

Research on the Development Path of Low-altitude Economy under the Background of New Quality Productivity

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Abstract: This study aims to explore the development pathways of the low-altitude economy under the new quality productivity framework. Through the comprehensive application of literature review, case analysis, and inductive synthesis methods, we conduct a thorough examination of relevant fields. The research reveals that new quality productivity and the low-altitude economy are closely interconnected. New quality productivity injects fresh momentum into the low-altitude economy, enhancing aircraft performance and driving operational model innovations. Simultaneously, the low-altitude economy provides application scenarios for emerging technologies, fostering coordinated development of related industries while feeding back into the advancement of new quality productivity. Based on these findings, three key development pathways are identified: technological innovation, industrial integration, and policy support. This study aims to provide theoretical and practical guidance for the sustainable development of the low-altitude economy driven by new quality productivity.

Keywords: New quality productivity; Low-altitude economy; Development path; Industrial integration; Technological innovation

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1. Introduction

1.1. Research background

Emerging as a pivotal concept in recent years, new-type productive forces emphasize technological innovation as the core driving force to propel industries toward high-tech, high-efficiency, and high-quality development, gradually becoming a new engine for global economic growth^[1]. Meanwhile, the low-altitude economy has gained prominence worldwide, emerging as a strategic emerging industry that nations are competing to develop. Domestically, the low-altitude economy has also attracted significant attention.

According to incomplete statistics, 27 provinces, autonomous regions, and municipalities have incorporated low-altitude economy-related content into their 2024 government work reports, demonstrating rapid development momentum^[2]. Against this backdrop, researching the development path of the low-altitude

economy under new-type productive forces not only aligns with the tide of the times but also addresses the critical need for China's high-quality economic development. This holds significant importance for cultivating new growth drivers and forming new-type productive forces.

1.2. Problem statement

While the low-altitude economy holds vast development potential, it currently faces multiple pressing challenges. In airspace management, issues such as inefficient airspace allocation and complex approval procedures significantly hinder economic activities^[3].

Safety concerns also emerge, with low-altitude flights encountering risks like aircraft malfunctions and operational interference with other aircraft, posing potential threats to public safety^[4]. Under the new productive forces framework, exploring appropriate development pathways has become particularly urgent. Innovative solutions are urgently needed to address these challenges and promote the healthy, sustainable growth of the low-altitude economy.

1.3. Research objectives

This study aims to conduct an in-depth analysis of the intrinsic relationship between new quality productivity and the low-altitude economy, clarifying the driving mechanisms of new quality productivity on the low-altitude economy and the reverse effects of the low-altitude economy on the development of new quality productivity. Simultaneously, it explores effective development pathways for the low-altitude economy under the framework of new quality productivity, conducting research from multiple dimensions including technological innovation, industrial integration, and policy support. The ultimate goal is to provide a solid theoretical foundation and practical guidance for the development of the low-altitude economy, facilitating its high-quality growth in the new era and injecting fresh momentum into China's economic development^[5].

2. Literature review

2.1. Theoretical basis of new quality productivity

New-type productive forces are advanced forms of productivity that prioritize innovation, breaking away from traditional economic growth models and development paths.

Characterized by high technology, efficiency, and quality, they align with the new development philosophy^[6]. Unlike conventional productive forces that rely solely on labor and capital inputs, new-type productive forces emphasize the critical role of emerging elements like knowledge, technology, and data. This fundamental distinction lies at the core of their differentiation from traditional productive forces^[1].

