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DE ESPAÑA

MINISTERIO
DE ECONOMÍA, COMERCIO
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SPAIN



SPAIN

The Ideal Destination for
Power Battery Projects

西班牙

动力电池项目的
理想投资地

西班牙驻上海总领事馆经济商务处
Economic & Commercial Office of Spain in
Shanghai. Embassy of Spain.
2024

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5 个重要因素

5 Key Facts

电池是无化石燃料经济的关键支柱

Batteries are the critical pillar in a **fossil fuel-free economy**

中国是全球最大的电池市场（占全球使用中的电池的一半以上）

China is the world's largest market for batteries (> half of all batteries in use)

电池存储是2023 年电力领域增长最快的能源技术

Battery storage in the power sector was the **fastest growing energy technology** in 2023

欧盟计划到 2030 年将其全球市场份额扩大到 15% 左右

The EU has set to grow their world market share to about 15% in 2030

近年来，车辆和固定能源存储领域的使用量呈指数级增长

Usage in **vehicles and stationary energy storage** has grown exponentially in recent years

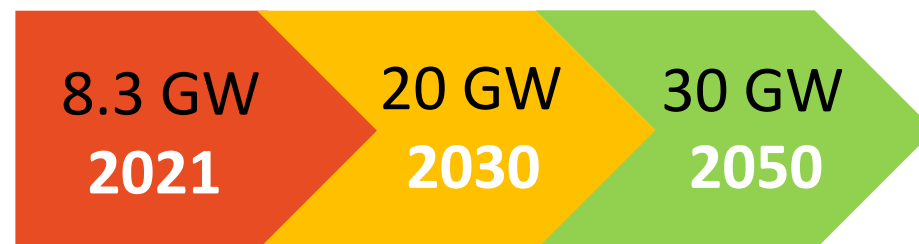


西班牙能源存储战略 (2021)

Spanish Energy Storage Strategy
(2021)

