

AmCham Shanghai June Covid Impact Survey

上海美国商会调研报告：
新冠疫情对企业的影响
2022年6月 | 上海



The American Chamber of Commerce in Shanghai
上海美国商会

Survey Highlights



Between June 7-9, AmCham Shanghai conducted a survey of its members to assess the impact of recent Covid lockdowns in Shanghai on foreign companies. The survey was answered by 133 member companies, with 69 respondents from the manufacturing sector and 64 respondents from the consumer and services sectors. The key survey findings include:

- 93% of respondents have cut their revenue projections for the year. 25% of respondents expect revenues to be more than 20% lower than originally projected, while this figure reaches 36% for consumer and service companies.
- 25% of consumer and services companies have decreased their investment plans, as have 20% of manufacturing companies. Just one respondent plans to increase their investment in China.
- 26% of manufacturers are accelerating the localization of their China supply chains while moving production of global products out of the country. 23% of manufacturers said that the Shanghai lockdowns had not impacted their supply chain strategy.
- Nearly three-quarters of respondents (74%) had no unexpected resignations of expatriate staff due to the recent lockdowns.
- Among manufacturers, 35% are operating at full capacity, 25% are operating at or below 75% capacity, and 3% have not resumed operations. Among consumer and service sector companies, only 27% are fully operational.
- Among respondents who are not yet operating at full capacity, 71% need their workers to be allowed to move freely between home and the workplace while more than half (53%) need better coordination with neighborhood committees in order to return to full capacity.
- Only 9% of respondents have received economic support measures from the Shanghai government to help them recover from the effects of the lockdowns, while an additional 19% have applied for support and are still waiting.

调研概要

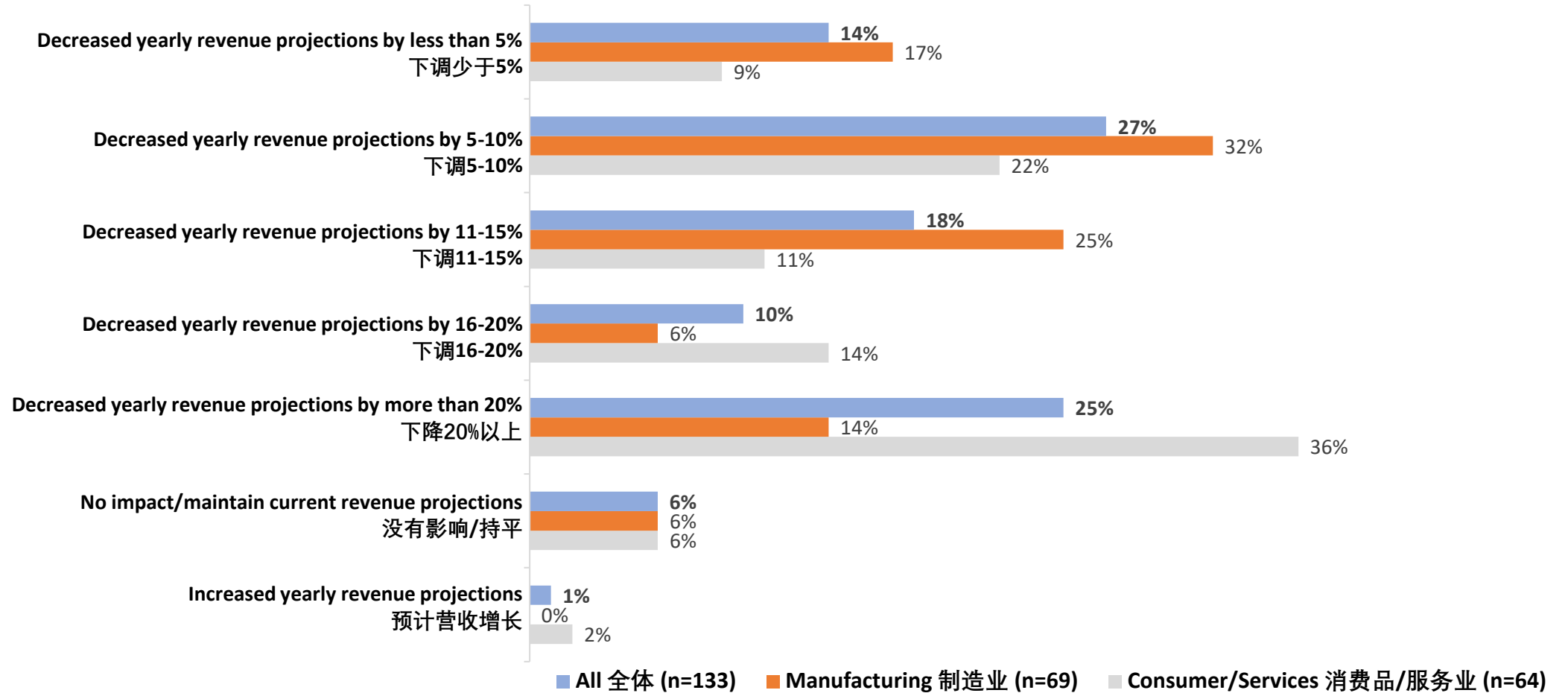


2022年6月7日至9日期间，上海美国商会向会员企业发起了新一轮调研，旨在了解近期的上海疫情以及封控政策对在沪外资企业的影响。此次调研共收到133家会员企业的反馈（含69家制造业企业和64家消费品及服务型企业）。主要调研结果如下：

- 93%的受访企业下调了2022年的营收预期，其中25%的受访企业的预计营收较年初下调20%以上；36%的消费品及服务型企业的预计营收较年初下滑20%以上。
- 25%的消费品及服务型企业与20%的制造业企业缩减了计划投资规模。仅有一家受访企业表示计划增加在华投资；
- 26%的制造业企业表示正在加速中国供应链本土化，将全球产品的生产转移到国外。23%的制造业企业表示，上海的疫情封控管理措施并未影响其供应链战略；
- 近四分之三（74%）的受访企业表示封控管理措施并没有导致外籍员工的计划外离职；
- 35%的受访制造业企业已全面恢复产能，25%的制造业企业产能仍未超过75%，3%的企业尚未复工。在受访的消费品及服务型企业企业中，仅27%的企业已经全面恢复运营。在尚未实现全面复工复产的受访企业中，71%的企业希望员工可以自由在工厂和住宅小间距自由通勤，逾半数（53%）的企业表示（与）属地政府（街道）的支持和良好沟通对全面复工复产很关键；
- 仅9%的受访企业表示申请并已获得了市政府的助企纾困补贴；另有19%的受访企业已申请助企纾困补贴，正在等待发放。

