



# **The development status of China's seabuckthorn industry**

**International Seabuckthorn Association ZHANG Bin**

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# 沙棘简介

- 定义与特性

沙棘是一种生长在干旱和半干旱地区的植物，具有极强的耐旱性和耐寒性。

- 营养价值与应用价值

果实富含维生素 C、维生素 E、 $\beta$ -胡萝卜素等多种营养成分，被誉为“天然维生素宝库”。根、茎、叶、果均可利用，可应用于食品、医药、化妆品、环境保护等领域。



# Introduction to sea buckthorn

- Definition and characteristics

Sea buckthorn is a plant that grows in arid and semi-arid regions and is extremely drought and cold tolerant.

- Nutritional value and application value

The fruit is rich in vitamin C, vitamin E,  $\beta$ -carotene and other nutrients, and is known as a "treasure trove of natural vitamins". Roots, stems, leaves, and fruits can be used, and can be used in food, medicine, cosmetics, environmental protection and other fields.



# 种植现状

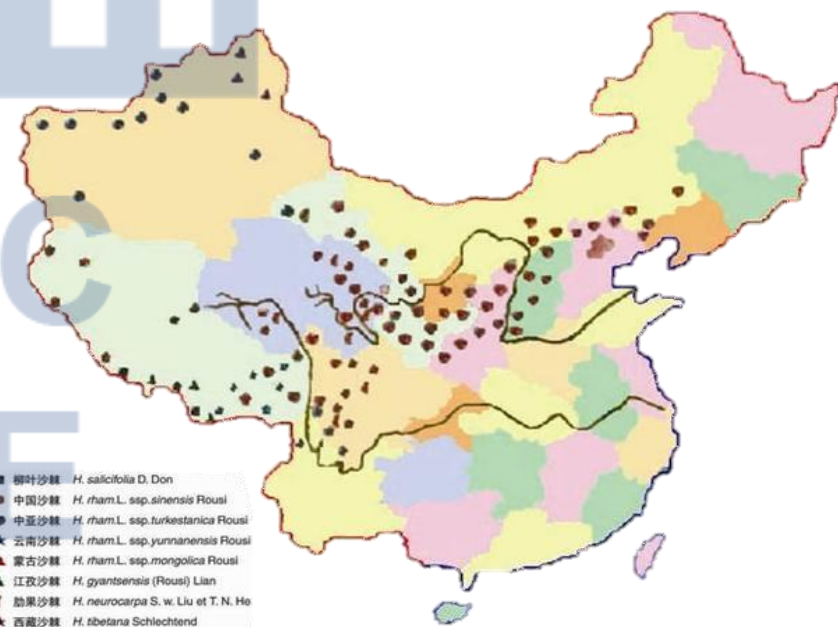
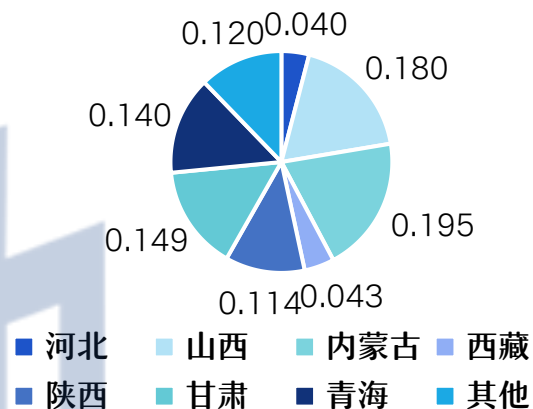
## ● 种植面积与分布

- 中国是全球最大的沙棘生产国，种植面积不断增长，主要分布在内蒙古、山西、甘肃、河北、陕西、宁夏、青海、新疆等三北地区及西南地区。
- 数据显示，2021 年我国沙棘林面积为 3212 万亩，其中人工林为 2129 万亩，占比 66.28%；天然林为 1083 万亩，占比 33.72%。

