



三七药材系列产品  
Panax Notoginseng Products

# TRADITIONAL CHINESE MEDICINAL HERBS

## 中药材

### Overview

Yunnan, renowned as the kingdom of plants ever since ancient times, is famous for genuine Chinese medicinal herbs. There are a variety of topography types in Yunnan. From less than 100 meters to more than 6,000 meters above sea level, there are high mountains, deep gorges, river valleys and flatland. There are also a variety of climate types, including tropical rainforest climate, subtropical monsoon climate and alpine ice climate. The favourable geographic and climate conditions has made Yunnan a homeland of medicinal herbs. According to statistics, of the 5000 types of Chinese medicine herbs used in China, over 3500 come from Yunnan. The traditional Chinese medicinal herb industry is developing rapidly. The scale of cultivation ranks the first in the country. There are also many varieties of Chinese medicinal herbs with excellent quality. The industry has created a certain brand effect and has enormous development potential.

### 综述

云南自古被称为植物王国，盛产道地药材。境内，从海拔不足百米到 6000 米以上，高山、深峡、河谷、平坝各种地形地势兼而有之，从热带雨林、亚热带季风到高山冰原等各种气候类型皆备，得天独厚的地理气候造就了云南一个药材之乡。数据显示，全国 5000 多个品种的中成药中，使用云南中药材就达 3500 多种。云南中药材产业发展较快，种植规模居全国第一，特色品种众多，药材质量较优，有一定的品牌效应，产业具有较大的发展潜力。



## Industry Mix

### 1. Scale of Resources

There is a distinct competitiveness in the medicinal resources in Yunnan. There are 6559 types of biological medicines in Yunnan, accounting for 51.2% of the 12807 types in China. In Yunnan, there are 145 categories of traditional Chinese medicinal herbs that are commonly planted, accounting for 48% of the 300 categories in China, in which 30 types are planted in a large scale, accounting for 10% of the country's total. There are 10 species of commodity medicinal herbs in Yunnan, accounting for 25% of the 40 species in China.

### 2. The Scale of Cultivation

There is an immense area for the cultivation of Chinese medicinal herbs in China. Yunnan has ranked the first in China in terms of the cultivation area for two consecutive years. In 2017, the planting area of Chinese medicinal herbs increased by 20% in China year on year, while the cultivation area in Yunnan went up 12.36% and accounted for 9.56% of the nation's total. According to statistics of the 13th Five-year Plan for 18 provinces and autonomous regions, planned cultivation area for Chinese medicinal herbs in China will be 59.985 million mu in 2020, in which there will be 8 million mu in Yunnan - again the largest in the country.

### 3. Proportion of Cultivation Areas

Traditional Chinese medicinal herbs in Yunnan features concentrated large varieties, a wide range of special varieties and diversified in minor varieties. There is a large cultivation area for *Panax notoginseng*, *dendrobium*, anise, ginger, *dendrobium*, *erigeron* and other characteristic varieties in Yunnan province, yielding outstanding output in 2017. There are 17 kinds of medicinal materials with an annual planting area of more than 100,000 mu. There are 1,713,000 mu of *Amomum tsao-ko*, 796,000 mu of anise, 514,000 mu of *panax notoginseng*, 206,000 mu of *gentian*, 152,000 mu of *safflower*, 139,000 mu of *poria*,

and 122,000 mu of *sauussurea costus*.

### 4. Output Value

The output value of medicinal herbs processing industry in Yunnan reached 37.16 billion yuan in 2017, an increase of 15.7% compared with 2016 and accounted for 6.05% of the national total. The agricultural output value of Chinese medicinal herbs totaled 34.89 billion yuan, accounting for 11.63% of the 300 billion RMB in China. As one of the fastest-growing industries in the modern agriculture of the plateau, Yunnan traditional Chinese medicine industry has become an important pillar underpinning the economic development of agriculture and rural areas. It is also an important industry that has contributed to targeted poverty alleviation efforts that will bring benefits to financially challenged households.

## Top 10 Traditional Chinese Medicinal Herbs in Yunnan (2018)

No.1: "Yunnan Notoginseng" by Yunnan Notoginseng Technology Co., Ltd.

No.2: "Xumeide" *Rhizoma Gastrodiae* by Yiliang Agricultural and Sideline Products Processing Plant.

No.3: "Yunquan I" *Paris Polyphylla* by Lijiang Yunquan Biological Development Co., Ltd.

No.4: "Nan Cao Tang" *Dendrobium* by Yunnan Jinjiudi Biotechnology Co., Ltd.