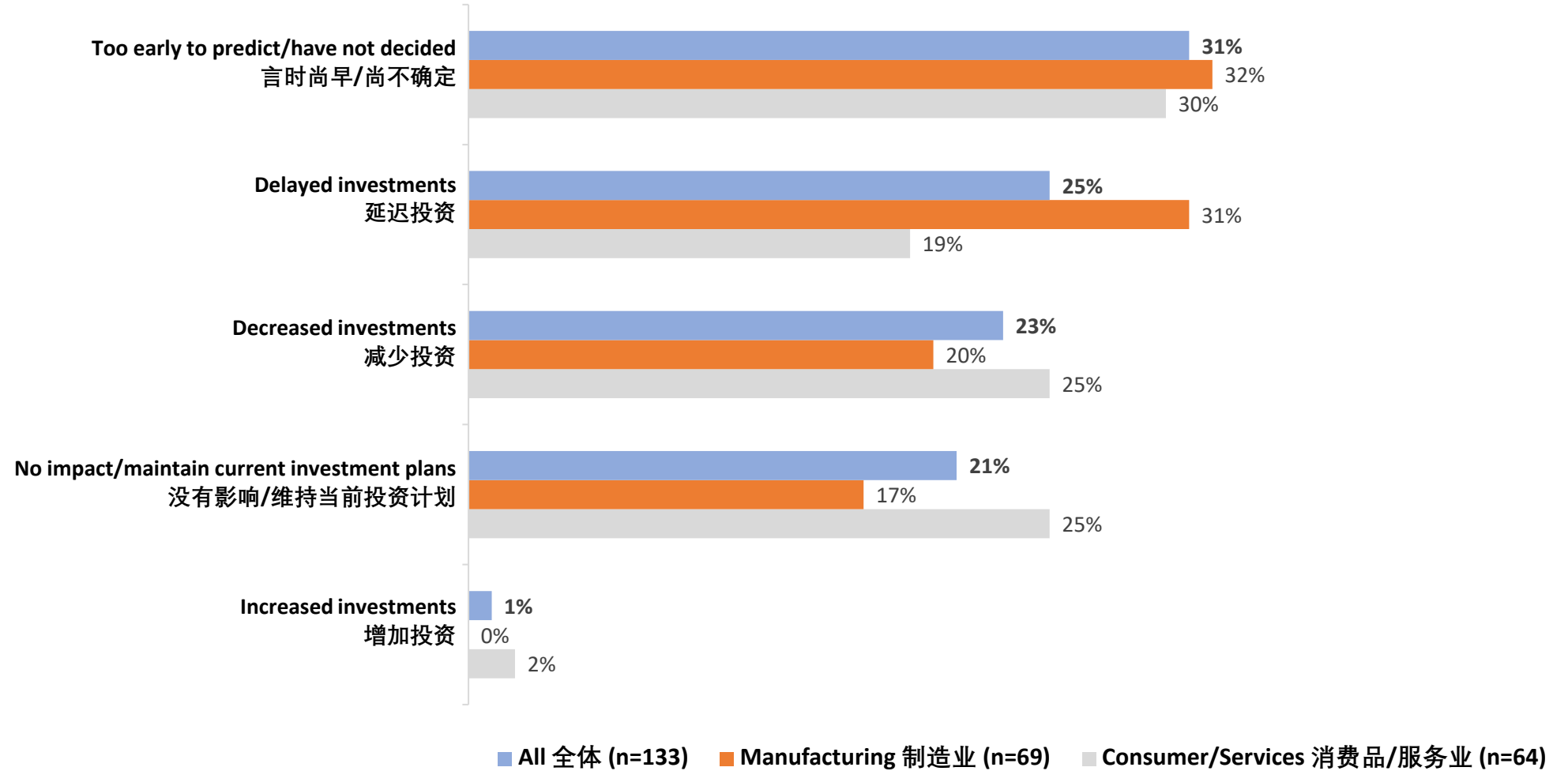
Q1: How have you adjusted your revenue projections to account for the impact of recent Covid-related lockdowns in Shanghai and the YRD?

近期上海及长三角地区的疫情封控管理措施对贵司今年的预计营收有何影响？



*Note: Due to rounding, some charts may not add up to 100%.
 本次调研数据以四舍五入的方法精确至整数位，因此会出现个别总和高于（低）于100%的情况。