## ● 种植技术与和管理

部分地区种植技术成熟，但整体仍有待提高，存在管理粗放、雌雄株比例失调、品种混乱等问题。

2022年各省沙棘资源面积占比



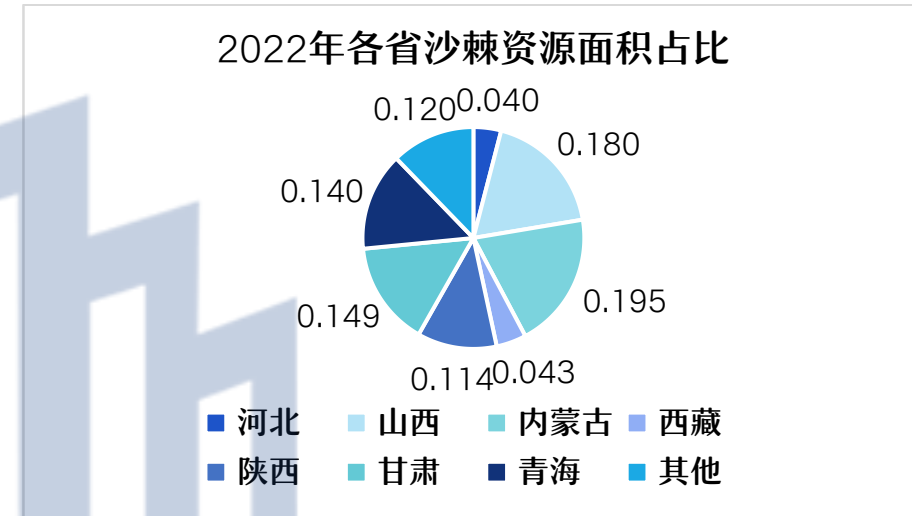
# Current status of cultivation

## ● Planting area and distribution

- China is the world's largest producer of sea buckthorn, with growing planting area, mainly distributed in Inner Mongolia, Shanxi, Gansu, Hebei, Shaanxi, Ningxia, Qinghai, Xinjiang and other northern regions and southwest regions.
- According to the data, in 2021, the area of sea buckthorn forests in China was 32.12 million mu, of which 21.29 million mu were planted forests, accounting for 66.28%; natural forests were 10.83 million mu, accounting for 33.72%.

## ● Planting technology and management

The planting technology is mature in some areas, but the overall planting technology still needs to be improved, and there are problems such as extensive management, imbalance in the proportion of male and female plants, and confusion of varieties.



# 加工产业现状

- 加工技术

随着科技的发展，加工技术不断提升，但部分技术仍相对落后，如沙棘油提取工艺成本高、效率低。

- 主要产品

沙棘加工产品丰富，包括沙棘果汁、沙棘果酱、沙棘油、沙棘保健品、沙棘茶、沙棘粉、沙棘酒等。

- 应用领域

食品、医药、化妆品、环境保护等领域。



# Current state of the processing industry

- **Processing technology**

With the development of science and technology, the processing technology has been continuously improved, but some technologies are still relatively backward, such as the high cost and low efficiency of sea buckthorn oil extraction process.

- **Main products**

Rich processed products of sea buckthorn, including sea buckthorn juice, sea buckthorn jam, sea buckthorn oil, sea buckthorn health products, sea buckthorn tea, sea buckthorn powder, sea buckthorn wine, etc.

- **Applications**

food, medicine, cosmetics, environmental protection and other fields.





