



## Supply Chains & Factory Openings: An AmCham Shanghai Mini-Survey

《上海美国商会小型问卷调研报告：  
企业供应链与工厂复工情况》

The American Chamber of Commerce in Shanghai | February 17<sup>th</sup>, 2020

上海美国商会 | 2020年2月17日

# Survey Summary 调研情况



- The American Chamber of Commerce in Shanghai conducted a survey of member companies with manufacturing operations in Shanghai, Suzhou, Nanjing and the wider Yangtze River Delta. The survey was conducted from February 11-14 with 109 members responding.

今年2月11至14日期间，上海美国商会向其上海、苏州、南京和其他长江三角洲地区内拥有制造业务的会员企业发起了有关新型冠状病毒肺炎疫情下企业供应链与工厂复工情况的调研项目，共计收到109家会员企业的回复。

- The purpose of the survey is to provide a clear picture of the operating environment as companies begin to re-open. In addition, AmCham seeks to provide helpful feedback to the local and provincial government on the re-opening process.

在新型冠状病毒肺炎疫情影响下，本次调研旨在为企业/工厂提供复工经营环境的相关参考。与此同时，上海美国商会希望将企业/工厂复工的情况或反馈提供给地方政府，作有益参考。

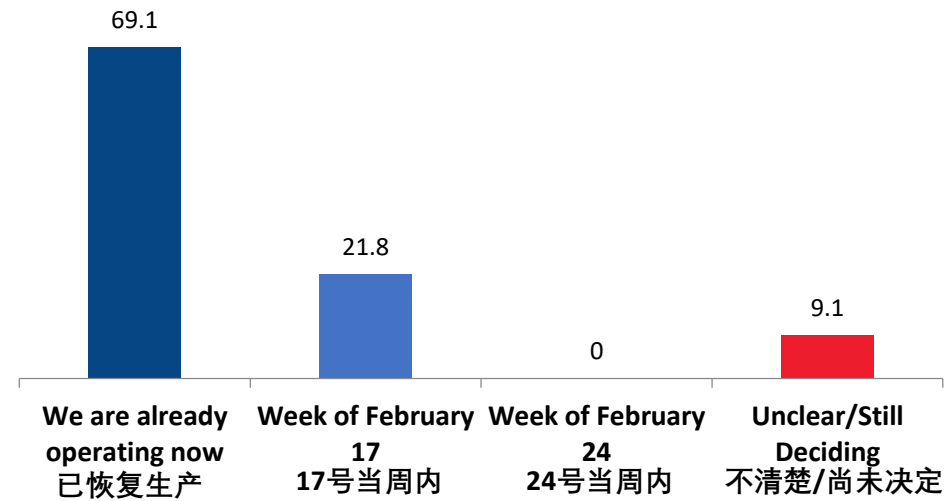
# Survey Highlights 调研概要



- 48% of companies report their global operations are already impacted by the shutdown  
48%的受访企业表示因未获得复工审批而导致的停产已经影响到其全球供应链；
- 78% of companies do not have sufficient staff to run a full production line  
78%的受访企业表示其尚未有充足的员工配备恢复全面生产；
- 41% of companies say a lack of staff is their biggest challenge in the next 2-4 weeks; 30% of companies say logistics issues will be their biggest concern  
41%的受访企业表示未来2-4周内其最大挑战是员工短缺； 30%的受访企业表示物流是他们最为关注的问题；
- Over the next few months, 58% of companies expect demand for their output to be lower than normal  
58%的受访企业预计未来几个月其产品的市场需求将较预期出现下滑；
- 38% of companies do not have sufficient masks/other supplies to protect their staff from coronavirus infection  
38%的受访企业表示其尚未有充足的口罩和（或）其他防护用品以保护员工安全；
- 35% of companies ranked a clearer explanation of requirements as the most important thing government officials could do to speed up factory opening approvals