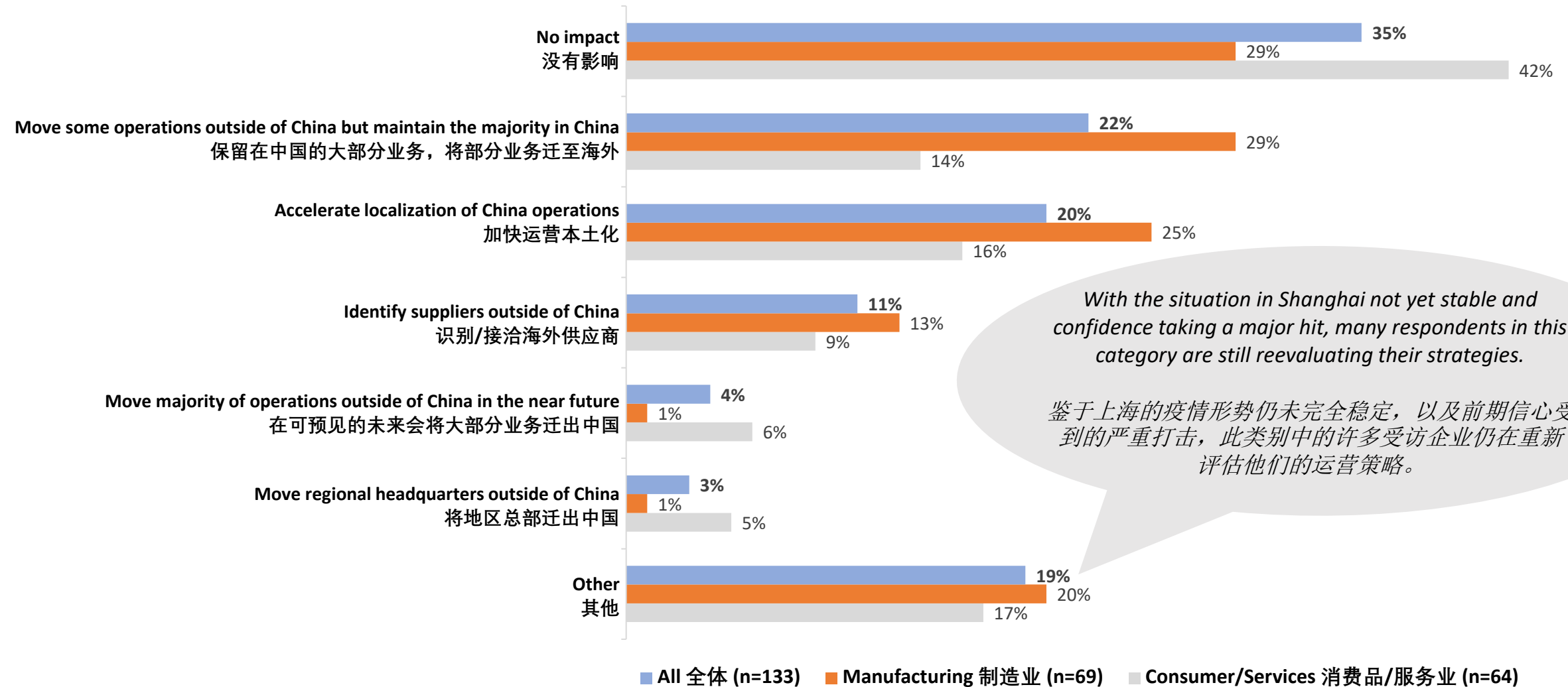
Q2: What impact have the recent Covid lockdowns in Shanghai had on your investment plans? 本轮疫情引发的上海封控管理措施对贵司的投资计划有何影响?



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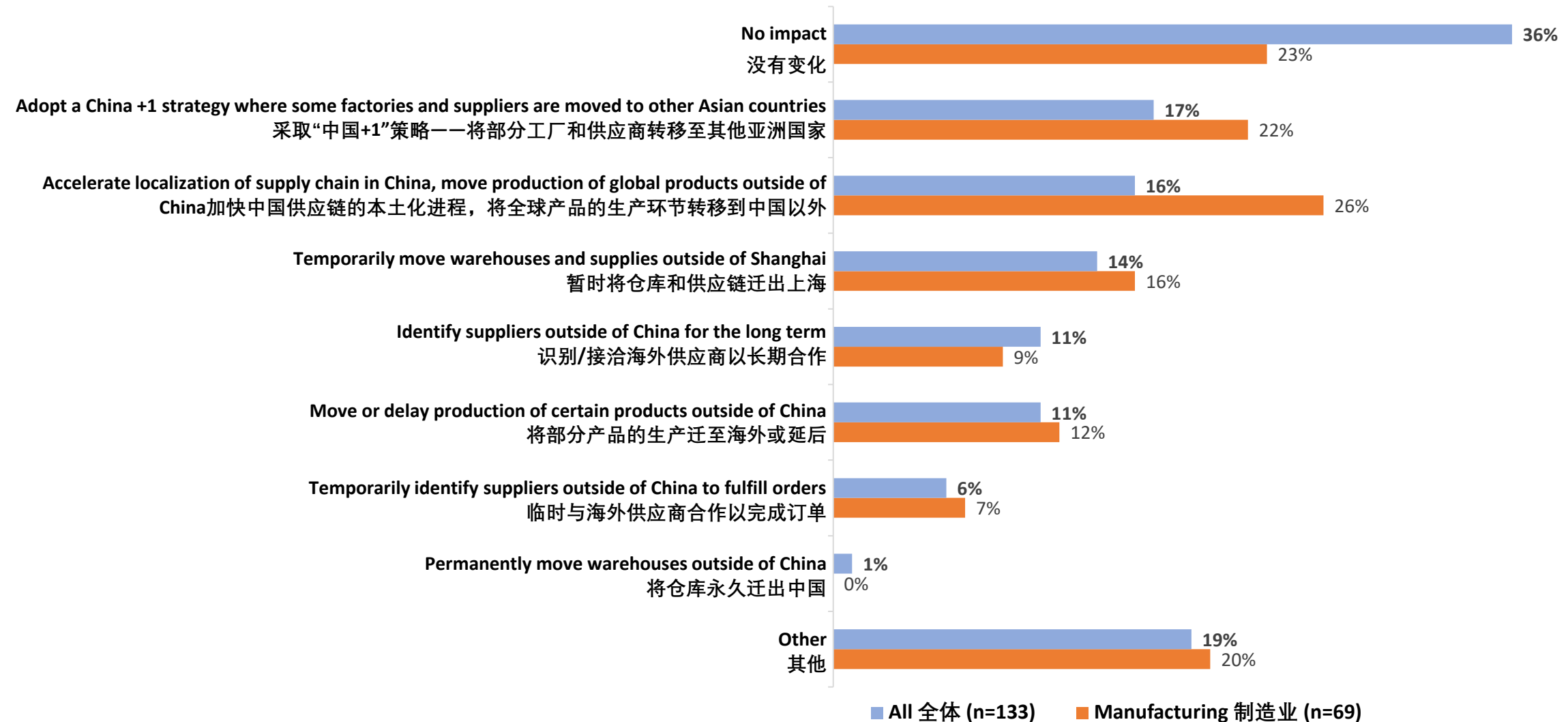
Q3: What impact have the recent Covid-related lockdowns in Shanghai had on your company's China operations strategy? Select all that apply.