# 市场现状

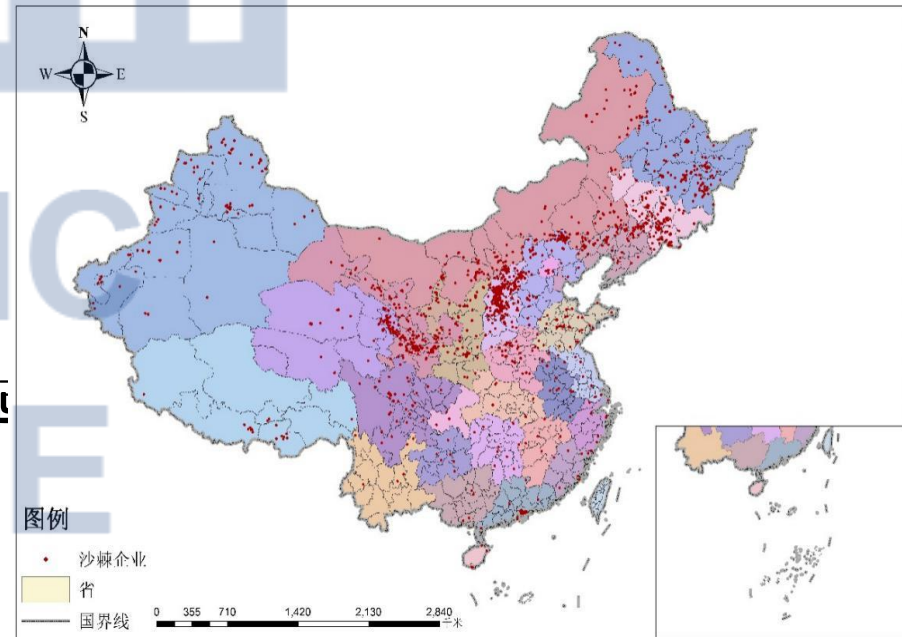
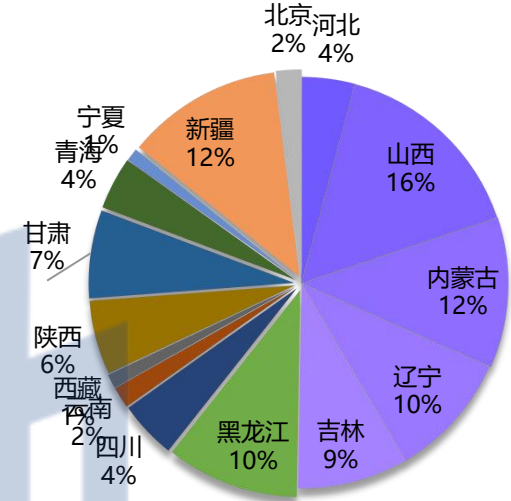
## ● 市场规模

- 近年来市场规模不断扩大，2020 年我国沙棘果汁市场规模约为 20 亿元人民币，较 2019 年增长了 20%。
- 2019 年我国沙棘果市场规模为 100 亿元，沙棘果汁市场规模占整个沙棘果市场的一半以上。

## ● 消费群体与消费渠道

- 消费群体主要为中老年人、孕妇、学生等注重健康的人群。
- 消费渠道包括超市、专卖店、电商平台等，电商平台的兴起为沙棘产业发展提供了新的机遇。

2022年沙棘主产区沙棘企业分布情况



# The current state of the market

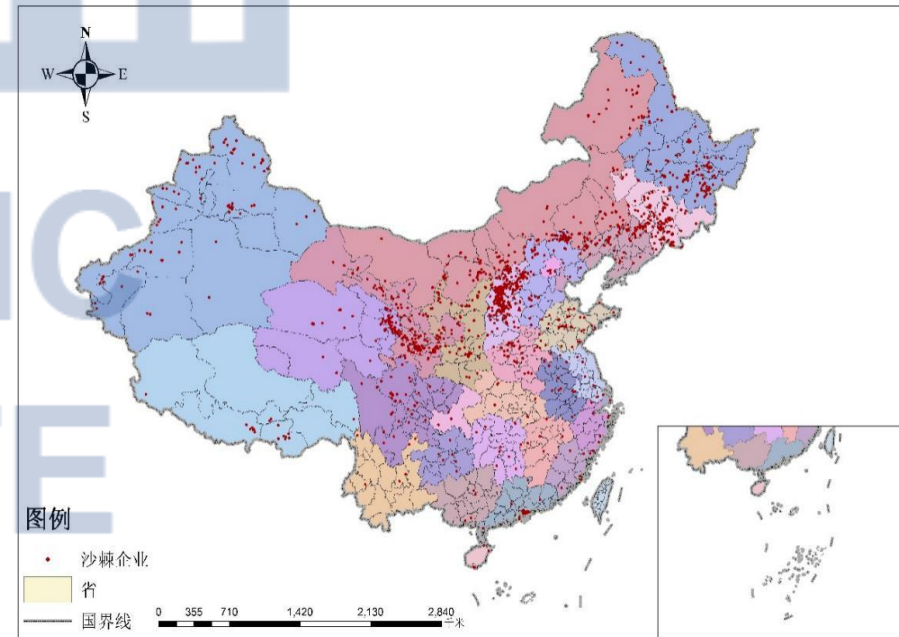
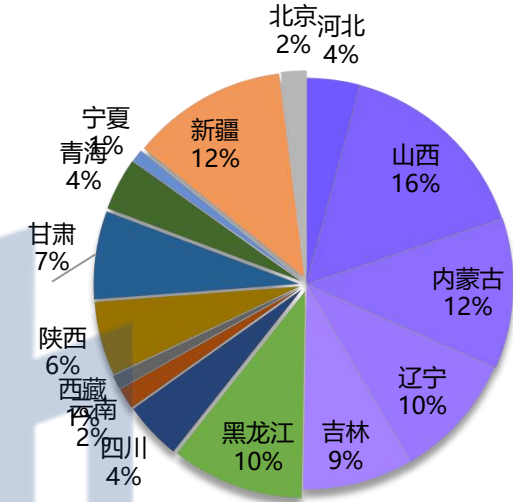
## ● Market size

