described as terrain-hugging and intended to provide greater reach, lethality and survivability to Pakistan's conventional missile force.

The significance lies less in the individual missile than in the institutional architecture. The ARFC gives Pakistan the ability to develop a dedicated conventional deep-fire chain independent of fighter availability. That complicates Indian air operations because Pakistan can potentially impose costs through multiple vectors like aircraft, cruise missiles, UAVs, ballistic missiles/rockets, and loitering Munitions (LMs). This is precisely what a system-of-systems approach seeks to achieve: multiple shooters presenting multiple dilemmas against a target system.

(d) UAVs: From Nuisance Value to Credible Options. The other major lesson of contemporary warfare is that mass matters. Expensive combat aircraft are increasingly being augmented by comparatively inexpensive unmanned systems for surveillance, targeting, deception, electronic warfare and strike. Pakistan has been incorporating Turkish UAV technology into its force structure, while its broader relationship with Türkiye provides access to one of the world's fastest-growing military-UAS ecosystems.

The strategic attraction is obvious: UAVs provide persistent surveillance, battle damage assessment, decoy and deception effects, electronic warfare capability, stand-off weapon delivery, saturation and finally attritable mass. For Pakistan, which faces a substantial resource asymmetry with India, the economics are compelling. Instead of trying to match India's expensive platforms one-for-one, Pakistan can build mass at the lower end of the cost spectrum while concentrating sophisticated capabilities at the high end. That is a rational asymmetric response, and China and Türkiye are central to its realisation.

The most significant development, however, is not a weapon system or the acquisition of modern technology. It is the emerging political-security architecture involving Pakistan, Saudi Arabia and Türkiye. On August 07, 2026, the three countries signed the Makkah Joint Defence Agreement.¹⁰ The agreement stipulates that an armed attack against one signatory

would be regarded as an attack against all, a commitment Turkish Foreign Minister Hakan Fidan described as technically equivalent to the North Atlantic Treaty Organization's (NATO) Article 5.¹¹ While the alliance may not classically read as anti-India, the wider Indian strategic community will need to consider its implications.

So, what does Pakistan gain from this alliance? Pakistan gains tremendous strategic and financial depth, increases its diplomatic clout and significantly expands defence-industrial cooperation. Saudi Arabia brings financial resources and geopolitical influence; Türkiye brings a sophisticated and increasingly autonomous defence industry, and Pakistan brings a large standing military, nuclear deterrence, missile technology and an established defence-industrial base. The three countries have agreed to establish a permanent secretariat in Saudi Arabia, initially headed by a Pakistani secretary-general for three years. The inaugural Strategic Political and Defence Committee has also begun work, with interoperability, defence capability and joint production among the areas of discussion.¹² For Pakistan, this is potentially much more than diplomatic symbolism. It provides a framework within which military cooperation can evolve into industrial cooperation, common training, interoperability and potentially shared capabilities. A key takeaway from this could be what happened in the 1960s-1980s, when the Arab nations geographically and politically tried to isolate Israel. The MJDA could just be a similar attempt to isolate India geographically, especially if Bangladesh also joins the alliance.

Parting Shots

Pakistan's shopping spree does not fundamentally alter the strategic balance with India. The economic asymmetry remains substantial. SIPRI estimates India's 2025 military expenditure at USD 92.1 billion, almost eight times Pakistan's USD 11.9 billion.¹³ India therefore does not need to match Pakistan platform for platform. What India needs is to understand the emerging architecture because the real danger lies in underestimating a smaller force that is becoming more integrated. Acquisition of the Shenyang J-35 is one independent problem. J-35s, J-10CEs and numerous JF-17 Block IIIs, networked, data-linked, and supported by force multipliers like AEW&Cs, are a totally different problem. Similarly, operationalising the Fatah-IV is an independent problem, but the entire ARFC operating in unison with airborne elements is a different problem altogether. The emerging paradigm is not based on numbers and technology. It is about systems and, therefore, the Indian response has to be equally systemic.