本轮疫情引发的上海封控管理措施对贵司的在华运营策略有何影响？（多选）

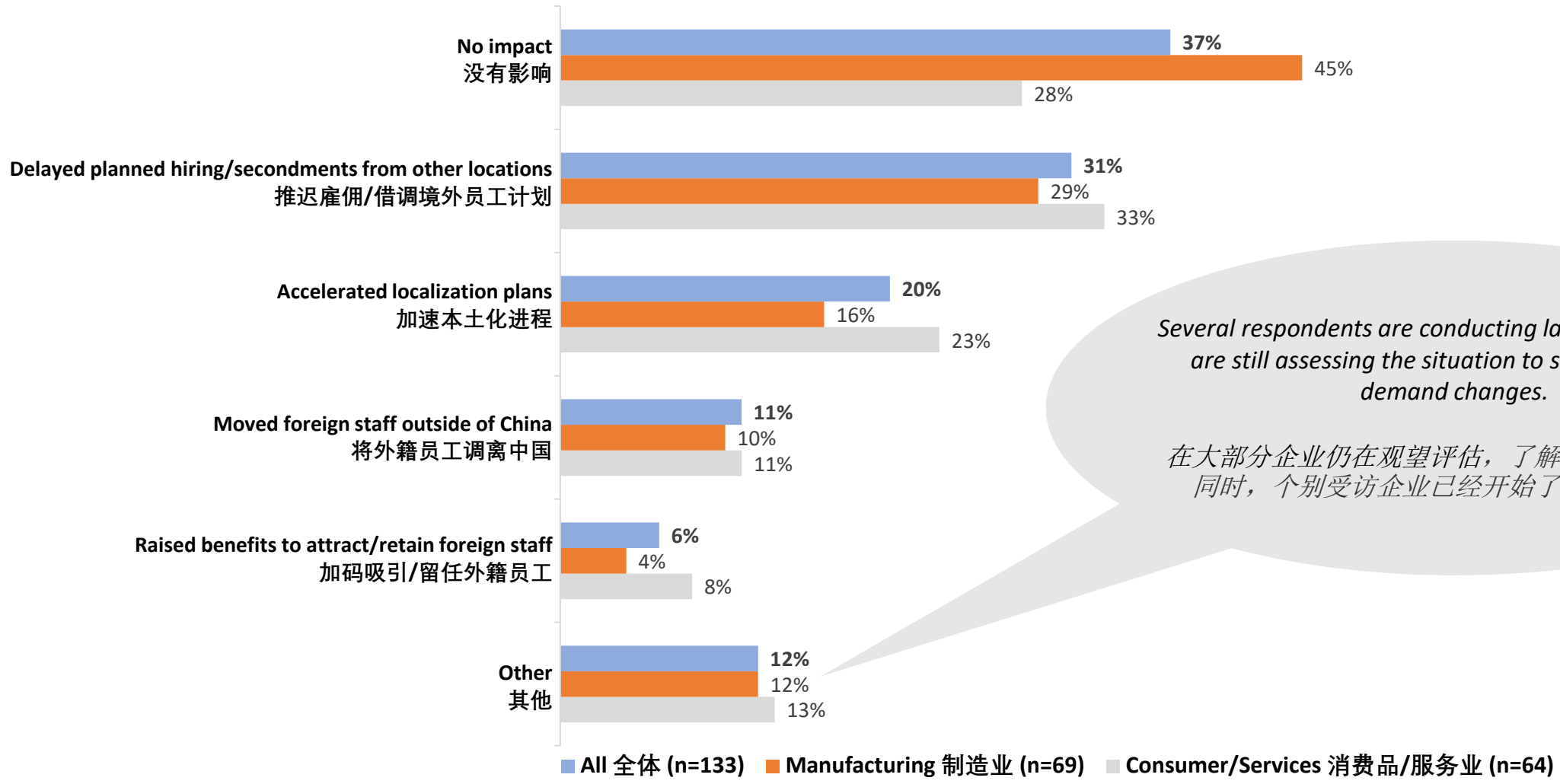


Q4: What impact have the Shanghai lockdowns had on your supply chain strategy? Select all that apply.

本轮疫情引发的上海封控管理措施对贵司的供应链策略有何影响？（多选）



Q5: How have the recent lockdowns in Shanghai impacted your HR strategy in China?
Select all that apply.
 本轮疫情引发的上海封控管理措施对贵司的人力资源战略有何影响？（多选）