电力储存容量目标

Storage power capacity objectives

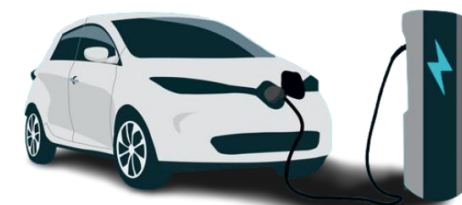


两个行业推动 电池需求并提供 商业机会

Two sectors drive demand for batteries and
offer business opportunities



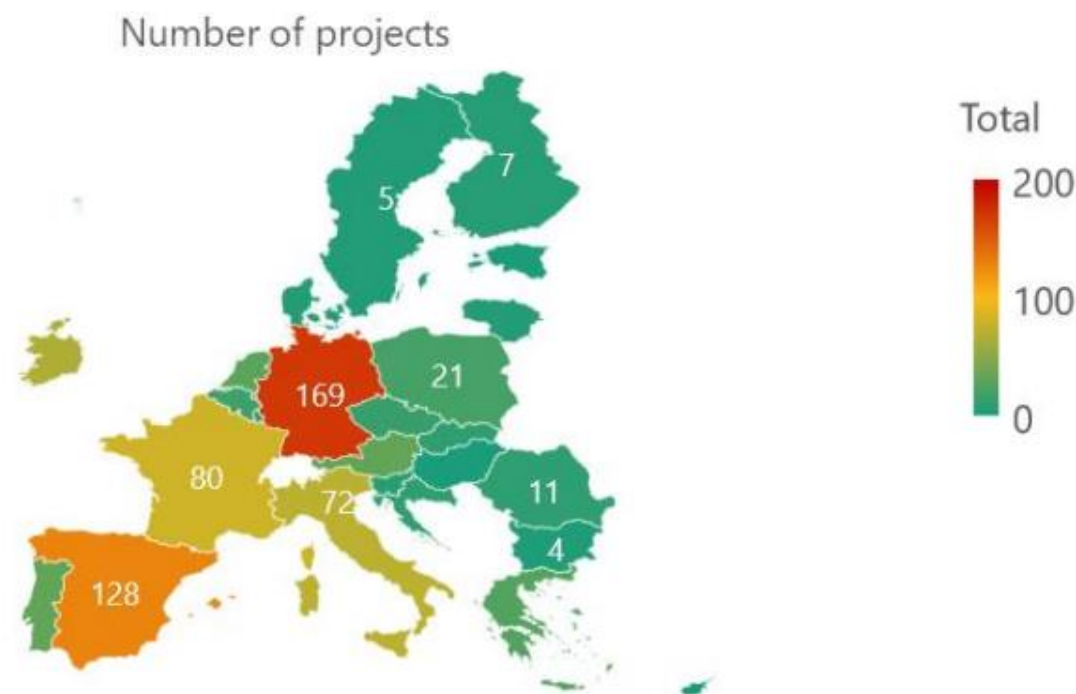
可再生能源
Renewable Energy



电动汽车
Electric Vehicle

西班牙: 欧洲储能的领导者

Spain: European Leader in Energy Storage



项目数量排名欧洲第二

2nd in Europe by number of projects

已装机的存储容量排名欧洲第三

3rd in Europe by installed storage capacity



西班牙汽车工业 与电动汽车

Spanish Automotive Industry
and Electric Vehicles

重要因素 Key facts

- 欧洲第2大、全球第9大汽车生产国

The 2nd largest automaker in Europe and the 9th largest in the world

- 2023年西班牙生产的89%的汽车和60%的汽车零部件出口到全球

89% of the vehicles and 60% of the auto-parts manufactured in Spain were exported worldwide in 2023

- 产值: 超过 1000 亿欧元 (占国内生产总值的 10%)

Turnover: more than 100 billion euros (10 per cent of GDP)

- 创新: 汽车产业占整个工业研发投入的10%

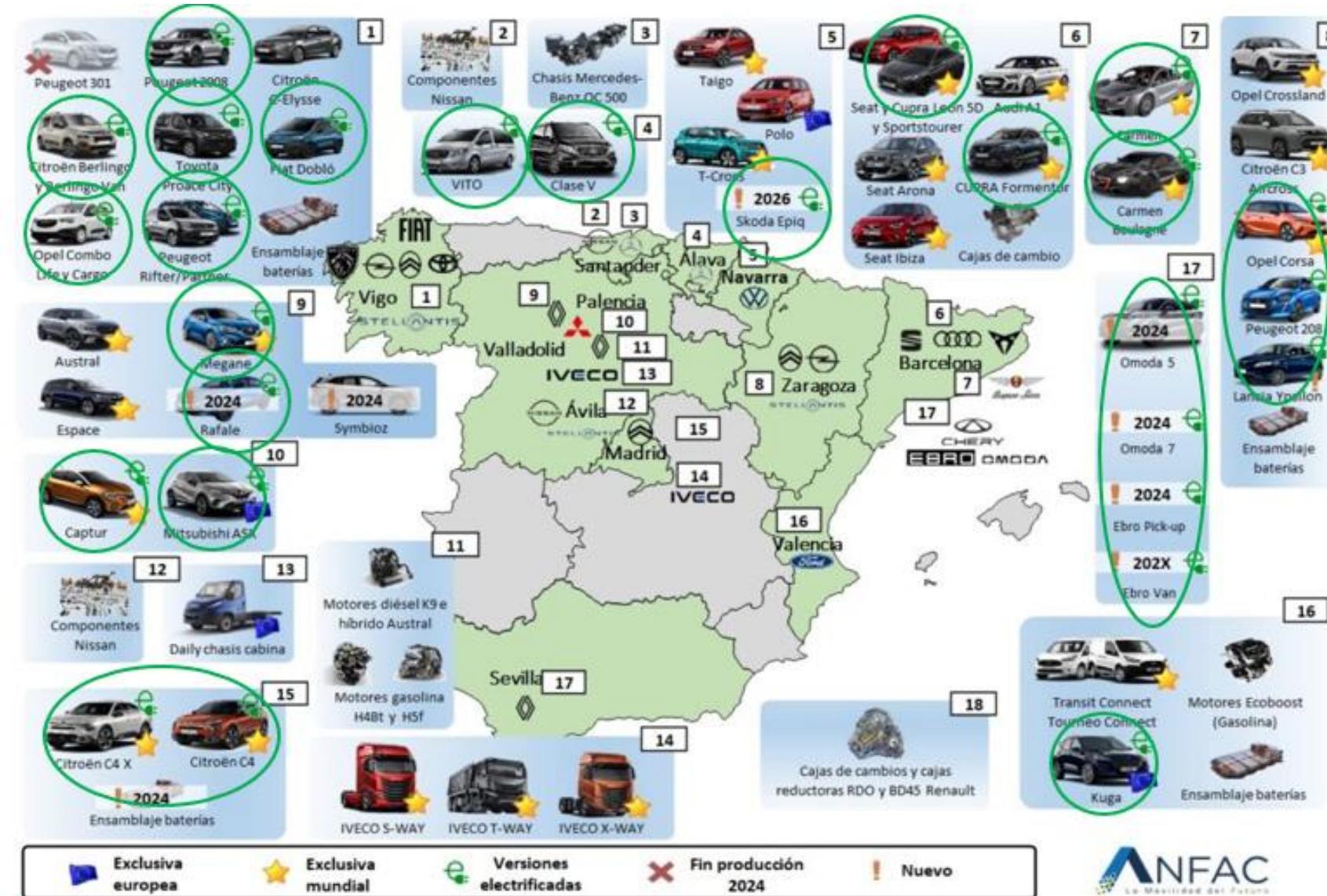
Innovation: Automotive industry accounts for 10% of all industrial investment in R&D&I