2.2. Research progress on low-altitude economy

In terms of industrial scale, both domestic and international low-altitude economies have shown rapid growth in recent years. Some developed countries abroad started earlier and have formed relatively mature industrial systems with large industrial scales and sustained stable growth. Although China's low-altitude economy started relatively late, it has developed rapidly. According to relevant studies, China's low-altitude economy reached a scale of 505.95 billion yuan in 2023, with a growth rate of 33.8%, and is expected to maintain rapid growth in the coming years^[7]. In terms of application fields, early low-altitude economies were mainly concentrated in traditional general aviation sectors such as air transportation and aerial operations. With technological advancements and changes in market demand, their application fields have continuously expanded. Currently, in China, low-altitude economies have been widely applied in leisure tourism, logistics distribution, transportation,

urban security, medical rescue, emergency rescue, and agricultural and forestry plant protection^[2]. Overseas, developments in low-altitude tourism and urban air transportation are also relatively advanced. From a chronological perspective, early research primarily focused on defining the concept and industrial structure of low-altitude economies, while recent years have paid more attention to expanding application scenarios, industrial integration, and policy support systems^[8].

The Low Altitude Economy Research Institute (LAEI) plays a pivotal role in advancing the global low-altitude economy. Through integrated research and cross-disciplinary collaboration, it drives scientific management and commercial development of low-altitude airspace resources. The institute focuses on technological innovation, policy and regulatory research, market analysis, and social impact assessment to create a safe and efficient low-altitude economic ecosystem. By partnering with industry stakeholders, LAEI facilitates the transition from theoretical research to practical applications, particularly in developing key technologies like vertical takeoff and landing (VTOL) aircraft and electric drones. Through its innovation-driven initiatives such as the “Low Altitude Economy+” program, LAEI not only promotes the development and application of low-altitude technologies but also lays a solid foundation for the globalization and sustainable growth of the low-altitude economy.

In the field of Urban Air Mobility (UAM), flying taxis represent a revolutionary innovation anticipated as a key component of future urban transportation. These aerial vehicles are typically designed for vertical takeoff and landing (VTOL) or short takeoff and landing (STOL) operations, enabling them to operate in densely populated urban areas including confined spaces like building rooftops or specialized small airports (vertiports)^[9].

Electric flying taxis (eVTOL), with their eco-friendly, low-noise characteristics and features such as vertical takeoff, electric propulsion, and autonomous driving, can significantly reduce operational costs, minimize environmental impact, and enhance efficiency. While most flying taxis currently require human pilots, the ultimate goal is full automation through advanced autonomous driving technologies to improve safety and operational efficiency. Major tech and aviation companies like Uber, Airbus, and Boeing have already invested substantial R&D resources in this field, indicating that within the next decade, as technology matures and policy environments improve, flying taxis are poised to become an indispensable part of urban transportation networks.

As a vital component of the low-altitude economy, the diversified applications of drones are significantly advancing the efficient utilization and management of low-altitude airspace resources. The rapid development of the drone industry urgently calls for establishing an efficient low-altitude governance system, giving rise to intelligent low-altitude networks. These applications not only enhance operational efficiency across industries but also open up new business opportunities and service models. For instance, in agriculture, drone applications have expanded from basic monitoring to various aspects of precision farming, thereby promoting sustainable agricultural development. In logistics and distribution, drones are transforming traditional delivery models by drastically reducing transportation time and improving emergency response capabilities. For aerial photography and monitoring, drones provide a cost-effective and flexible solution. In environmental protection, urban planning, and disaster assessment, drones deliver real-time data and imagery to help decision-makers better understand and respond to various situations. Overall, the diversified applications of drones are becoming a powerful driving force for the development of the low-altitude economy. Through technological innovation and policy support, the low-altitude economy is ushering in a new chapter. In summary, the operations of the Low-Altitude Economy Research Institute, the development of new business models like flying taxis, and the diversification of drone applications all reflect the current status of the low-altitude economy and new productive forces in practice. These developments not only drive the growth of the low-altitude economy but also provide new opportunities for technological innovation and commercial exploration in related fields^[10].

3. Development path of low-altitude economy under new quality productivity: A case study of Xinjiang

3.1. Development foundation of low-altitude economy in Xinjiang

3.1.1. Natural resource advantage

Xinjiang boasts abundant airspace resources, with an airspace area of approximately 1.8 million square kilometers, accounting for one-sixth of the national total. The excellent climatic conditions allow for over 320 flight days annually, providing ample time guarantees for low-altitude flight activities. The rich airspace resources and favorable flight conditions can significantly reduce the time and flight costs for general aviation enterprises.

