

C-UAS MICRO-TARGET BD LIST

Firms Inside the Counter-UAS Technology Stack

CoExcel Solutions Intelligence Brief | As of April 2026

EXECUTIVE SUMMARY

The Counter-UAS (C-UAS) market has entered a period of accelerated, high-value contract activity driven by the establishment of Joint Interagency Task Force 401 (JIATF-401), the DoD's enterprise counter-drone task force, and over \$1.86 billion in announced C-UAS spending authority in 2025–2026 alone. This brief identifies ten prime and neo-prime firms currently embedded in the U.S. DoD C-UAS technology stack, with rationale for BD engagement, recent contract awards, and website references for further research.

These firms represent high-value targets for teaming, subcontracting, advisory services, and supply chain engagement through CoExcel Solutions and SourceBoard®. Each entry includes stack layer positioning, strategic rationale, and the most recent verified contract intelligence available as of April 2026.

1. Anduril Industries | *C2 Software / AI / Hardware*

WHY INCLUDE

Anduril's Lattice platform is now the DoD's chosen command-and-control backbone for the entire counter-UAS enterprise. As the first awardee under Joint Interagency Task Force 401's (JIATF-401) enterprise contract vehicle, Anduril sits at the apex of the C-UAS stack. Their Sentry towers, Ghost-X interceptor, and AI-driven sensor fusion make them the integrating node that all other stack vendors plug into. Any subcontractor, data provider, or hardware supplier seeking DoD C-UAS work must understand Anduril's ecosystem.

RECENT / FORECASTED CONTRACT AWARDS

March 2026: U.S. Army / JIATF-401 awarded Anduril an \$87M task order — the first under a \$20B, 10-year enterprise C-UAS contract vehicle — for Lattice software as the DoD's common C2 framework. Additional task orders under the same vehicle are expected to flow over the contract's life through 2036.

WEBSITE: <https://www.anduril.com>

2. RTX / Raytheon | *Kinetic Effectors / Radar / Missile Defense*

WHY INCLUDE

Raytheon is the dominant kinetic effector provider in the C-UAS stack. Its Coyote Block 2 interceptor and KuRFS (Ku-band Radio Frequency System) radar form the Army's Low, Slow, Small UAS Integrated Defeat System (LIDS) — the primary fielded kinetic C-UAS solution for base protection and maneuver. Raytheon also produces the LTAMDS radar and Patriot system, anchoring the upper-tier missile defense layer that integrates with C-UAS architectures.

RECENT / FORECASTED CONTRACT AWARDS

September 2025: U.S. Army awarded Raytheon a \$5.04B contract for Coyote counter-UAS systems and KuRFS radars through September 2033. January 2026: Raytheon received a \$1B Army contract modification for LTAMDS production with completion expected March 2030. RTX ended 2025 with a \$268B total backlog.

WEBSITE: <https://www.rtx.com>

3. L3Harris Technologies | *Kinetic Effectors / EW / ISR / Sensors*

WHY INCLUDE

L3Harris fields the VAMPIRE (Vehicle Agnostic Modular Palletized ISR Rocket Equipment) system — a proven, deployable C-UAS kinetic effector that has seen combat use in Ukraine and continues to expand into land, maritime, and airborne variants. L3Harris also produces key ISR sensors and EW systems integrated across

multiple C-UAS platforms. Their breadth across sensing, communications, and effectors makes them a pervasive C-UAS stack participant.

RECENT / FORECASTED CONTRACT AWARDS

June 2025: L3Harris received a new DoD contract for additional VAMPIRE C-UAS systems supporting European operations and DoD partners. October 2025: L3Harris announced VAMPIRE expansion into land, maritime, air, and EW variants integrated on platforms including GM Defense ISVs. L3Harris holds additional contracts across the SDA Tranche 3 Tracking Layer (\$843M) supporting the missile defense layer adjacent to C-UAS.

WEBSITE: <https://www.l3harris.com>

4. AeroVironment | UAS / C-UAS / Loitering Munitions

WHY INCLUDE

AeroVironment sits at the intersection of both the UAS and C-UAS stacks. Its Titan C-UAS system provides ground-based counter-drone capability, while its Switchblade loitering munitions serve as low-cost kinetic interceptors. AeroVironment has received direct orders through the JIATF-401 Counter-UAS Marketplace, confirming its position as a vetted stack vendor. The company's Locust laser weapon system, delivered to the Army in August 2025, further expands its C-UAS directed energy role.

RECENT / FORECASTED CONTRACT AWARDS

December 2025: U.S. Army Contracting Command awarded AeroVironment an \$874.26M five-year IDIQ for UAS and C-UAS systems under Foreign Military Sales — covering Titan C-UAS, JUMP 20, P550, Puma, and Raven. The Army also holds a separate five-year, \$990M IDIQ for Switchblade systems. JIATF-401 Marketplace orders received as a vetted C-UAS vendor in early 2026.

WEBSITE: <https://www.avinc.com>

5. Northrop Grumman | Integrated Air Defense / Sensors / EW

WHY INCLUDE

Northrop Grumman provides key sensing and integration capabilities across the C-UAS and broader IAMD (Integrated Air and Missile Defense) stack. Their work spans EW systems, fire control radars, and integration of multi-layered air defense solutions. Northrop's Precision Guidance Systems (PGS) mobile firepower units have been highlighted at AUSA 2025 as an infantry C-UAS option, and their broader Mission Systems segment produces C-UAS-relevant sensor and C2 products.

RECENT / FORECASTED CONTRACT AWARDS

December 2025: Northrop Grumman awarded \$764M SDA OTA for 18 Tranche 3 Tracking Layer satellites supporting the missile defense layer. Northrop maintains sustained C-UAS program participation through the Army's SHORAD and IAMD programs. Additional task orders expected through existing DoD IDIQ vehicles.

