

China Civil Unmanned Aerial Vehicle Industry Report, 2015

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Abstracts

Increasing maturity in supporting facilities of industrial chains and falling costs of all types of hardware have created favorable conditions for the development of unmanned aerial vehicle (UAV) in China. In 2014, the Chinese civil UAV market was worth about RMB400 million, and is expected to swell to RMB1.45 billion by 2020, driven by demands from farming, patrolling, and logistics.

Civil UAVs can be divided into industrial grade and consumer grade, with industrial applications including mainly agricultural and forestal plant protection, pipeline inspection, and power line inspection. The industrial-grade UAVs can be used in disaster prevention and inspection, geology and meteorology, and urban planning, with tremendous room for growth. As to consumer-grade UAVs, the drone equipped with Gopro for aerial photography (represented by DJ-Innovations or DJI) is growing rapidly, and relevant companies in the industry are avidly courted in capital markets.

Source: China Civil Unmanned Aerial Vehicle Industry Report (2015), ResearchInChina

As civil UAVs gain more and more attention, the industry grows more competitive. There are by far more than 200 enterprises and institutions engaged in UAVs in China, which can generally be divided into four categories:

- 1) State-owned enterprises and institutions represented by Aviation Industry Corporation of China and China Aerospace Science and Technology Corporation, which primarily specialize in R&D of military UAVs, and partly get involved in dual-use or civil UAVs (mainly industrial UAVs);
- 2) Private enterprises represented by DJI, Ehang, ZERO TECH, and XAIRCRAFT,

which are driven by market demand and focus on consumer UAVs;

3) Listed enterprises represented by SUNWARD, Shandong Mining Machinery Group, Zongshen Power, and Loncin Motor, which don't take UAVs as their main products but participate in R&D of UAVs via acquisitions or establishing of new companies;

4) Other copycat private enterprises with no core technology, poor innovation capability, and gaining profits completely by virtue of market response and cost control.

China Civil Unmanned Aerial Vehicle Industry Report, 2015 focuses on the following:

Overview of Chinese civil UAV industry, including definition and classification, application areas, system structure, and policies, laws, and regulations;

Analysis of the Chinese civil UAV market, covering global UAV market size, Chinese UAV market size, competitive landscape, R&D, and financing; Profile, financial position, hit products, R&D, and technical characteristics of 17 domestic and foreign UAV companies, including DJI, Ehang, ZERO TECH, XAIRCRAFT, 3D Robotics, Parrot, SUNWARD, Zongshen Power, Loncin Motor, and Shandong Mining Machinery Group.

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