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西班牙- 您在欧洲的伙伴 中资企业投资机会

Spain, your partner in Europe
Investment opportunities for Chinese corporates

2025年6月
June 2025

西班牙投资促进局服务 Invest in Spain: Services

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- ✓ 投后服务 Aftercare Services
- ✓ 定制报告 Customized Reports
- ✓ 信息与建议 Intelligence & Advise
- ✓ 会议和旅行日程 Meeting & Trip Agendas
- ✓ 联系,政府,工业 Contacts: Institutional, Industry,...
- ✓ 寻找当地合作伙伴 Search for Local Partners
- ✓ 搜索网站 Search for sites
- ✓ 支持投资项目 Investment project support
- ✓ 和地区机构协调 Coordination w/Regional Agencies.
- ✓ 开发与再投资 Development & Reinvestment

我们的国外网络

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提供免费和保密性服务



为什么西班牙?

西班牙是一个高度发展的巨大市场

- 世界第13大、欧盟第4大经济体
- 全球游客数量全球排名第

西班牙是欧盟成员国，投资西班牙意味着投资欧盟。所以一旦进入了西班牙，就在欧盟统一市场里拥有了5亿高购买力的消费者。

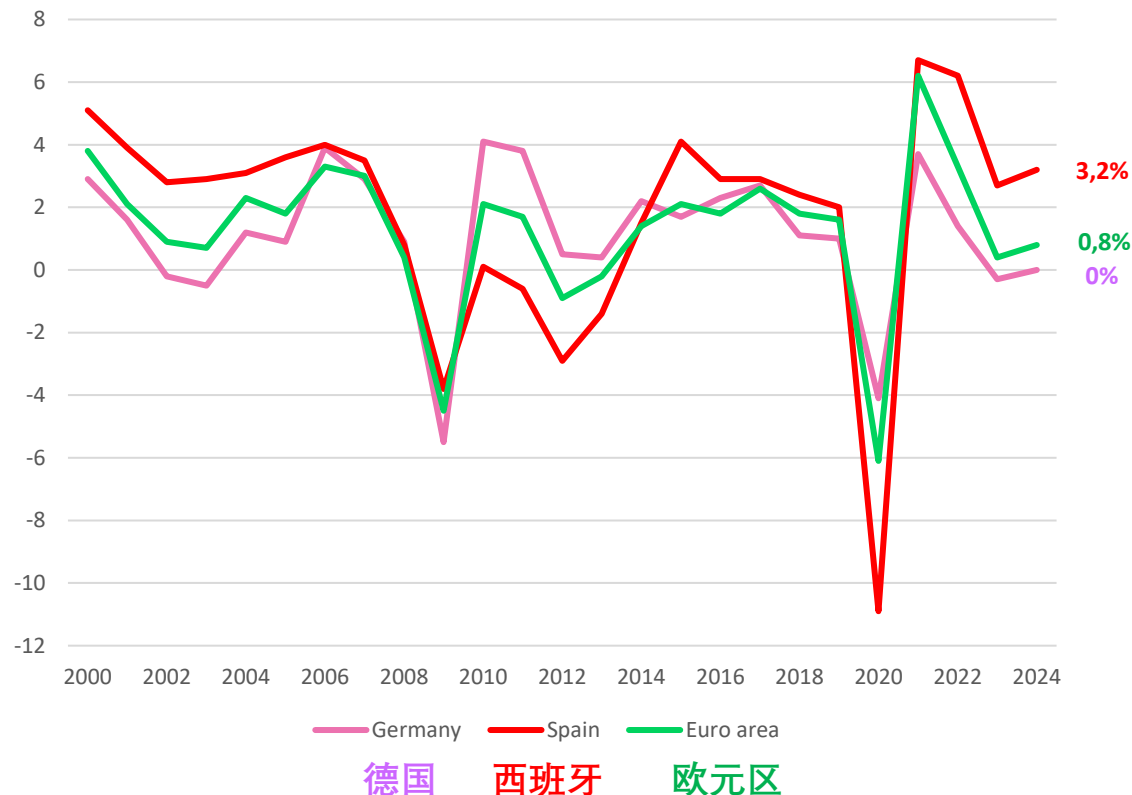
西班牙是世界第11大外国直接投资接收国

许多西班牙企业是世界上最领先的企业，在第三方市场提供很多合作机会。目前，22家西班牙企业进入了福布斯全球两千500强榜单。



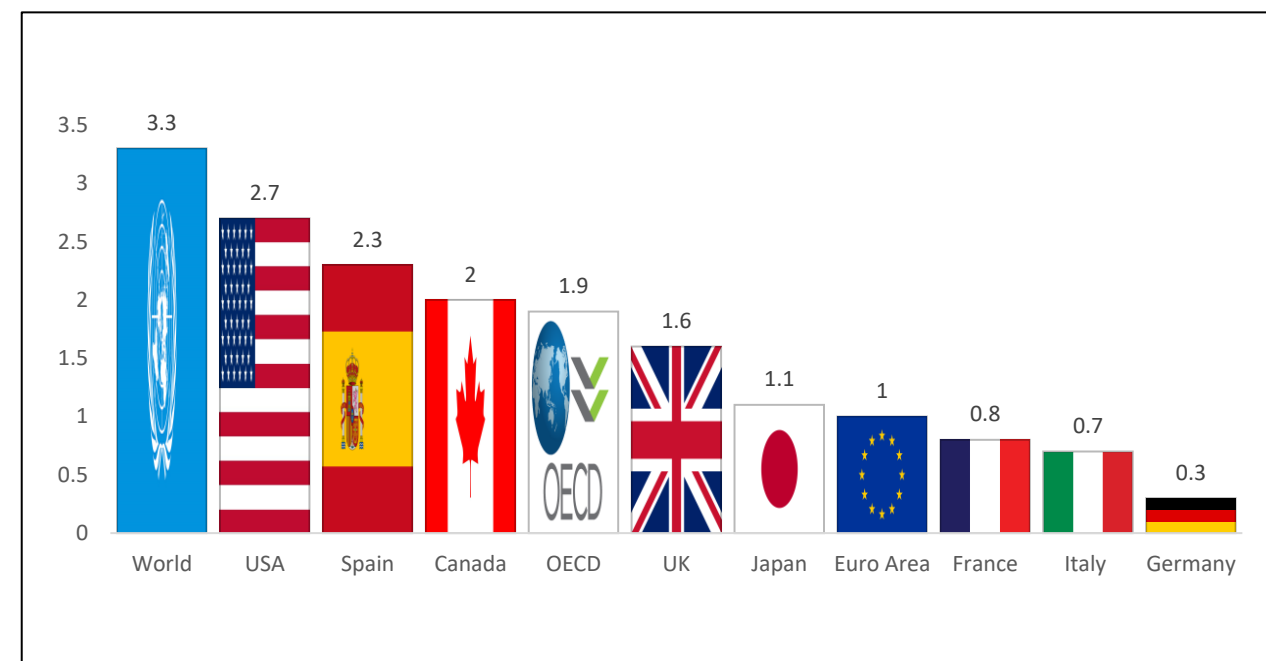
- ❖ 世界第15大, 欧盟第4大经济体：国民生产总值 1.4 万亿 美元.
- ❖ World's 15th largest economy and the 4th largest economy in the EU: GDP worth 1,426 billion USD.
- ❖ 世界第10大贸易服务出口国, 2022年货物出口全球排名第19位.
- ❖ 10th largest exporter of commercial services worldwide and 19th ranked exporter of merchandise trade in 2022.
- ❖ 世界第二大、欧洲第一大旅游国(外国游客到达量)；接收外国游客量欧洲排名第一—2023年游客超过9千3百万人.
- ❖ 2nd country worldwide in international tourist arrivals and in receipts (2nd in Europe) in 2024. More than 93 million international tourists in 2024.
- ❖ 2022年世界第13大外资吸收国, 第17大对外投资国.
- ❖ 13th largest economy in terms of accumulated inward FDI stock and 17th in outward FDI stock in the world in 2023.
- ❖ 总人口4800万, 500万出生于国外.
- ❖ Total population of 48 million. More than 5 million are foreigners.
- ❖ 全球基础设施最佳国家第七名（全球竞争力报告-世界经济论坛）
- ❖ 7th country worldwide with best infrastructures (The Global Competitiveness Report-World Economic Forum)

