Is Europe dependent on American weapons?

Partly: 58 % of the major weapons European NATO members imported in 2021–2025 came from the US, and some capabilities have no European alternative yet.

What the import data show

SIPRI tracks international transfers of major weapons. In its March 2026 report, imports by the 29 European NATO members in 2021–2025 were 143 % higher than in the previous five years, and 58 % of them came from the United States, the same share as in 2016–2020. South Korea, Israel and France followed far behind, each with under 9 %.

Counting all European states, including Ukraine, imports more than tripled, and the US share was 48 %. Europe became the world's largest arms-importing region for the first time since the 1960s, with a third of global imports, and for the first time in two decades it was the main destination of American arms exports.

Two countries stand out. Ukraine was the world's largest importer, with 41 % of its imports from the United States. Poland took 17 % of all imports by European NATO members, split mainly between South Korea and the United States.

The 78 % figure and its limits

The most quoted number comes from the European Commission's 2024 defense industrial strategy: "78% of the defence acquisitions by EU Member States between the start of Russia's war of aggression and June 2023 were made from outside the EU, with the US alone representing 63%." The Draghi report repeated it for a slightly different period, June 2022 to June 2023, on a base of €75 billion.

It covers about sixteen months of emergency buying right after the invasion. It rests on a single study by the French institute IRIS. The same strategy puts the share before the war at about 60 %, so the crisis raised an already high level. And the Commission itself notes in the same document that "data on products' origin is not collected in a centralised manner." It is a snapshot of a crisis period. It does not measure where all European defense money goes year after year, and it should not be quoted as if it did.

Where the dependence bites

The sharpest dependence is in specific systems. The clearest case is the F-35: at the end of 2025 twelve European states had 466 of them on order or preselected, SIPRI reports. The Draghi report found that European-made fighters, the Eurofighter, Rafale and Gripen, make up only about a third of Europe's fleet. And the enablers Europe never built in quantity, from reconnaissance satellites to air-to-air refueling, still come mainly from the United States (Could Europe defend itself without the US?). Dependence on these systems is not only about purchase: spare parts, software updates and munitions keep flowing from the supplier for decades.

Imports are also only part of the bill. EU states spent €115 billion on equipment in 2025, and SIPRI's figures cover only imports of major weapons, not what governments buy from their own industries. Within that total the problem is fragmentation: only 11 % was bought jointly with other European states.

What the EU is changing

In 2024 the Commission set targets for member states: at least 50 % of their defense investment spent within the EU by 2030 and 60 % by 2035, and 40 % of equipment bought jointly by 2030. They are not binding. The binding rules come with money: the €150 billion SAFE loans and the €1.5 billion EDIP program both cap components

from outside the EU and its partners at 35 % of the cost of components.

Whether Europe should buy less American is a political choice, and buying the best available system quickly is sometimes the right one. The case for building more at home is about who controls the supply when it matters. A continent that plans and orders together can sustain the long production runs that make European systems competitive. The spending behind all this is tracked in European defence in numbers.

All questions →

FREQUENTLY ASKED

How much of Europe's weapons come from the US?
Of the major weapons imported by European NATO members in 2021–2025, 58 % came from the United States, by SIPRI's count. For all European states, including Ukraine, the US share was 48 %. These are imports of major weapons only; SIPRI does not count what governments buy from their own industries.

Is it true that 78 % of EU defense spending goes abroad?
It is one estimate for one period. The Commission wrote in 2024 that 78 % of EU states' defense acquisitions from the start of Russia's full-scale war to June 2023 went to non-EU suppliers, with the US alone at 63 %. It rested on a single study, and the Commission noted that origin data are not collected centrally.

Why does Europe buy so many American weapons?
Partly for specific systems: twelve European states had 466 American F-35 fighters on order or preselected at the end of 2025. Partly for enablers Europe lacks in quantity, such as satellite reconnaissance, air-to-air refueling and heavy transport. And partly because imports by European NATO members rose by 143 % in 2021–2025 as governments rearmed.

Which European countries buy the most from the US?
In 2021–2025 Poland received 17 % of all major arms imported by European NATO states, 44 % of it from the US and 47 % from South Korea. Ukraine, the world's largest importer, got 41 % of its imports from the United States, by SIPRI's count.

What is the EU doing to buy more European weapons?
It set non-binding targets in 2024: half of member states' defense investment spent within the EU by 2030 and 60 % by 2035. Its SAFE loans and the EDIP program cap components from outside the EU and its partners at 35 % of the cost of components.

SOURCES

- SIPRI: Trends in International Arms Transfers, 2025 (3/2026) – 2021–25: US 58 % of European NATO imports (same share as 2016–20), European NATO imports +143 %; all European states +210 %, US 48 %; Europe 33 % of global imports; US 42 % of global exports, 38 % of them to Europe; Ukraine 9.7 % of global imports (US 41 %); Poland 17 % of European NATO imports (South Korea 47 %, US 44 %); 12 European states with 466 F-35 on order or preselected at the end of 2025
- European Commission: European Defence Industrial Strategy, JOIN(2024) 10 (3/2024) – Box 1, pp. 3–4: "78% of the defence acquisitions by EU Member States between the start of Russia's war of aggression and June 2023 were made from outside the EU, with the US alone representing 63%"; footnote 8, IRIS study (Maulny, 9/2023); footnote 23, "data on products' origin is not collected in a centralised manner"; p. 10, 40 % collaborative procurement by 2030; p. 15, "nearly 80%" of defence investments since 2022 with non-EU suppliers "against approximately 60% before the war"; 50 % of defence investments within the EU by 2030, 60 % by 2035
- European Commission: The future of European competitiveness (Draghi report), Part B, pp. 164–165 (9/2024) – of €75 billion spent June 2022 to June 2023, 78 % to non-EU suppliers, 63 % to the US; breakdown by member state unavailable, mostly government-to-government deals; Eurofighter, Rafale and Gripen about a third of Europe's fighter fleet; no European strategic airlifters or heavy helicopters
- EEAS: European Defence Industry Programme – Council gives final approval (12/2025) – €1.5 billion; components from outside the EU and associated countries "should not exceed 35%" of the total component cost; EUR-Lex: Council Regulation (EU) 2025/1106 (SAFE), Art. 6 and Art. 16(10) (5/2025) – €150 billion; 35 % limit
- Kiel Institute / Bruegel: Defending Europe without the US (2/2025) – capabilities supplied mainly by the US: reconnaissance satellites, air-to-air refueling, strategic transport, suppression of enemy air defenses
- EDA: Defence Data 2025–2026, pp. 13–17 (7/2026) – EU equipment procurement €115 billion in 2025; European collaborative procurement 11 %