

VEGETABLES

蔬菜

Overview

The planting area of vegetables remains the largest among other cash crops in Yunnan province. It is a traditional industry with distinctive features and sound industrial base. The vegetable-growing sector in Yunnan has played an irreplaceable role in the South-to-North and West-to-East vegetable transportation projects. Currently, Yunnan is seeking to boost its competitiveness, produce vegetables with the best quality in the world, pursue high-quality and green development and enhance the vegetable industry. To this end, the strategic approach is to remain committed to market-oriented development, endeavor to make “Two Efforts”, establish “Three Systems”, enhance “Four Capabilities”, adopt “Five Pathways to Innovation”, and carry out the “Six Major Projects”. Efforts will be made to create big platforms, new market entities and large industries, so as to upgrade the development mode of the local vegetable industry.

综述

蔬菜是我省面积第一大经济作物，是云南一项优势特色明显和产业基础较好的传统产业，长期以来在全国南菜北运、西菜东运、出口蔬菜中发挥了不可替代的作用。当前，如何进一步再造新优势，打响“世界一流绿色蔬菜牌”，顺应高质量发展、绿色发展要求，做大做强蔬菜产业这一命题，提出战略思路是：坚持市场导向，强化发展“两个着力”，构建“三个体系”，提升“四个能力”，推进创新“五条路径”，实施“六大”工程。着力打造大平台、新主体、大产业，促进蔬菜产业发展方式转变和现代产业转型升级。

Industry Mix

1. Industrial Scale

(1) Scale of Vegetable Production

According to statistics from the National Bureau of Statistics(NBS), the planting area of vegetables in Yunnan has leaped from 8.429 million mu to 15.602 million mu over the past 10 years, with an increase of 85.1% and an annual growth rate of 8.51%. The production of vegetables in Yunnan has grown from 11.133 million tons in 2007 to 19.686 million tons in recent years, representing an increase of 8.553 million tons. The current production of vegetables in Yunnan is 1.77 times than ten years ago, with an annual growth rate of 7.68%.

(2) Scale of Operation

In recent years, more than 4 million growers have been

engaged in vegetable cultivation; over 400,000 work in vegetable processing industries and 100,000 are involved in logistics and transportation. There are more than 600 specialized cooperatives and organizations among vegetable growers. More than 500 companies in the vegetable industry have been registered. Processing enterprises, joint cooperatives and associations are mainly located in Kunming, Yuxi, Qujing and Chuxiong, accounting for more than 90% of the province's total.

(3) Competitiveness of Local Brands

In recent years, 836 vegetable products have been certified as pollution-free farm produce, green food and organic agricultural products, or labeled as agro-product geographical indications. Local vegetable brands are thriving, such as Chengnong, Hongbing, Zidi, etc. There





Kunming stands as one of the four major bases for the South-to-North Vegetable Transportation

have emerged many well-known local products, such as the zingiber officinale from Luopin, pepper from Qiubei, pickled vegetables from Midu, konjac from Fuyuan, early winter vegetables from Yuanmou, *Artemisia lactiflora* from Tonghai and small waxy corn from Xishuangbanna.

2. Industry Mix

(1) Regional Structure

Vegetable production in Yunnan has been more integrated than ever, with its competitiveness on the rise. The top ten prefectures (or cities) with the largest vegetable planting areas are: Qujing, Wenshan, Honghe, Kunming, Yuxi, Zhaotong, Chuxiong, Dali, Pu'er and Baoshan. The cultivation area, production and output of vegetables of these ten prefectures (or cities) account for more than 90% of the province's total. Products sold abroad or to another part of the country account for 95% of the prov-

ince's total. Vegetables producing regions in Tonghai (for all-year-round production), Luoping (for production in summer and autumn) and Yuanmou (for production in winter and spring) are gradually taking shape.

(2) Varieties of Products

Yunnan boasts numerous varieties of vegetables. There are more than 200 species of vegetable crops (including fresh corns and potatoes) that can be biologically classified into 45 families. Vegetables that are commonly produced can be categorized into 16 families and 45 varieties. Cruciferous vegetable of 9 varieties covers the largest cultivation area, which is the major product that is sold abroad or to other parts of China. Five varieties of vegetables of the composite family occupies the second largest cultivation area.