国内生产总值增长演变(2000-2024)
GDP Growth Evolution (2000-2024)



Source: IMF, 2025

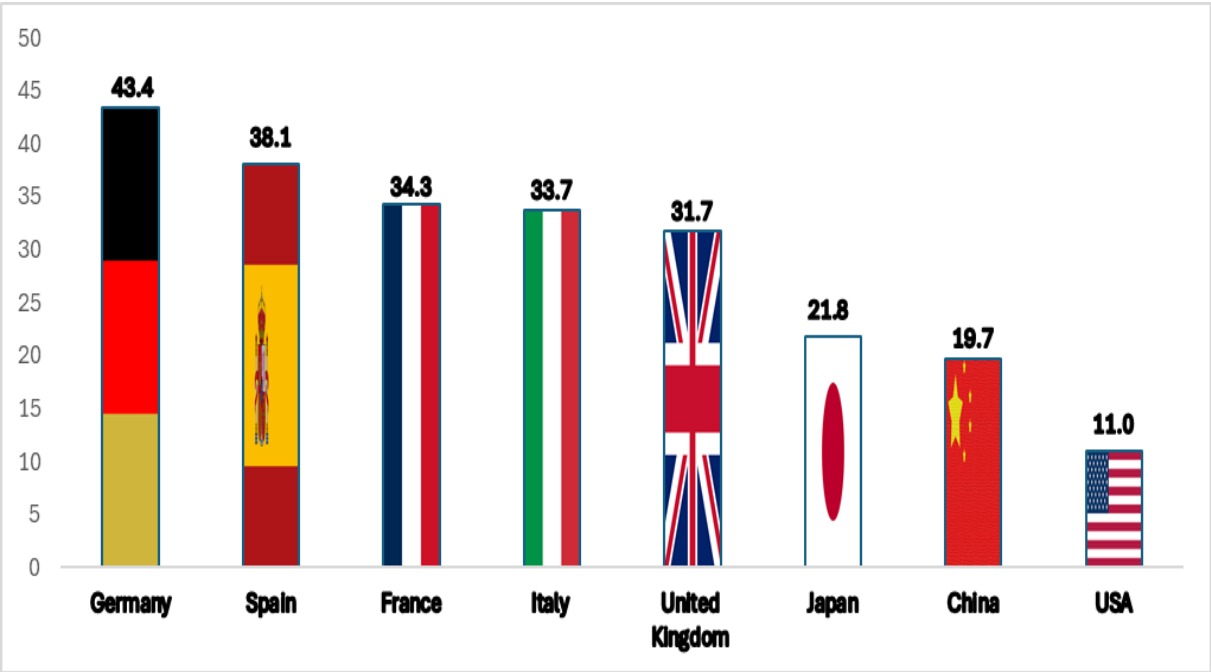
国际货币基金组织对2024年的增长预测
IMF Real GDP Growth Forecasts for 2025
(WEO January 2025)



Source: IMF, 2025

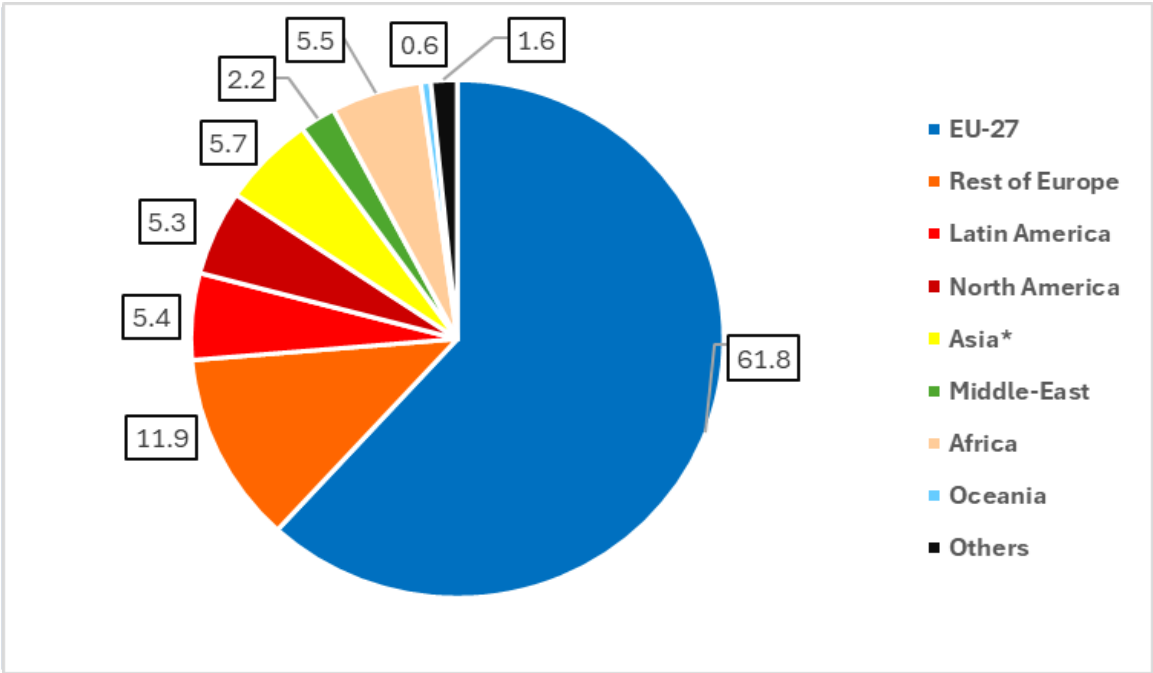
一个开放的经济是更有竞争力和更有弹性的经济
An open Economy is a more Competitive & Resilient Economy