在复工审批提速方面，35%的受访企业将“地方政府更清晰地解释复工审批要求”视为最重要的条件。

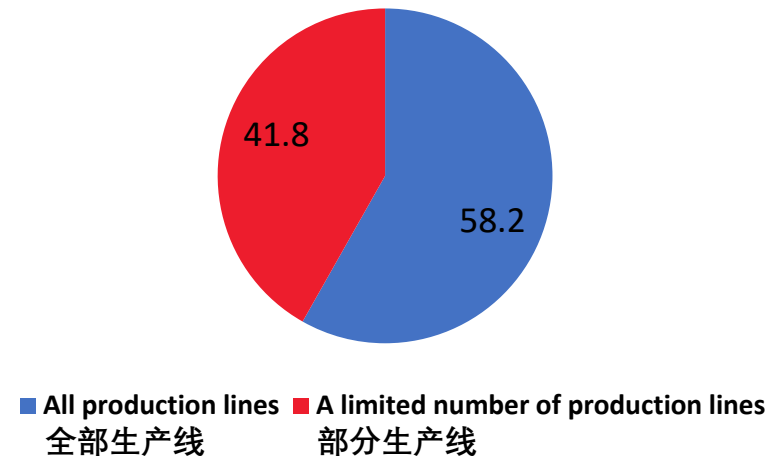
Q1: When does your company plan to restart operations?  
贵司计划何时恢复生产?



Two-thirds (69%) of manufacturing operations were open and running by February 14, with another 22% expecting to be operational by the week of February 17. However, of those that have received approval to open only 58% were permitted to run all production lines.

三分之二 (69%) 的受访企业表示其生产运营已于2月14日或之前恢复; 22% 的受访企业预计于2月17日当周截止前恢复。然而, 即使在已获得复工审批的受访企业群体中, 也仅有58% 表示“已经获准恢复全面生产”。

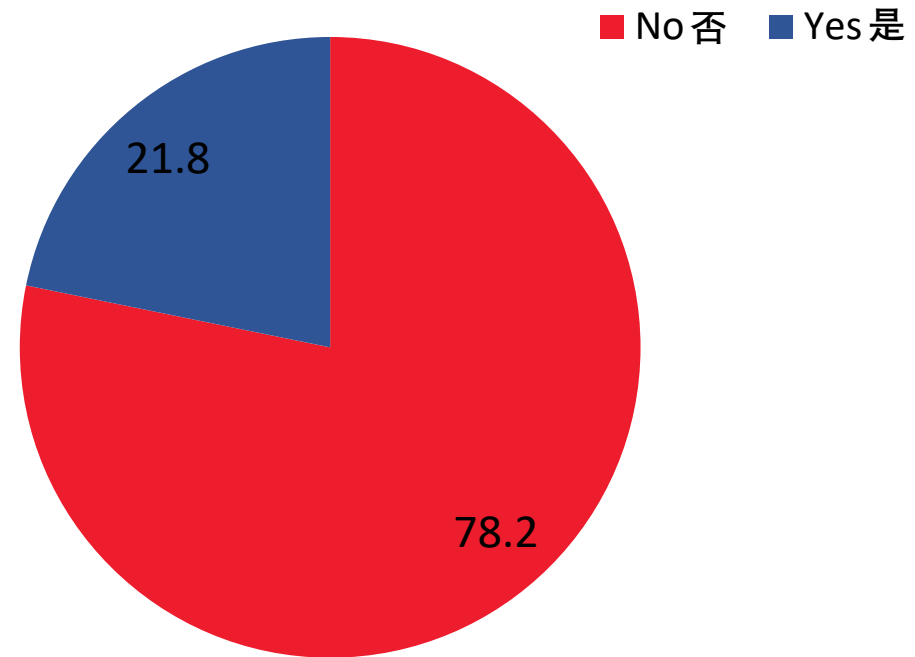
Q2: If your factory has already received approval to open, are you permitted to run:  
若贵司已获得复工审批, 是否获准恢复全面生产?



