Counter-Unmanned Aircraft Systems (C-UAS)

Market Intelligence Report · Physical Security · 2026 · v2

$6.6B	$20.3B	9,000+	55%	16
Global market 2025	Projected 2030 (25.1% CAGR)	CNI facilities eligible UAFR	Military segment share	CNI sectors in FAA framework

Detection	Identification / Tracking	Mitigation / Defeat	C2 Software
Finding the drone. Radar, RF, acoustic, EO/IR, AI. No single sensor works alone.	What is it, where is the pilot, is it authorized. Remote ID is now a key data source.	RF jamming, GPS spoofing, protocol takeover, kinetic intercept. Heavily restricted for U.S. commercial operators.	Single pane of glass: sensors, alerts, maps, AI, incident response. Where SaaS recurring revenue is built.

U.S. Legal Constraint: *Private operators cannot legally jam, spoof, or kinetically disable drones. FAA Section 2209 NPRM (May 2026) proposes airspace restriction for CNI but does NOT authorize defeat technology.*

Green = new addition. *Gold border = updated. Includes new DaaS Operators section.*

Vendor Comparison Table

VENDOR	CATEGORY	DEPLOYMENT	KEY CAPABILITIES	MARKET FOCUS	DIFFERENTIATOR / STRATEGIC POSITION
Dedrone (Axon) UPDATED	C2 Software / Detection	On-prem / Cloud / Air-gapped	RF detection, AI classification, multi-sensor fusion, single pane of glass C2; Remote ID; BVLOS DFR	Enterprise / Airport / CNI / Gov	Acquired by Axon (Oct 2024). 800+ sites, 40 cities, 30 airports, 50 stadiums, 50 prisons, 36 countries. DHS SAFETY Act certified.
Anduril Industries	AI Platform / Autonomous Defense	Edge / Distributed	Lattice AI platform; autonomous sensor fusion; multi-domain C2; AI threat classification and neutralization	DoD / Military / CNI	$642M IDIQ 10-year USMC contract. Lattice is the most capable AI-native C2 in market.
DroneShield	Detection / Defeat Systems	Mobile / Fixed / Vehicle	RF detection, DroneSentry, DroneSentry-X mobile, DroneCannon defeat, AI classification; SaaS layer	Military / Law Enforcement / CNI	ASX-listed; AU$57.5M revenue 2024. NATO framework. SaaS revenues doubling.
Fortem Technologies	Radar / Interceptor	Fixed / Mobile	TrueView radar; DroneHunter autonomous interceptor; AI tracking; net capture	Airport / Stadium / CNI	Only major vendor with purpose-built autonomous interceptor drone.
SRC Inc.	Radar / EW	Fixed / Mobile / Vehicle	Silent Archer C-UAS; GRYPHON radar; electronic warfare; multi-sensor integration	Military / DoD / Federal	Defense contractor heritage. Silent Archer is a mature deployed DoD system.
BlueHalo	Directed Energy / EW	Fixed / Mobile	Directed energy; RF defeat; high-power microwave; electronic countermeasures	Military / IC / DoD	DE and RF defeat for classified/sensitive CNI sites.
OpenWorks Engineering	Kinetic Intercept	Fixed / Portable	SkyWall net launchers; compressed gas projectile capture; SkyWall Patrol, SkyWall 300	Military / Event / CNI	Net-capture intercept. No jamming — legally cleaner for some deployments.
Teledyne FLIR	Sensor / Enterprise Platform	Fixed / Mobile / Integrated	SkyRaider radar; Ranger thermal; R80D integrated; multi-sensor detection kits	Military / Border / CNI / Enterprise	Thermal + radar heritage. Growing as detection layer in multi-vendor stacks.
Motorola Solutions	C2 Integration / Platform	Cloud / On-prem / Hybrid	C-UAS detection into Avigilon and VESTA; command center integration; alert workflows	Enterprise / Public Safety / Airport	Integrating C-UAS into existing physical security platform.
Dedrone / Axon DFR NEW	Drone-as-First-Responder	Cloud / BVLOS	DedroneBeyond BVLOS; autonomous dispatch; airspace awareness; incident response integration	Law Enforcement / Public Safety	BVLOS DFR layered with C-UAS defense. Unique dual-use platform.
Axis Communications	Detection / Camera	Edge / Fixed	ACAP drone detection apps; radar integration; AI tracking; Milestone/Genetec integration	Enterprise / CNI / Airport	Detection via existing camera infrastructure. No defeat capability.
Leonardo S.p.A.	Integrated C-UAS / Defense	Fixed / Mobile / Naval	Falcon Shield; multi-layer detection and defeat; AESA radar; EW; kinetic options	Military / Government / CNI / Airport	Major EU defense prime. Falcon Shield covers detection through defeat.
D-Fend Solutions NEW	Protocol Takeover / Cyber Defeat	Fixed / Mobile / Portable	EnforceAir takeover; safely lands rogue drones; no RF jamming; cyber-based defeat	Airport / Prison / CNI / Government	Cleanest commercial defeat method — no collateral RF. Used at airports, prisons.