- 西班牙正在迅速适应可持续出行的新趋势: 2024 年西班牙将生产 25 款电动汽车

Spain is rapidly adapting to the new trends in sustainable mobility: 25 electric vehicle models will be manufactured in Spain in 2024

生产和获奖车型的工厂地图 (2024)

Map of factories with models in production and awarded (2024)



9 家跨国品牌在西班牙设立了 17 家工厂。2023 年西班牙的工厂生产了 245 万辆汽车

9 multinational brands with 17 plants are established in the country. Spanish plants manufactured 2.45 million vehicles in 2023

2024 年25 款电动汽车车型将在西班牙生产 (占总产量的 13.2%)

25 electric vehicle models will be manufactured in Spain in 2024 (13.2% of total production)

西班牙生产的OEM车型

OEMs in Spain

IVECO



CHERY



RENAULT

供应链第一层的西班牙企业

Tier 1 companies in Spain



BASQUEVOLT



CIE Automotive

过去五年来，西班牙是跨国公司在欧洲新绿地项目的第二大首选目的地

Spain was the second preferred destination in Europe for **new greenfield projects of multinational companies in the last five years**

Destination Country 目的国	Capex 资本支出	Projects 项目	Jobs created 就业岗位	Companies 公司
Germany 德国	12.279,6	194	16.386	138
Spain 西班牙	11.703,0	94	21.282	52
United Kingdom 英国	9.397,1	132	19.276	79
Turkey 土耳其	4.894,4	95	10.521	82
Hungary 匈牙利	3.995,8	73	13.317	50
Slovakia 斯洛伐克	3.724,8	19	8.914	17
Poland 波兰	2.968,9	61	15.822	50
Serbia 塞尔维亚	2.763,5	37	18.391	30
France 法国	2.468,6	113	8.168	75
Russia 俄罗斯	2.133,2	31	11.890	28
Portugal 葡萄牙	1.233,6	25	3.536	22
Romania 罗马尼亚	1.207,9	39	9.464	31
Total 34 countries 总共34个国家	67.558,6	1.143	192.323	651

西班牙需要生产**700,000**
辆电动汽车以保持其在
欧洲的制造地位，并有
500万辆上路以实现欧盟
2030年的排放目标。

Spain needs to **produce 700,000 electric vehicles** to maintain its position as a manufacturer in Europe and **5 million on the road** to meet EU emissions targets by 2030

电池需求增长为西班牙
带来了独特的投资机会

Increased demand for batteries poses unique investment opportunities in Spain

目前，只有 3% 的电动
汽车电池在欧洲生产

Only 3% of the batteries for electric cars are currently produced in Europe

PERTE VEC
经济恢复和转型战略项目（电动车）

经济恢复和转型战略项目（电动车）是西班牙政府的一项激励政策，旨在推动汽车行业向电动和互联出行转型。其重点包括

PERTE VEC is a Spanish government initiative aimed at transforming the automotive industry toward electric and connected mobility. Its key points include:

1. 资金和预算：该计划包括约 43 亿欧元的公共投资，旨在通过公共和私人资金筹集总计 240 亿欧元。

1. Funding and Budget: The program includes a public investment of around €4.3 billion, aiming to mobilize a total of €24 billion through public and private funding.