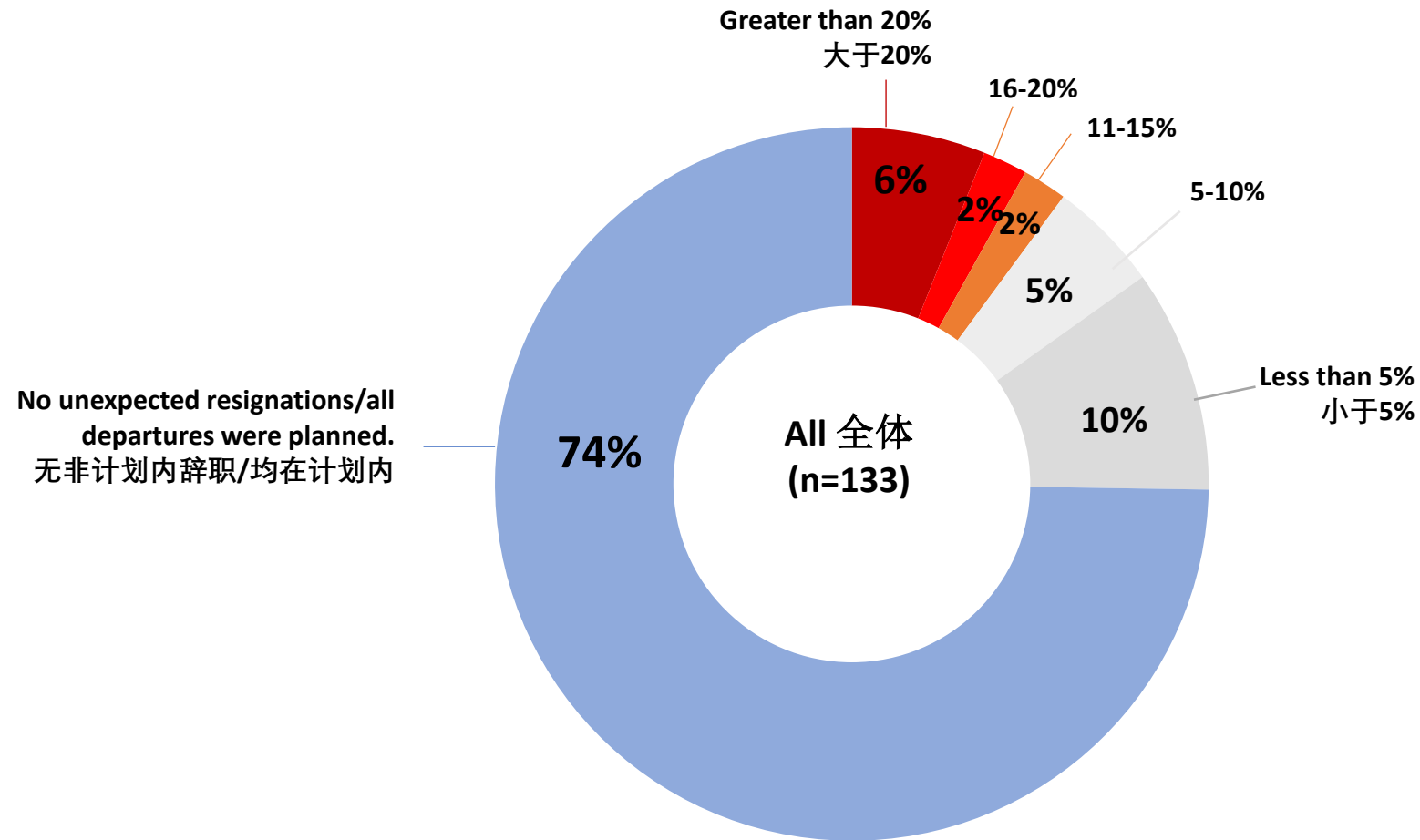


Several respondents are conducting layoffs while others are still assessing the situation to see how market demand changes.

在大部分企业仍在观望评估，了解市场需求变化的同时，个别受访企业已经开始了裁员的动作。

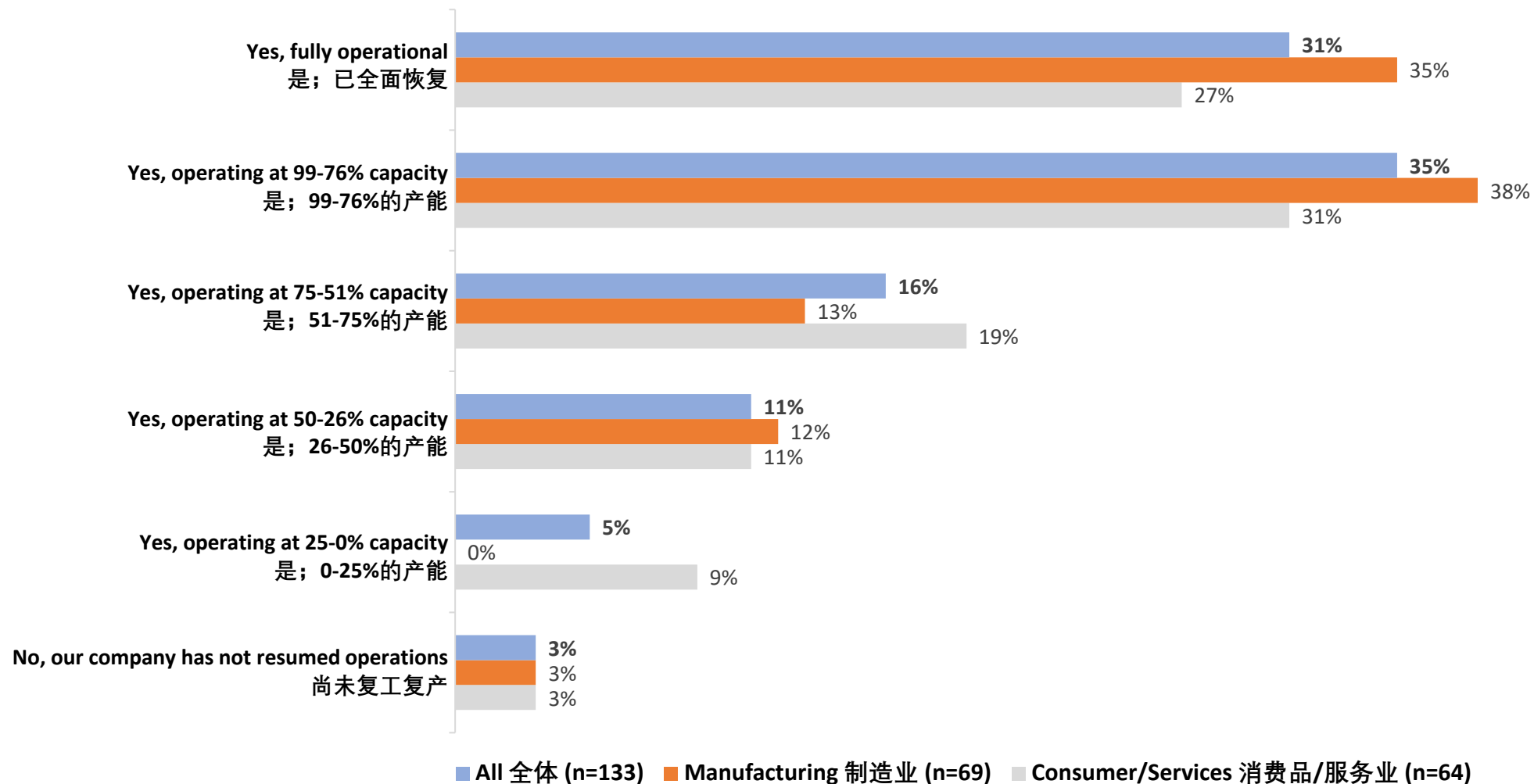
Q6: What percentage of your expatriate staff have unexpectedly resigned due to recent lockdowns?

贵司外籍员工中出于本轮疫情封控管理措施而提出非计划内离职申请的比例为:



Q7: Has your company resumed operations and, if yes, at what capacity is your company currently operating?