- The market size has been expanding in recent years, and the market size of sea buckthorn juice in China was about RMB 2 billion in 2020, an increase of 20% compared to 2019.
- In 2019, the market size of sea buckthorn fruit in China was 10 billion yuan, and the market size of sea buckthorn juice accounted for more than half of the entire sea buckthorn fruit market.

## ● Consumer groups and consumption channels

- The consumer groups are mainly middle-aged and elderly people, pregnant women, students and other health-conscious people.
- Consumption channels include supermarkets, specialty stores, e-commerce platforms, etc., and the rise of e-commerce platforms has provided new opportunities for the development of the seabuckthorn industry.

2022年沙棘主产区沙棘企业分布情况



# 竞争格局

- 国内竞争

国内沙棘产业竞争激烈，市场集中度较低，前十家品牌的市场份额之和不足 30%。

- 国际竞争

沙棘产品在国际市场上也具有一定的竞争力，但与国外先进水平相比，在品牌建设、产品质量等方面仍有差距。



# Competitive landscape

- **Domestic competition**

Domestic competition: The domestic seabuckthorn industry is highly competitive and the market concentration is low, with the combined market share of the top 10 brands being less than 30%.

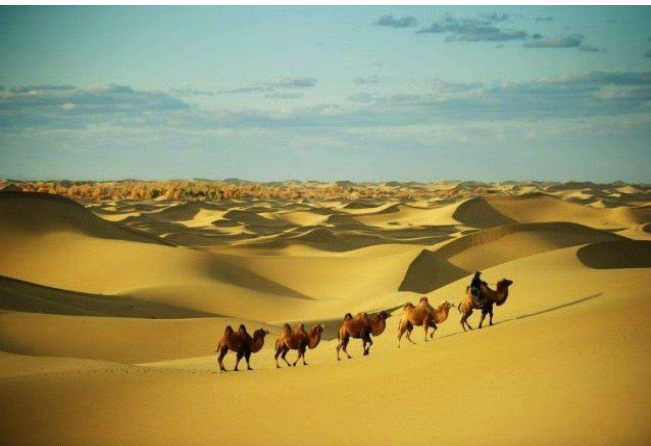
- **International competition**

Seabuckthorn products also have a certain competitiveness in the international market, but compared with the advanced level of foreign countries, there is still a gap in brand building and product quality.



# 面临的挑战

- 种植方面：种植技术不成熟，导致产量和质量不稳定。
- 加工方面：深加工产品研发滞后，缺乏科技含量和自主知识产权。
- 市场方面：市场竞争激烈，品牌忠诚度不高，产品消费相对单一。
- 质量方面：缺乏有效的质量控制体系，品质参差不齐，影响行业声誉。



# Challenges

- Planting: The planting technology is not mature, resulting in unstable yield and quality.
- Processing: The research and development of deep-processed products is lagging behind, and there is a lack of scientific and technological content and independent intellectual property rights.
- Market: The market competition is fierce, the brand loyalty is not high, and the product consumption is relatively simple.
- Quality: Lack of effective quality control system, uneven quality, affecting the reputation of the industry.