2024：货物和服务出口占 GDP的百分比
2024: Exports of Goods & Services % GDP



Source: World Bank 2023 Data

2024：按目的地划分的西班牙货物出口（%）。
2024: Exports of Goods from Spain by Destination (%)



Source: Secretariat of State for Trade

*Excluded Middle East

西班牙出口到第三方市场总额的41.8%来自西班牙跨国企业
Multinationals in Spain account for more than 41.8% of total exports from Spain to third Markets

西班牙：一个高度国际化的经济体 Spain: a highly internationalized economy

西班牙吸收的外国直接投资存量居全球第十三位

Spain is the 13th largest economy in terms of accumulated inward FDI stock in the world

2023 接收外国直接投资存量 百万美元

2023 Inward FDI Stock			
Economy		Mill USD	Share
1	United States 美国	12,817,063	26%
2	China + HK 中国	5,766,671	12%
3	United Kingdom 英国	3,048,932	6%
4	Netherlands 荷兰	2,678,218	5%
5	Singapore 新加坡	2,632,364	5%
6	Canada 加拿大	1,665,774	3%
7	Ireland 爱尔兰	1,410,084	3%
8	Luxembourg 卢森堡	1,183,734	2%
9	Switzerland 瑞士	1,136,788	2%
10	Germany 德国	1,128,259	2%
11	France 法国	1,012,705	2%
12	Brazil 巴西	997,570	2%
13	Spain 西班牙	897,268	2%
14	Australia 澳大利亚	807,427	2%
15	Mexico 墨西哥	778,371	2%
16	Malta 马耳他	725,715	1%
17	Belgium 比利时	577,961	1%
18	India 印度	536,930	1%
World 世界		49,130,846	

Source: UNCTAD, WIR 2024.

2023 对外直接投资存量 百万美元

2023 Outward FDI Stock			
Economy		Mill USD	Share
1	United States 美国	9,433,926	21%
2	China + HK 中国	4,967,632	11%
3	Netherlands 荷兰	3,386,269	8%
4	Canada 加拿大	2,746,892	6%
5	Germany 德国	2,179,240	5%
6	Japan 日本	2,132,578	5%
7	United Kingdom 英国	2,124,191	5%
8	Singapore 新加坡	1,792,289	4%
9	Luxembourg 卢森堡	1,679,068	4%
10	France 法国	1,635,680	4%
11	Switzerland 瑞士	1,472,959	3%
12	Ireland 爱尔兰	1,336,414	3%
13	Belgium 比利时	770,505	2%
14	Australia 澳大利亚	710,639	2%
15	Malta 马耳他	695,859	2%
16	Republic of Korea 韩国	682,023	2%
17	Spain 西班牙	630,189	1%
18	Italy 意大利	584,031	1%
World 世界		44,380,560	

Source: UNCTAD, WIR 2024.

在西班牙有超过15 ,000间外资公司横跨不同的经济产业.
Over 15,000 foreign companies in Spain across all economic sectors.

根据路透社数据，福布斯排名前100家企业，其中70家在西班牙公司设有分公司，排名前100的研发公司当中有90间在西班牙设有子公司。 70 of the FORBES Top 100 companies have branches and 90 out of 100 top R&D Companies have a subsidiary according to Thomson Reuters

根据金融时报外国直接投资市场的统计，西班牙世界第五大绿地项目以及创新和高端绿地业务第六目的地 (2024)
Spain is the world's 5th greenfield projects and 6th Innovative & high-end greenfield activities destination, according to FDI Markets Financial Times (2024)

Top 10 Greenfield Destinations in the World 2024					
	Country	Projects	Capex € Million	Jobs created	Companies
1	USA 美国	2,454	225,891.5	277,344	1,717
2	UAE 阿联酋	1,365	12,938.6	44,594	1,316
3	UK 英国	1,184	84,062.2	79,502	974
4	India 印度	1,077	100,869.1	416,632	856
5	Spain 西班牙	856	35,603.6	72,416	626
6	Germany 德国	839	28,217.7	36,995	729
7	Canada 加拿大	598	31,078.4	47,016	538
8	Mexico 墨西哥	526	40,772.7	134,856	467
9	France 法国	522	23,882.2	35,740	410
10	China 中国	500	37,045.8	94,447	416
	Rest 其它	9,255	609,549	1,396,610	8,333
Total 总额		19,176	1,229,910.5	2,636,152	12,220

Source: FDI Markets, 2025. € Million.

Top 10 Innovative & High-End Greenfield Activities (*) Destinations in the World 2024					
	Country	Projects	Capex € Million	Jobs created	Companies
1	USA 美国	344	15,826.7	33,708	325
2	India 印度	267	17,161.2	99,651	234
3	UK 英国	158	33,307.5	16,381	153
4	Germany 德国	115	9,609.3	7,940	106
5	Canada 加拿大	102	5,935.2	8,541	96
6	Spain	99	12,296.6	12,911	92
7	UAE 阿联酋	97	2,689.5	6,134	97
8	Poland 波兰	64	790.9	6,732	62
9	Saudi Arabia 沙特阿拉伯	64	7,088.4	6,871	63
10	China 中国	62	2,991.9	10,609	54
	Rest 其它	1,003	102,575	123,231	941
Total 总额		2,375	210,272.3	332,709	1,860

Source: FDI Markets, 2025. € Million.

(*) Innovative & High-End Activities: Headquarters, Ict&Internet infrastructure, R&D.

