

NUTS

坚果

Overview

Nut products mainly include almonds, walnuts, pistachios, cashews, hazelnuts, American pecans, macadamia nuts, pine nuts and so on, among which walnuts and macadamia nuts are the most well-known in Yunnan Province. The Provincial Party Committee in Yunnan and the local government are committed to the development of the nut industry which can benefit 26.223 million residents in mountainous regions. Besides, the nut industry plays a decisive role in some projects such as rural revitalization, targeted poverty alleviation, the promotion of green food as well as the social stability. The area of walnut plantation in Yunnan has reached 43 million mu and its production has reached 1.16 million tons by 2017. Meanwhile, the area of macadamia nuts has reached 2.2 million mu, yielding 16,000 tons. Therefore, the nut industry has become the largest cash crop industry in Yunnan. As the largest region to plant and produce walnuts and macadamia nuts around the world, Yunnan has laid a solid foundation for leading the world in cultivation, processing and marketing of walnuts and macadamia nuts in the future.

综述

坚果主要包括杏仁、核桃、开心果、腰果、榛子、薄壳山核桃（碧根果）、澳洲坚果（夏威夷果）和松子等。云南坚果以核桃、澳洲坚果为主，坚果是云南省委、省政府致力打造的重点产业，惠及我省2622.3万山区群众，对云南实施乡村振兴、精准扶贫、绿色食品等工程以及社会稳定有举足轻重的作用。截止2017年，云南省核桃种植面积达4300万亩，产量达116万吨；澳洲坚果种植面积达220万亩，产量达1.6万吨，已成为云南最大的经济作物产业，全球最大的核桃、澳洲坚果种植和生产地区，具备了未来引领和主导世界核桃和澳洲坚果种植、加工与市场的坚实基础。



Walnut Fruit

Industrial Mix

1.Planting Scale

The global walnut planting area has reached 124 million mu, in which China occupies the largest of 108 million mu by the end of 2016. According to the statistics provided by the provincial forestry departments, in 2016 Yunnan Province ranked the first in walnut planting area in China, reaching an area of 42.8 million mu (which accounts for 34.5% of the global walnut planting area and 40% of the nation's total). Yunnan has become the largest walnut planting base in the world. By the end of 2017, the province's walnut planting area has reached 43 million mu and its production has reached 1.16 million tons with the comprehensive output value of 31.8 billion yuan; the macadamia nuts cover an area of 2.2 million mu and the production has reached 16,000 tons, with the output value of 480 million yuan.

2.Production and Processing

There are more than 10 types of walnut products, including walnut shell fruit, kernel, walnut milk, oil, protein powder, crafts, capsules, activated carbon, hair dye and so on, among which walnut shell fruit, kernel and walnut milk are the main products in the market. The processing rate is 35%, excluding the scattered shell fruit that are sold directly after being dried. The output value of the main processed products was 8.501 billion yuan, accounting for 27.87% of the total output value of 30.5 billion yuan in 2016. Macadamia nuts are mainly processed in the primary stage, so among the proportion of the products, pistachio nuts account for about 90%, nut production accounts for 5% to 10%, other products like oil, candy, dessert, ice cream and cosmetics account for about 1% to 2%.

3.Corporate Composition in Nut Industry

There are over 780 walnut enterprises in the province, including 123 leading enterprises that account for 15.7% of the total number of enterprises in the nut industry. In

addition, there are 204 walnut-processing enterprises, accounting for 26.1% of the walnut enterprises. Yunnan Mo'er Farm Biotechnology Development Co., Ltd. is the only enterprise that owns the total output value of 1 billion yuan. Another 14 enterprises hold the output value between 100 million yuan and 1 billion yuan. There are more than 10 enterprises focusing on planting and processing macadamia nuts, in which there are 7 leading enterprises. A total number of 5,270 forestry cooperatives have been established, including 1,309 walnut cooperatives accounting for 24.8% of the total forestry cooperatives. Besides, there are 50 macadamia nut cooperatives, accounting for 1% of the total forestry cooperatives.