VENDOR	CATEGORY	DEPLOYMENT	KEY CAPABILITIES	MARKET FOCUS	DIFFERENTIATOR / STRATEGIC POSITION
Skyfend NEW	Portable Defeat / Detection	Handheld / Mobile	AFA100 handheld jammer/detector; multi-band RF defeat; compact field deployable	Military / Law Enforcement / Events	Compact handheld for tactical response teams.

U.S. Regulatory Landscape

FAA Section 2209 NPRM — May 6, 2026	Most significant development of 2026. FAA published NPRM implementing Section 2209 (nine years after Congress ordered it). Comment period through July 6, 2026. Creates 14 CFR Part 74 with two tiers: Standard UAFR: Restricted airspace up to 400ft AGL within property lines. Unauthorized drone ops prohibited. Renewable every 5 years. Special UAFR: Stricter controls for high-threat sites; often sponsored by federal agencies. Eligibility: 16 CNI sectors per NSM-22. Estimated 9,000+ eligible facilities. Data centers qualify under Information Technology sector. CRITICAL: Does NOT authorize geo-fencing, jamming, drone capture, or mitigation technology. Restricts airspace only.
Executive Order 14305 — June 6, 2025	"Restoring American Airspace Sovereignty." Ordered FAA to submit Section 2209 NPRM promptly. Direct cause of the May 2026 NPRM filing after a decade of delay.
FAA Reauthorization Act of 2024	Extended FAA authority through FY2028. Key C-UAS provisions: Section 929 added state prisons to Section 2209 eligibility; Section 935 authorized TFRs around large public events; Section 1112 extended DHS/DOJ C-UAS authorities. Dedrone CEO criticized Act for failing to include new commercial C-UAS authorities.
NDAA 2025 — Chinese Drone Restrictions	Countering CCP Drones Act language remained in NDAA 2025. DJI and Autel face national security review. Federal agencies prohibited from acquiring covered drones. Accelerates demand for NDAA-compliant alternatives across government and CNI.
Who Can Use Defeat Technology	Currently restricted to: DoD (military installations), DHS, DOJ (limited), FAA (testing programs), certain DHS-approved pilot programs. Private companies, state/local law enforcement, and CNI operators generally cannot legally jam, spoof, or kinetically disable drones.
What Is Coming	Active legislative effort to expand defeat authorities to state/local law enforcement and designated CNI operators. December 2024 NJ drone sightings (5,000+ reports) created significant congressional urgency. Section 2209 UAFR, once finalized, gives CNI operators an airspace restriction tool.

Market Structure & Where It Is Going

The C-UAS market is growing at 25%+ CAGR driven by one core economics reality: a $1,500 consumer drone can now conduct facility reconnaissance, map access points, carry contraband, target cooling systems, or act as a delivery mechanism for an explosive payload. Traditional perimeter security has no answer to that threat vector.

1 Sensor Fusion	2 AI-Driven Autonomous Response	3 CNI & Data Center Protection	4 Managed DaaS Services
No single sensor is reliable. Modern C-UAS requires radar + RF + EO/IR + AI. Vendors compete on fusion quality. Key: Dedrone/Axon, Anduril Lattice, SRC, FLIR.	Auto classification, autonomous tracking, predictive threat scoring. Moving from human-in-the-loop to human-on-the-loop. Key: Anduril Lattice, DroneShield SaaS, Dedrone/Axon.	Fastest-growing commercial segment. Data centers, substations, water, nuclear, ports. Primary concern: nation-state recon, sabotage. FAA UAFR framework will accelerate procurement. Key: Dedrone/Axon, Fortem, FLIR, D-Fend.	Emerging model: remote monitoring subscription, drone response, SOC integration. Mirrors managed cybersecurity MDR. SaaS recurring revenue play. Key: Titan Protection, Dedrone/Axon DFR, Stealth Monitoring.