2019-2023年各国对西班牙投资存量和流量				外国投资登记处. 百万欧元				
Stock and Recent Trends in Spain by Country 2019 – 2023				Foreign Investments Registry. Million Euro				
Country 国家		Investment Flows 投资流量					Investment Stock (*) 投资存量	
		2019-2023	2019	2020	2021	2022		
1	USA 美国	36,059.5	4,600.9	7,087.7	5,877.8	10,069.3	8,423.8	117,952.3
2	France 法国	22,599.7	4,491.4	2,525.5	8,122.2	3,490.4	3,970.2	64,716.0
3	UK 英国	22,572.7	5,759.8	2,993.0	3,417.7	6,706.4	3,695.8	60,400.9
4	Germany 德国	12,008.1	1,043.9	1,604.3	1,516.6	4,843.6	2,999.8	54,320.0
5	Switzerland 瑞士	6,370.8	761.9	3,761.7	131.4	511.8	1,204.0	15,833.7
6	Australia 澳大利亚	5,473.1	15.1	276.6	2,484.1	1,353.6	1,343.7	13,522.8
7	Mexico 墨西哥	5,356.5	1,583.9	781.1	739.4	606.1	1,645.9	31,195.3
8	Costa Rica 哥斯达黎加	4,026.5	136.9	3,838.1	3.3	8.8	39.3	799.2
9	Netherlands 荷兰	3,799.5	657.3	670.1	843.7	1,049.0	579.3	17,398.4
10	Sweden 瑞典	3,665.5	339.6	1,435.0	1,418.6	348.6	123.8	6,054.9
11	Canada 加拿大	3,447.2	666.4	451.9	323.1	830.3	1,175.4	12,603.3
12	Italy 意大利	3,420.1	815.3	397.1	964.0	997.8	245.8	53,243.2
13	Japan 日本	3,094.3	170.1	728.9	1,345.3	336.0	514.0	12,629.3
14	China Mainland + HK 中国	2,017.0	204.5	488.4	457.1	729.1	137.9	11,932.1
15	Argentina 阿根廷	1,622.0	829.0	325.8	217.9	53.1	196.2	10,212.7
16	Belgium 比利时	1,582.0	124.7	544.7	333.1	377.2	202.4	3,573.6
17	Austria 奥地利	1,488.6	48.4	24.6	69.1	696.7	649.8	1,480.1
18	Luxembourg 卢森堡	1,403.8	414.2	302.2	271.7	224.8	190.9	3,819.1
19	South Africa 南非	1,361.3	259.7	25.0	108.4	742.4	225.8	1,224.8
20	Portugal 葡萄牙	1,283.7	200.8	189.7	150.0	219.0	524.2	14,465.8
21	Russia 俄罗斯	1,276.7	249.3	8.6	941.5	61.6	15.6	423.1
22	Qatar 卡塔尔	1,242.8	11.7	1,218.5	8.0	4.4	0.2	3,049.0
23	UAE 阿拉伯联合酋长国	1,136.5	317.6	77.1	107.4	275.0	359.5	5,687.8
24	Brazil 巴西	804.7	511.3	186.5	4.2	64.4	38.4	7,804.8
25	Singapore 新加坡	786.4	291.4	55.5	215.2	115.1	109.2	4,548.4
	Other 其它	14,522.7	3,073.5	2,534.6	2,539.4	2,347.2	4,028.0	64,756.5
TOTAL 总计		162,421.8	27,578.5	32,532.3	32,610.3	37,061.8	32,638.8	593,647.1
Total Productive Investment 生产性投资总计		145,109.6	24,846.1	27,191.9	30,242.5	34,614.2	28,214.9	551,616.3

Source: Foreign Investments Registry. Ministry of Economy, Trade and Business, 2024. Million €. (*) Stock 2022 data.

西班牙各行业的外商直接投资 FDI in Spain by Sector

西班牙各行业的外国直接投资。存量和最近的趋势 2019 – 2023 Foreign Direct Investment in Spain by Sector. Stock and Recent Trends 2019 – 2023			外国投资注册. 百万欧元 Foreign Investments Registry. Million Euro				
Sectors 行业		Total Stock *	Investment Flows 投资流入量				
			2019	2020	2021	2022	2023
1	Real Estate, Building and Infrastructures 房地产建筑基础设施	96,051.4	4,389.3	4,736.3	7,903.7	4,135.1	4,094.9
2	Energy 能源	88,140.3	1,049.5	1,352.2	6,531.9	3,375.8	2,092.3
3	Retail and Wholesale 零售和批发	57,961.0	1,980.3	5,246.4	2,365.2	1,883.5	4,260.5
4	Financial Services 金融服务	51,156.2	6,637.8	7,689.3	1,089.9	1,821.8	1,769.2
5	Metals and Manufacturing of other Materials 金属及其他材料制造	47,420.1	730.4	558.4	1,609.4	1,468.8	2,886.6
6	ITC: Communications, Software & IT Services 通信软件和IT服务	41,955.4	2,129.2	4,798.8	5,297.8	5,953.2	3,838.0
7	Chemicals and Petrochemicals 化学品和石化产品	31,439.5	1,468.7	516.1	489.0	518.9	1,007.0
8	Food and Beverages 食品和饮料	28,970.1	1,082.5	2,059.5	1,548.4	1,261.7	742.2
9	Pharmaceuticals, Medical, Healthcare & Biotechnology 制药、医疗、保健和生物技术	23,521.9	450.6	591.1	954.9	501.5	2,101.0
10	Mining and Natural Resources 矿产和自然资源	22,655.2	167.1	20.0	10.7	906.1	3,556.7
11	Transport and Logistics 运输和物流	19,070.0	493.0	1,699.5	801.2	1,490.5	472.5
12	Automotive OEM & Automotive Components 汽车代工和汽车配件	18,063.5	409.5	344.2	167.1	1,499.6	1,641.4
13	Business Services 商业服务	17,912.2	2,211.5	1,410.3	789.1	925.6	435.6
14	Tourism 旅游	16,373.4	669.6	399.8	1,592.4	3,490.1	1,097.5
15	Environmental industries 环境工业	10,592.2	681.1	39.6	301.9	93.4	1,631.6
16	Industrial Machinery and Equipment 工业机械和设备	7,934.5	204.1	196.9	368.9	5,854.5	267.1
17	Paper, Wood and Others 纸张、木材和其他	7,421.8	1,717.4	497.0	121.7	362.9	172.7
18	Leisure and Entertainment 娱乐部门	5,750.8	884.5	295.7	579.0	1,468.6	286.1
19	Consumer Goods 消费品	1,127.9	215.4	73.6	85.2	40.2	284.2
20	Other 其它	129.8	7.1	7.8	2.8	10.1	1.6
Total Investment 总投资		593,647.1	27,578.5	32,532.3	32,610.3	37,061.8	32,638.8
Total Productive Investment 生产性总投资		551,616.3	24,846.1	27,191.9	30,242.5	34,614.2	28,214.9

Source: Foreign Investments Registry. Ministry of Economy, Trade and Business, 2024. Million Euro. (*) Stock 2022 data.

