



U.S.-China Economic and Security Review Commission

USCC RELEASE: China's Military Unmanned Aerial Vehicle Industry

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USCC STAFF BACKGROUNDER: China's Military Unmanned Aerial Vehicle Industry

Washington, DC - Today, the U.S.-China Economic and Security Review Commission released a staff backgrounder, "[China's Military Unmanned Aerial Vehicle Industry](#)," which outlines the development and diversification of the Unmanned Aerial Vehicle (UAV) industry in China and discusses the outlook for industry advancements.

The backgrounder's key judgments include the following:

- China's UAV industry is diversifying and expanding, though scant publicly available information on state-owned UAV producers limits a detailed understanding of the industry. The dual-use nature of the technology has led to significant crossover across academia, the People's Liberation Army (PLA), state-owned defense enterprises, and the private sector.
- The PLA primarily uses UAVs for intelligence, surveillance, and reconnaissance (ISR) missions and communications relay, but likely is developing and operating UAVs for electronic warfare (EW) and lethal missions as well. Furthermore, China increasingly is incorporating UAVs into non-defense missions, such as border security, maritime surveillance, and humanitarian assistance/disaster relief.
- Chinese defense firms – state-owned, university-based, and private – have publicized the development of armed UAVs and unmanned combat aerial vehicles (UCAVs). The PLA appears to have a requirement for both types of systems, though the status of these programs is unknown.
- Surging domestic and international market demand for UAVs, from both military and civilian customers, will continue to buoy growth of the Chinese industry. Chinese defense firms do not face the same export restrictions as top UAV-exporting countries, such as the United States and Israel. As a result, China could become a key UAV proliferator, particularly to developing countries.

The backgrounder was prepared by Kimberly Hsu, a Military and Security Policy Analyst, with Craig Murray, Senior Policy Analyst, Military & Security Affairs; Jeremy Cook, Research Intern; and Amalia Feld, Research Fellow. The full backgrounder can be read [here](#).

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