Despite many factories having already opened, extensive travel restrictions and 14-day quarantine periods remain in place to curtail the spread of the coronavirus. As a result, only a quarter of companies (21.8%) have sufficient staff to run a full production line.

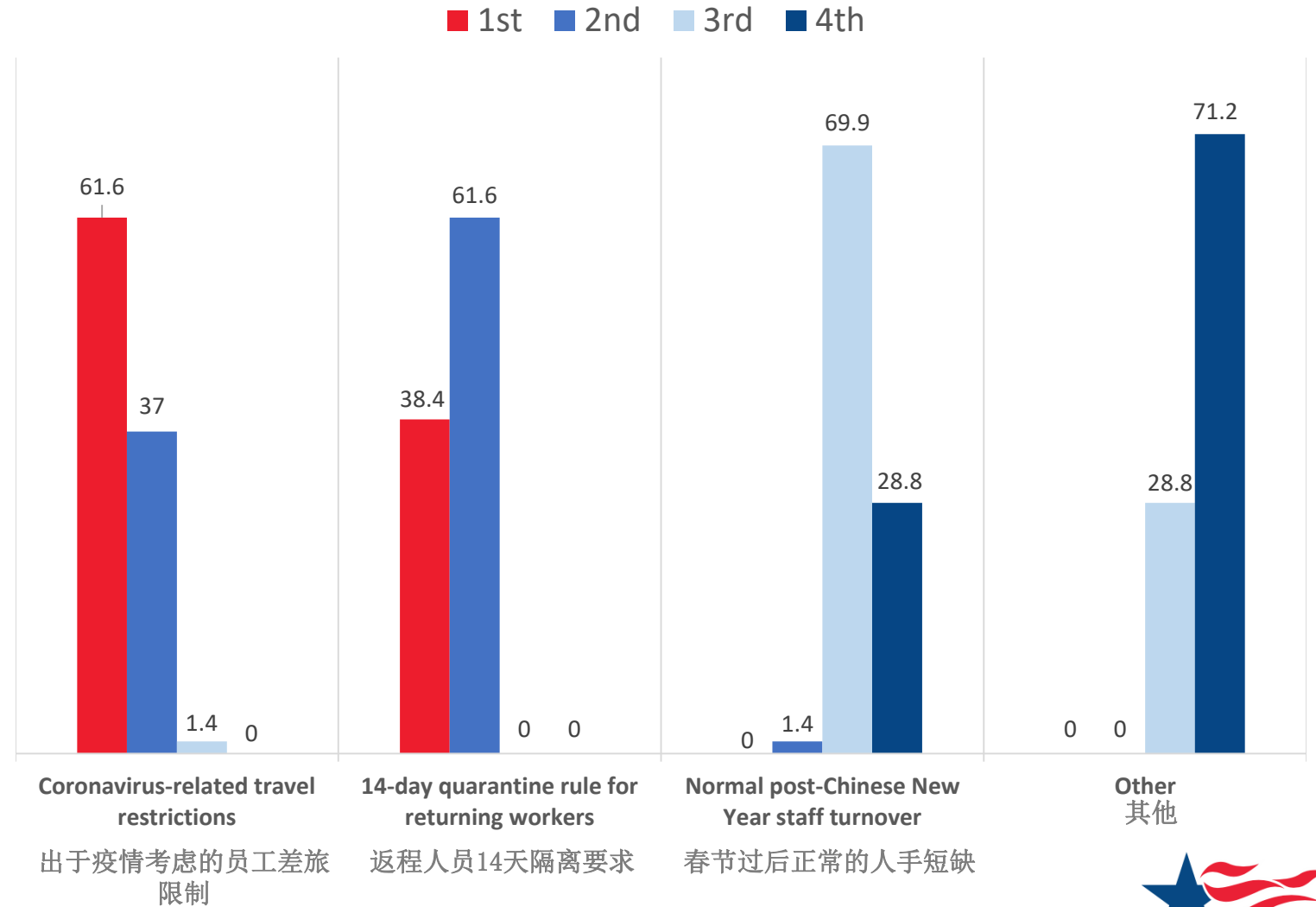
尽管许多工厂已经复工，但出于防止疫情扩散蔓延的考虑，公司仍然施行了员工差旅限制和为期14天的隔离观察。因此，只有近四分之一（21.8%）的受访企业表示其有足够的员工配备恢复全面生产。

Q3: Does your company have sufficient staff to run a full production line?  
贵司是否具有充足的员工配备全面恢复生产?