(3) Market Structure

The vegetable industry in Yunnan is export-oriented. Products sold to other parts of China have kept a large share in the total sales volume. Meanwhile, the products to places outside Yunnan have been rising in recent years, accounting for nearly 70% of the province's total, up from 50% in 2013. In 2017, the sales volume for products sold abroad or to other parts of China stood at 68% and 5.7%, respectively, of the province's total. Yunnan ranks the fourth to fifth in China in terms of export volume for many years. Revenue in foreign exchange created by vegetable export ranks the second in China, next to Shandong Province. Over 60 varieties of vegetables have been exported, including broccoli, cabbage, potatoes, matsutake and tomatoes, etc. Export volume of broccoli, cabbage, matsutake and so on remains to be the largest in China in recent years.

Top 10 Vegetable Products in Yunnan (2018)

- No. 1: "Hongbing" capsicum frutescens by Yunnan Hongbin Green Food Group Co., Ltd.
- No. 2: "Plateau Oasis" fresh Chinese cabbage by Tonghai Plateau Agricultural Products Co., Ltd.
- No. 3: "Longyun Dayou" tomatoes by Yunnan Longyun Dayou Co., Ltd.
- No. 4: "Yunjiang" ginger power by Yunnan Wanxinglong Biotechnology Group Co., Ltd.
- No. 5: "Yunsongnan" cream cabbage by Yanshan Songnan Agricultural Development Co., Ltd.

- No. 6: "Chennong" sweet bean by Kunming Shengshi Chennong Agricultural Development Co., Ltd.
- No. 7: "Yuanlu" onion by Yuanmou Vegetable Co., Ltd.
- No. 8: "Heze" frozen sweet corn by Shilin Heze Vegetable Frozen Processing Factory.
- No. 9: "Qingmeiyuan" Shanghai cabbage by Yunnan Qingmei Agricultural Science and Technology Development Co., Ltd.
- No. 10: "GH" potato by Yunnan Guanghui Vegetable Cultivation Co., Ltd.



结构

1. 产业规模

(1) 种植规模

国家统计局数据表明，过去 10 年间，云南省蔬菜种植面积从 2007 年的 842.9 万亩增加到近年来的 1560.2 万亩，增幅达到 85.1%，年平均增幅为 8.51%。全省蔬菜产量从 2007 年的 1113.3 万吨增