Pakistan's post-*Sindoor* modernisation is no longer simply an India–Pakistan arms race. Its military capabilities are increasingly embedded in a wider network involving China, Türkiye and Saudi Arabia, creating a strategic environment that extends from the Gulf and Arabian Sea to the Himalayas and the Indo-Pacific. China remains the backbone. SIPRI records that China supplied 80 per cent of Pakistan's major arms imports during 2021–25.¹⁴ More importantly, Chinese fighters, AEW&C aircraft, missiles, air defence, UAVs and C2 systems are creating an increasingly integrated architecture. India must therefore contend with Chinese-origin capabilities on both its Northern and Western fronts. While the geography remains separate, the technology increasingly is not.

Another important dimension is the emerging Pakistan–Türkiye–Saudi axis. The Makkah defence agreement should not be overstated as a NATO equivalent, but its collective-defence provision and emerging institutional mechanisms are significant. Saudi Arabia brings financial and geopolitical weight; Türkiye brings a growing defence-industrial ecosystem; Pakistan brings military capability and nuclear deterrence. The concern is less a formal alliance than strategic convergence, making Pakistan less vulnerable to isolation. The key question is whether Pakistan has the appetite to make good on the agreement's provisions.

New Delhi should not view Saudi Arabia's relationship with Pakistan as a zero-sum proposition. Riyadh has substantial interests in India, especially energy, investment, trade and maritime security. The Gulf is increasingly practising multi-alignment, and India must do the same, while paying greater strategic attention to Türkiye's growing defence relationship with Pakistan. The military response cannot be another procurement race. India's advantage lies in its economic scale, technological base, space capability, industrial potential and expanding strategic partnerships.

The strategic geography is also changing. India must increasingly view the Gulf–Arabian Sea–Pakistan–Himalayan–Indo-Pacific continuum as an interconnected security environment, even while retaining the ability to fight geographically distinct contingencies. Pakistan is attempting to compensate for its resource disadvantage through integration, precision, mass and external partnerships. India is trying to split its forces into multiple entities. While India has far greater resources, the challenge is ensuring they translate into military advantage. The real question is whether India has the urgency, because time is no longer an ally.\

(Disclaimer: The views and opinions expressed in this article are those of the author and do not necessarily reflect the position of the Centre for Aerospace Power and Strategic Studies [CAPSS])

Notes:-

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³ Ibid., p. 8.

⁴ "Pakistan Ramps Up Defence Spending by 20 percent after India Conflict," *Al Jazeera*, June 10, 2025, <https://www.aljazeera.com/news/2025/6/10/pakistan-ramps-up-defence-spending-by-20-percent-after-india-conflict>. Accessed on September 02, 2026.

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⁷ Akhil Kadidal, "Pakistan Announces Chinese J-35 Aircraft Offer," *Janes*, June 09, 2025, <https://www.janes.com/defence-intelligence-insights/defence-news/air/pakistan-announces-chinese-j-35-aircraft-offer>. Accessed on September 03, 2026.

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¹⁰ Timour Azhari, Ariba Shahid and Tuvan Gumrukcu, n. 1.

¹¹ "Turkey, Pakistan, Saudi Arabia Defence Pact Technically Same as NATO's Article 5, Turkish Minister Says," *Reuters*, August 09, 2026, <https://www.reuters.com/world/asia-pacific/turkey-pakistan-saudi-arabia-defence-pact-technically-same-natos-article-5-2026-08-08/>. Accessed on September 04, 2026.

¹² Nuri Aydin, Tugba Altun and Merve Berker, "1st Committee Meeting Under Mecca Joint Defense Agreement Begins in Istanbul," *Anadolu Ajansi*, August 31, 2026, <https://www.aa.com.tr/en/turkiye/1st-committee-meeting-under-mecca-joint-defense-agreement-begins-in-istanbul/4042472>. Accessed on September 04, 2026.

¹³ Liang, et.al., n. 2.

¹⁴ "Global Arms Flows Jump Nearly 10 Percent as European Demand Soars," *Stockholm International Peace Research Institute*, March 09, 2026, <https://www.sipri.org/media/press-release/2026/global-arms-flows-jump-nearly-10-cent-european-demand-soars>. Accessed on September 05, 2026.