Q4: If you answered “no” to question 3, what are the reasons for your staff shortage? Please rank 1-4, with 1 being the biggest reason.

若贵司尚未有充足的员工配备全面恢复生产，导致员工短缺的原因是什么？请以1-4为下列因素进行重要性排序，1表示最重要的因素。

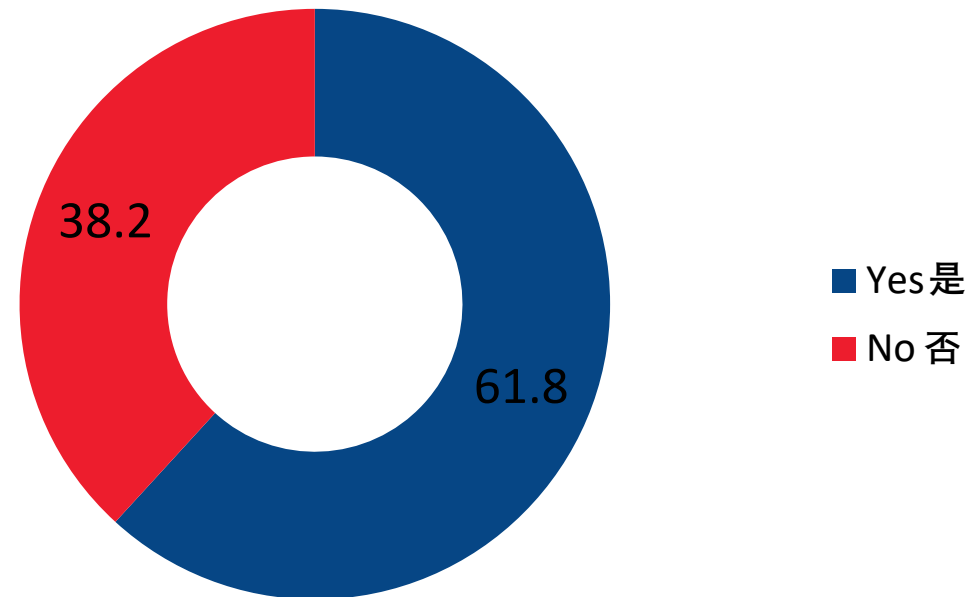


Q5: Do you have enough masks/other supplies to help protect your employees from coronavirus infection?

贵司是否配备了足够的口罩和其他防护用品以防止员工感染新型冠状病毒?

