

等待春天的緬甸養殖業

Aquaculture Investors Wait for Their Ship to Come In

緬甸有句俗諺說：「緬甸只有窮人，不會餓死人」。這是因為緬甸的物產豐饒，田野間遍布著各式野菜、野果，長達兩千兩百多公里的海岸線、大大小小的河川和內陸湖泊，更蘊藏著捕撈不盡的漁產，隨時可為沒錢買米的底層民眾補充蛋白質。

四季皆夏的氣候與縱橫交錯的湖泊、河流，也成為養殖業者眼中的寶地。向以水產養殖技術聞名全球的台商，早在10年前挺進此地。他們歷經缺電、匯差震盪、冷凍設備落後等風風雨雨，正在苦候緬甸經濟起飛的春天。

綿延2,288公里的伊洛瓦底江，是緬甸最重要的經濟命脈，光是流域面積即達緬甸國土的6成以上；富庶的沿岸平原和廣達3萬2,400平方公里的伊洛瓦底江三角洲，更是緬甸的穀倉與人口最稠密的區域。

距仰光市約100公里、占三角洲2/3大的伊洛瓦底省，則是精華中的精華，不但盛產水稻及五穀雜糧，阡陌交錯的湖泊、河川，亦蘊藏著豐富的漁業資源。

相中這塊「魚米之鄉」的養殖業者不在少數，其中又以來自台灣宜蘭的安達曼水產生技公司董事長林孟崇最具代表。

以興建萬里長城的精神打造魚塢

已有40年歷史的安達曼水產生技，在宜蘭、基隆一帶頗具知名度，旗下擁有數家蝦米、魚粉加工廠及冷凍工廠，亦是知名的「紅鷹牌海底雞」股東。

2003年，有感於台灣漁產資源漸趨枯竭的林孟崇，在友人引薦下，決定轉戰治安良好、水量豐沛且四季溫暖，適合養殖的緬甸，期待能開創事業第二春。

他大手筆地砸下新台幣1億5,000萬元，在當時地價仍偏低的伊洛瓦底省，買下了廣達1,225公頃的土地。

不過，要在欠缺重型機械設備的緬甸開發大型

魚塢並不容易，所幸此地最不缺的就是人工，林孟崇找來數百名臨時工，以兩人一組的協力方式，一畚箕又一畚箕地挖出比宜蘭羅東鎮還大的廣袤魚塢（羅東鎮面積約為1,134公頃）。

提及這段如同「愚公移山」的往事，對全靠人力的「緬甸傳統工法」頗為讚賞的林孟崇，忍不住打趣說：「難怪人類早在幾千年前，就能打造出工程浩大的萬里長城！」

好不容易闢建魚塢後，接下來的重頭戲則是放養魚苗。林孟崇指出，緬甸雖有綿長的海岸線，卻是少數不愛吃海魚的國家；篤信佛教的緬甸人，甚至寧選冰鮮保存的死魚、死蝦，也不願吃「會種下殺生罪業」的活魚。

入境隨俗的安達曼，因而選擇淡水養殖，魚種則以鯪魚、鰱魚、草魚、鯖魚、吳郭魚、淡水白鯧等廣受各地市場歡迎的淡水魚，以及本地特產的長腳蝦（即台灣俗稱的泰國蝦）。

以空間爭取產量的粗放養殖

令人洩氣的是，在基礎建設極為落後的緬甸，奠基於高科技的台灣養殖技術，幾乎全無用武之地。

例如，台灣魚塢最常見的「密集養殖」作業——以增氧機打氣，增加單位面積產量的養殖方式，就完全不可能在極度缺電的緬甸實現。

因此，台灣魚塢每公頃約可放養50萬條魚苗，但同樣面積在純靠水中氧氣養魚的緬甸魚塢，只能放養5萬條魚苗，「所以才需要這麼廣大的魚塢呀！」林孟崇嘆了一口氣說。

此外，緬甸也缺乏專業的冷凍宅配業者，只能依靠最原始的「卡車加碎冰」方式運送漁獲，但偏偏路況常顛簸難行，大幅增加腐壞風險；若是不幸又遇上貨車拋錨、延誤行程，往往整車魚蝦都會跟著「泡湯」！

