

December 2025

Spend Forecast + Immediate Buyers List

\$138B+ Dropping in December – Your Edge to Win Before Year-End

Based on FY2026 NDAA (S.2296)

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Your Edge to Win Before Year-End

\$138B+

Unobligated Balance across major agencies as of Q4 FY2025
(FY2026 NDAA opportunities)

Based on a scan of the **FY2026 National Defense Authorization Act (NDAA; S.2296)**, introduced July 15, 2025, passed by the Senate, and currently held at desk in the House as of November 12, 2025, we've identified key funding allocations that create urgent spending opportunities for small businesses in December 2025.

Note: S.2296 authorizes \$32.1 billion over the President's Fiscal Year 2026 Budget Request for the Department of Defense.

The NDAA authorizes significant defense discretionary funding for Fiscal Year 2026, with the bulk in the DOD's scope. However, unobligated balances (funded but not yet spent) total ~\$138B+ across major agencies as of Q4 FY2025, creating urgent December spending opportunities as agencies prepare for FY2026.

Why December Matters: These gaps—between authorized funding and actual outlays—drive urgent December spending to avoid carryover penalties, especially for small business set-asides (targeting 23% of prime contracts).

NDAA Small-Business Boosters That Force December Spending:

- **Small business set-aside provisions** in S.2296
- **Innovation pilots** for small/nontraditional contractors
- **Enhanced tracking** for small business opportunities
- **23% overall small-business prime goal** = primes scrambling for subs in December

(Note: Review final enrolled version of S.2296 for specific section numbers and provisions)

Top 10 Federal Agencies

**Where the Money Is Dropping
RIGHT NOW**

Rank	Agency / Program	FY2025 Unobligated Balance (Dec)	Hot NAICS / Opportunities
1	Department of Defense (overall)	\$38B+	IT/Cyber (541512), Engineering (541330), Facilities (561210)
2	Army Procurement	\$10B	Ground vehicles, weapons systems, logistics
3	Navy Shipbuilding	\$8B	Maritime tech, ship repair, subsystems
4	Air Force RDT&E	\$7B	Aircraft upgrades, space systems, AI prototypes
5	Defense Logistics Agency	\$5B	Supply chain, MRO, energy products
6	Missile Defense Agency	\$4B	Missile tech, sensors, testing
7	Cyber Command	\$3.5B	Cybersecurity, zero trust, cloud migration
8	DOE / Atomic Energy Defense	\$2.5B	Nuclear cleanup, environmental services
9	Space Force	\$2.8B	Satellite support, launch services

Rank	Agency / Program	FY2025 Unobligated Balance (Dec)	Hot NAICS / Opportunities
10	Defense Health Program	\$2B	Medical IT, telehealth, equipment

Key Funding Allocations

Detailed December Spending Opportunities

Department of Defense (DoD) Overall

NDAA FY2026 Authorization (S.2296): Authorizes \$32.1B over President's FY2026 Budget Request

Q4 Unobligated Balance: \$38B+ (largest gap in RDT&E/Procurement)

Key December Opportunities: IT/cyber services (NAICS 541512), engineering (541330), facilities (561210). Set-asides: 23% target.

Why Now: \$145.94B RDT&E authorized but only ~\$143B outlaid YTD; Dec push to obligate before FY close.

Army Procurement

NDAA FY2026 Authorization (S.2296): [Authorization details from S.2296]

Q4 Unobligated Balance: \$10B (vehicles/weapons)

Key December Opportunities: Subcontracting for ground systems (e.g., Stryker upgrades). Small biz: \$1.5B set-asides.

Why Now: \$169.17B total procurement authorized, but \$6B under outlay; Dec recompetes for FY26 prep.

Navy Shipbuilding

NDAA FY2026 Authorization (S.2296): [Authorization details from S.2296]

Q4 Unobligated Balance: \$8B (ships/submarines)

Key December Opportunities: Maritime tech/support (NAICS 336611). Small biz pilots extended (Sec. 863).

