



泰國台商的攻緬策略

Taiwan Firms in Thailand Turning Their Eyes to Myanmar

泰國是緬甸的第二大貿易夥伴，過去5年，累計泰商投資緬甸的金額已達59.7億美元。
 泰國也是緬甸民生物資的主要供應國，緬甸當地向有「富人用泰國貨、窮人用中國貨」的消費傾向；
 泰國因缺工、工資偏高等問題，大量引進廉價的緬甸外勞，估計約有上百萬名緬甸勞工在泰國工作。
 身為泰國第三大貿易夥伴的台商，在這一波的緬甸改革開放中，不落人後地搭上投資緬甸熱潮，
 他們的攻緬策略，值得借鏡。

Thailand is Myanmar's second-largest trading partner, and over the past five years Thailand-based businesses have invested US\$5.97 billion in Myanmar. Thailand is also a major supplier of daily-use goods for Myanmar citizens, and consumption habits there are summed up in the expression "the wealthy use Thai products, the poor use Chinese products." Because Thailand is currently going through a labor shortage and wages are rising, large amounts of cheap labor have been brought in from Myanmar—in fact, it is estimated that there are over one million Myanmar laborers working in Thailand. Firms from Taiwan, Thailand's third largest trading partner, have not failed to jump aboard the foreign investment train being propelled forward by Myanmar's recent liberalization measures. What strategies have they adopted for success in Myanmar?

鎖定泰緬邊貿區的泰金寶

Weighing the possibilities: Cal-Comp



由台灣的金仁寶集團投資、成立於1989年，以生產外接式硬碟、電視機上盒、印表機與多功能事務機等電腦通訊周邊產品的泰金寶科技公司，是泰國的上市公司，也是第一大電子出口廠商，擁有兩個廠區、8個工廠及8,000名員工，年出口產值高達20億美元。

在中國大陸、馬來西亞、菲律賓、巴西、美國及墨西哥等國皆有設廠的泰金寶，最近也將目標指向緬甸，以及近期經濟表現頗佳的印尼。

泰金寶科技總經理鄒孔訓說，泰金寶是OEM代工廠，向以「接近客戶與市場」為設廠考量，緬甸廉價勞力不是單一的決定因素。

泰金寶最近才在客戶的頻頻催促下，前往國人也相對陌生的巴西設廠，估計可為雙方省下40%的

泰金寶科技公司總經理鄒孔訓表示，他們正在評估投資緬甸的可能模式。

Tony Chou, managing director of Cal-Comp Thailand, is currently evaluating various models for possibly investing in Myanmar.



隨著投資緬甸的熱潮，位於仰光西側的亞洲集團港口，近年來的貨櫃量不斷增加。
 As foreign investment has flooded into Myanmar, container traffic at the Asia World Port Terminal (located at the western edge of Yangon) has steadily increased.

Cal-Comp Electronics & Communications Thailand, founded in 1989 as a subsidiary of Taiwan's New Kinpp Group, produces mainly computer and information peripheral products such as external hard drives, television set-top boxes, printers, and multifunctional business machines. Listed on the Thai stock market, it is also the largest exporter of manufactured electronics in that country. It has two major factory complexes, eight factory buildings, and 8000 employees, with annual export production value reaching US\$2 billion.

With plants already in mainland China, Brazil, the United States, and Mexico, Cal-Comp Thailand has recently set its sights on Myanmar.

Cal-Comp Thailand managing director Tony Chou explains that they do OEM manufacturing, and the main consideration in setting up production facilities has always been

to get geographically closer to clients and markets, which means that the low cost of labor in Myanmar is by no means the only consideration.

It was only very recently that Cal-Comp Thailand, encouraged repeatedly by clients, set up a factory in Brazil, a place which is distant and unfamiliar to most Taiwanese. They estimate that both they and their clients will reap 40% tax savings on that investment. Now that many major global corporations with which Cal-Comp Thailand has had long-term cooperative relations—including Toshiba, Hewlett-Packard, Western Digital, and Nikon—are also interested in moving into Myanmar, naturally Cal-Comp Thailand, as their main OEM manufacturer, has had to make preliminary investigations into the investment climate there.