Major Enterprises

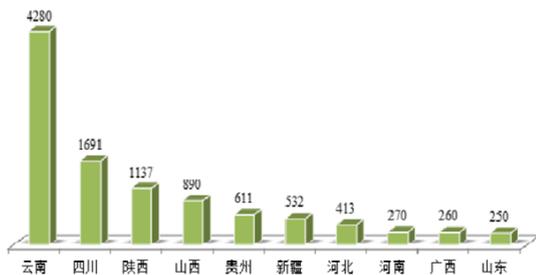
Yunnan Yunaoda Nut Development Co., Ltd. is a comprehensive leading enterprise that provides solutions for the cultivation and supply of macadamia nut seedling, scientific planting, production and processing, scientific research and technical services as well as import and export trade. The main economic forest products are the high-quality seedling, seed, kernel, nut of the macadamia nuts and its series of processed products. The market share of the series products of nuts stands at 30%, and high-quality seedling has a market share of 50%.

Dali Yangbi Walnut Co., Ltd., founded in March 2000, is a modern enterprise of science, industry and commerce with the first-level legal entity status. It mainly focuses on the deep-processing of "Yangbi" walnut. The enterprise has been listed as the "Green Vegetation and Medicine Demonstration Park (Yunnan)" in the national Go-West Campaign. One of its products, the "Yangbao" walnut milk, has won many awards such as the gold prize in China Health Products Expo and China International Beverage Technology Exhibition, and silver prize in National Forestry Premium Products Expo, etc.

结构

1. 种植规模

截止 2016 年底，全球核桃种植面积达 1.24 亿亩，中国 1.08 亿亩，是世界核桃种植面积最大的国家。根据各省区林业厅提供数据，2016 年云南省核桃种植面积居全国第一位，达 4280 万亩（占全球核桃种植面积的 34.5%，全国的 40%），云南已成为全球最大的核桃种植基地。截至 2017 年底，全省核桃种植面积达 4300 万亩、产量 116 万吨、综合产值 318 亿元；澳洲坚果种植面积达 220 万亩、产量 1.6 万吨、综合产值 4.8 亿元。



2016 年全国核桃栽培面积情况 (万亩)

2. 生产加工

云南省核桃产品类型有核桃壳果、仁、乳、油、蛋白粉、工艺品、胶囊、活性炭、染发剂等 10 余类，加工率为 35%（不含零散干燥后直接销售的壳果），市场主要以核桃壳果、仁、乳为主。2016 年主要加工产品产值 85.01 亿元，占当年核桃总产值 305 亿

元的 27.87%。澳洲坚果以初级加工为主，开口壳果产品份额约占 90%，果仁产品约占 5%~10%，其它产品，如油、糖果、点心、冰淇淋和化妆品等大约占 1%~2%。

3. 企业结构

全省有核桃企业 780 余家，其中龙头企业 123 家，占核桃企业总数的 15.7%；核桃加工企业 204 家，占核桃企业总数的 26.1%。总产值在 10 亿元仅有云南摩尔农庄生物科技开发有限公司 1 家企业，1 亿元-10 亿元之间的有 14 家。澳洲坚果共有 10 余家种植加工企业，其中龙头企业 7 家。全省共有林业专业合作社 5270 个，其中核桃专业合作社 1309 个，占林业专业合作社的 24.8%；澳洲坚果专业合作社 50 个，占林业专业合作社的 1%。

重点企业

云南云澳达坚果开发有限公司：是集澳洲坚果种苗培育和供应、高效种植、生产加工、科研与技术服务、进出口贸易为一体的综合性龙头企业。主要经济林产品为澳洲坚果优质种苗、种子、壳果、果仁及其系列加工产品，其中果仁系列产品市场占有率达 30%，优质种苗市场占有率达 50% 以上。

大理漾濞核桃有限责任公司：成立于 2000 年 3 月，是以开发漾濞核桃资源精深加工为主，集科、工、贸为一体的具有一级法人资格的现代企业，在国家西部大开发战略中被称为：“云南绿色植物药产业化示范科技园”。“漾宝”牌漾濞核桃乳曾荣获中国保健商品博览会金奖、中国国际饮品技术展览会金奖、全国林业名特优产品博览会银奖等多项殊荣。