西班牙工厂生产能力达300万辆车

Spanish plants set to manufacture 3 million vehicles

全球生产的3%， 占欧洲市场份额的12%

3% of global production, 12% of European market share.

车辆类型

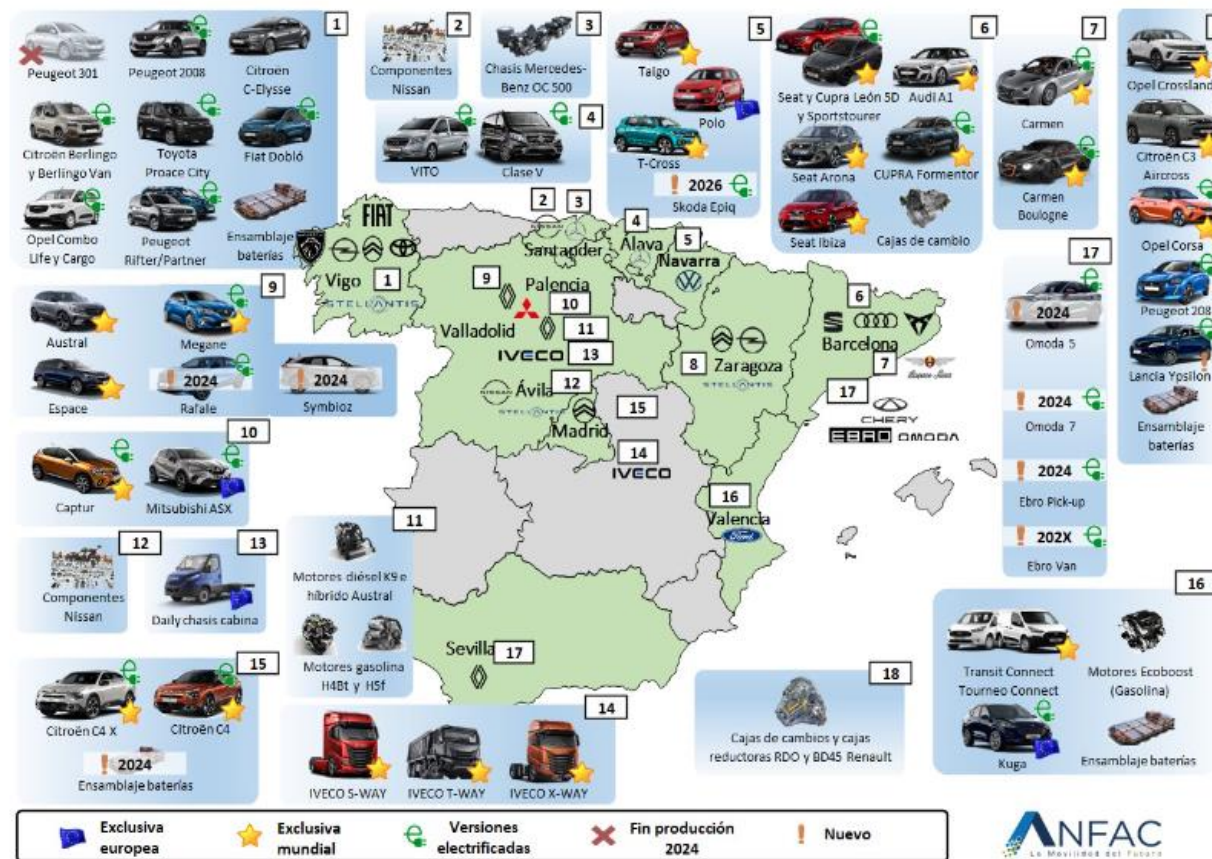
Units by types

78%乘用车

78% Passenger cars and pick-ups

22%商用车辆

22% Commercial and industrial vehicles



10 个汽车制造集群

10 Automotive clusters

47 个技术中心

47 Technology Centres

生产44个车型， 25个电动车 (2024)

44 models manufacture, 25 electrified versions in 2023-2024.

国际地位 International Position

Ranking 30 years ago

1. USA



2. Japan



3. Germany



4. France



5. Italy



6. UK



7. Spain



Others

South Korea
Czech Republic
Romania

In over 30 years, only USA, Japan, Germany and Spain have remained TOP-10 players

30多年来，只有美国、日本、德国和西班牙始终保持在前10位。

Spain is the 2nd car manufacturer in Europe, after Germany

西班牙是仅次于德国的欧洲第二大汽车制造商

Ranking (2023)

1. China



2. USA



3. Japan



4. India



5. South Korea



6. Germany



7. Mexico



8. Spain



9. Brazil



10. Thailand



中国企业为什么要选择投资西班牙？

Why Spain for Chinese Companies?





中国在西班牙 China in Spain

中国是西班牙第十四大投资国：119,3216亿欧元 (存量)
西班牙有 350 家中国企业
创造了12,000 个工作岗位

14th Investor in Spain: 11,932 million € (stock)
350 Chinese companies in Spain
12,000 Jobs

中国对西出口总值 (2024年) : 456.01亿欧元
中国是西班牙第二供应国
中国赴西旅游人次 (2019年) : 647,801人
在西班牙居住的中国公民 (2024年) : 232,982人

Chinese Exports to Spain (2024): 45,601.2 Mill. €
China is Spain second supplier country
Chinese tourists in Spain (2024): 647.801
Chinese Residents in Spain (2023): 232,982



西班牙在中国 Spain in China

西班牙是中国第24大投资国：33.07亿欧元 (存量)
中国有500-600家西班牙公司
创造了30,674 个工作岗位

24th destination Spanish Investment 3,307 million € (stock)
500-600 Spanish Companies in China
30,674 Jobs

西班牙对华出口总值 (2023年) : 83.72亿欧元
西班牙赴华旅游人次 (2019年) : 165,984人
在中国居住的西班牙公民 (2023年) : 4,675 人

Spanish Exports to China (2024): 8,372 Mill.€
Spanish Tourists in China (2019): 165,984
Spanish Residents in China (2023): 4,675

资料来源：外商直接投资登记。西班牙经济与企业部。2003-2017外商直接投资市场。2023西班牙国家统计局 以及中国国家旅游管理局 (CNTA)