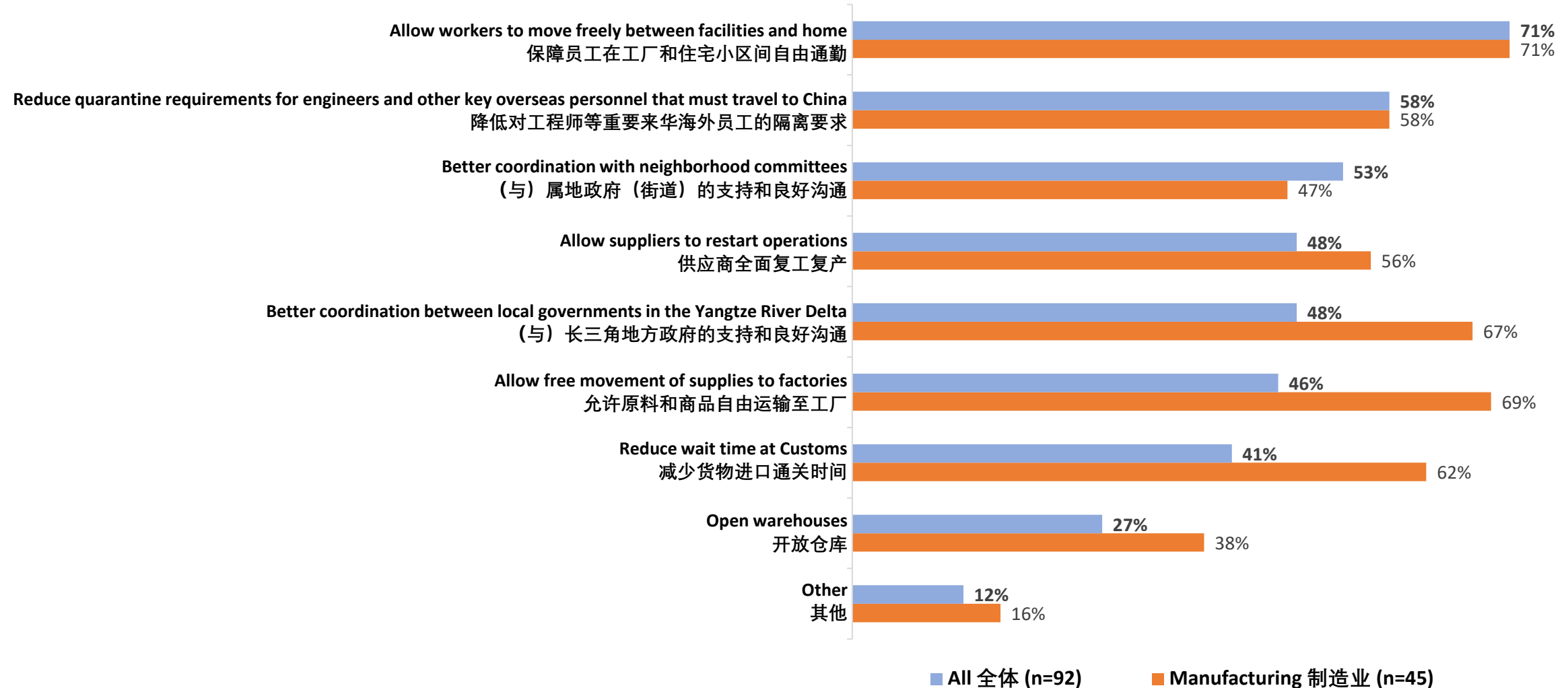
贵司是否已恢复生产经营？若是，产能/经营活动的恢复程度为：



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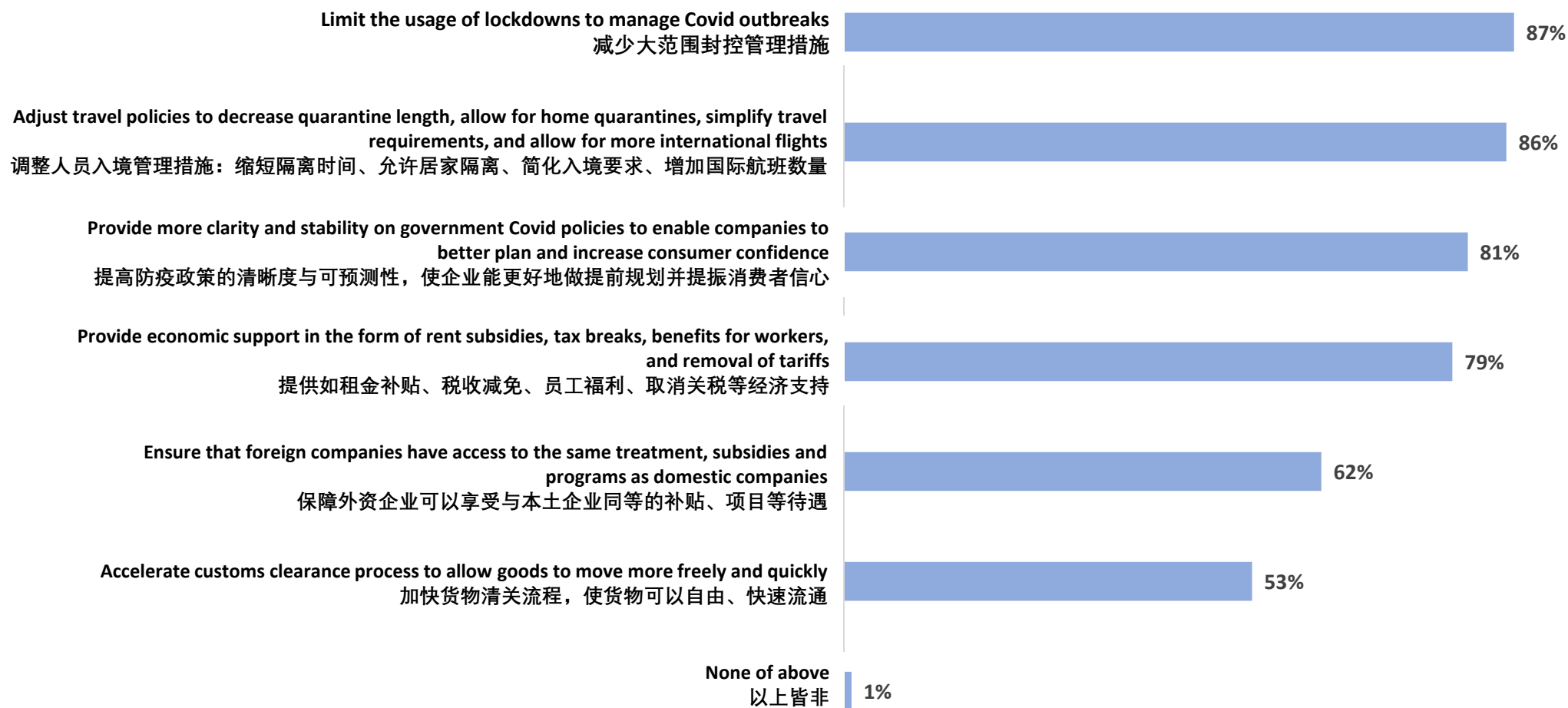
Q8: What measures are needed to allow your company to operate at full capacity? Select all that apply.