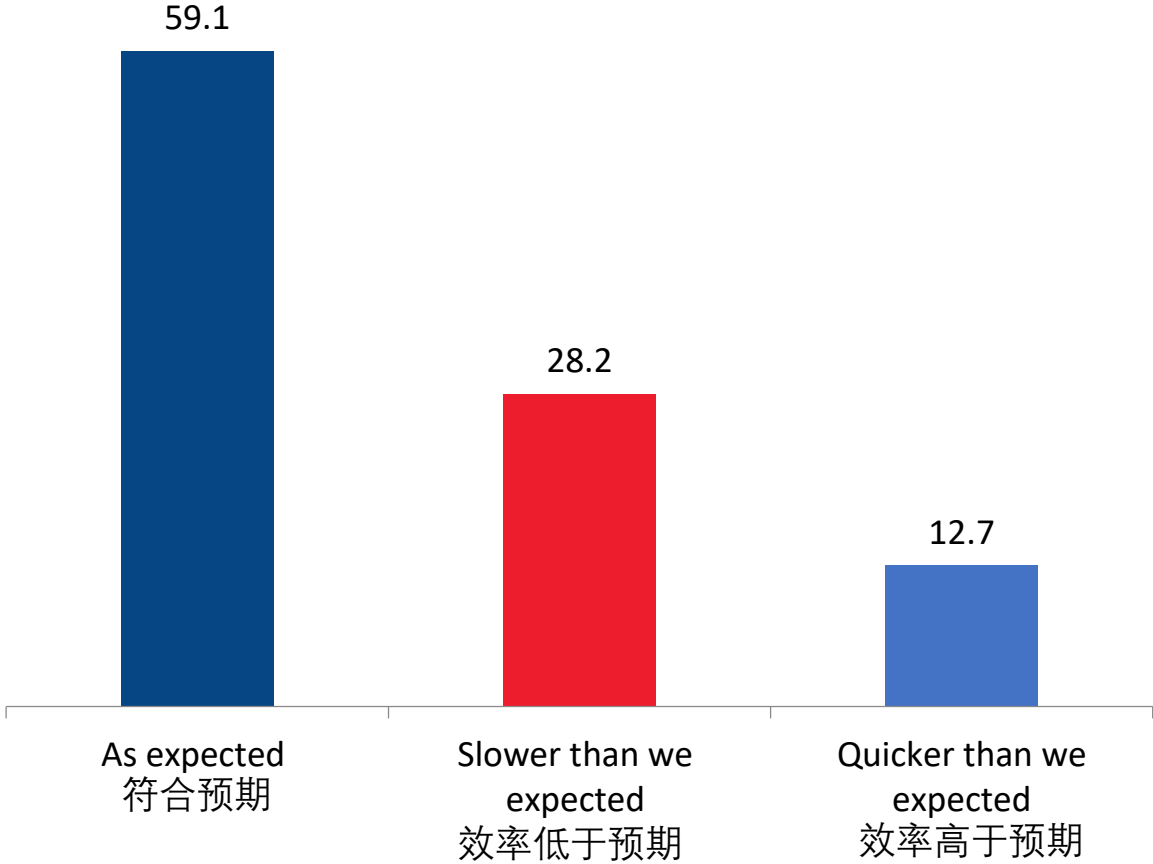
New government regulations require that factories provide masks and other supplies to protect workers. However, 38% percent report that they do not have enough of these materials.

虽然一些地方新政要求工厂提供口罩和其他防护用品以保护员工。然而，逾38%的受访企业表示他们并不具备足够的防护用品。



Q6: How would you describe your local government's processing of factory opening approvals?

贵司如何评价当地政府的复工审批流程?





Q7: What can your local or provincial government do better to speed up factory opening approvals? Please rank 1-7, with 1 being the most important.