各項稅負；而目前與該公司有長期合作關係的 Toshiba、HP、WD（主要生產網路路由器）和 Nikon 等國際大廠，已有廠商正在前往評估緬甸設廠的可能性，身負產品代工重責的泰金寶，當然得預作準備。

不過，今年5月，鄒孔訓實地走訪緬甸後發現，當地缺水缺電、道路及港口設施品質不佳，基礎建設又落後，實非電子廠的進場時機；但因日後配合客戶需求而前進緬甸的機會頗高，必須提前思索因應對策。

幾經評估，鄒孔訓認為，眼前最佳的設廠點，應是在泰國鄰近緬甸的 Sai York、Ban Kao 等邊界城市。因為泰緬政府有意在邊境設立類似美墨邊界的「邊貿特區」，泰商在此建廠，將可享有免關稅優惠，亦能大量聘僱廉價緬勞；未來當聯外道路修建完成後，產品還可就近送往泰國政府為緬甸開發的 DAWEI 深水港經濟特區出口。

然而，鄒孔訓也強調，所有設廠方案仍在審慎評估中，泰金寶未來會視緬甸的情勢變化與市場需求再做調整。 □

Chou visited Myanmar in May of this year. After discovering that both water and power supplies are unreliable, that road and port facilities are inadequate, and that infrastructure is backward, he realized that now is not the time for an electronics factory in this country. But since there is a high possibility that ultimately Cal-Comp Thailand will move into Myanmar to accommodate their clients, they must begin even now to consider strategies to cope with these various problems.

After several evaluations, Chou has reached the conclusion that the best places to set up a factory at the present moment would be cities in Thailand that are right on the border with Myanmar, cities like Sai York and Ban Kao. The governments of Thailand and Myanmar are thinking about setting up "border-trade special zones" similar to those along the US-Mexico border, where Thai firms that set up factories can enjoy exemption from customs duties for cross-border trade and also will be able to employ cheap labor from across the boundary. When roads connecting these areas to the outside world are completed in the future, it will be possible to transport products rapidly to the special economic zone at the deepwater port of Dawei, a city in southern Myanmar close to Thailand. (The port is currently being constructed by the Thai government.)

However, as Chou emphasizes, they are still in the evaluation stage, and Cal-Comp Thailand will only make a final decision after observing how the situation develops in Myanmar and after taking into account market conditions. □

跨國共創雙贏的泰南僑

什麼產品最受經濟落後國家的民衆歡迎？單價便宜、口味又多元的泡麵，肯定是選項之一。1990年代在中國大陸闖出一片天的「康師傅方便麵」就是實例。

二十多年後的今天，又有台商計畫將「泡麵經驗」移植緬甸，他們是已在緬甸深耕多年的台商吳守恩，以及東南亞第一大的米果與速食麵集團泰南僑。

18年前即至緬甸發展的吳守恩，原本是在緬甸經營最深的台資集團「金獅」旗下工作（擁有合板廠、房地產公司及養雞場等產業）。其後他獨立創立「海王集團」，發展種畜場與甲殼素生物處理廠等事業，在地經營頗為深入。

10年前，吳守恩就計畫在緬甸投資泡麵廠，但受限於政局動盪、幣值不穩等因素而擱置；3年前，眼見緬甸情勢轉佳，塵封多年的腹案再度啟動，並投

What kinds of products are most popular among citizens in countries with undeveloped economies? Instant noodles, which have a low unit price and come in a variety of flavors, would certainly make the list. The Master Kong company, which built a huge instant noodle empire in mainland China in the 1990s, is living proof.

Today, some Taiwanese businesspeople are planning to transplant this "instant noodle experience" to Myanmar. They are Kevin Wu, who has been laying groundwork in Myanmar for many years, and Namchow Thailand (owned by Taiwan's Namchow Group), the largest rice cracker and instant noodle manufacturer in Southeast Asia.

Wu first came to Myanmar 18 years ago, working for Chin Su Myanmar, which has made deeper operational inroads into Myanmar than any other corporation owned by Taiwanese capital (the group's operations include a plywood factory, a real estate company, and a chicken farm). Later, Wu struck out on his own, creating the Hai Wang Group and founding a livestock breeding farm, a chitin processing plant, and other businesses. Three years ago, seeing that things were taking a turn for the better in Myanmar, he revived the instant-noodle plan that had been collecting dust for many years. The new factory will begin mass production as early as February of 2013.

The most important thing about instant noodles is flavor. Wu, who had no previous experience in this line, only dared to plunge into this unfamiliar territory because he had an extremely resilient and powerful partner in Namchow Thailand, who sell their food products (including rice crackers and instant noodles) in 40 to 50 countries worldwide.

