Agency Spend & Competition Brief

Department of Defense × NAICS 332618 · Pythia Digital LLC · 2026-07-25

Competition profile - FY2023+FY2024+FY2025 (USASpending Award Data Archive)

How competitive this NAICS × agency cell is, measured over the swept window (FY2023+FY2024+FY2025).

- Category-coded slice (5660, 5680, Y1PZ, Z1PC, Z2PZ): **$15,279,574** obligated across **43** winners, median offers **3.0**
- *Full NAICS context:* the whole NAICS 332618 cell is $187,544,905 across 930 winners **-** this includes non-category products and is **not** the addressable market.
- Set-aside rate: **6%** · SDVOSB rate: **0%**

Top recipients - last 3 years, by total award value

A multi-year live lookback ranked by current total award value (which includes multi-year IDIQ/BPA ceilings). This window and dollar metric differ from the single-fiscal-year obligations above. The two figures are not directly comparable: a single recipient's multi-year ceiling can exceed one year's obligations. These rows show who the dominant players are, not annual spend.

Across **9850** awards in this window, **$222,455,693** in total award value was recorded. The leading recipients (these sum to the figure above, not to the cell total):

Recipient	UEI	Location	Award value	Awards	Last award
ALLIED TUBE & CONDUIT CORPORATION	J3WSJTMBRWA1		$56,174,548	18	2026-01-23
L3HARRIS TECHNOLOGIES, INC.	LB5KVANFKPY7		$29,626,903	987	2026-03-30
TRIMAN INDUSTRIES INC	VWX3JEES4FF7		$12,285,663	146	2026-03-20
CHAMPLAIN UNDERSEA CABLE CORP	FEPBMLS7DDN3		$11,616,765	2	2024-02-06
CABLE MOORE, INC.	DAHLE1WKLN65		$9,015,857	266	2026-03-24
WIRECO WORLDGROUP INC	Y7FDUHFG2AT3		$6,188,350	6	2026-04-02
MACCAFERRI, INC.	F2BTFRMGSND1		$4,246,053	7	2026-04-09
VEHICLE MAINTENANCE PROGRAM INC	CHBEDTWA1YX8		$3,824,087	18	2026-01-20

Recipient	UEI	Location	Award value	Awards	Last award
MCFARLANE AVIATION, LLC	Y556KBJJF1Y6		$3,097,494	2	2024-09-10
PCX AEROSTRUCTURES, LLC	KGUJF135PFY8		$2,862,900	2	2026-03-23
R & M GOVERNMENT SERVICES INC	M8BLN7XW5M86		$2,528,753	23	2026-03-10
FLOOD DEFENSE GROUP LLC	S79JD9N8LAS9		$2,331,314	10	2024-12-05
LOOS & CO INC	JMPGTRJVJPU6		$2,118,081	157	2026-03-02
WARFIGHTER FOCUSED LOGISTICS INC.	KBTXQNMRVBW5		$1,999,461	10	2025-07-11
BOEING DISTRIBUTION SERVICES DEFENSE LLC	N64BN2M8M5G8		$1,883,506	251	2024-07-23
RUDY III, ERNEST	LBF1QJLUKNN9		$1,733,786	125	2026-04-03
KAMPI COMPONENTS CO INC	XX2WFHJEFB45		$1,629,379	238	2026-04-01
HANES SUPPLY, INC.	XARHP5VK8JA6		$1,580,219	74	2026-03-26
RUTA SUPPLIES INC	WA4XL5GSPX23		$1,538,582	125	2026-04-02
AMERICAN POSTS LLC	HC4NR2AFYVA2		$1,503,742	5	2026-03-24
WIREROPE WORKS, INC.	KB7JKU9WXBN1		$1,336,674	2	2026-01-13
PIONEER INDUSTRIES, LLC	TGGMDYLJGVN8		$1,319,000	185	2026-04-02
PIEDMONT AVIATION COMPONENT SERVICES, LLC	Y8RDAEXDFGK1		$1,246,825	1	2023-02-02
JERSEY SHORE STEEL CO	W9XDNLKPD763		$1,227,678	1	2026-01-22
ALLOY SLING CHAINS, LLC	K3FBJJ56JQ32		$1,218,727	73	2026-03-23

Showing top 25 of 871 recipients - the complete ranking is delivered with this report as a data appendix.

What this means for your positioning

This is the largest product-side cell in the category and the least approachable of the five. Defense's 332618 category-coded slice carries **$15,279,574 in obligations across 43 winners at a median of 3 offers**. The offer count looks inviting, but two other numbers argue for caution.

The set-aside rate is 6%. This is the only cell in the engagement where set- asides are effectively absent, which means a small regional firm competes head-on against national manufacturers with no structural protection. Compare that to Interior's 82% on the same NAICS code. The same product, bought by a different agency, is a completely different competitive proposition. SDVOSB participation is 0%, so no certification changes the picture here.

The incumbents are manufacturers operating at catalog scale. Reading the recipient table with its scope in mind (current total award value over a multi-year live lookback across the full NAICS cell, including IDIQ and BPA ceilings, not the category-coded slice): **Allied Tube & Conduit holds $56,174,548 across 18 awards, L3Harris Technologies $29,626,903 across 987 awards, and Triman Industries $12,285,663 across 146 awards.** Award counts in the hundreds mean stock-numbered, catalogued requirements filled on recurring delivery orders. This is a supply relationship measured in fill rate and lead time, not a project competition. The full NAICS context line makes the scale explicit: $187,544,905 across 930 winners, of which the category-coded fencing slice is $15,279,574, about 8%.

Recommended entry move: do not compete here, buy here. Allied Tube is the dominant fence-materials supplier across this entire report, appearing as the number two recipient in the market map with $5,456,083 over 30 awards. The productive relationship is as a customer at distributor terms, using their pricing to compete on Defense installation and repair task orders (the Y1PZ and Z2PZ work at base-level contracting offices), where the competition is other installers rather than manufacturers.

If a direct product play is wanted later, the realistic route is a Defense Logistics Agency long-term supply arrangement, which requires stocking commitments and delivery performance history that a new entrant does not have. Revisit after the Interior and Agriculture lanes have produced two to three years of documented past performance.

Methodology & sources

All data is drawn from **USASpending.gov** (FPDS contract data, US-government public-domain), retrieved 2026-07-25. The **competition profile** is a multi-fiscal-year sweep (FY2023+FY2024+FY2025) of the USASpending Award Data Archive - *offers received* is its `number_of_offers_received` field, and its dollars are obligations. The **top-recipients** table is a separate multi-year live `spending_by_award` lookback ranked by current total award value (which includes IDIQ/BPA ceilings); the two are different scopes and are reported separately by design. No licensed entity data (SAM Entity API / Dun & Bradstreet) is used in this report.