3.1.2. Unique geographical advantages

As a brilliant pearl on the northwest frontier of China, Xinjiang's strategic position is self-evident. Located in the heart of the Eurasian continent, it is the core area of the Silk Road Economic Belt, maintaining close cooperation with Central Asian and West Asian countries in trade, logistics, and other fields. By developing cross-border charter flights, medical transport, and other short-haul transportation services, it can meet the growing collaborative needs of both sides. Xinjiang borders eight neighboring countries and has a land border of over 5,600 kilometers. Its unique geographical location makes Xinjiang an important node and core area of the Belt and Road Initiative. This advantage stems not only from its unparalleled geographical position but also from its role as a bridge for economic integration, cultural exchange, and technological innovation between the East and West, demonstrating extraordinary strategic significance.

3.2. The construction of low-altitude infrastructure is accelerating

At present, Xinjiang has stood out in the development of the national general aviation field, not only with a large fleet and a large number of airports, but also with a strong development momentum, showing significant advantages and huge potential ^[11].

As of the end of 2023, Xinjiang had 25 civil airports, including 17 general aviation airports. Among these, 2 Class A1 general aviation airports had been constructed and certified, 11 were Class B airports, and 4 were helicopter landing sites. Additionally, low-altitude flight service stations were planned for Altay, Karamay, and Qiemo. According to the development plan, by 2030, Xinjiang aims to build 89 general aviation airports of Class A2 or higher, achieving a density of 5.4 per 100,000 square kilometers. By 2035, this number is projected to reach 98, with a density of 5.9 per 100,000 square kilometers. The region currently has 79 general aviation takeoff and landing points and 2 flight camps, forming an integrated network of trunk routes, feeder lines, and general aviation airports.

This infrastructure provides comprehensive support for takeoffs, landings, and maintenance of low-altitude aircraft.

3.3. Low-altitude applications are diversified

Xinjiang, with its vast territory, boasts 175A-level scenic spots and over 1,100 tourist attractions of various sizes. While the region is rich in tourism resources, some remote locations face transportation challenges that hinder further development. Low-altitude aerial tours offer visitors unique aerial experiences, allowing them to overlook Xinjiang's natural landscapes. For instance, Kashgar Ancient City has launched a low-altitude tourism project where visitors can take helicopter flights to admire the ancient city's panoramic views, experiencing its charm through aerial perspectives. At Sayram Lake Scenic Area, the dual-person powered paragliding experience has become a popular choice, with pilots guiding the entire flight from 150 meters above the lake,

enhancing the area's appeal for visitors.

In agriculture, the widespread use of drones to cultivate millions of acres of farmland exemplifies one of the low-altitude economy's key applications in Xinjiang. This technology not only boosts efficiency but also reduces costs. Compared to traditional manual methods, agricultural operations like pesticide spraying, crop sowing, fertilization, and forestry pest control demonstrate significantly higher efficiency with more uniform coverage. These advancements minimize labor expenses, pesticide waste, and occupational health risks. Data shows that drone-powered field spraying can cover 120-150 mu (1 mu $\approx$ 666.67 square meters) per hour. With advanced technologies like GPS, drones enable real-time monitoring and precise operations, effectively addressing labor shortages while promoting large-scale, intensive agricultural development. Additionally, drones play crucial roles in field data collection, crop growth monitoring, and early disaster warnings^[12].

Drones and other low-altitude aerial vehicles have not only enhanced safety in Xinjiang's geological surveys and mineral exploration, but also significantly boosted operational efficiency. As most mineral resource development in Xinjiang occurs in uninhabited desert, Gobi, and mountainous areas, aerial surveying technology offers rapid, precise, and cost-effective solutions for exploration and scientific experiments. This approach effectively supports comprehensive assessments of mineral resource distribution, reserves, and development potential.