2. 战略目标：

1. 促进电动和互联网汽车在西班牙生产
2. 建立电池、零部件和充电系统的全国供应链
3. 推动汽车行业的创新和技术，提高西班牙的竞争力

2. Strategic Objectives:

1. Boost the production of electric and connected vehicles in Spain.
2. Develop a national supply chain for batteries, components, and charging systems.
3. Promote innovation and technology within the automotive industry to increase Spain's competitiveness.



PERTE VEC
经济恢复和转型战略项目（电动车）



3. 要点:

1. 促进电动汽车需求：激励措施增加西班牙电动汽车销量。
2. 充电基础设施：为在全国范围内部署充电桩提供补贴。
3. 电池工厂：支持在西班牙境内建立电池生产设施，以减少对进口的依赖。

3. Main Components:

1. **Encouragement of Electric Vehicle Demand:** Incentives to increase electric vehicle sales in Spain.
2. **Charging Infrastructure:** Subsidies for the deployment of charging stations nationwide.
3. **Battery Factories:** Support for establishing battery production facilities within Spain to reduce dependency on imports.

还将进行经济恢复和转型战略项目
（电动车）的第四次评选，提供
10 亿欧元贷款和 2.5 亿欧元补贴。

There will be a fourth PERTE VEC call endowed with 1 billion euros in loans and 250 million euros in grants.

PERTE VEC
经济恢复和转型战略项目（电动车）



直接金融扶持

- **无需偿还的补贴：**
 - 为与电动汽车相关的研究、技术开发、创新和制造项目提供 20% 至 80% 的合理成本补贴。
 - 这些补贴集中在以下领域：
 - 电池生产
 - 连接系统的开发
 - 充电基础设施的建设
- **软贷款（低息融资）：**
 - 贷款最多可融资项目成本的 75%，并提供优惠条件，包括较长的宽限期和还款期。

税收优惠

- 研发和创新税收减免：企业可享受与研究、创新和开发相关的企业所得税减免。
- 研发费用减免高达 42%，技术创新费用减免高达 12%。

Direct financial aid

•Non-repayable grants:

- 20% to 80% of eligible costs coverage for research, technological development, innovation, and manufacturing projects related to electric vehicles.
- These
- grants focus on key areas such as:
 - Battery production.
 - Development of connectivity systems.
 - Creation of charging infrastructure.

•Soft loans (low-interest financing):

- Loans can finance up to **75% of project costs**, with preferential conditions, including long grace and repayment periods.

Tax incentives

- Tax deductions for R&D&I: Companies can benefit from deductions in Corporate Income Tax for activities related to research, innovation, and development.
- Deductions of up to 42% of R&D expenses and 12% for technological innovation.

远景集团（远景动力合资企业的一部分）将领导Extremadura地区电池超级工厂的开发

Envision Group (as part of AESC joint venture) to lead development of battery gigafactory in Extremadura



Extremadura地区政府已提供 200 公顷土地用于开发。该项目涉及 9 亿欧元的投资，并将 从 2025 年起创造约 3,000 人的就业机会。

The Regional Government of Extremadura has provided 200 hectares of land for development. It involves an **investment of 900 million euros** and creating employment for around 3,000 people from 2025.



斯特兰蒂斯将与宁德时代联手在萨拉戈萨投资 40 亿欧元建设电池超级工厂。

Stellantis, together with CATL, will invest 4 billion euros in a battery gigafactory in Zaragoza.