# 发展趋势

## ● 种植产业发展趋势

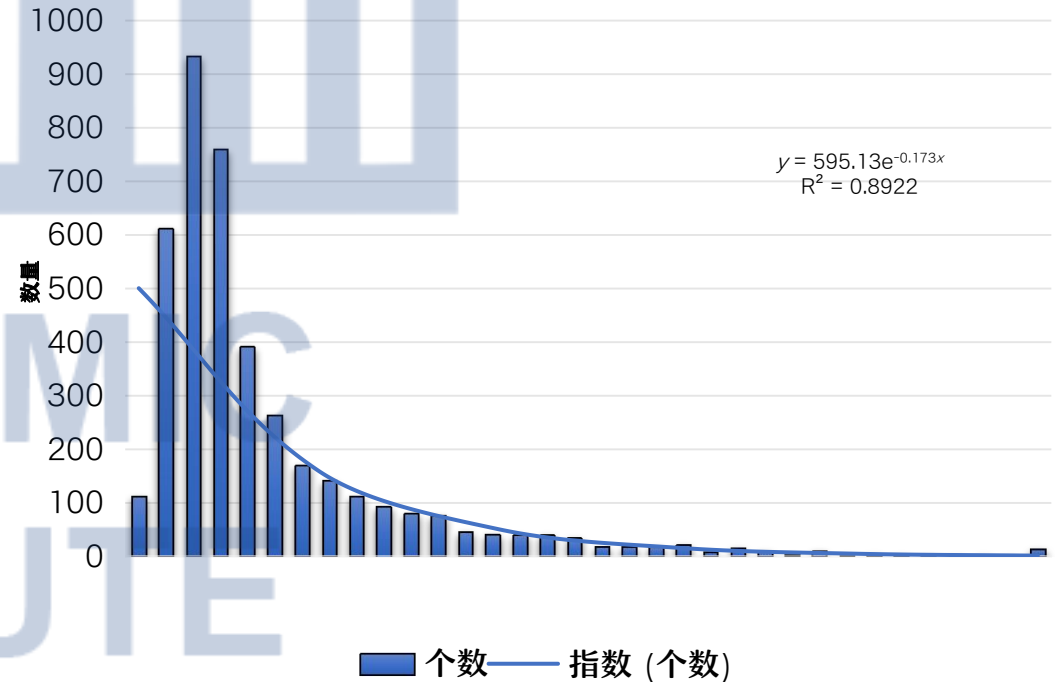
政府对沙棘产业的支持力度加大，种植面积将继续扩大，种植技术和管理水平将不断提高。