若尚未全面复工，下列哪些措施有助于贵司全面恢复经营生产？（多选）



Q9: How can the local government mitigate concerns about the impact of Covid lockdowns on your company's revenues? Select all that apply.

哪些政策可以缓解因疫情封控措施对贵司预计营收造成的负面压力？（多选）



All 全体 (n=133)

Q10: What short-term economic support measures would be most helpful to your company to recover from the lockdowns? Select all that apply.
哪些短期经济援助政策有助于贵司从疫情封控措施造成的影响中恢复？（多选）

Tax breaks
税收优惠



76%

Rental support
租金减免



66%

Tax reduction or direct subsidies for
Chinese public to stimulate consumption
个人所得税减免或发放现金
补贴以提振消费



63%

One-off subsidies
一次性现金补助



50%

Extension of benefits-in-kind
non-taxation treatment for
foreign employees
延长外籍员工的津补贴优惠政策



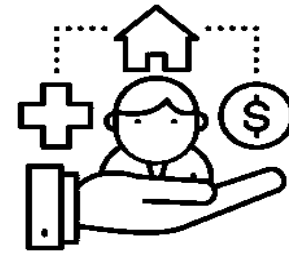
47%

Waive administrative fees
行政事业性收费减免



46%

Waive social security benefits
contributions for foreign employees
减免外籍员工社保缴纳金



41%

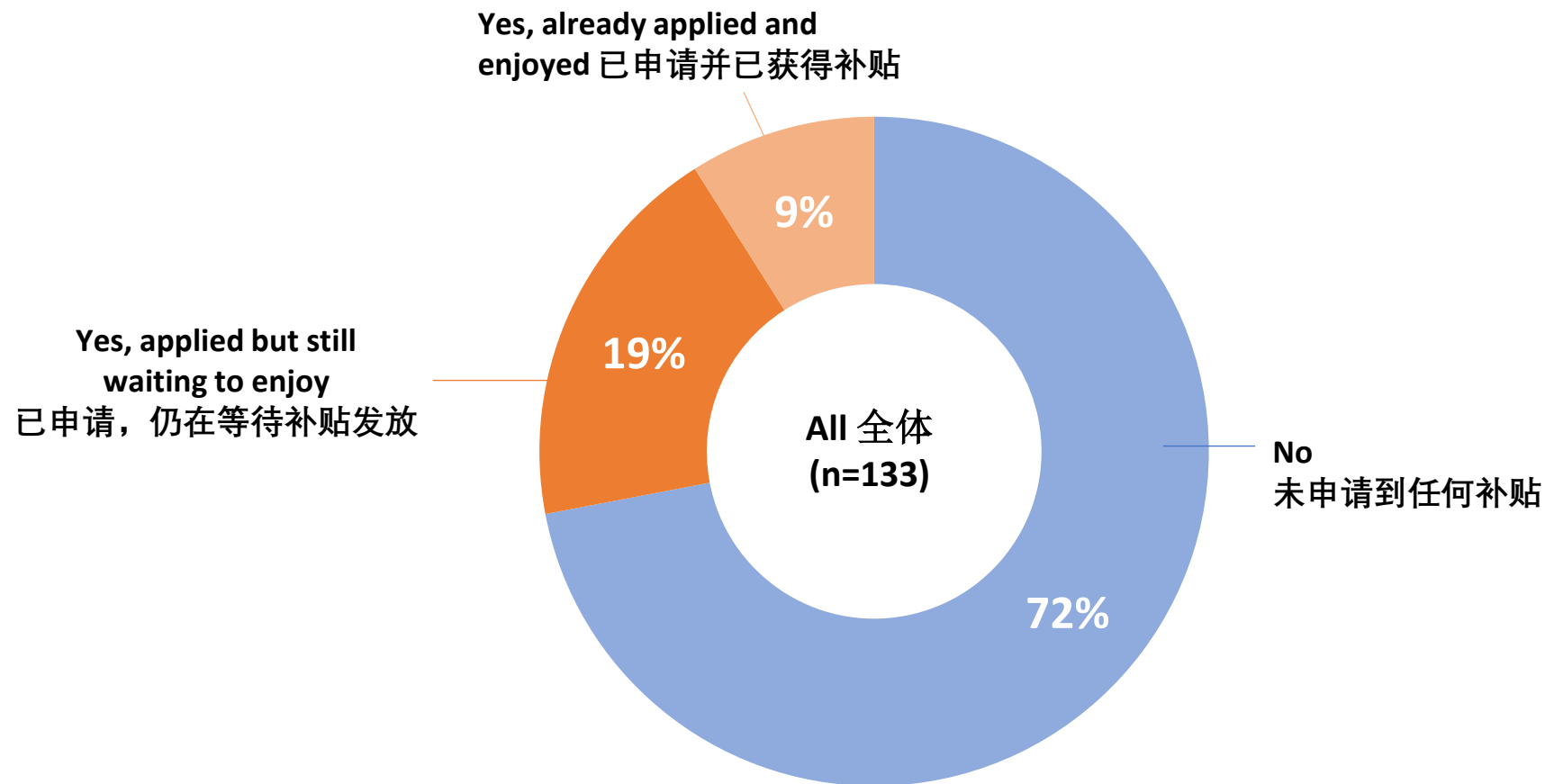
Waive/reduce utilities fees
(water, electrical, sewage)
降低企业公共服务费用成本（补
贴水费、电费、污水处理费等）