斯特兰蒂斯将与其中国合作伙伴 宁德时代共同投资 40 亿欧元在萨拉戈萨建设电池超级工厂。西班牙最大的汽车制造商从第三批 经济恢复和转型战略项目（电动车）中获得超过 1.33 亿欧元

Stellantis, together with its Chinese partner CATL, will invest 4 billion euros in a battery gigafactory in Zaragoza. Spain's largest car manufacturer receives more than 133 million euros from the third Perte VEC.



大众超级锂电池工厂建设（瓦伦西亚大区Sagunto）

Construction begins on Volkswagen's battery gigafactory in Sagunto (Valencia)

大众汽车子公司 PowerCo 已开始在西班牙瓦伦西亚的Sagunto建造电动汽车电池超级工厂。在占地 200 公顷的场地上，该公司计划实现每年 40 千兆瓦的生产能力并创造 3,000 多个就业岗位。这家德国公司已获得 经济恢复和转型战略项目（电动车）1.54 亿欧元的电动汽车援助。

PowerCo, the VolksWagen subsidiary, has started building a gigafactory for electric vehicle batteries in Sagunto (Valencia, Spain). On a 200-hectare site, the company plans to achieve a production capacity of 40 gigawatts per year and create more than 3,000 jobs. The German company has been granted 154 million euros in aid from the PERTE for electric vehicles.



湖南裕能新能源电池材料股份有限公司计划在西班牙投资约9亿欧元

Hunan Yuneng plans to invest approximately a total of 900 million euros in Spain



湖南裕能计划在西班牙投资近9亿欧元，共计年产30万吨锂电池正极材料，该项目将分期建设。一期项目为年产5万吨锂电池正极材料，投资约9.82亿元人民币。

Hunan Yuneng plans to invest approximately a total of 900 million euros, to produce a total of 300,000 tons of lithium battery cathode material, in several phases. The first phase of the project Will have an annual production of 50,000 tons of lithium battery cathode material, with an investment of approximately 982 million de yuan.



西班牙的可再生能源行业

Renewable Energy in Spain

西班牙可再生能源产量增长15.1%（2022-2023年），创下134,321吉瓦时的历史新高。

Renewable production in Spain increased by 15.1 % (2022-2023), recording a **record high** of 134,321 GWh.

风能是全国发电结构中最重要可再生能源技术（占总发电量的23.5%）。太阳能位居第二（占14%）。

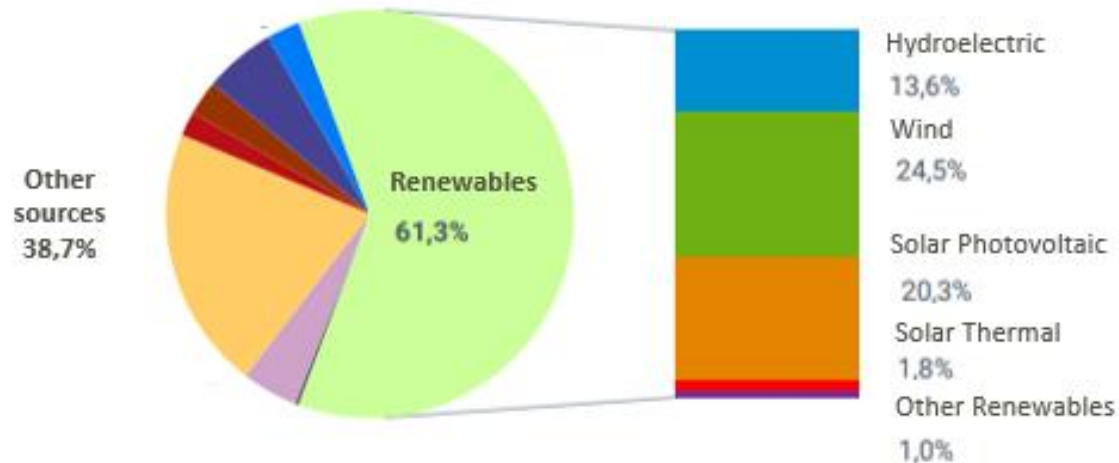
Wind is the most important renewable technology in the national generation mix (23.5% of total production). **Solar** is the second one (14%).