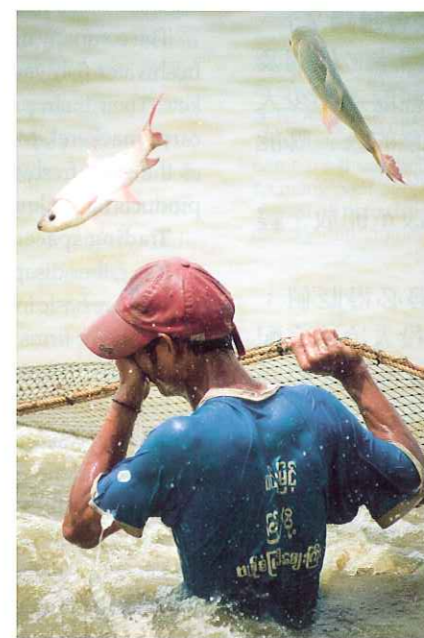
雖然如此，「粗放式」的養殖方式，仍有難以取代的優點，因為在這種最接近天然環境成長的淡水



安達曼水產公司董事長林孟崇，坐在小船上巡視這片全用人力打造的廣袤魚塢。（下）緬甸當地仍使用傳統的圍網捕魚方式，一名工人捕魚時用手保護臉部，惟恐被驚嚇的魚群撞擊到。
Lin Mong-chung (above), chairman of Bioandaman Organic Seafood Company, sits in a small boat, surveying his vast aquaculture pond network, constructed entirely by manual labor. Purse-seine fishing (below) is still the norm in Myanmar. This worker is using one hand to protect himself against being struck in the face by panicking fish.

There is a saying in Myanmar: "Here there are only poor people, but no one is starving to death." This is because Myanmar is rich in the products of nature. Wild fruits and vegetables are widely distributed, and there is a seemingly inexhaustible supply of seafood from the country's 2200-kilometer coastline, rivers large and small, and inland lakes. Even the poorest people in society, lacking money to buy even rice, can find sustenance and protein from the land.

With a climate that is consistently hot year-round and a vast network of intersecting lakes and rivers, Myanmar provides ideal conditions for the aquaculture industry. Taiwanese aquaculture firms, who operate with



world-class technology and skills, began coming here as early as a decade ago. Persevering through power shortages, currency fluctuations, and a complete lack of specialized freezer services, they have long been waiting for the day when Myanmar's economy will finally take off.

The 2288-kilometer long Ayeyarwady (or Irrawaddy) River is Myanmar's most important economic artery. The total watershed area of this single waterway accounts for more than 60% of Myanmar's national territory. The highly fertile floodplains and the Ayeyarwady River Delta, which alone has an area of 32,400 square kilometers, are the grain basket of the country and also its most densely populated area.

魚，肉質極為鮮美，口感比起台灣人最愛吃的「現撈海魚」毫不遜色，更無一般淡水魚最讓饕客詬病的「土味」。

爲了提高粗放養殖的價值，林孟崇也率先在2006年取得德國與泰國的有機認證，外銷價格就能比同業提高5成。「有機養殖的認證標準很嚴，得管控飼料品質，也不准灑藥，還要求必須人道宰殺；但這些規定在只能以最原始方式養殖的緬甸，反倒都不成問題！」他苦笑說。

經歷匯差震盪的經營危機

然而，即使像林孟崇這樣兢兢業業經營的養殖業者，也難抵擋最近幾年打垮緬甸出口業者的匯差震盪。

原來林孟崇的漁獲，主攻欠缺淡水魚的歐洲、中東等外銷市場。但自2010年後，緬幣匯率節節高升，一路由1美元兌1,300緬幣、升值至1美元兌800緬幣（現回貶至1美元兌850緬幣）左右，匯率整整升值近40%，嚴重打擊出口業者的生存空間。