41%

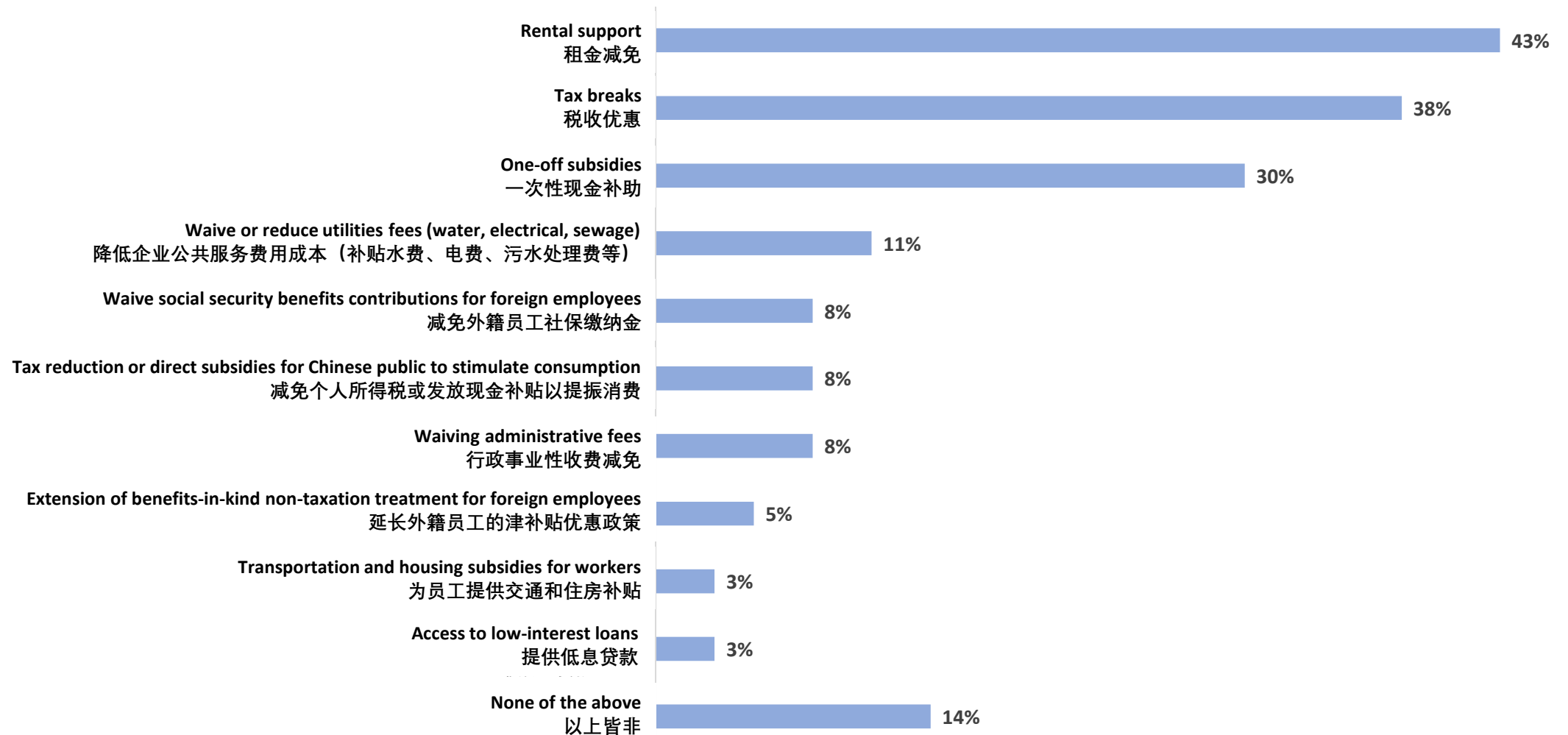
Q11: Has your company already enjoyed any economic support measures since the Covid lockdowns in Shanghai?

自上海实施疫情封控管理措施实施以来，贵司是否已经享受到政府补贴？



Q12: If yes, what economic support measures has your company already enjoyed or applied to enjoy? Select all that apply.

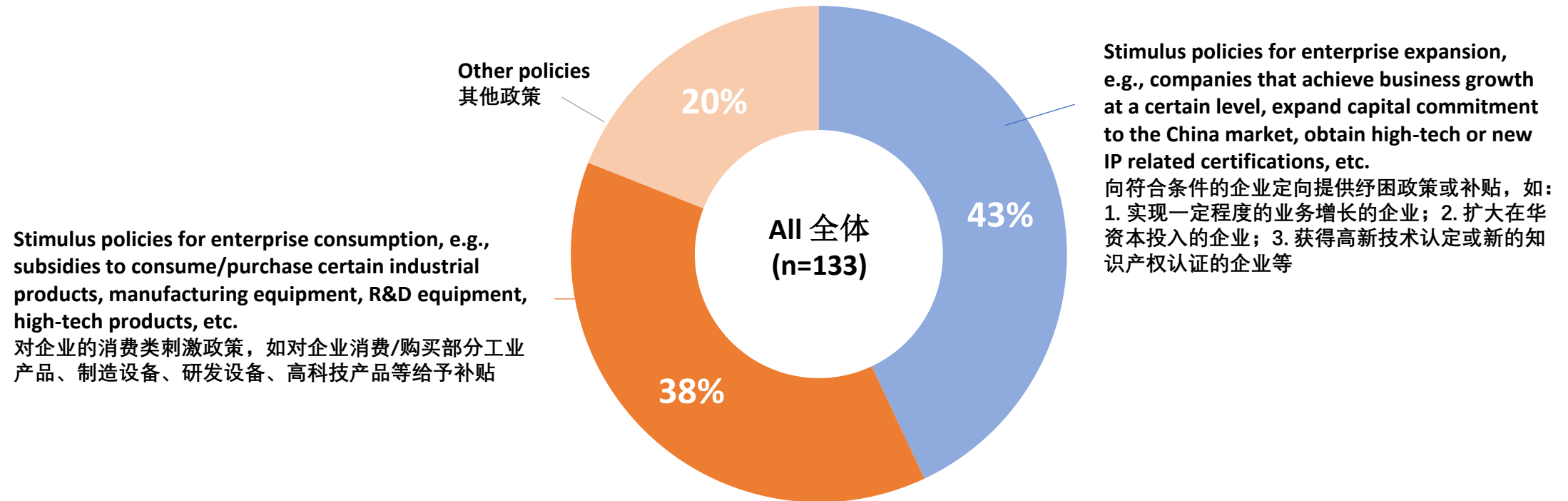
若是，贵司已享受到下列哪些纾困或补贴措施？（多选）



(n=37)

Q13: In the medium and long term, what economic stimulus policies would be the most helpful for your company to further grow and develop in the China market?

中长期来看，哪些纾困刺激政策有助于贵司未来进一步发展和开拓中国市场？



Additional suggestions include 其他建议包括:

- Better market access and equal treatment for foreign and local products 进一步放开市场准入，并保障内外资企业的产品得到平等对待
- Equal treatment for private and state-owned companies 对国有企业与民营企业一视同仁
- Clearer macroeconomic guidance and Covid management policies 提高宏观经济指导和防疫政策的清晰度
- Easier domestic travel 更便利的本土差旅

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Thank you 谢谢



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