西班牙需要储存其可再生能源盈余

Spain needs to store its renewable energy surplus

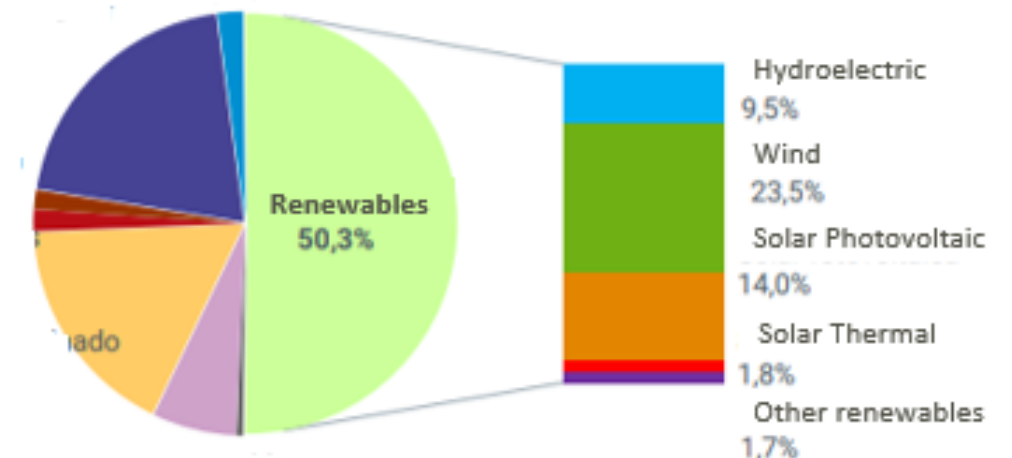
2023年电力装机容量结构（%）

Installed power capacity structure (%) in 2023



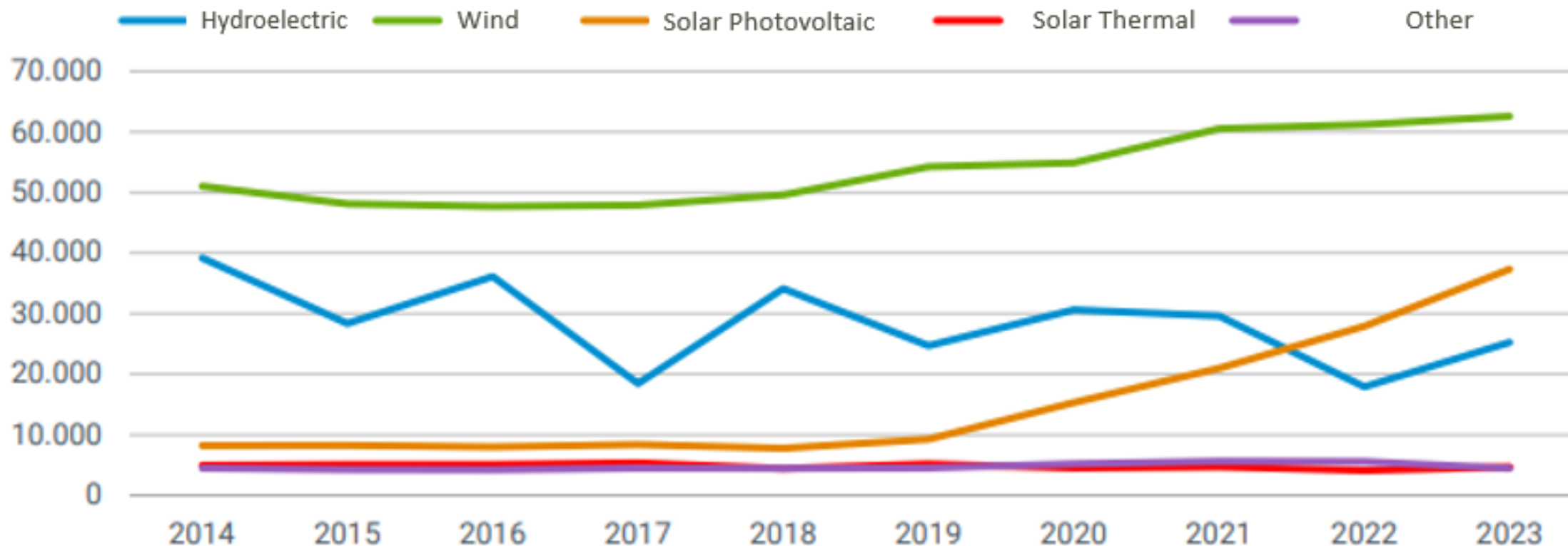
2023年发电结构（%）

Electricity generation structure (%) in 2023



西班牙可再生能源发电量 (GWh) 比例

Evolution of renewable energy generation (GWh) in Spain



光伏太阳能产业

PV Solar Energy Industry

2030年容量目标: 76.39 GW

Capacity Goal 2030: 76.39 GW.

现容量:

28.50吉瓦 (至24年9月)

6.95吉瓦 (自我供给)

Current capacity:

- 28.50 GW Sept. 24 (grid).
- 6.95 GW 2023 (self-consumption).



2023 年国际出口业务:

- 业务遍及 72 个国家
- 进口额: 28.23 亿欧元
- 出口额: 40.82 亿欧元 (60.70% 为商品)

International export business 2023:

- Presence in 72 countries
- Imports: €2,823 million
- Exports: €4,082 million (60.70% goods)

2023年与光伏行业直接、间接和衍生的工作职位: 120,742

Number of jobs in Spain tied directly or indirectly to PV energy industry in 2023: 120,742

西班牙是欧洲覆盖率最高的国家之一: 2,150 千万时/峰瓦

Spain has one of the highest levels of solar radiation in Europe: 2,150 kWh/kWp

风电行业

Wind Power

当前容量是31.50 吉瓦
(2024年)
新安装量为691.00 吉瓦

Current capacity: 31.50 GW 2024.
New installations 2023: 691.00 MW.

2030年容量目标:
62.04 吉瓦

Capacity Goal 2030 : 62.04 GW.



全球第五大风力涡轮机出口国
(2023 年为 25.12 亿欧元)

The world's 5th largest exporter of wind turbines (€2,512 million in 2023).

2022 年西班牙与风能行业
直接或间接相关的就业岗位