WEBSITE: <https://www.northropgrumman.com>

6. Epirus | Directed Energy / High-Power Microwave

WHY INCLUDE

Epirus makes the Leonidas family of High-Power Microwave (HPM) systems — the leading non-kinetic directed energy effector in the U.S. C-UAS stack. Leonidas is the only solid-state, software-defined HPM platform fielded under an Army program of record (IFPC-HPM). It defeats drone swarms electromagnetically without consuming missiles or creating fragmentation hazards, making it ideal for base defense and protected areas. Epirus has achieved a 100% success rate in DoD demos and is scaling to operational test and evaluation in 2026.

RECENT / FORECASTED CONTRACT AWARDS

July 2025: U.S. Army RCCTO awarded Epirus a \$43.55M contract for IFPC-HPM Generation II systems — the next upgrade from four GEN I systems delivered in May 2024. Ongoing operational testing at China Lake through 2026 with potential program-of-record decision that could unlock multi-year, multi-billion dollar production authority. GDLS TRX integration announced October 2025.

WEBSITE: <https://www.epirusinc.com>

7. DroneShield | *Detection / Jamming / Portable C-UAS*

WHY INCLUDE

DroneShield is a leading provider of portable, RF-based counter-UAS detection and jamming systems. Their DroneSentry and DroneCannon products are fielded by multiple U.S. and allied military customers. DroneShield's focus on handheld and fixed-site non-kinetic defeat gives them a critical role in the sensing and soft-kill layer of the C-UAS stack. Their systems are widely used for dismounted unit protection and critical infrastructure security — a growing mission set tied to events like FIFA World Cup 2026.

RECENT / FORECASTED CONTRACT AWARDS

January 2026: DroneShield won an \$8.2M contract (via in-country reseller) for portable C-UAS equipment, accessories, spare kits, and software updates — extending a 7+ year customer relationship. DroneShield maintains an active pipeline of DoD and allied nation contracts; A\$1.2B European pipeline reported in 2026 outlook.

WEBSITE: <https://www.droneshield.com>

8. Fortem Technologies | *AI Radar / Interceptor Drones / C2 Software*

WHY INCLUDE

Fortem's DroneHunter F700 is the only reusable, AI-driven, net-capture interceptor in the JIATF-401 C-UAS portfolio. It was the first system procured under the Replicator 2 initiative, which specifically targets C-UAS for military installations and critical infrastructure. Fortem's TrueView radar provides RF-silent drone detection independent of communications signatures — critical as fiber-optic drones render traditional jamming ineffective. The SkyDome AI platform manages multi-interceptor engagements autonomously.

RECENT / FORECASTED CONTRACT AWARDS

January 2026: JIATF-401 selected Fortem's DroneHunter F700 for the Pentagon's C-UAS portfolio as the first system procured under the Replicator 2 initiative. December 2025: Fortem announced a strategic partnership with Southern States LLC for utility/grid C-UAS protection integrating TrueView radar and DroneHunter F700. Expanding DHS/FEMA mission sets tied to FIFA World Cup 2026 security funded at \$115M+.

WEBSITE: <https://fortemtech.com>

9. Dedrone (Axon Enterprise) | *RF Detection / Sensor Fusion / Software*

WHY INCLUDE

Dedrone is the leading RF-based drone detection software platform, now operating under Axon Enterprise. Their DedroneTracker.AI provides AI-driven drone classification, operator geo-location, and sensor fusion for ground truth airspace awareness. Dedrone sensors are integrated into fixed-site DoD installations, U.S. prisons, and critical infrastructure. Their 'Defender 2' system, recently integrated with ARX Robotics' Combat Gereon UGV, shows their expanding C-UAS hardware stack partnerships.

RECENT / FORECASTED CONTRACT AWARDS

Dedrone maintains an active DoD contract portfolio for airspace security at military installations and federal facilities. October 2025: ARX Robotics Combat Gereon UGV integrated with Dedrone Defender 2 for mobile C-UAS sensing demonstrated at AUSA 2025. DoD and DHS customer base supports recurring revenue across multiple contract vehicles including DHS's new \$1.5B counter-drone IDIQ vehicle.

WEBSITE: <https://www.dedrone.com>

10. SRC Inc. | *Radar / EW / C-UAS Integration*

WHY INCLUDE

SRC is a Syracuse-based not-for-profit research and development company with deep DoD roots in radar, electronic warfare, and C-UAS integration. SRC's Silent Archer C-UAS system provides detection, tracking, identification, and non-kinetic defeat of UAS threats and is fielded by the U.S. Army and international customers. SRC also supports integration of C-UAS components into broader IAMD architectures. As an NPO, SRC retains mission-focus and competes effectively for rapid prototyping and OTA contracts.

RECENT / FORECASTED CONTRACT AWARDS

SRC holds sustained DoD contracts for Silent Archer C-UAS fielding and sustainment. SRC participates in multiple DoD IDIQ vehicles and OTA consortia including JIATF-401 procurement pathways. Silent Archer is operationally fielded and SRC continues to receive production and sustainment awards through Army and SOCOM channels.

WEBSITE: <https://www.srcinc.com>

RESEARCH NOTES & DISCLAIMERS

Contract values and award dates reflect publicly available information from DoW contract announcements, company press releases, and defense media sources. JIATF-401 C-UAS Marketplace vendors and Replicator 2 procurement activity may include non-public awards not captured here. All figures should be independently verified prior to use in formal BD submissions or government documents. This document is intended for internal CoExcel Solutions BD planning purposes only.