在复工审批方面，贵司认为地方政府在下列哪些方面可以做得更好以加速工厂复工流程？请以1-7对下列选项进行重要性排序，1表示最重要的因素。

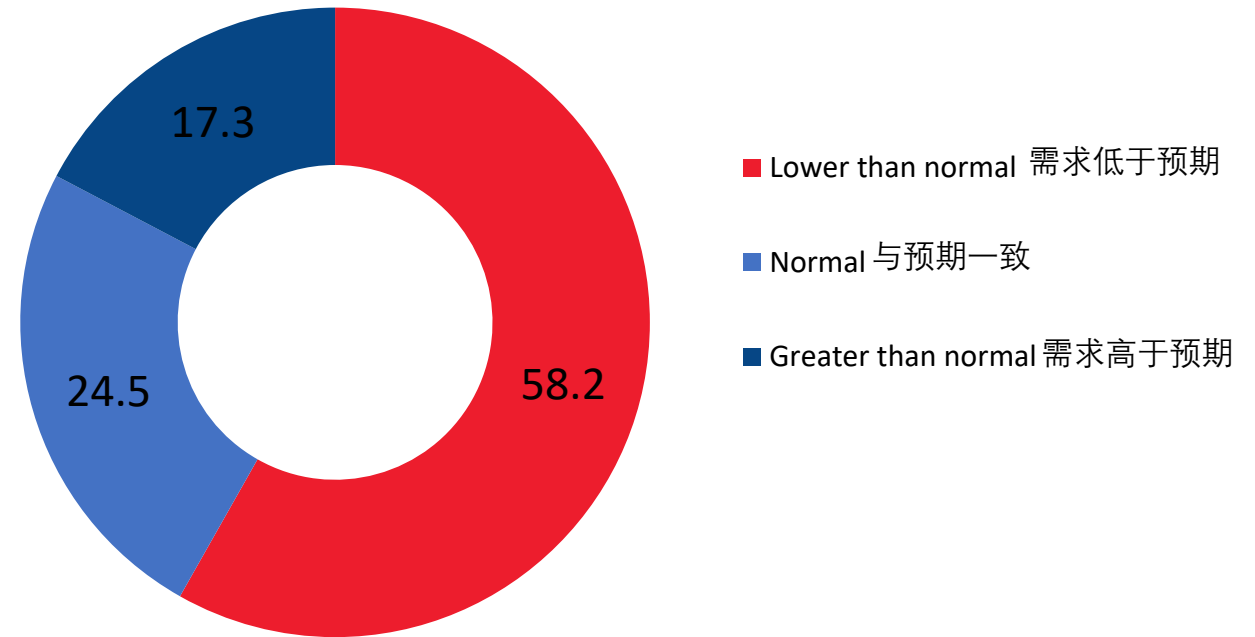
<b>GOVERNMENT ACTIONS</b> 地方政府措施	<b>1<sup>st</sup></b> <b>第1</b>	<b>2<sup>nd</sup></b> <b>第2</b>	<b>3<sup>rd</sup></b> <b>第3</b>	<b>4<sup>th</sup></b> <b>第4</b>	<b>5<sup>th</sup></b> <b>第5</b>	<b>6<sup>th</sup></b> <b>第6</b>	<b>7<sup>th</sup></b> <b>第7</b>
<b>Clearer explanations of requirements</b> 更清晰地解释复工审批要求	34.5%	10.9%	14.5%	13.6%	18.2%	7.3%	0.9%
<b>Open traffic for supplies and workers</b> 为物资和员工开放交通便利	20%	20%	30%	16.4%	8.2%	5.5%	0%
<b>Faster permit processing times</b> 提高复工许可证流程时效	17.3%	20.9%	16.4%	15.5%	21.8%	6.4%	1.8%
<b>Provide materials (masks, safety equipment)</b> 提供防护用品（口罩、安全装备）	16.4%	23.6%	13.6%	17.3%	17.3%	10%	1.8%
<b>Lift quarantine restrictions on healthy workers</b> 取消对健康员工的隔离要求	8.2%	20.9%	18.2%	18.2%	15.5%	12.7%	6.4%
<b>Other</b> 其他	1.8%	0%	0.9%	0.9%	0.9%	9.1%	86.4%

Q8: Do you expect demand in the next few months for your products to be:

贵司如何预期旗下产品在未来几个月内的市场需求？

In a sign that the Chinese economy will see significant first quarter decline as a result of the coronavirus, 58% of respondents expect demand for their products to be lower over the next few months. Interestingly, 17% anticipate greater demand.

有迹象表明，受新型冠状病毒肺炎疫情的影响，中国经济增速将在第一季度内出现明显的下滑。由此，58%的受访企业预计未来几个月其产品的市场需求也将下滑。但值得注意的是，17%的受访企业则预计其产品的市场需求可能会出现增长。



Q9: What will be your biggest challenges in the next 2-4 weeks? Please rank 1-5, with 1 being your biggest challenge.