Source: FDI Investments Registry. Ministry Economy . FDI Markets 2003-2017; Ministry of Inclusion, Social Security and Migration (2023); INE (2023); National Bureau of Statistics of China (2019) / UNWTO (2019)

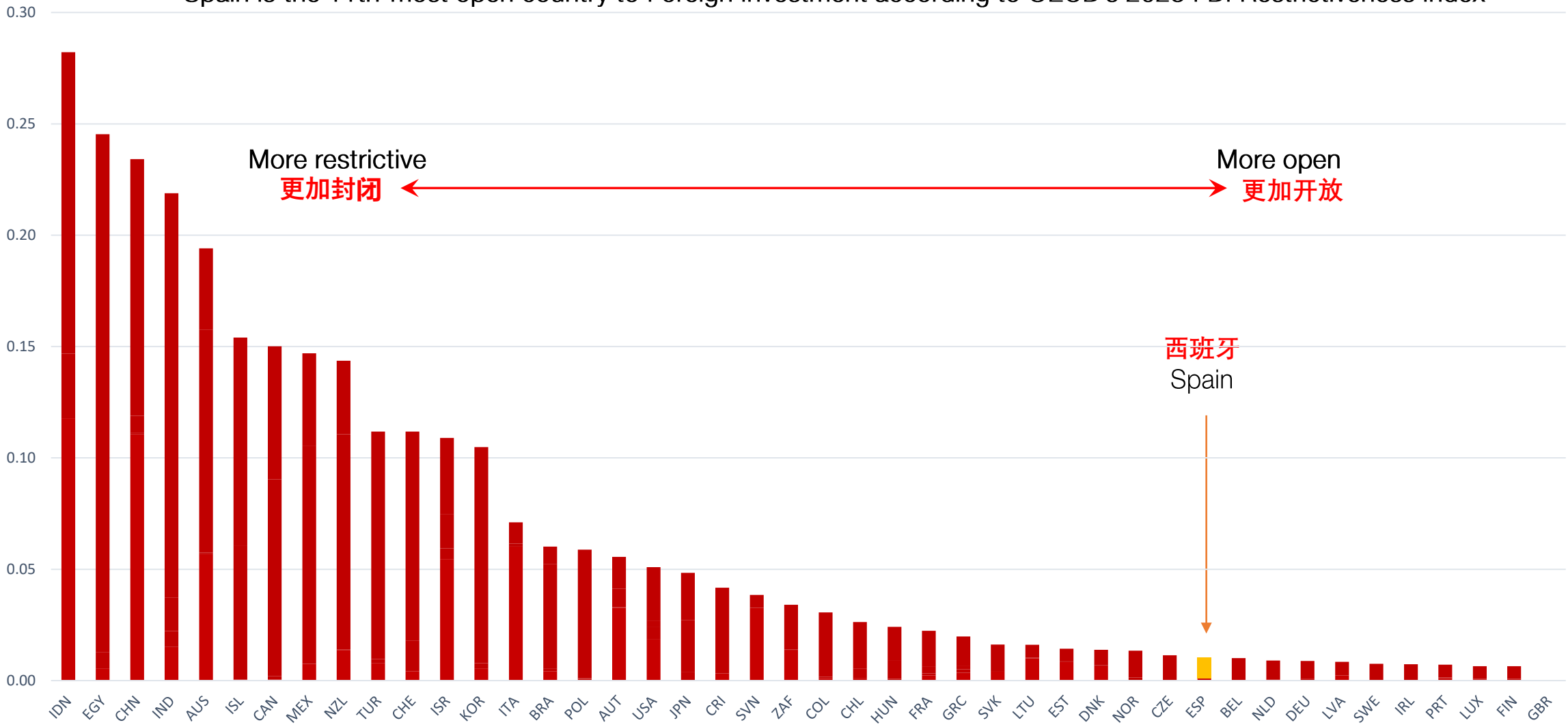
在西班牙的主要中国企业 Main Chinese investments in Spain



欧盟对外商直接投资的国际开放度 International Openness to FDI in EU

根据经合组织(OECD)2020年FDI限制指数，西班牙是外商直接投资第九大开放国

Spain is the 11th-most open country to Foreign Investment according to OECD's 2023 FDI Restrictiveness Index