2007-2016年云南省蔬菜生产基本情况图

加到近年来的 1968.6 万吨，增加 855.3 万吨，增长 1.77 倍，年均增幅 7.68%。

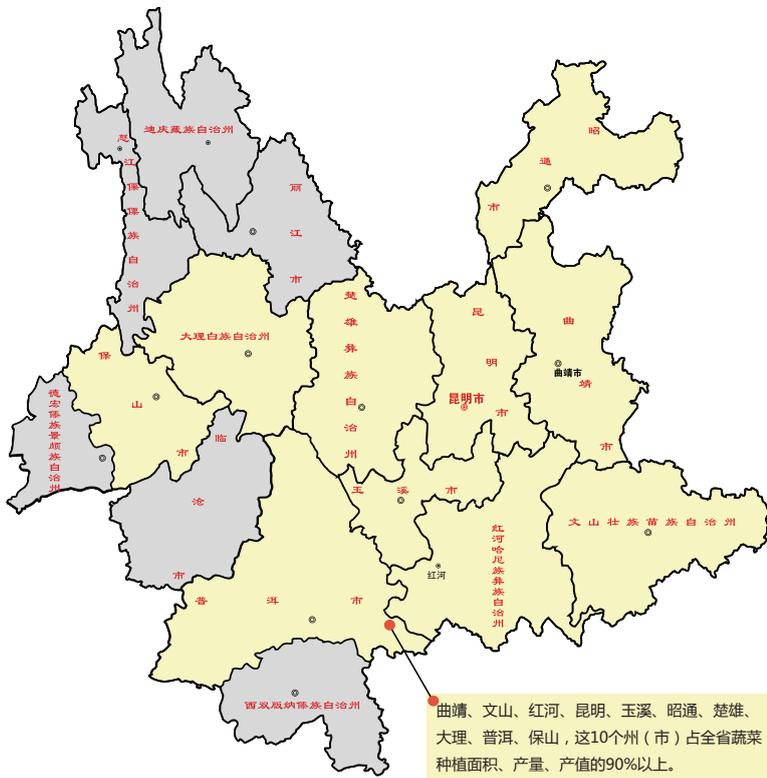
(2) 经营规模

近年来，全省蔬菜种植涉及 400 余万菜农，蔬菜加工涉及 40 余万人，蔬菜流通涉及 10 余万人；蔬菜专业合作社或协会等组织 600 多家；蔬菜产业相关企业 500 余家。加工企业、合作社和协会主要分布在昆明、玉溪、曲靖、楚雄，占全省 90% 以上。

(3) 品牌规模

近年来，云南蔬菜“三品一标”累计认证产品 836 个；培育了“晨农”“宏斌”“子弟”等一批具有较大市场影响力的本省自主蔬菜品牌；形成了“罗平小黄姜”“丘北辣椒”“弥渡酸腌菜”“富源魔芋”“元谋冬早蔬菜”“通海四季菜”“版纳小糯玉米”等区域公共品牌。

2. 产业结构



曲靖、文山、红河、昆明、玉溪、昭通、楚雄、大理、普洱、保山，这10个州（市）占全省蔬菜种植面积、产量、产值的90%以上。

The cultivation area, production and output of vegetables in Qujing, Wenshan, Honghe, Kunming, Yuxi, Zhaotong, Chuxiong, Dali, Pu'er and Baoshan account for more than 90% of the Province total.



Broccoli



cabbage



potatoes



matsutake



tomatoes

(1) 区域结构

我省蔬菜生产进一步集中，竞争优势进一步优化。蔬菜种植面积排名前十的州市依次为曲靖、文山、红河、昆明、玉溪、昭通、楚雄、大理、普洱、保山，这10个州（市）占全省蔬菜种植面积、产量、产值的90%以上。外销和出口占全省总量的95%以上。逐步形成了通海县等的常年蔬菜产区、罗平县等的夏秋蔬菜产区、元谋县等的冬春蔬菜产区。

(2) 品种结构

云南蔬菜种类繁多，栽培蔬菜作物（含鲜食玉米、冬春马铃薯）有200种以上，分属45科，其中常生产的蔬菜有16个科45类。面积最大的是十字花科的9类蔬菜，是云南蔬菜外销和出口的主要品种，其次是菊科的5类蔬菜。

(3) 市场结构

云南蔬菜为外向型产业结构，始终保持着强劲的外销（出省销售）势头，外销（含出口）量逐年提高，占全省蔬菜总产量的比重从2013年的50%上升到近70%。2017年全省蔬菜外销量、出口量分别占全省蔬菜总产量的68%和5.7%。全省蔬菜外销量多年处于全国第四、第五位，蔬菜出口创汇额仅次于山东居全国第二位，出口品种超过60个，主要有西兰花、卷心菜、马铃薯、松茸、番茄等，其中，西兰花、卷心菜、松茸等蔬菜单项出口量多年保持

全国第一。

云南省 2018 年“10 大名菜”

- 第一名：云南宏斌绿色食品集团有限责任公司“宏斌”牌小米辣
- 第二名：通海高原农产品有限责任公司“高原绿洲”牌高山娃娃菜
- 第三名：云南龙云大有实业有限责任公司“龙云大有”牌西红柿
- 第四名：云南万兴隆生物科技集团有限责任公司“云姜”牌姜粉
- 第五名：砚山县松南农业开发有限责任公司“云松南”牌奶白菜
- 第六名：昆明盛世晨农农业发展股份有限公司“晨农”牌甜豆
- 第七名：元谋县蔬菜有限责任公司“元绿”牌洋葱
- 第八名：石林禾泽蔬菜速冻加工厂“禾泽”牌速冻甜玉米
- 第九名：云南青美农业科技发展有限责任公司“青美源”牌上海青
- 第十名：云南广汇种植有限责任公司“GH（图形）”牌马铃薯