

# China Civil Unmanned Aerial Vehicle Industry Report, 2015

May 2015

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

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.

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:

**Civil UAV Investment and Financing, 2012-2015**

Time	Manufacturer	Investor	Round	Amount
Dec-12	3DR	True Ventures and O'Reilly AlphaTech Ventures	A round	USD5 million
Dec-12	DJI	Maison Capital	A round	RMB6 million
Sep-13	3DR	Foundry Group, True Ventures, O'Reilly AlphaTech Ventures, and SK Ventures	B round	USD36 million
Apr-Jul 2014	Ehang	LeBox Capital, Zhen Fund, PreAngel	Angel	RMB millions
Sep-14	XAIRCRAFT	Chengwei Capital	A round	USD20 million
Sep-14	PowerVision	Beijing Jiaxun Feihong Electrical	N/A	RMB38 million
Dec-14	Ehang	GGV, WestSummit Capital	A round	USD10 million
Jan-15	DJI	Sequoia Capital	B round	RMB200 million
Jan-15	ZERO TECH	Shenzhen Rapoo Technology	N/A	RMB50 million
Feb-15	3DR	Qualcomm Venture, Foundry Group, Mayfield, O'Reilly AlphaTech Ventures,	C round	USD50 million
May-15	DJI	Accel Partner	C round	USD75 million

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

- 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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