衆多無法因應匯差波動的中小型養殖業者，只有倒閉一途；同樣深受衝擊的安達曼，也不得不關閉廣達千頃的魚塢，僅留1/6的土地繼續養殖。

出口生意難以維持，安達曼只能轉攻利潤有限的內銷市場，如今尚在養殖的魚塢計有225公頃，年漁獲量約爲千噸，營收則僅約新台幣5,000萬元。

林孟崇解釋，在漁業資源不虞匱乏的緬甸，向有「富人吃肉、窮人吃魚」的迷思。漁獲既以所得偏低者爲主力消費群，價格就難以抬高，平均1緬斤（約1.6公斤）的淡水魚，僅售1500緬幣（約新台幣50元）；但同等重量的豬肉、羊肉，售價卻可飆高4~10倍，「這樣的市況，賣魚的人怎麼會賺錢？」

雖然安達曼在緬甸經營近10年仍未回本。但問及是否後悔前來緬甸投資，今年65歲、經歷過不少大風大浪的林孟崇淡淡地笑說：「做生意的人，哪能說什麼後悔！」

展望未來，他認爲緬甸已逐步走向改革開放，經濟景況好轉指日可待。

「相信爲了鼓勵出口產業，緬幣勢必得貶值；而當外商陸續進場後，一定也會有人投入冷凍宅配及水產加工事業，我們的經營成本就可望大幅降低。」老驥伏櫪的林孟崇，對養殖事業的熱情不減，正待一旦情勢好轉，就將休養生息的千頃魚塢再度投入生產。

遠渡重洋打拚的緬甸台商，走過歷歷在目的辛酸血淚奮鬥史，而林孟崇的樂觀、靈活、不輕言放棄，就是強韌不屈的台商精神之最佳寫照。 □

The Ayeyarwady Region, located about 100 kilometers away from the largest city of Yangon and occupying about two thirds of the delta, is the *crème de la crème*. Not only is it a major producer of paddy rice and other grains, its lakes and rivers are home to rich fisheries resources. No wonder many aquaculture entrepreneurs have been attracted here. Among them, perhaps the most representative is Bioandaman Organic Seafood chairman Lin Mong-chung, who hails from Yilan County in Taiwan.

People power?

The company has already been around for 40 years, and is well known in the Yilan-Keelung belt. The company's subsidiaries include several dried shrimp and fish powder processing plants, as well as freezer facilities, and it is a major shareholder in the renowned Sea Chicken brand.

Back in 2003, sensing that Taiwan's fisheries resources were being squeezed dry, Lin, through an introduction from a friend, decided to turn his attention to Myanmar, attracted by its low crime, abundant water supplies, and year-round warm weather. Here he hoped to reproduce his earlier entrepreneurial successes. Equipped with a war chest of NT\$150 million at a time when prices were still quite low, he bought 1225 hectares of land in the Ayeyarwady Region.

However, it proved to be no easy feat to construct an enormous aquaculture facility in a country like Myanmar, which lacked any heavy machinery. Fortunately for Lin, the country has never had a shortage of human muscle power, and he hired hundreds of temporary workers, organized in relay teams of two, and basketful by basketful they dug out a fish-raising facility larger than all of Luodong Township in Yilan County (the area of the township being about 1134 hectares).

Having overcome many difficulties to construct his fishponds, next came the main event: releasing the fish fry. Lin points out that although Myanmar has a long coastline, it is one of the few countries where ocean seafood is not widely consumed. Devout Buddhists, the Burmese go so far as to prefer frozen fish, which after all are already dead, rather than catching live fish and eating them fresh, which is thought to create bad karma.

The company quickly adapted to local customs, and opted for freshwater fish varieties known to be popular in overseas markets. Their main products included mud carp, silver carp, grass carp, mackerel, Mozambique tilapia, and black pacu, as well as the giant freshwater prawn, one of Myanmar's special local products (albeit known in Taiwan as "Thai prawn").

Trading space for volume

It is rather disappointing, however, to discover that in Myanmar, where basic infrastructure is very primitive, there is little opportunity for firms to bring into play the high-tech and advanced aquaculture techniques for which Taiwan is famous.