## ● 加工产业发展趋势

深加工产品不断涌现，产品附加值将不断提高。

## ● 市场发展趋势

随着人们对健康饮食的重视和保健意识的提高，沙棘产品的市场需求将不断增长，市场前景广阔。



沙棘产品生产和关联企业发展情况

# Trends

- **Development trend of planting industry**

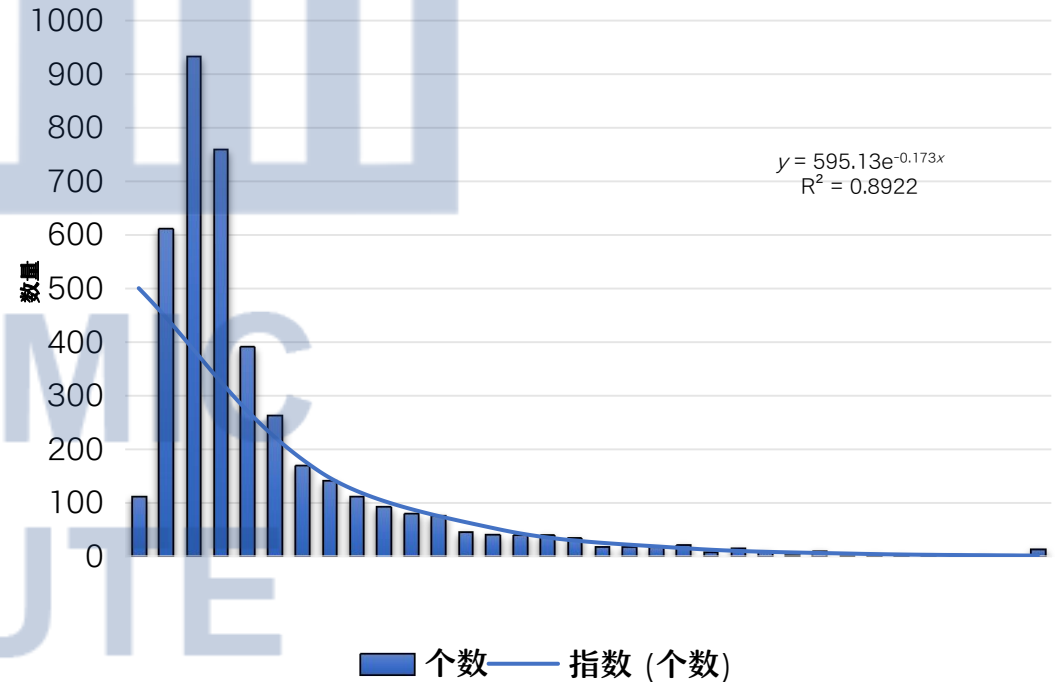
The government's support for the seabuckthorn industry will increase, the planting area will continue to expand, and the planting technology and management level will continue to improve.

- **The development trend of processing industry**

Deep-processed products continue to emerge, and the added value of products will continue to increase.

- **Market development trend**

With people's attention to healthy diet and the improvement of health awareness, the market demand for sea buckthorn products will continue to grow, and the market prospect is broad.



沙棘产品生产和关联企业发展情况



# 结论与展望

## ● 总结

中国沙棘产业发展取得了一定的成绩，但仍面临着诸多挑战。

## ● 展望

未来，中国沙棘产业将在政策支持、技术创新、市场拓展等方面不断发展，有望成为具有国际竞争力的特色产业

开发沙棘，  
利国利民。

苏子英  
九八年元月

我在林业部首创沙棘区种灌木技术。它是一种  
保持水土的灌木，又是一种饮料、菜子、作饲料、  
帮助鸟食。但能保持水土作用的灌木树种和草类技术  
技术

以开发沙棘资源作为  
加速黄土高原治理的一个突破口

——关于在山西省开发沙棘的调查报告

耀精、紫阳同志：

据山西省右玉县同志说，他们曾向你们汇报过开发利用沙棘的问题。林业部也于今年八月在五台召开全国沙棘培育利用讨论会。对水保部来说，直到今年六月召开的黄河中上游水土保持工作座谈会上，山西省方山县的有关资料，才开始引起我们的注意。在这以后，我们曾组织过两次调查，并在北京邀请经委、科委、农、林、轻工、科学院等方面同志听取山西省和我部同志的汇报，进行座谈。最近我和部内有关同志并邀请财政部一位同志由山西省副省长郭强怀同志陪同，去方山县实地考察，并和地、县同志进行座谈，最后向山西省委作了汇报。经过这段时间的调查酝酿，我们感到，以开发沙棘作为在黄土高原种树种草，加速治理的一个突破口，是有可能的。现将有关情况简要汇报如下：

胡283



耀精、紫阳同志：... 林业部... 水保部... 经委、科委、农、林、轻工、科学院... 山西省... 副省长郭强怀同志... 胡283

# Conclusions and prospects

## ● Conclusions

The development of China's seabuckthorn industry has made certain achievements, but it still faces many challenges.

## ● Prospects

In the future, China's seabuckthorn industry will continue to develop in terms of policy support, technological innovation and market expansion, and is expected to become a characteristic industry with international competitiveness

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**谢谢！**

**Thank you for your listening!**

**ECONOMIC**

**INSTITUTE**