Why does Europe have 178 weapon systems?

Because Europe's armies are national: each state buys, and often builds, its own weapons, so a 2016 count found 178 types against America's 30.

The number has become shorthand for European military disorganization. It is older and rougher than most people who quote it assume.

Where the number comes from

The figure first appeared in the Munich Security Report of February 2017, in a chart prepared by McKinsey from the International Institute for Strategic Studies' Military Balance. It counted the types of weapon system in service in 2016 in eleven categories:

- main battle tanks: 17 in Europe, 1 in the United States;
- infantry fighting vehicles: 20 against 2;
- 152/155 mm howitzers: 27 against 2;
- fighter aircraft: 20 against 6;
- attack helicopters: 4 against 2;
- anti-ship missiles: 12 against 2;
- air-to-air missiles: 13 against 3;
- destroyers and frigates: 29 against 4;
- torpedoes: 20 against 4;
- conventional submarines: 11 against none;
- nuclear submarines: 5 against 4.

Total: 178 against 30. Four months later the European Commission reused the comparison in its reflection paper on the future of European defense, citing SIPRI, the IISS and the Munich report, and the figure has traveled ever since.

What it does and does not count

The count is a snapshot of 2016, and its "Europe" was wider than the EU: the Munich report defined it as the member states of the European Defence Agency, the countries with administrative arrangements with the agency, including Serbia and Ukraine, and Denmark. The Commission's chart labeled the same numbers "EU-28".

It also counts types, and where a type ends and a variant begins is a judgment call. In 2019 the German defense journal Europäische Sicherheit & Technik recounted the tanks strictly by type and found 11 in the EU-28 rather than 17, or 6 if Cyprus and Greece were left out; counting every variant, its author noted, would put Europe well above 17 and the United States above one.

No one has published a full recount since. The Draghi report on European competitiveness in 2024 cites twelve battle-tank types operated in Europe against one American. The exact count is dated and debatable; the gap with the United States is not.

What duplication does to an army

The cost of 178 types shows up in four places, none of them a single line in a budget.

Development is paid once per type, not once per continent. Production runs stay short, so every unit carries more of the fixed costs; a European Parliament study found the same PzH 2000 howitzer bought at unit prices between €4.5 million and €23.5 million by different European customers, though the packages behind those prices differ. Spare parts, ammunition and training pipelines multiply with every type. And armies standing side by side cannot easily share any of it.

Ukraine has tested that last point. According to the Draghi report, EU member states sent Ukraine some ten different types of 155 mm howitzer from their stocks, plus four more types from other NATO countries, several of them in different variants, which created what the report calls "serious logistical difficulties". Every type needs its own spare parts and its own repair skills, delivered to a front line under fire.

When Europe had to buy fast, much of the money left the continent: between June 2022 and June 2023, the Draghi report found, 78 % of EU states'

defense procurement spending went to suppliers outside the EU, 63 % to the United States.

Why Europe got here

Defense purchases often escape the single market. Article 346 of the EU treaty lets a government set aside the common rules for arms where it considers its essential security interests at stake. Buying from a national factory keeps jobs, skills and political control at home, and each ministry answers to its own parliament for that choice.

Nothing has pulled hard the other way. EDA's voluntary 2007 target, to buy 35 % of equipment together with other European states, has never been met; the story is in Does Europe buy weapons together?, and the spending series sits in European defence in numbers.

Europe's three home-built fighters, the Eurofighter, the French Rafale and the Swedish Gripen, make up only about a third of its fighter fleet, according to the Draghi report; the rest are American.

The count is a symptom

178 types are what you get when some thirty governments each equip an army for themselves. The United States has 30 because it has one defense budget and one procurement system. The European Union now ties its SAFE defense loans to joint orders by at least two states, a first step toward buying as a group. A Europe that bought from one budget would still argue over types, but it would argue once.

All questions →

FREQUENTLY ASKED

Where does the 178 figure come from?
From a McKinsey analysis of IISS data published in the Munich Security Report in February 2017. It counted weapon-system types in service in 2016 across eleven categories: 178 in Europe, 30 in the United States. The European Commission reused the chart in its June 2017 reflection paper on defense.

Is the number still accurate?
No one has published a full recount. The 2016 snapshot included Serbia and Ukraine, and a German defense journal counted 11 EU tank types rather than 17 when variants are excluded. The Draghi report of 2024 cites twelve tank types in Europe against one in the US, so the pattern holds while the exact count does not.

Which categories are most fragmented?
In the 2016 count: 29 types of destroyer and frigate against 4 in the US, 27 types of heavy howitzer against 2, 20 infantry fighting vehicles against 2, 20 fighter types against 6 and 17 main battle tanks against 1.

Why doesn't the EU single market fix this?
Because defense is largely exempt. Article 346 of the EU treaty lets a member state set aside single-market rules where it considers its essential security interests are at stake. Governments have used that room to buy from their own industry, and there is no common defense budget to buy for everyone.

Is anything reducing the number?
Some states now join each other's orders, and the EU's SAFE loans require, with few exceptions, at least two buyers per contract. But EDA counted only 11 % of 2025 equipment spending as European collaborative procurement, against a 35 % benchmark set in 2007, so the trend is still running the wrong way.

SOURCES

- Munich Security Conference: Munich Security Report 2017, pp. 20–21 (2/2017) – chart "Number of systems from selected weapon system categories in service, 2016", source McKinsey based on IISS; Europe defined as EDA members, countries with EDA administrative arrangements (incl. Serbia and Ukraine) and Denmark
- European Commission: Reflection Paper on the Future of European Defence, p. 9, Figure 4 (6/2017) – same comparison labeled EU-28 vs US; data SIPRI 2016, IISS Military Balance 2017, Munich Security Report 2017
- Europäische Sicherheit & Technik: Das Märchen der 17 EU-Kampfpanzer (12/2019) – strict type count: 11 tank types in the EU-28, 6 without Cyprus and Greece
- European Commission: The future of European competitiveness (Draghi report), Part A, pp. 7–8 (9/2024) – twelve tank types; 78 % of procurement spending June 2022–June 2023 to non-EU suppliers, 63 % to the US
- European Commission: Draghi report, Part B, pp. 164–165 (9/2024) – some ten 155 mm howitzer types sent to Ukraine from EU stocks plus four from other NATO countries; three European fighter types are about a third of Europe's fleet; €75 billion base
- EPRS: Improving the quality of European defence spending, p. 10 (11/2024) – PzH 2000 unit prices from €4.5 million to €23.5 million across buyers
- EDA: Defence Data 2025–2026, p. 17 (7/2026) – European collaborative procurement 11 % in 2025, 19 of 27 states reporting; EDA: Defence Data 2009, p. 1 – 35 % benchmark set November 2007
- EUR-Lex: Treaty on the Functioning of the European Union, Article 346 – essential-security exemption from treaty rules
- EUR-Lex: Council Regulation (EU) 2025/1106 (SAFE) (5/2025) – common-procurement condition, Art. 2(3) and 4(3)