For example, because Myanmar has an insufficient supply of electricity, it is simply impossible to employ the concentrated aquaculture techniques that are so widely seen in Taiwan, because these approaches, which allow greater production volume per area, rely on electrically powered machinery to oxygenate the water. For this reason, whereas in Taiwan about 500,000 fish fry are released for each hectare of ponds, only about 50,000 fry can be released in a

comparable area in Myanmar, where the sole oxygen available is whatever happens to be in the water naturally. "So now you know why I need such an enormous facility!" says Lin with a sigh.

In addition, there is no specialist food-freezing industry in Myanmar. Freshly caught fish have to be transported using the most basic method: a truck packed with crushed ice. However, because the roads are in such poor condition, making transport slow, the risk of the fish simply rotting is greatly increased. And if your driver is unlucky enough to meet with a road accident or gets lost along the way, the whole truckload of seafood goes to waste!

Despite these rough edges, there are still unique advantages for the aquaculture industry here. Most importantly, freshwater fish growing to maturity in an environment that is very close to their natural one have better-quality and better-looking meat, with a texture by no means inferior to the "freshly caught seafood" so beloved by Taiwanese. Moreover, they don't have that "muddy taste" that diners so often complain about with farmed freshwater fish.

Aiming to increase the value of this low-tech aquaculture, in 2006 Lin, proving to be a pioneer yet again, won "organic" certification in both Germany and Thailand, making it possible to export his products for 50% more than the price his competitors were getting. "The criteria for organic aquaculture certification are very strict. You have to exercise stringent control over the quality of the feed, and you are not permitted to use chemicals of any kind, and moreover the fish have to be killed in a humane manner. It just so happens, oddly enough, that these criteria are no problem at all in a place like Myanmar, where no-tech methods are the only ones available!" he says with a laugh, appreciating the irony of the situation.

Currency jolts

Be that as it may, even the wiliest operators in the aquaculture business have been powerless to do anything about the currency fluctuations that have proven so devastating to export firms in Myanmar.

Originally Lin intended to export his product to markets in Europe and the Middle East, where freshwater fish is in relatively short supply. But the Myanmar currency, the kyat, began to appreciate in 2010, rising from 1300 to the US dollar to 800 against the dollar (at the time of writing, the rate is about 850:1). This 40% rise in the value of the kyat proved to be a serious blow to exporters. Many small and medium-sized enterprises, unable to cope with the currency fluctuations, went bankrupt. Even Bioandaman was forced to close about 1000 hectares of fishponds, keeping only one-sixth of its total aquaculture area in operation.

With the prospects for exports more or less extinguished, Bioandaman had little choice but to explore the domestic market, which offers only limited profits. Today, producing about 1000 metric tons of fish a year from just 225 hectares of fishponds, the company's annual revenues are only about NT\$50 million. Lin explains that in Myanmar, where there is no shortage of fisheries resources, there is a widespread belief that "the rich eat meat; fish is for the poor." Naturally, it is difficult to get a very high price for any product when your main consumers are the people with the lowest incomes.

The bottom line is that Bioandaman has still not recouped its initial investment after nearly 10 years of operations in Myanmar. But when asked whether or not he regrets having invested here, Lin—now 65 years old and a man who has seen a great deal of life—laughs the question off: "If you're a businessman, you can only take your best shot. Why waste time talking about regrets?"

Instead, he looks to the future. He is optimistic that Myanmar will continue to reform and open up to the outside world, and that economic conditions will take a turn for the better. "I believe that the country will eventually devalue its currency in order to promote exports. Moreover, as more and more foreign firms come here, inevitably someone will invest in the businesses of freezing, delivery, and processing of fish products, and at that point we expect our operating costs will fall sharply." A grizzled veteran, Lin has lost none of his passion for aquaculture, and he is just waiting for the day when the situation improves to bring his thousand hectares of idle fishponds back into operation.

Lin Mong-chung, with his optimism, flexibility, and indomitable spirit, is a shining example of the many Taiwanese businesspeople who have traveled so far and struggled so hard to make their way in Myanmar. □

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



緬甸隨處可見茅草屋與舢舨，衆多貧苦民衆的食、住需求全由大自然得到滿足。
You can see grass huts and sampans throughout Myanmar, as many poor people meet almost all their daily needs directly from nature.