Strategic Ranking — Commercial Enterprise and CNI Focus

COMPANY	POSITION	CNI/DATA CENTER RELEVANCE	KEY 2024-2026 DEVELOPMENT
Anduril Industries	Most transformative overall	High — growing from DoD into CNI	$642M Marine Corps IDIQ; Lattice expanding to commercial
Dedrone (Axon)	Strongest commercial enterprise player	Very High — deepest CNI/airport/prison footprint	Acquired by Axon (Oct 2024); DFR integration; 800+ sites; DHS SAFETY Act
DroneShield	Strong global tactical player	Moderate-High — defense + CNI crossover	AU$57.5M 2024 revenue; NATO framework; SaaS doubling
Fortem Technologies	Best interceptor innovation	High — airports, stadiums, CNI	DroneHunter kinetic intercept avoids jamming legal issues
D-Fend Solutions	Cleanest defeat method commercially	High — airports, prisons, CNI	EnforceAir cyber-takeover: no jamming, soft landing
Titan Protection	Leading DaaS operator	High — no FAA complexity; 60-day deployment	First nationwide BVLOS waiver; first one-to-many approval (Feb 2026)

Threat Vector Analysis — Data Centers and CNI

Surveillance & Reconnaissance

- Facility mapping identifies generator/cooling/camera positions
- Pre-attack intelligence for kinetic or cyber ops
- Nation-state actors use commercial drones for CNI recon
- OPSEC failure: drone footage leaks security zone design

Physical Attack Vectors

[redacted]

Cyber & Electronic Threats

- Wi-Fi/RF recon — maps wireless networks from above
- Man-in-the-middle on unencrypted facility comms
- Rogue access point insertion via drone-mounted hardware
- Signal jamming of radio comms and GPS timing signals

Source Material Validation Notes

STATUS	ITEM	DETAIL
VALIDATED	**Dedrone as strongest commercial enterprise player**	Confirmed. Now Axon-owned Oct 2024. 800+ locations, 9 federal agencies, DHS SAFETY Act certified.
VALIDATED	**Anduril as most transformative overall**	Confirmed. $642M IDIQ USMC. Lattice is the most capable AI-native C2 platform in market.
VALIDATED	**U.S. legal constraints on defeat technology**	Confirmed. FAA Section 2209 NPRM explicitly does NOT authorize defeat. Jamming/spoofing remain federally restricted.
UPDATE	**Dedrone standalone — now Dedrone/Axon**	Axon acquisition completed October 2024. Now part of Axon public safety ecosystem.
ADDITION	**D-Fend Solutions — cyber takeover defeat**	EnforceAir protocol takeover: cleanest commercial defeat, no RF jamming, softly lands drone.
ADDITION	**Titan Protection — DaaS operator**	First nationwide BVLOS waiver; first one-to-many approval Feb 2026. 60% cost reduction vs. guards documented.
MARKET DATA	**Market sizing range**	MarketsandMarkets: $6.64B 2025 → $20.3B 2030 at 25.1% CAGR. Use as working figure.

Drone-as-a-Service (DaaS) Operators — Managed Aerial Security

The vendors on preceding pages build and sell technology. This section covers **managed aerial security operators** who deploy drones as a subscription service — supplying hardware, FAA-certified pilots, SOC monitoring, and operational response. This is the physical security equivalent of managed detection and response (MDR) in cybersecurity. For enterprise and CNI buyers, DaaS operators are often the most immediately actionable option because they absorb FAA complexity, pilot staffing, and hardware lifecycle entirely.

Why DaaS for Data Centers and CNI

Three barriers for enterprise drone security: (1) FAA BVLOS waiver — months of process, up to $80K/site; (2) pilot staffing — FAA Part 107 certified pilots are specialized and expensive; (3) hardware management — drone-in-a-box requires aviation expertise. DaaS operators eliminate all three. The tradeoff is operational control. For most enterprise programs without dedicated aviation expertise, DaaS is the correct starting point.