数量达到39,015 个

Number of jobs in Spain tied directly or indirectly to wind energy industry in 2022: 39,015.

西班牙公司在欧盟、美国、加拿大、墨西哥、
中国、澳大利亚、印度等地区的综合增长

Consolidated growth of Spanish companies in the European Union, United States, Canada, Mexico, China, Australia, India, etc.

主要的西班牙公司

Main Spanish Companies



近期投资案例

New Success Stories

ICEX

INVEST IN
SPAIN

中国三峡集团收购西班牙619兆瓦的太阳能光伏产业

China Three Gorges acquires 619 megawatts in solar PV projects

中国三峡集团是亚洲最大的可再生能源集团，其分公司三峡欧洲（CTGS）从英国可再生能源投资者Nexwell Power和Ibox Energy手中收购西班牙约619兆瓦的太阳能光伏产业，这是三峡西班牙分公司第一次参与绿地项目的购买

The European subsidiary of China Three Gorges (CTG), the largest renewable energy group in the Asian country, has bought a 619-megawatt solar PV portfolio, entirely in Spain, from Nexwell Power and Ibox Energy. this is CTG Spain's (CTGS) first greenfield asset acquisition



中国三峡
China Three Gorges Corporation



金风科技与德国木塔共同收购西班牙Eblades科技风机叶片工厂

Vensys / Goldwind acquired EBlades Technology's windmill blade factory

2016 年，德国木塔（金风科技持股70%）收购了西班牙Eblades科技，由此，这家大型风电企业在西班牙南部拥有一家风力涡轮机叶片生产厂，供应国际市场，项目总投资额为 600 万欧元。

In 2016, Vensys (70% owned by Goldwind) acquired Eblades Technology. As a result, the large wind power company now owns a wind turbine blade production plant in southern Spain, to supply international markets. Investment amounted to 6 million euros.