贵司认为在未来2-4周内将面临哪些挑战？请以1-5对下列挑战进行排序，1表示程度最高。

<b>BIGGEST CHALLENGES</b> 主要挑战	<b>No. 1</b> 第1	<b>No. 2</b> 第2	<b>No. 3</b> 第3	<b>No. 4</b> 第4	<b>No. 5</b> 第5
<b>Lack of staff</b> 员工短缺	40.9%	19.1%	16.4%	15.5%	8.2%
<b>Logistics 物流</b>	30%	34.5%	22.7%	6.4%	6.4%
<b>Finding alternative materials/goods supplies</b> 寻找替代材料/货物供应	16.4%	30.9%	22.7%	24.5%	5.5%
<b>Inventory management</b> 库存管理	7.3%	10.9%	24.5%	37.3%	20%
<b>Cash flow management</b> 现金流管理	5.5%	4.5%	13.6%	16.4%	60%

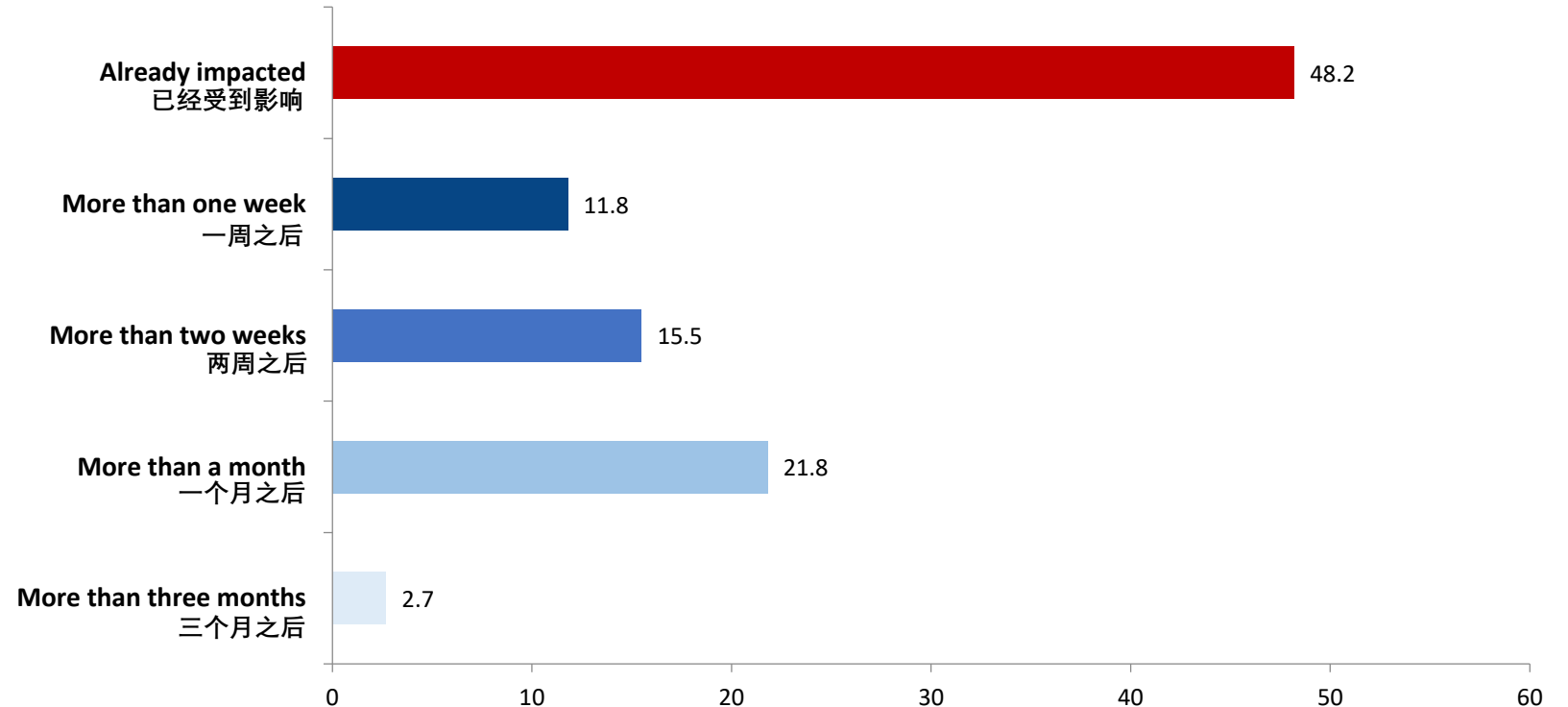
- Lack of staff (41%), logistics (30%), and the need to find alternative supplies (16%) were ranked as the top three challenges in the next 2-4 weeks by respondents.  
受访企业表示，员工短缺（41%）、物流（30%）和寻找替代材料/货物供应（16%）是他们在未来2-4周内面临的三大主要挑战。
- Logistics continues to be a major concern for companies as roadblocks and other COVID-19-related bottlenecks are making it challenging to move goods and supplies around China.  
物流仍然是企业关注的一个主要问题，由于封路和疫情导致的其他瓶颈问题使得企业在境内运输货物、供给等方面面临严峻的挑战。