In addition, low-altitude economy has been widely used in logistics distribution, emergency rescue, environmental monitoring, power inspection, meteorological monitoring and other aspects. Diversified application scenarios not only promote the development of low-altitude economy in Xinjiang, but also provide new impetus for regional economic growth and social progress.

4. Policy support

The Xinjiang government has prioritized the development of the low-altitude economy, implementing a series of supportive policies. As outlined in the 2024 Government Work Report, it aims to actively cultivate this sector as a new growth engine. Xinjiang Airport Group has keenly recognized the vast potential of low-altitude economy development. By strategically planning and leveraging policy incentives and regional advantages, the group has made significant strides in this field. Key initiatives include establishing Xinjiang Tianyuan General Aviation Co., Ltd. and the Xinjiang Aviation Industry (Low-altitude Economy) Research Institute, advancing the construction and operation of Yecheng Airport, and developing a distinctive low-altitude economic model tailored to Xinjiang's conditions.

The establishment of the Xinjiang Aviation Industry (Low-altitude Economy) Research Institute provides crucial theoretical and technical support for this sector. The research institution will mobilize its platform and resources to collaborate with experts from universities and research institutes, forming a professional think tank to conduct research, formulate development plans, and promote the integration of enterprises and application scenarios in the low-altitude economy. This effort will provide intellectual support for Xinjiang's low-altitude economic development and drive comprehensive socio-economic progress. Additionally, Xinjiang is actively learning from the experiences of China's first batch of low-altitude airspace management reform pilot provinces. By accelerating local legislation, optimizing the business environment, and leveraging government leadership, the region is stimulating and promoting the growth of its low-altitude economy.

4.1. Development path of low-altitude economy in Xinjiang under new quality productivity

4.1.1. Give full play to the role of the Xinjiang assistance mechanism and jointly build a low-altitude economy

Strengthen regional collaboration to promote the joint development of low-altitude economy between Kashgar and Shenzhen, Korgos and Suzhou, and Shihezi and Liaoning. Shenzhen has long been a national leader in traditional general aviation, while Suzhou, leveraging its established aviation industrial parks and low-altitude industrial parks, is building a low-altitude economic industrial park that covers diversified sectors such as technology R&D, production, and operational support, with differentiated development.

Shenyang in Liaoning is even hailed as the “eldest son of China’s aviation industry.” It is recommended to fully utilize the aid mechanism for Xinjiang, leveraging the combined policy advantages of the Kashgar and Korgos Free Trade Zones and Economic Development Zones, as well as the substantial resources of capital, technology, industry, and talent from Shenzhen, Suzhou, and Liaoning, to achieve complementary strengths and jointly create a highland for the development of the low-altitude economy.

4.1.2. Improve infrastructure and develop “low-altitude navigation + tourism”

Strengthen the development of low-altitude infrastructure. Establish a comprehensive low-altitude ground infrastructure system, leveraging state-owned platforms like the Transportation Investment Group to guide private capital investment. Implement phased construction of general aviation airports, water-based airports, and vertical takeoff/landing sites across prefecture-level cities and districts. Propose establishing low-altitude air routes between cities and scenic areas in Xinjiang. Promote the designation of low-altitude air routes. Coordinate with military and civil aviation authorities to conduct research on low-altitude air route planning, focusing on urban low-altitude passenger and cargo transportation needs. Develop low-altitude air charts and optimize the regional air route network layout to efficiently utilize urban and regional airspace resources. Cultivate new urban air transportation models. Expand cultural, sports, and tourism applications^[13].

Encourage general aviation enterprises to develop unique projects like aerial tours, aerial photography, and aviation sports by leveraging natural resources such as Tianchi Lake, Kanas Lake, Bosten Lake, and Fuhai Lake, as well as key attractions like Nalati Desert and Huyang Forest. Utilize drones and other low-altitude aircraft to create innovative tourism experiences blending ethnic culture and Western Regions characteristics, such as aerial sightseeing tours and drone formation shows, establishing a “low-altitude + cultural tourism” industry model.