天合光能收购了太阳能追踪器制造企业Nclave

Trina Solar buys the manufacturer of solar trackers Nclave

中国太阳能解决方案供应商天合光能已完成了对西班牙太阳能跟踪系统制造商 Nclave 新能源的多数股权收购。这是中国太阳能行业公司首次在海外市场收购太阳能跟踪器制造商。Nclave 在可再生能源领域拥有 12 年以上的经验。该公司总部位于马德里，在西班牙纳瓦拉地区设有制造工厂，并在五大洲都设有办事处。

The Chinese solar energy solutions supplier Trina Solar has completed the acquisition of a majority stake in Nclave Renewable, the Spanish manufacturer of solar tracking systems. This is the first time that a Chinese company in the sector has bought a manufacturer of solar trackers outside its domestic market. Nclave has more than twelve years of experience in the renewable energy sector. It has its headquarters in Madrid, a manufacturing plant in Navarre and commercial offices on five continents.





为什么是西班牙？

Why Spain?

经济 **Economy**

欧盟第**4**大经济体, 全球第**14**大经济体

The 4th economy of the EU and the 14th in the world

外商投资目的地地位列世界第十三位

The 13th recipient of foreign investments in the world

世界上对国际投资限制最少的第十个国家

The 10th country in the world with the least restrictive regulations for international investments.

进入欧洲、北非、中东以及拉丁美洲市场的门户地

The gateway to the European Union, North African, Middle Eastern and Latin American markets



Infrastructure: Spain is a logistics hub

基础设施建设：西班牙是物流中心



48 airports, 2 among the 10 largest in Europe.

48座机场, 两座位居欧洲十大机场之列。

The largest **network of highways and freeways** in the EU (over 17,300 km).

欧盟最大的高速公路网络, 超过17,300公里。

The **second most extensive high-speed rail network** in the world (3,402 km).

世界第二的高铁网络, 总长3,402公里。

46 ports, of which 3 are among the top 10 in the European Union in terms of container volume

46个港口, 其中有3个集装箱吞吐量位列欧盟前10名

279 logistics parks and Europe's largest logistics platform: 80.5 million square meters of area.

279个物流园区和欧洲最大的物流平台, 面积达8,050万平方米

西班牙人才市场

Labor Market in Spain

3rd in Europe and 7th in the world in terms of the proportion of the **population with higher education**.

接受过高等教育的人口比例在欧洲排名第3, 位列世界第7

4th in Europe in terms of the number of **people working in science and technology**.

从事科技行业人才数量在欧洲排第4

Wage costs are stable and competitive compared to other large European economies

与欧洲其他大型经济体相比, 工资成本稳定且更具竞争力

Modern and flexible regulatory framework

现代且灵活的监管体制

劳动成本 按小时计算
Hourly labor costs Spain



西班牙:
21.7 欧元/小时

Spain:
24.6 €/hour

Italy: 29.8 €/hour
Germany: 41.3 €/hour
France: 42.2 €/hour



欧盟:
27.4 欧元/小时

EU-27:
27.4 €/hour

意大利: 29.8欧元/小时
德国: 41.3欧元/小时
法国: 42.2欧元/小时

Taxes aimed at encouraging internationalization and foreign investment

- **Participation Exemption:** Exemption of 95% of the tax on dividends and capital gains of non-resident subsidiaries
- **Special tax regime** for holding companies
- **Fiscal neutrality** in corporate reorganization operations
- Double Taxation Avoidance Agreements (DTAs) with 99 countries
- **Special tax regime for foreign employees** assigned to the Spanish territory for work-related reasons

The general rate of Spanish corporate tax is 25%, which is the average of the rates prevailing in the Euro Area. **The effective tax rate is around 20%**, thanks to the various tax incentives and exemptions available.

旨在鼓励国际化和外国投资的税收

- **参与豁免:** 免征非居民子公司股息和资本收益中95%的税收
- 针对控股公司的**特殊税收制度**
- 公司重组操作中的**财政中立性**
- 与**99个**国家签署的避免双重征税协定
- 因工作原因而派往西班牙领土的**外国员工享受特别税收制度**

西班牙公司税的一般税率为25%，是整个欧元区现行税率的平均值。有效税率约为20%，这得益于各种现有的税收优惠和免税政策

谢谢！
Thanks!

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