No.5: "Long Jin" *Erigeron breviscapus* by Xuanwei Longjin Biotechnology Co., Ltd.

No.6: "Dian Qi" *Tuckahoe* by Yunnan Fuzi Agricultural Science and Technology Development Co., Ltd.

No.7: "Wei Xi" *Angelica sinensis* by Yunnan Shangri-La Bluegrass Herbal Medicine Co., Ltd.

No.8: "Hua Gui" *Sauussurea costus* by Lijiang Huali Biological Development Pharmaceutical Co., Ltd.

No.9: "Xue Li" *Fructus Tsaoko* by Lushui Agricultural Production Material Co., Ltd.

No.10: "Dian Ji" *Bletilla striata* by Pu'er Liangbao Biotechnology Co., Ltd.

## 结构

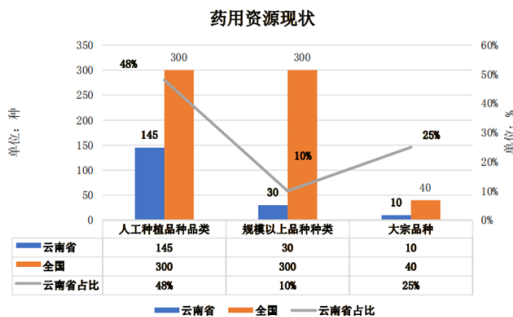
### 1. 资源规模

云南药用资源优势明显，全国药用生物资源12807种，云南6559种，占比51.2%；全国常规种植中药材品种约300种，云南145种，占比48%，其中规模以上种植品种约30种，占10%；全国大宗药材品种40种，云南10种，占25%。

区域及行业	类别	种(个)	云南占全国比例
云南现状	药用生物资源种类	6559	51.2%
	人工种植品种种类	145	48% (占常规种植品种)
	规模以上品种种类	30	10% (占常规种植品种)
	大宗品种	10	25%

### 2. 种植规模

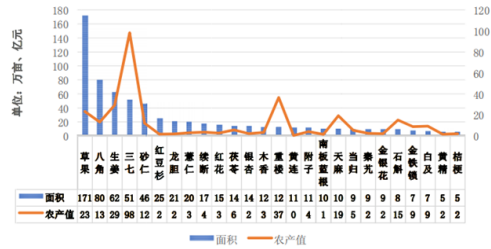
全国中药材种植面积巨大，云南种植面积连续两年稳居全国第一。2017年较2016年全国中药材种植面积同比增长20%，云南同比增长12.36%，占全国种植面积9.56%。据18省区十三五规划数据，2020年全国规划面积5998.5万亩，云南规划面积800万亩，仍是全国第一。



### 3. 种植结构

云南中药材品种总体呈现大品种高度集中、特色品种散列突出、小冷品种多元化分布发展态势。三七、重楼、八角、生姜、石斛、灯盏花等云南省特色品种面积规模大，产值贡献突出2017年种植面积达10万亩以上的有17种药材。其中，草果171.3万亩、八角79.6万亩、三七51.4万亩、龙胆20.6万亩、红花15.2万亩、茯苓13.9万亩、滇重楼12.2万亩、云木香12.2万亩。

云南省2017年中药材品种产值对比图



### 4. 产值情况

云南中药材加工产值2017年达371.6亿元，较2016年同比增长15.7%，占全国加工产值6.05%。中药材农业产值达348.9亿元，占全国中药材农业产值3000亿元比重达11.63%。云南中药材产业作为高原特色现代农业中发展较快的产业之一，已经成为促进农业农村经济发展的重要支撑和实现贫困农户精准脱贫的重要产业。

## 云南省2018年“10大名药材”

- 第一名：云南三七科技有限责任公司“云三七”牌三七
- 第二名：彝良县农副产品加工厂“徐美德”牌天麻
- 第三名：丽江云全生物开发有限责任公司“云全1号”牌滇重楼
- 第四名：云南金九地生物科技有限责任公司“南草堂”牌铁皮石斛金条
- 第五名：宣威市龙津生物科技有限责任公司“龙津”牌灯盏细辛
- 第六名：云南福滋农业科技开发有限责任公司“滇奇”牌茯苓
- 第七名：云南香格里拉兰草药业有限责任公司“维西当归”牌云当归
- 第八名：丽江华利生物开发药业有限责任公司“华桂牌”云木香
- 第九名：泸水市农业生产资料有限责任公司“雪梨”牌草果
- 第十名：普洱良宝生物科技有限责任公司“滇及”牌白芨