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纵观虫草（真菌）的来世今生

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摘要：虫草为一类具有悠久利用历史的真菌。随着研究的逐渐深入，虫草的概念也随之改变，同时也带来了机遇和挑战。虫草已由独处深闺变得与人们生活密切相关。本文从概念出发，对虫草的研究历史、物种界定、分类研究，以及开发应用前景进行了综述和展望。

关键词：虫草，表观形态，系统发育，研究历史，机遇与挑战

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Research overviews of *Cordyceps*: past, present and future

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Abstract: *Cordyceps* has been medicinally utilized for a long history in China. The concept of *Cordyceps* constantly change with deepening study, bringing opportunities and challenges in scientific research and utilization. *Cordyceps* previously originated from remote mountains and dense forest has become closely related to people's life nowadays. In this paper, the research history, species definition, classification, development and application of *Cordyceps* are reviewed and the future prospects are predicted.

Key words: *Cordyceps*, morphological characteristics, phylogeny, research history, opportunity and challenge

一直以来,虫草对公众来说是耳熟能详,但由于概念不明晰,导致使用“虫草”时,存在诸多误区。生活中“虫草”的概念,公众一般认为是冬虫夏草,或形态特征与冬虫夏草相似的一类真菌。在这种情况下,“虫草”不具有特定的分类学含义,而是一种俗称。对初识分类学的人来说,“虫草”概念也需要厘清。在传统表观形态特征(宏观和微观)分类系统中,“虫草”是指隶属于真菌界 Fungi、子囊菌门 Ascomycota、子囊菌纲 Ascomycetes、粪壳菌亚纲 Sordariomycetidae、肉座菌目 Hypocreales、麦角菌科 Clavicipitaceae (Kirk *et al.* 2001) 中的虫草属 *Cordyceps* (Fr.) Link。在此分类系统中,虫草属 *Cordyceps* 包含有 3 个亚属,即线虫草亚属 Subgenus *Ophiocordyeps* (Petch) Kobayasi、虫草亚属 Subgenus *Eucordyceps* Kobayasi 和新虫草亚属

Subgenus *Neocordyceps* Kobayasi (Kobayasi 1983)。

随着分子生物学及测序技术的发展,系统发育分析广泛应用于分类学研究。“虫草”的概念也随之发生了变化。在基于靶向序列相似性的基础上,传统的虫草属 *Cordyceps* 已分别隶属于虫草菌科 Cordycipitaceae 的虫草属 *Cordyceps* (Fr.) Link、麦角菌科 Clavicipitaceae 的泛虫草菌属 *Metacordyceps* G.H. Sung, J.M. Sung, Hywel-Jones & Spatafora、线形虫草菌科 Ophiocordycipitaceae 的线形虫草属 *Ophiocordyceps* Petch 和大团囊虫草属 *Elaphocordyceps* G.H. Sung & Spatafora (Sung *et al.* 2007)。同时,在上述 3 个科与虫草名称相关的分类单元中,尚有大量在表观形态特征上与传统虫草相似的真菌。随着新分类单元不断出现及分子分析方法的深度应用,

虫草的概念还将发生变化。本文就虫草的研究历史、物种界定、分类研究及开发利用的机遇与挑战进行了综述与展望。

1 初识虫草

最早关于虫草类真菌的记录可以追溯到公元前 1 000–200 年, 在安葬死者的口中, 放置蝉形或蚕形的物件 (小林义雄和黄年来 1983)。这些物件可能是模仿被虫草菌感染的蝉以及蚕后长期保持原来虫体僵硬的形状。我国最早记录见于《证类本草》(公元 1082 年) 和《重修证类本草》(公元 1249 年) 中记载染菌的蝉 (蝉花) 和蚕 (白僵蚕) (小林义雄和黄年来 1983)。1578 年,《本草纲目》已将冬虫夏草以雪蚕之名, 作为中药。1694 年的《本草备要》中已有关于冬虫夏草的描述: “冬虫夏草, 冬在土中形如老蚕, 有毛能动, 至夏则毛出土上, 连身俱化为草” (董洪新和吕作舟 2002)。随后的古籍中对冬虫夏草形态的描述基本沿用“冬为虫, 夏为草, 一物竟能兼动植”的说法 (李皓翔等 2020)。