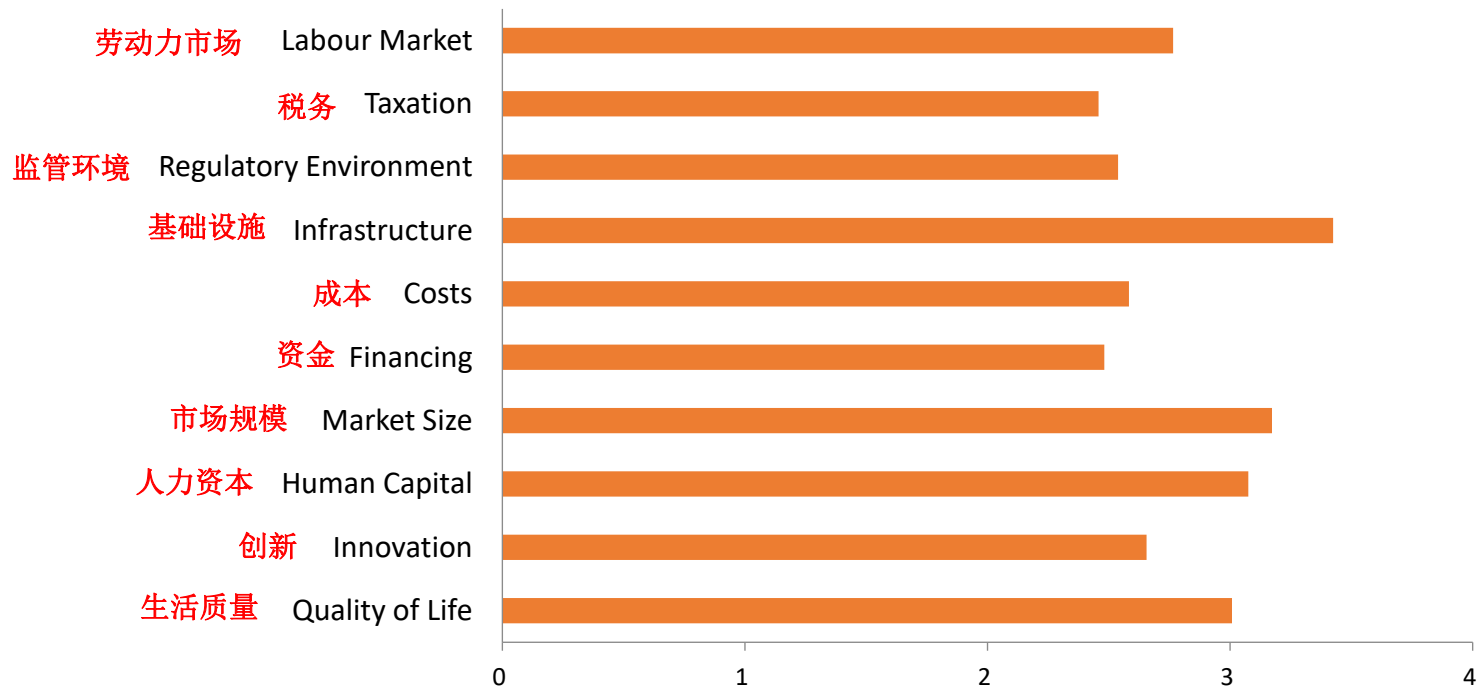


Source: OECD, 2025 Data Referred to 2023 来源: 2025 经合组织 数据为2023年

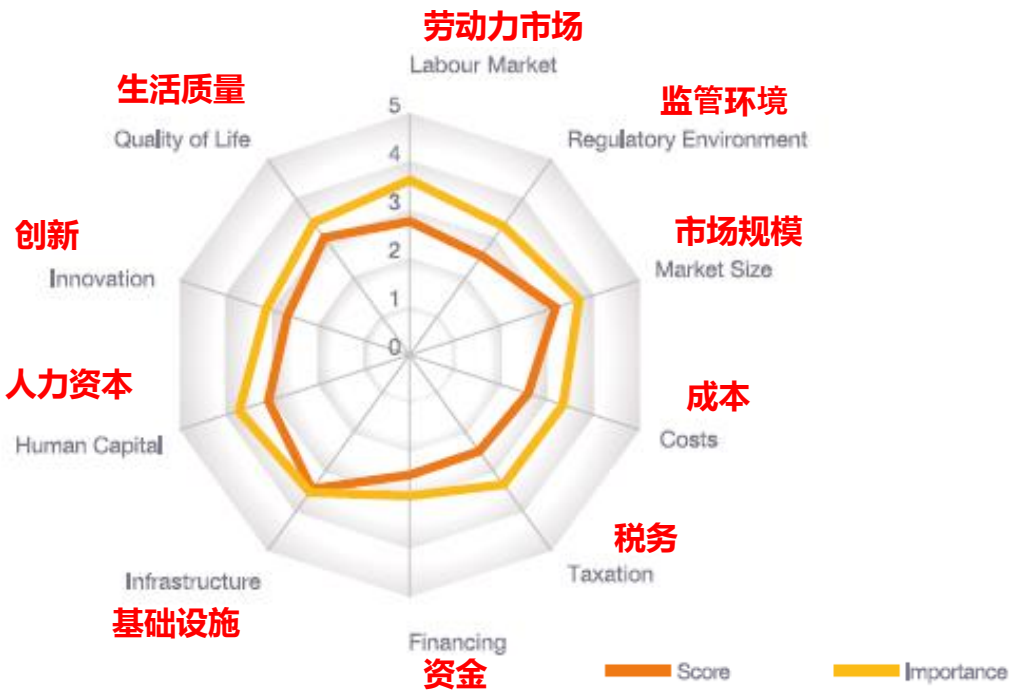
720 家国际企业参与 2024 调查

Over 720 International Companies participating in the 2024 survey

2024 年评估 (从1到5)
Assessments 2024 (from 1 to 5)



2024 年各领域的重要性和评估
Importance and assessment by areas 2024



89%参与调查的企业计划于2025年扩大或保持其在西班牙的投资 (86% 2024 年)

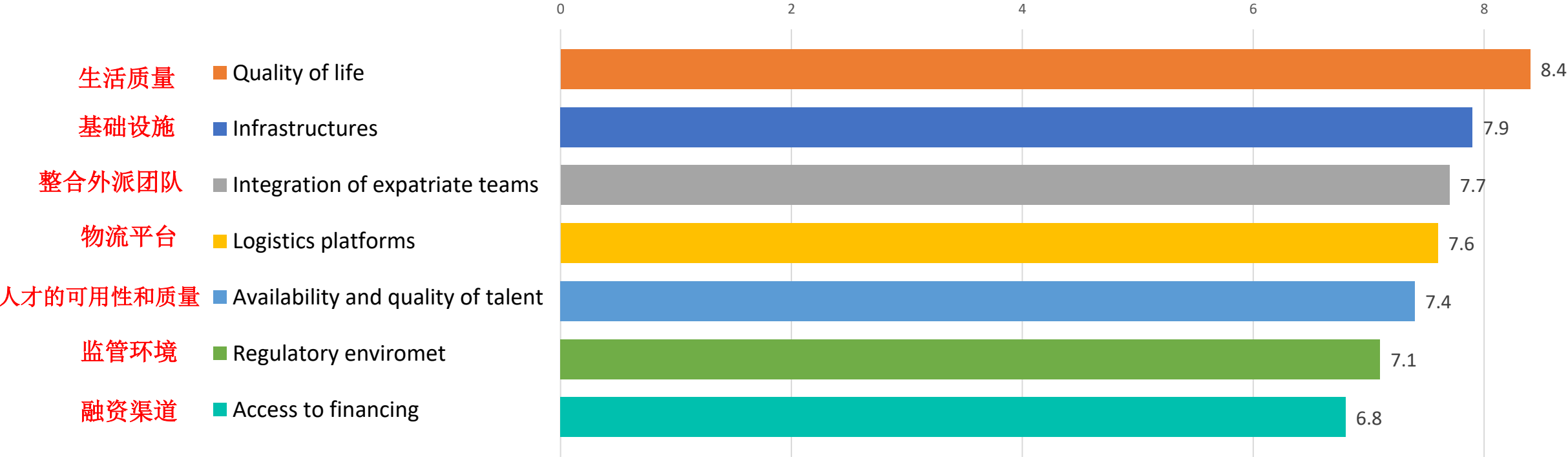
89% of the surveyed companies plan to increase or maintain their investments in 2025 (86% in 2024)

Source: ICEX Invest in Spain "Barometer of Business Climate in Spain" 2024

“中国在西班牙的外商直接投资：2023年全球展望”
Study ‘Chinese FDI in Spain: Global Outlook 2023’

该调查得到了在西班牙成立的近100家中国公司的高层指令的回答
The survey was answered by almost 100 high level directives of Chinese companies established in Spain

2023 年评估（从1到5）
Assessments 2023 (from 1 to 5)