Q10: If the shutdown continues, how long before it seriously impacts your company's global operations?

如果因未获得复工审批而导致的停产持续，您预计在未来何时会出现对贵司全球运营的严重影响？

Forty-eight percent of respondents say the shutdown has already impacted their global supply chain, while almost all others expect an impact within the next month.

48%的受访企业表示因未获得复工审批而导致的停产已经影响到其全球供应链，其余受访企业则预计一个月内将出现影响。

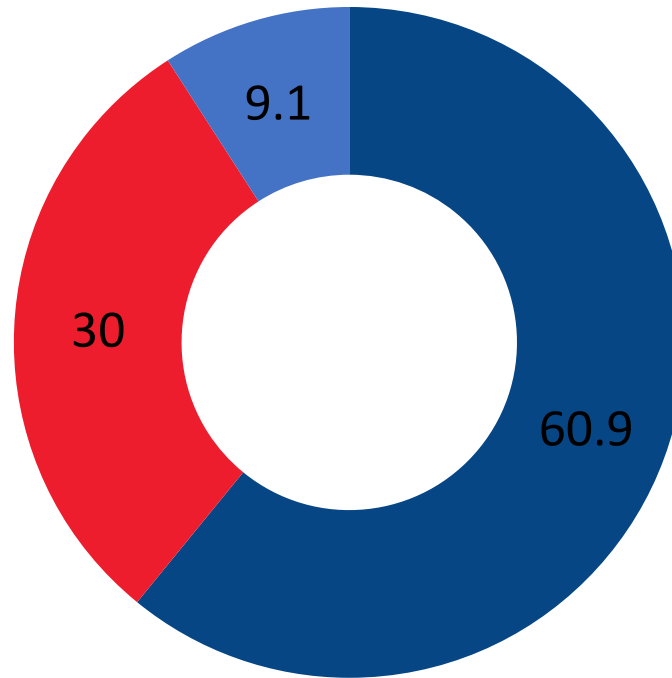


Q11: Do you have any contingency plans for production and supplies in other regions of China or outside China, if you are unable to open your factory?

如（近期）仍无法复工，贵司在国内其他地区或国外是否备有生产和供给的应急计划？

Thirty percent of companies say if their factories are unable to open, they will move operations out of the country, 61% say they will wait until their China factories open, and 9% percent will shift production to other provinces.

近1/3的受访企业表示，如果工厂仍无法复工，他们将会把生产设置迁出中国；61%的受访企业表示其将继续等待工厂复工；9%的受访企业则表示会将生产转移到国内其他省份/地区。



- No, will wait for factory to open  
没有，将继续等待工厂复工
- Yes, move operations out of China  
有，计划将工厂迁出中国
- Yes, continue to operate in China but in different provinces with less strict policies  
有，计划将工厂转移至国内其他省份/地区