2 初次命名虫草

虫草用于描述能感染昆虫, 并从其头部或体表长出子座体而构成的虫、菌复合体 (梁宗琦等 2007)。它的科学描述大致可以分为 3 个时期: 第 1 个时期 (18 世纪前半期–19 世纪中叶), Réaumur 于 1726 年将冬虫夏草标本从中国送至巴黎, 以冬虫夏草 *Cordyceps sinensis* (Berk.) Sacc. 学名在一次学术会议上介绍给听众。Fries (1818) 将虫草属最早作为核菌纲中的成员而命名, 其模式种蛹虫草 *Cordyceps militaris* (L.: Fr.) Fr. 在 17 世纪和 18 世纪被记载描述的特征为: 棍棒状, 向上逐渐变得纤细, 形状类似于手指或脚趾 (Micheli 1729; Buxbaum 1733; Gleditsch 1753; Schmidel

1762; Holmskjöld 1796)。而现在广泛使用的属名虫草属 *Cordyceps* 则是 Link 于 1833 年发表的。第 2 个时期 (19 世纪后半叶), 主要是整理和记载别人采集的标本, 期间出现了较为特色的专著《冬虫夏草志》。第 3 个时期 (20 世纪) 出现了专攻某一地区虫生菌的研究者, 诸如柏林的 Henning、巴西南部的 Möller、爪哇的 Penzig 和 Saccardo、新西兰的 Cunningham、中国的邓叔群、美国的 Lloyd 和 Mains, 以及英国的 Petch (小林义雄和黄年来 1983)。上述关于虫草的记载描述皆是基于肉眼可见、直观的表现特征。

3 基于表观形态特征的虫草

虫草首次在分类学上的定义采用的是基于表观形态特征, 即表型种 (Mayr 1942) 的概念。19 世纪初期, 虫草描述主要基于宏观形态特征, 如寄主昆虫或真菌的种类、子座的形状以及子囊壳在子实体可孕部的着生位置等。Schroeter (1894) 将虫草属中子囊壳部分埋生的种归于 *Racemella* Ces. 亚属, 而将子囊壳全埋生的种归于 *Cordylia* Tul. 亚属, 继后, 又将 *Cordylia* 亚属依据寄主种类, 将寄主为昆虫的种归为真虫草亚属 *Eucordyceps* Sacc.。

19 世纪中叶, 根据微观形态特征, 如子囊中子囊孢子的数量、排列方式、形状、颜色、长度及断裂后的状态等, 将虫草作了进一步划分。基于宏观和微观表型特征的综合差异, Kobayasi 将虫草属分为 3 个亚属: 线虫草亚属 *Ophiocordyceps* (Petch) Kobayasi、真虫草亚属 *Eucordyceps* Kobayasi 和新虫草亚属 *Neocordyceps* Kobayasi (Kobayasi 1941)。Moureau (1961) 几乎以相似的方式将出现在非洲地区的虫草分为 3 个亚属: 虫壳亚属 *Torrubiella* Boud.、真虫草亚属 *Eucordyceps*

Lindau 和线虫草亚属 *Ophiocordyceps* Petch。Koval (1974) 将虫草划分成 4 个亚属：线虫草亚属 *Ophiocordyceps* Petch、虫草亚属 *Cordyceps* Kobayasi、梭形虫草亚属 *Fusicordyceps* Koval 和新虫草亚属 *Neocordyceps* (Kobayasi) Koval。

Kobayasi(1983)建立的虫草的分类系统，在后续实际鉴定工作中得到了广泛应用(梁宗琦等 2013)。该分类系统将广义虫草属细分为 3 个亚属、7 个组和若干个亚组和群：

(1) 线虫草亚属 Subgenus *Ophiocordyceps*：特征为子囊孢子梭形，分隔，不断裂成次生子囊孢子。该亚属分为 3 个组，分别为：①表生组 Section *Epicarposoma* Kobayasi：可孕部顶生，子囊壳表生；②新虫草组 Section *Neocarposoma* Kobayasi：可孕部侧生，子囊壳埋生；③头状组 Section *Capitate* Kobayasi：可孕部顶生，子囊壳埋生。(2) 虫草亚属 Subgenus *Eucordyceps* Kobayasi：子囊孢子柱状，分隔，断裂成两端平截的次生子囊孢子。该亚属分为 4 个组，分别为：④侧生组 Section *Laterales*：可孕部侧生，子囊壳埋生；⑤表生组 Section *Racemella* Cesati：可孕部非侧生，子座肉质或纤维质，子囊壳表生或半埋生，该组分为 3 个亚组，即 I 散生型亚组 Subsection *Sparsae* Kobayasi：子座瘤状、丝状或柱状，子囊壳表生；嗜麦角菌群 Group *Clavicipiticola* Kobayasi，生于麦角菌 *Claviceps* 的菌核上；II. 致密型亚组 Subsection *Conferte* Kobayasi：可孕部明显，子囊壳表生或半埋生，当多数子囊壳聚集时看似埋生；III. 假埋生亚组 Subsection *Pseudoimmersae* Kobayasi：可孕部明显或模糊，子囊壳密集着生，半埋生；⑥垂直埋生组 Section *Cystocarpion* Kobayasi：真垂直埋生亚组 Subsection *Eucystocarpion* Kobayasi：可孕部顶生或间生，子座虫生或菌生，肉质，拟纤维质或小皮伞质，子囊壳埋