4.1.3. Develop drone delivery and expand the market size of low-altitude logistics

We will collaborate with key domestic logistics enterprises to develop drone landing infrastructure, meeting essential functions including takeoff, landing, parking, charging, transportation, and operational needs. This involves strengthening communication networks, surveillance systems, and low-altitude meteorological monitoring facilities to establish an intelligent low-altitude logistics network. Urban low-altitude delivery scenarios will be expanded through partnerships with major logistics companies, piloting smart logistics solutions and commercial meteorological support services while building a multi-tiered low-altitude logistics hub system. The application of medium/large cargo drones for cross-airport cargo transfers and supply chain logistics will be explored. New logistics models like low-altitude freight transportation will be tested in bonded zones of Urumqi, Kashgar, Korgos, and Alashankou, alongside innovative trade practices such as bonded maintenance services. A dedicated air corridor will connect county-level blood banks, medical testing centers, and major hospitals, enabling rapid transportation of blood products, test samples, and donor organs.

4.1.4. Actively carry out pilot projects and encourage the expansion of applications in various fields

Initiate pilot zone development. Select 3-5 counties, cities (districts) with strong industrial foundations to conduct low-altitude economy pilot demonstrations, promoting the organic integration of low-altitude flight with market consumption. Cultivate new forms of low-altitude consumption and establish replicable, scalable operational models to drive high-quality development of the low-altitude economy across Xinjiang. Encourage government departments including emergency management, health, public security, fire control, and agriculture, as well as state-owned enterprises and public institutions, to increase the application of drones and helicopters in emergency rescue, medical assistance, urban management, firefighting, and agricultural production during public service delivery. Urge local government agencies and relevant departments to prioritize domestic enterprises in their service procurement catalogs. Promote commercial applications of unmanned aerial vehicles, helicopters, and eVTOL (Electric Vertical Takeoff and Landing) in power line inspections, aerial surveying, and agricultural protection. Regularly organize regional unmanned aerial vehicle exhibitions, speed competitions, and low-altitude flight innovation contests. Facilitate multimodal transport integration between highways, railways, airports, and low-altitude aircraft to continuously explore new business models in the low-altitude economy^[14].

4.1.5. Optimize the policy environment to unleash the innovation potential of the low-altitude economy

First, develop a low-altitude economy development plan. Tailored to Xinjiang's specific conditions, formulate a strategic blueprint that defines clear objectives, prioritized tasks, and safeguard measures to guide and support the sector's growth. Second, implement targeted support policies. The government should introduce comprehensive measures including fiscal subsidies, tax incentives, and land use benefits. Concurrently, enhance financing support for low-altitude economy enterprises by reducing funding costs and stimulating innovation. Third, strengthen talent cultivation and recruitment. Intensify efforts to develop and attract professionals in the low-altitude economy sector. Encourage universities and research institutions to establish specialized programs, cultivating high-caliber professionals. Simultaneously, attract top domestic and international talents and teams to establish operations in Xinjiang, ensuring a sustainable talent pipeline for the sector's long-term development. Fourth, diversify financing channels. Financial institutions should innovate financial products tailored to the low-altitude economy's unique characteristics, increase credit support for related projects, and guide private capital into infrastructure development, thereby establishing a diversified financing ecosystem.

4.1.6. Strengthen top-level planning and improve the construction of service guarantee system

- (1) In alignment with the formulation of the 15th Five-Year Plan, we will holistically consider the relationship between low-altitude economic development, industrial transformation and upgrading, and regional coordinated development. This will drive local governments to formulate tailored low-altitude economic development plans, dynamically optimize and improve the industrial chain layout across Xinjiang, ultimately forming a top-level design that coordinates industrial chain points and surfaces, advances orderly regional development, and integrates military-civilian collaboration.
- (2) Priority will be given to regions with strong industrial foundations to establish low-altitude economic demonstration zones, focusing on cultivating distinctive new forms of low-altitude consumption. Special funds will be allocated to support low-altitude economic development, facilitate the construction of new infrastructure related to low-altitude economy, and encourage demonstration zones to accelerate the introduction of leading domestic and international enterprises in low-altitude industry chain R&D, production, and operations. This will provide valuable experience for accelerating innovative and high-quality development of the low-altitude economy across Xinjiang.