COMPANY	FOUNDED / HQ	MODEL	KEY CREDENTIALS	CAPABILITIES	MARKET FOCUS	CNI / DATA CENTER RELEVANCE
Titan Protection & Consulting NEW ADDITION	2008 Overland Park, KS	DaaS / Managed Service	First U.S. security company with nationwide FAA BVLOS waiver. Feb 2026: first one-to-many BVLOS approval (single operator, multiple simultaneous autonomous aircraft). 5-Diamond UL-certified monitoring center. 600+ employees.	Drone-in-a-box weatherproof docking stations; autonomous patrol and response; 24/7 SOC with FAA-licensed pilots; VMS integration; perimeter trigger; geofenced boundaries; 2-min avg dispatch; 60-day deployment. Powered by FlytBase.	Commercial / Industrial / Utilities / Construction / Auto	HIGH. Nationwide BVLOS waiver eliminates per-site FAA complexity. 60% cost reduction vs. guards documented. Relevant for outdoor perimeter at data centers and utility corridors. Current portfolio skews commercial — CNI/hyperscale is the logical next market.
Dedrone / Axon DFR Platform	2014 / 2024 Washington DC	C-UAS + DaaS Hybrid	DHS SAFETY Act certified. Post-Axon acquisition (Oct 2024): nationwide BVLOS DFR via DedroneBeyond. 800+ deployed locations across airports, stadiums, prisons, CNI, and law enforcement.	DedroneBeyond BVLOS autonomous dispatch; airspace C-UAS detection layered with DFR; single pane of glass C2; Axon body camera + VESTA integration; RF detection + AI running simultaneously with DFR.	Law Enforcement / Public Safety / CNI / Airport	VERY HIGH. Only vendor simultaneously covering C-UAS defense AND DFR response from single platform. Most complete integrated aerial security for CNI.
Stealth Monitoring	~2009 Dallas, TX	Managed Video / Drone Patrol	#1 North American remote video monitoring company (SDM Top 100 2024). 2,000+ employees, 40+ offices, 8 monitoring centers. Proactively monitors 100,000+ cameras.	Proactive live video monitoring with AI-assisted detection; drone patrol as escalation layer; virtual guard services; alarm response; integration with existing camera and access control infrastructure.	Commercial / Retail / Industrial / Multi-site	MODERATE. Strong monitoring scale. Drone capability is emerging rather than core. Better fit for mixed camera/drone estate than pure aerial perimeter security.

DaaS vs. In-House — Decision Framework for CNI

FACTOR	DAAS OPERATOR	IN-HOUSE PROGRAM	VERDICT FOR CNI
FAA BVLOS Authority	Operator holds nationwide waiver — no site-specific filing	Each site: months of process, up to $80K	DaaS wins — Titan's nationwide waiver is a major structural advantage

Pilot Staffing	FAA-certified pilots supplied and managed by operator	Must recruit, certify, train, retain Part 107 pilots	DaaS wins — pilot shortage is real; aviation expertise is expensive
Hardware & Maintenance	Drone-in-a-box managed by operator; maintenance included	Capital purchase; internal drone maintenance program	DaaS wins for most enterprise buyers
Operational Control	Dependent on third-party SLA	Full control; integrate directly into SOC workflows	In-house wins for classified or highly sensitive CNI sites
Speed to Deploy	60 days or less (Titan)	6-12+ months for program build and FAA authorization	DaaS wins — critical for new data center campuses
Cost	~60% lower than equivalent guard deployment; subscription	Higher upfront; lower unit cost at scale (20+ sites)	DaaS wins at 1-10 sites; in-house may win at large scale
Regulatory Monitoring	Operator tracks FAA changes; automatically compliant	Internal team must monitor and adapt to rulemaking	DaaS wins — UAFR and Part 108 rules are complex and evolving

Sources: MarketsandMarkets, Precedence Research, Frost & Sullivan, Holland & Knight, FAA NPRM (14 CFR Part 74), Congressional Research Service, Axon/Dedrone, DroneShield 2024 Annual Results, Titan Protection / FlytBase case study, AUVSI, Commercial UAV News, company websites. CoreBastion Security Consulting | C-UAS Market Intelligence 2026 v2 | Internal Use Only | May 2026