生；虫生类群 Series *Entomogena* Tul.：虫生(包括蜘蛛)；无附枝群 Group without apical appendage.：可孕部皮层拟薄壁组织，菌丝，栅栏状或未知；拟球形或拟盘状群；有顶生附枝群 Group with apical appendage.：菌生类群 Series *Mycogena* Tul.；⑦倾斜埋生组 Section *Cremastocarpon* Kobayasi：子座肉质或小皮伞状，子囊壳倾斜埋生，该组分为 2 个亚组，即 I. 肉质亚组 Subsect. *Carnose* Kobayasi：子座肉质；II. 拟小皮伞质亚组 Subsect. *Marasmoioideae* Kobayasi：子座拟小皮伞质。(3) 新虫草亚属 Subgenus *Neocordyceps* Kobayasi：子囊壳倾斜埋生，子囊孢子梭形，分隔。

4 基于系统发育分析的虫草

随着测序技术的发展及成本的降低，虫草在分类学上已不是一个单系的系统发育型(Cracraft 1983)。起初采用 ITS 序列解析时(Chen et al. 2002; Liu et al. 2002; Stensrud et al. 2005)，其变异水平无法区分近缘种。当利用其他基因，尤其是蛋白编码基因，如核糖体小亚基(SSU)、大亚基(LSU)、延伸因子(TEF)、RNA 多聚酶 II 大亚基(RPB1)、次大亚基(RPB2)、 β 微管蛋白(TUB)等，进行联合分析，可提供更多的系统发育信息。继后，以多基因“谱系一致的系统发育物种识别法(genealogical concordance phylogenetic species recognition, GCPSR)”作为物种分析在虫草中得到广泛应用(Sung et al. 2007; Khonsanit et al. 2020; Mongkolsamrit et al. 2020a)。

目前广泛使用的虫草系统发育的分类系统(Sung et al. 2007)将原属于虫草属的成员重新归于 3 个科的 4 个属，即(1)麦角菌科 *Clavicipitaceae*：包含了禾草共生物和一些昆

虫病原真菌; ①泛虫草菌属 *Metacordyceps*, 此属包括那些麦角菌科中与禾草共生体密切相关的真菌, 也包括那些绿僵菌的有性型和其他相关无性型。此属中的虫草具有鲜艳或暗色、肉质或坚韧的子座; (2) 虫草菌科 *Cordycipitaceae*: 以经典的虫草属 *Cordyceps* 为模式属, 子座具鲜明色彩, 肉质; ②虫草属 *Cordyceps*, 包含了原虫草属种的大部分种; (3) 线形虫草菌科 *Ophiocordycipitaceae*: 以线形虫草属 *Ophiocordyceps* 为模式属, 子座或多或少暗色, 柔韧, 子囊壳通常表生; ③线形虫草属 *Ophiocordyceps*, 包含了原虫草属的部分成员; ④大团囊虫草属 *Elaphocordyceps*, 该属包含全部寄生大团囊菌属真菌的虫草和一些紧密相关的寄生节肢动物的虫草。近年来随着测序成本的进一步降低, 基因组测序的虫草物种数量不断增加, 线粒体基因组和核基因组数据也开始用于虫草的系统发育分析 (Gao *et al.* 2011; Wang *et al.* 2016; Li *et al.* 2020a; Shu *et al.* 2020), 未来虫草的概念将还会进一步发生变化。

5 虫草面临的机遇与挑战

5.1 虫草成员范围扩大

随着系统发育分析的应用及“一种真菌一个名称 (1 F 1 N)”命名法规的实施, 虫草的成员范围逐渐扩大, 例如: Kepler *et al.* (2014) 基于 4 个蛋白编码基因序列, 将原泛虫草菌属成员重新划分, 而使绿僵菌属 *Metarhizium* Sorokin 包含原绿僵菌属 *Metarhizium*、泛虫草菌属 *Metacordyceps*、拟青霉属 *Paecilomyces* Bainier、野村菌属 *Nomuraea* Maubl. 及变色龙霉属 *Chamaeleomyces* Sigler 等全部或部分成员。Quandt *et al.* (2014) 基于 5 个基因序列系统发育分析及一个真菌一个名字的法则, 将线虫草菌科分成 6 个属, 即线形虫草菌属