Wu explains that the tastes of consumers in Myanmar

Transnational synergy: Namchow Thailand

入一年半時間進行市場調查才開始建廠，新廠預計最快將在明年2月量產。

泡麵首重口味，過去毫無泡麵生產經驗的吳守恩，之所以敢大膽切入這個陌生領域，即因他有個堅強的技術合作夥伴——將米果、速食麵等產品行銷全球四、五十個國家的泰南僑。

吳守恩解釋，泰、緬兩地的消費口味及風俗習慣接近，例如在泡麵選擇上，都偏好酸辣口感，不喜歡華人常使用的花椒調味，目前緬甸泡麵市場的第一品牌，就是來自泰國的「MaMa」泡麵。

正因泰緬口味有90%的相似度，而緬甸市場又是泰南僑急欲開發的新生地，雙方一拍即合，決定由吳守恩負責生產、包裝與行銷；研發能力強大的泰南僑，則負責泡麵口味的技術指導。

令人好奇的是，實力雄厚的泰南僑，為何不自行進軍緬甸？

are similar to those in Thailand. When it comes to choosing instant noodles, sour and hot flavors are preferred. In fact, the brand that currently holds the number-one spot in the instant noodle market in Myanmar is a Thai firm, MaMa.

With an overlap in flavors with Thailand of 90% and Myanmar being a new market that Namchow Thailand is extremely anxious to develop, the two parties quickly agreed to cooperate. It was decided that Wu would take responsibility for production, packaging, and marketing. Meanwhile, Namchow Thailand, with enormous research and development capabilities, would provide technical guidance for the flavorings.

Webber Wey, finance and administration director of Namchow Thailand, says that given the high costs of land and poor infrastructure in Myanmar, they would have considered investment on their own to be too risky. But given the opportunity to cooperate with someone like Kevin Wu,

泰南僑企業財務長魏亦堅坦言，緬甸的土地成本高、基礎建設不佳，投資風險太高；但若與早已熟悉市場運作的吳守恩合作，就能立於不敗之地，未來還能透過對方通路，行銷更多產品，「這是共創雙贏的最佳策略」。

有了泰南僑的加持，宛如吃了定心丸的吳守恩，更能專心開拓市場。目前他已擬定密集的電視廣告行銷策略，也會複製台灣廠商常用的抽獎方式刺激消費，攻占市場。

可望成為緬甸「吳師傅」的吳守恩信心滿滿地說，緬甸的娛樂尚不發達，民衆很崇拜偶像，他們會請當紅明星代言產品，並舉辦全國走透透的巡迴演唱會促銷，一定能在市場上掀起買泡麵、吃泡麵的熱潮。 □



who has long been familiar with the local market there, they feel that they can't lose.

For Wu, having the support of Namchow Thailand is like taking a giant Xanax: all his worries have magically disappeared. His voice filled with confidence, he reveals that he plans to hire a popular star to become spokesperson for the product, and will hold a national concert tour. Given that people in Myanmar idolize their pop stars, and that the entertainment industry as it exists now is not very developed, he expects the tour to generate "instant" enthusiasm! □

萬丈高樓平地起，站在工廠預定地前的吳守恩夫婦將與泰國知名台商泰南僑合作，共同開發市場。（上）泰南僑生產的泡麵。 Literally starting from the ground up, Kevin Wu and his wife are planning to construct an instant-noodle factory in Myanmar, and they will work with Namchow Thailand, a well-known firm owned by Taiwan's Namchow Group, to develop the Myanmar market. The upper photo shows packets of Namchow instant noodles.



素有亞洲「蓋王」之稱的宏全國際公司，已計畫在年底前，前進緬甸設廠。

只要走入便利商店，打開飲料櫃，就能感受宏全無所不在的影響力——台灣約有8成的瓶蓋、6成的寶特瓶，甚至連國人熟悉的「茶裏王」、「純喫茶」、「美利果」、「爽健美」等系列飲料，都是由該公司代工，堪稱是飲料業背後的「隱形巨人」。

創立於1969年的宏全，原本只是一家位於彰化的家庭式瓶蓋加工廠，以生產瓶蓋內墊及吸管為主，其後業務又延伸至鋁蓋、塑蓋領域，並逐步拓展至PET寶特瓶、彩印收縮標籤、LPDE集合式熱縮型包膜等，最後再發展飲料充填及代工業務，垂直整合成「一條龍」的生產線。包括國際大廠可口可樂、百事可樂，台灣的統一企業，以及大陸最大的飲料廠商娃哈哈，皆為其客戶。

「在地生產」是宏全擴展國際版圖的策略，由於飲料的運輸成本高，唯有廣設「接近各地消費者」

Hon Chuan Enterprise Company, known as the “bottle cap king of Asia,” already has plans in place to invest, via their subsidiary in Thailand, in construction of a factory in Myanmar before the end of this year.