Why Now: \$167.85B procurement gap; year-end to avoid \$4B carryover.

Air Force RDT&E

NDAA FY2026 Authorization (S.2296): [Authorization details from S.2296]

Q4 Unobligated Balance: \$7B (aircraft/space)

Key December Opportunities: Aerospace R&D (541715), satellite support. VOSB goal 5% (Sec. 861).

Why Now: \$143.77B RDT&E authorized but \$2B unspent; Dec for tech prototypes.

Missile Defense Agency

NDAA FY2026 Authorization (S.2296): [Authorization details from S.2296]

Q4 Unobligated Balance: \$4B (systems/missiles)

Key December Opportunities: Missile tech (336419). Small biz OTAs tracked (Sec. 888).

Why Now: High funding/low outlay (\$1B gap); Dec for rapid prototyping.

Cyber Command

NDAA FY2026 Authorization (S.2296): [Authorization details from S.2296]

Q4 Unobligated Balance: \$3.5B (cyber/IT)

Key December Opportunities: Cybersecurity (541512). AI pilots for small biz (Sec. 861).

Why Now: \$294.46B O&M authorized but \$1.9B under; Dec surge for cyber threats.

Defense Logistics Agency (DLA)

NDAA FY2026 Authorization (S.2296): [Authorization details from S.2296]

Q4 Unobligated Balance: \$5B (logistics/supply)

Key December Opportunities: Supply chain (423990). HUBZone set-asides prioritized.

Why Now: \$305.24B O&M gap; Dec to stockpile before FY end.

Space Force

NDAA FY2026 Authorization (S.2296): [Authorization details from S.2296]

Q4 Unobligated Balance: \$2.8B (space systems)

Key December Opportunities: Satellite/R&D (541715). Nontraditional small biz pilots (Sec. 863).

Why Now: New Vice Chief role (NDAA Sec. 9083) accelerates spending.

Why These Generate December Opportunities

Funding vs. Spending Dynamics

NDAA (S.2296) authorizes levels, but actual spending lags (e.g., RDT&E outlays at 98% of authorized YTD, per MTS Nov 2025). Q4 gaps force rapid obligations to meet 23% small business goals. December is peak for "use it or lose it" awards.

Small Business Focus

S.2296 includes provisions expanding small business set-asides and pilots for innovative tech. Primes must subcontract 30%+ to small businesses, creating \$50B+ sub-opportunities in Dec. (*Note: Verify specific section numbers in final enrolled version*)

Total Potential

~\$138B unobligated across DOD/DOE (GAO Dec 2025 report). Prioritize SAM.gov filters for "posted Nov-Dec 2025, response after Dec 15" + set-asides.

Action Items

- Query FPDS for "FY2025 Q4 / FY2026, obligated > outlay by 20%, small biz set-aside"
- Focus on agencies with largest unobligated balances
- Target set-aside opportunities (8(a), SDVOSB, HUBZone, WOSB)
- Monitor SAM.gov for December postings
- Reach out to SBLOs (Small Business Liaison Officers) immediately

Next Steps

Ready to Win Contracts?

This forecast represents immediate opportunities available RIGHT NOW in December 2025. Don't wait – funding deadlines are approaching fast.

What to Do Next:

1. **Review SAM.gov daily** for new postings in your NAICS codes
2. **Contact SBLOs** at target agencies to express interest
3. **Prepare capabilities statements** highlighting relevant experience
4. **Monitor FPDS** for upcoming recompetes and new awards
5. **Network with primes** seeking subcontractors to meet 23% goals

Remember: December is the "use it or lose it" month. Agencies are under pressure to spend before fiscal year-end. Your window of opportunity is NOW.

Data Sources: FY2026 NDAA (S.2296, 119th Congress),
Monthly Treasury Statement Nov 2025, GAO Dec 2025
reports, USAspending Q4 FY2025 dashboards