Ophiocordyceps、弯颈霉属 *Tolypocladium* W. Gams、淡紫紫霉属 *Purpureocillium* Luangsa-ard, Hywel-Jones, Houbaken & Samson、镰孢霉属 *Harposporium* Lohde、德雷克霉属 *Drechmeria* W. Gams & H.-B. Jansson 和多头霉属 *Polycephalomyces* Kobayasi。据报道, 全球已有超过 800 余种虫草 (梁宗琦等 2007, 2012; 陈万浩等 2020), 新的虫草分类单元还在陆续报道中 (Kuephadungphan *et al.* 2019; Chen *et al.* 2020a, 2020b, 2020c, 2021; Khonsanit *et al.* 2020; Li *et al.* 2020b; Mongkolsamrit *et al.* 2020a, 2020b, 2021; Wang *et al.* 2020, 2021; Khao-ngam *et al.* 2021; Zha *et al.* 2021)。随着不断增多的成员, 虫草已与更多真菌类群有密切的亲缘关系。

5.2 虫草与寄主

虫草主要寄生于昆虫、螨、蜘蛛和大团囊菌属 *Elaphomyces* Nees & Fr. 的地下子实体 (梁宗琦等 2013)。随着虫草成员的扩大, 其与寄主的关系也在发生变化。例如: 变色龙霉属 *Chamaeleomyces* 真菌可感染变色龙出现肉芽肿状病变 (Sigler *et al.* 2010)。淡紫紫霉属 *Purpureocillium* 中淡紫紫孢菌 *Purpureocillium lilacinum* (Thom) Luangsa-ard, Houbaken, Hywel-Jones & Samson 能引起免疫低下哺乳动物和病人的感染 (Luangsa-ard *et al.* 2011)。多头霉属中云南多头霉 *Polycephalomyces yunnanensis* Hong Yu bis, Y.B. Wang & Y.D. Dai 可重寄生于下垂虫草 *Ophiocordyceps nutans* (Pat.) G.H. Sung, J.M. Sung, Hywel-Jones & Spatafora (Wang *et al.* 2015), 而绒多头霉 *Polycephalomyces tomentosus* (Schrad.) Seifert 可寄生黏菌 (Kepler *et al.* 2013)。此外, 虫草也可栖息于土壤, 内生于植物和昆虫 (Ownley *et al.* 2010; 王瑶 2014; Niu *et al.* 2019; 王旭 2019)。目前, 虫草涉

及的宿主范围包括土壤、植物、黏菌、真菌、线虫、蜘蛛、昆虫、变色龙以及人类。随着虫草成员及宿主范围的扩大,使它们与生态环境,包括与人类的生活与生产关系变得更加复杂。

5.3 虫草的应用与开发

虫草作为传统意义上的药用真菌与保健食品,由于其成员及宿主范围的扩大,已涉及人类机会病原,以及在生物材料、生物色素及新生物活性物质发现等多领域。虫草中所包含的活性物质通常包括甘露醇、核苷、氨基酸、麦角甾醇、虫草酸、虫草素和胞外多糖 (Yang *et al.* 2020)。其中胞外多糖因具有降血糖、保护肝肾、抗菌、抗炎、抗肿瘤、抗心律失常、提高免疫力、减轻机体疲劳等多种功能而备受关注 (Yu *et al.* 2004; Li *et al.* 2006; Leung *et al.* 2009; Wan *et al.* 2017; Wu *et al.* 2019)。而胞外多糖在生物材料方面的开发同样引人关注。一些虫草所产生的胞外多糖具有生物亲和性,同时刺激 IL-8 细胞因子促进伤口愈合,而另一些胞外多糖对猴肾细胞和人的皮肤成纤维细胞不具毒性,具有较好的生物相容性且其培养液还含有糖醛酸(透明质酸) (Madla *et al.* 2005)。此外,有一些胞外多糖对嗜酸乳杆菌和双歧杆菌的生长有促进作用,具作为益菌素的潜在应用前景 (Prathumpai *et al.* 2012),还有一些胞外多糖与硒形成的纳米颗粒具有成为富硒补充剂的潜力 (Xiao *et al.* 2021)。