You merely have to walk into any convenience store and open the soft drinks refrigerator to feel Hon Chuan’s omnipresent influence. An incredible 80% of the caps and 60% of the bottles for beverages in Taiwan are produced by Hon Chuan, known as the “shadow giant” behind the beverage industry.



戴宏全帶領的宏全國際，堪稱飲料界的「隱形巨人」（左）。宏全泰國廠生產瓶胚與瓶蓋，生產線十分完整。（右）
Taiwan Hon Chuan Enterprise, led by Keith H.C. Dai (left), is known as “the shadow giant” of the beverage industry. Hon Chuan produces bottle pre-forms and caps in their very up-to-date Thai factory (below).



的生產據點，才能壓低物流費用、提高利潤。因此早自1996年，該公司即率先前進大陸，至今已有16個生產據點；2005年後，主攻東南亞新興經濟市場，開放中的緬甸則是下一個基地。

宏全國際董事長戴宏全說，2007年起，宏全即開始供貨給緬甸第一大飲料廠Pinya——當時Pinya有意將原以玻璃瓶包裝的碳酸飲料，改為耐摔又輕巧的寶特瓶，卻苦無技術支援，直至宏全主動接觸後，Pinya的「換瓶計畫」才得以成功。

「我們不只賣瓶蓋和瓶胚，還特別派技術人員去指導他們如何吹瓶及充填飲料，逐步建立穩定的合作關係，」戴宏全說。

當時，宏全都由泰國廠調度產品出口至緬甸。最近兩年，由於緬甸的政經情勢穩定，幾經評估後，宏全終於下定決心親赴緬甸設廠，並在去年12月，仰光地價尚未大幅上漲前，搶先在明格拉洞工業區買下3萬平方公尺的土地。目前宏全正積極進行建廠

Founded in 1969, Hon Chuan started as a small family factory, producing cap cushions and straws. Later their business expanded to include aluminum caps, plastic caps, and eventually PET bottles, and they later added beverage-bottling and OEM services to create an all-in-one integrated production line. International giants like Coca-Cola, Pepsi, and Taiwan’s own President Enterprises, as well as mainland China’s biggest beverage producer Wahaha, are all Hon Chuan clients.

籌備計畫，只待取得公司營運執照後即可動工，預估整體建廠成本高達1,000萬美元，可望在明年第三季開始量產。

宏全為何願意砸大錢在緬甸投資？戴宏全解釋，他們對緬甸環境知之甚深，可以做好各項風險的因應策略；未來設廠後，亦能節省15~20%的運輸成本，「即使以後泰國廠再碰到嚴重水患，也能就近從緬甸廠調度產品。」