- (3) We will promote the establishment of an efficient and convenient low-altitude flight service support system through military-civilian integration. Based on security defense needs, general aviation development, and UAV application demands, relevant cities will implement grid-based airspace management for flight suitability. Low-altitude air route networks will be constructed according to operational scenarios, coordinating the layout of air routes across Xinjiang. Strengthening military-civilian collaboration, pilot cities will explore integrated low-altitude air traffic control systems to continuously reduce airspace conflicts^[15].
- (4) We will enhance the construction of new low-altitude infrastructure, prioritizing the development of aircraft charging facilities, eVTOL systems, drone landing sites, and general aviation airports. Fiscal support will be moderately increased to ensure hardware infrastructure for low-altitude economic development, adapting to the scaled growth of low-altitude economic demands.
- (5) Establish a new airspace management system with unmanned aerial vehicle (UAV) integrated applications as the primary focus, while accommodating manned and unmanned operations. Continuously improve institutional safeguards for low-altitude airspace coordination to support large-scale, high-density, and complex low-altitude scenarios, thereby enhancing resource utilization efficiency and operational effectiveness in this airspace.

5. Outlook for the future development trend of low-altitude economy

5.1. Market size continues to expand

With the continuous advancement of new quality productivity, the low-altitude economy is expected to show a trend of continuous market expansion in the coming years. The high-tech and high-efficiency elements inherent in new quality productivity provide a strong impetus for the development of the low-altitude economy. Judging from the current development trend, the low-altitude economy has demonstrated strong growth potential. According to relevant research predictions, by 2035, the industrial scale of China's low-altitude economy is expected to reach 6 trillion yuan, with a compound annual growth rate of 7.6%. In 2023, the scale of China's low-altitude economy reached 505.95 billion yuan, with a growth rate of 33.8%, and is expected to maintain a rapid growth trend in the coming years. Technological innovation under new quality productivity will further enhance the performance of low-altitude aircraft, reduce operating costs, thereby attracting more entities to participate in the low-altitude economy industry and promoting the continuous expansion of the market scale.

5.2. Application areas continue to expand

The low-altitude economy holds vast potential for application expansion in emerging fields. In smart city development, low-altitude aircraft leverage their agility to deploy sensors for aerial patrols and data collection, empowering urban managers to better monitor city operations and enhance governance efficiency. For instance, drone-powered traffic flow monitoring provides real-time congestion data, offering critical support for traffic management. In environmental monitoring, this technology proves particularly valuable.

Drones enable rapid and efficient surveillance of large areas, including air quality, water quality, and forest fire detection. Their capability to operate in complex terrains and harsh environments compensates for the limitations of traditional monitoring methods, delivering more comprehensive and accurate data for environmental protection.

5.3. More in-depth technology integration

In the context of new quality productivity, the integration of various technologies with the low-altitude economy will deepen further. Take 5G technology as an example: its high-speed and low-latency characteristics provide robust

support for communication and control of low-altitude aircraft, enabling more precise flight control and real-time data transmission. Low-altitude aircraft can utilize 5G networks to achieve remote real-time monitoring and instant transmission of flight status data, thereby enhancing flight safety and operational efficiency. The convergence of IoT technology with the low-altitude economy will also bring new development opportunities. By connecting various devices on low-altitude aircraft to the Internet of Things, interconnectivity and data sharing among devices can be achieved, establishing a low-altitude IoT ecosystem. For instance, drones working in tandem with other smart devices can accomplish complex tasks such as field inspections and precision fertilization in smart agriculture, further driving the low-altitude economy toward intelligent and collaborative development.

Disclosure statement

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