生物色素广泛用于饮料、酒类、糕点等食品,日用化工产品如洗涤剂、牙膏和化妆品以及医药等领域,但在应用过程中,寻找可持续利用且对人类健康和环境相对安全的生物色素一直是人们不懈追求的目标 (Kalra *et al.* 2020)。虫草作为传统药用真菌和保健食品,一直被人们所使用,因而在生物色素

领域具有得天独厚的优势。研究发现蛹虫草 *Cordyceps militaris* 中的黄色素可明显诱导 PC-12 细胞类轴突 (Axonal-like) 的旺盛生长 (Schmidt *et al.* 2003)。单侧生虫草 *Cordyceps unilateralis* (Tul. & C. Tul.) Sacc. 产生 6 种胞外红色萘醌且有广谱抗菌和抗疟原虫活性 (Kittakoop *et al.* 1999)。双梭孢虫草 *Cordyceps bifusispora* O.E. Erikss. 经碱处理并与甲基纤维素混合成一种敷料敷于伤口,可防细菌感染,并刺激伤口组织分泌生长因子及进入增生重整期 (赖建达 2005)。拟细虫草 *Cordyceps gracilioides* Kobayasi 产生的 3 种新色素,对蛋白质酪氨酸磷酸酶具有较高的抑制活性 (Wei *et al.* 2015)。

目前,随着抗生素的广泛使用,病原微生物对抗生素的耐药性成为一个全球性的公共卫生问题,因而寻找不同来源的新生物活性物质备受关注。虫草被视为新生物活性物质来源中非常有前景的一类生物 (Helaly *et al.* 2017; Kuephadungphan *et al.* 2017, 2019)。前人研究发现虫草如拟青霉 *Paecilomyces*、束梗孢 *Stilbella* Lindau 和弯颈霉 *Tolypocladium* 均可产生哌伯霉素类活性肽 (peptaibiotics), 而该物质为一类含 5–20 个氨基酸残基的独特抗菌肽,具有抗菌、抗病毒、诱导肿瘤细胞凋亡、诱导植物抗性等多种生物学活性 (Zeilinger 2015)。近年来发现,此前报道的绿僵菌素 (destruxins)、白僵菌环四肽 (bassianolide)、卵孢菌素 (oosporein) 均具有抑菌、抗菌活性 (Litwin *et al.* 2020)。研究发现来源于球束梗孢属 *Gibellula* 真菌生物碱和 pigmentosin 展现出抑制金黄色酿脓葡萄球菌 *Staphylococcus aureus* Rosenbach 生物膜形成的活性 (Helaly *et al.* 2019; Kuephadungphan *et al.* 2019), 而来源于 *Cordyceps morakotii* Tasan., Thanakitp. &

Luangsa-ard 的蒽酮等活性物质则具有多种抗真菌、细菌活性 (Wang *et al.* 2019)。总之, 虫草作为一类具有丰富生物活性物质的资源库, 其潜力还有待人们进一步挖掘 (Das *et al.* 2020)。

随着学科间的交叉融合逐步深入, 虫草除了上述方面的应用外, 还在环境、纳米材料及生物转化等领域展现出广阔的应用前景。研究发现, 绿僵菌可用于在家居用品中广泛使用的壬基酚 Nonylphenols、作为酯化催化剂 Dibutyltin、碳氢化合物等对环境有害的物质的降解, 且在培养条件下可完全降解为二氧化碳和水 (Różalska *et al.* 2013; Huarte-Bonnet *et al.* 2018; Szewczyk *et al.* 2018; Nowak *et al.* 2019; Stolarek *et al.* 2019)。虫草产生的银离子纳米颗粒 (AgNPs) 及钛纳米颗粒 (TiNPs) 不仅对细菌、真菌具有抑菌活性, 还对有害昆虫具有致死作用 (Banu & Balasubramanian 2014; Amerasan *et al.* 2016; Różalska *et al.* 2016, 2018; Yosri *et al.* 2018; Wang *et al.* 2019)。此外, 虫草还可对甾类化合物 (steroid)、类黄酮类化合物 (flavonoid) 等进行生物转化, 产生更高活性的衍生物且更利于吸收 (Yang *et al.* 2018; Dou *et al.* 2019; Kozłowska *et al.* 2019)。

总之, 随着人们对虫草认识的不断深入, 其概念也将逐渐发生变化。虫草不再是独处深闺, 而是以多种身份融入人类的生产和生活!

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