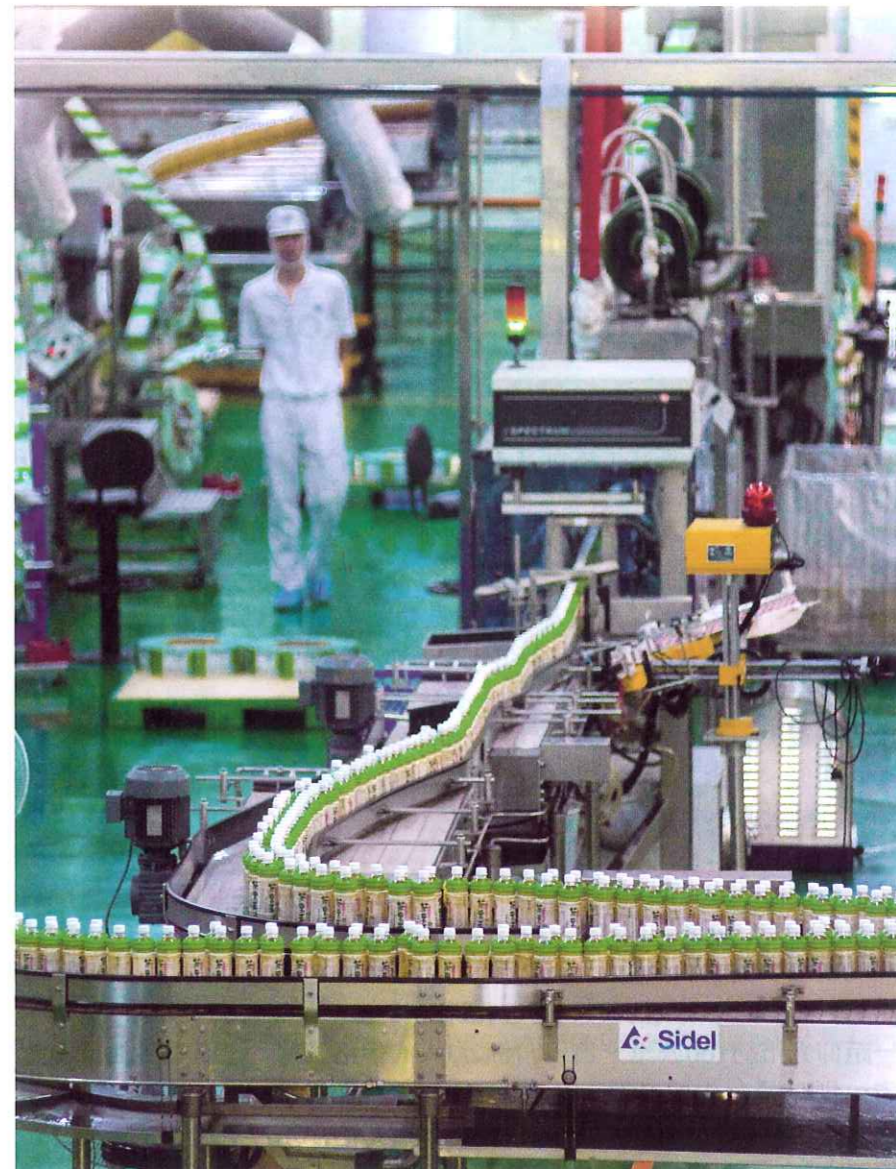
日前可口可樂已宣布將與Pinya合作設廠，其他飲料大廠也個個磨拳擦掌，戴宏全樂觀地說，緬甸的飲料市場即將起飛，只要做好準備，就能搶占先機。 □

“Local production” is the underlying strategy for Hon Chuan’s global deployments. Because transport is very expensive for beverages, logistics costs are best minimized by making the product as close as possible to the consumer. This is why Hon Chuan was, back in 1996, among the first firms to invest in mainland China, and today has 16 production facilities there. Since 2005 the company has been moving into the emerging markets of Southeast Asia, and Myanmar, just starting to open up, is the logical next step.

Hon Chuan chairman Keith H.C. Dai says that Hon Chuan began providing products to Myanmar’s largest drinks maker, Pinya, back in 2007. Pinya wanted to switch from glass to plastic—lighter and more resilient—for bottles for their carbonated beverages, but lacked the technical support to do so. It was only after they contacted Hon Chuan that Pinya was able to get their plan off the drawing board.

“We didn’t just sell them bottle caps and bottle pre-forms [a.k.a. bottle embryos], we sent technical personnel to teach them how to inflate the bottles and inject the beverages into them, steadily building up a cooperative relationship,” explains Dai.

Taking into account the stability in Myanmar’s economic and political conditions in the last few years, Hon Chuan finally decided to set up a factory there. At the end



宏全台中無菌飲料廠的主要客戶為統一企業。
Hon Chuan’s cutting-edge germ-free plant in Taichung produces mainly for President Enterprises.

of 2011, a time when land prices had not yet begun to rise sharply in Yangon, they got the jump on their competition by purchasing 30,000 square meters in the Mingaladon Industrial Park. They are now only waiting to get their company operating license to break ground, and they expect to begin mass production at the US\$10 million facility in the third quarter of 2013.

Dai says that when the factory is up and running, the company will cut transport costs by 15–20%. He says optimistically that Myanmar’s market for beverages is on the verge of taking off. Coca-Cola has already announced it will begin cooperating with Pinya, and other drinks manufacturers are also revving their engines. The early bird will get the worm. □

(Lin Hsin-ching/photos by Chuang Kung-ju/tr. by Phil Newell)