90%参与调查的企业计划于2024年扩大或保持其在西班牙的投资
90% of the surveyed companies plan to maintain or increase their investments in 2024

Source: Chinese FDI in Spain: Global Outlook 2023

欧盟成员国

Member State of the European Union

自由进入全球最大市场：欧盟有5亿多消费者

Free access to the world's largest market, the EU: more than 500 million consumers



与拉丁美洲贸易往来的最佳欧洲平台

The best European platform for doing business with Latin America

西班牙是连接北非、地中海国家和中东国家贸易的合适平台。

Spain is a suitable platform for doing business with North- African, Mediterranean and Middle East countries

和18个国家签订了避免双重征税协议：玻利维亚、巴西、智利、哥伦比亚、哥斯达黎加、古巴、萨尔瓦多、厄瓜多尔、墨西哥、巴拿马、多米尼加、特立尼达和多巴哥、乌拉圭、委内瑞拉、牙买加、阿根廷和巴巴多斯

18 Agreements to Avoid Double Taxation Argentina, Barbados Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, El Salvador, Ecuador, Jamaica, Mexico, Panama, Paraguay, Dominican Rep., Trinidad and Tobago, Uruguay and Venezuela.

和19个国家签订互惠投资保护促进协议：哥伦比亚、哥斯达黎加、古巴、智利、厄瓜多尔、萨尔瓦多、危地马拉、洪都拉斯、牙买加、墨西哥、尼加拉瓜、巴拿马、巴拉圭、秘鲁、多米尼加、特立尼达和多巴哥、乌拉圭、委内瑞拉和阿根廷

19 Agreements for Protection and Promotion of Reciprocal Investments Argentina, Colombia, Costa Rica, Cuba, Chile, Ecuador, El Salvador, Guatemala, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Dominican Rep., Trinidad and Tobago, Uruguay and Venezuela.

西班牙具有出色的交通条件和基础设施：马德里机场集中了欧洲和拉丁美洲约35%的空中交通

Excellent communications and infrastructure: Madrid concentrates around 35% of total air traffic between Europe & Latin America.



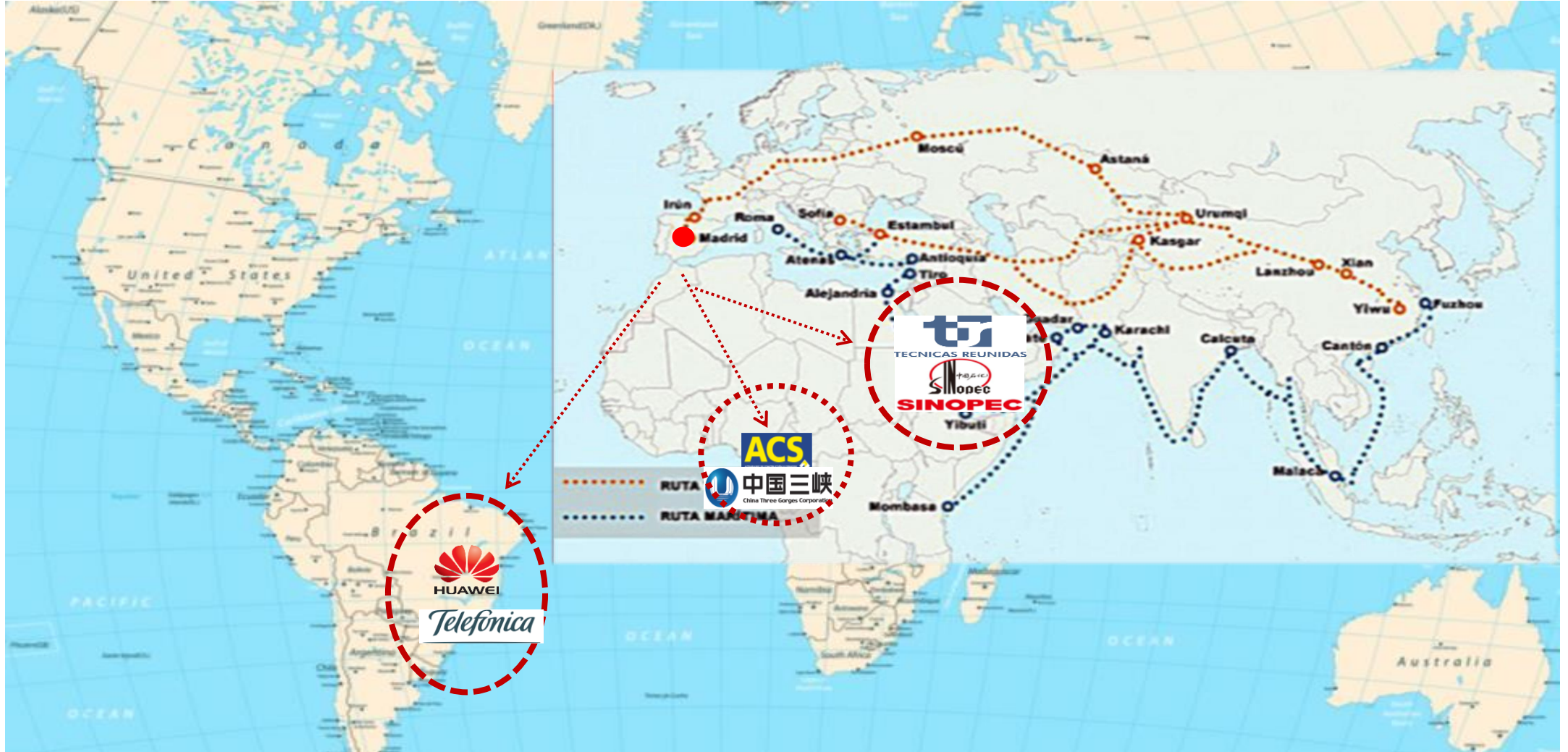


- ❖ 世界上每5个航班中就有3个是运用西班牙空中导航系统。3 out of every 5 flights worldwide are controlled using Spanish Air Navigation Management systems-ATM
- ❖ 西班牙电信是世界最大的电信公司之一（根据市值和用户量）。Telefonica is one of the largest telecommunications companies in the world (in terms of market capitalization and number of customers).
- ❖ 桑坦德银行是欧元区第三大银行也是全球最大的之一 (股票市值)，西班牙对外银行在40个国家开展业务。Santander is the 3rd bank in the Eurozone and one of the first in the world (stock market capitalization) and BBVA now operates in 40 countries.
- ❖ 西班牙伊维尔德罗拉公司是世界第四大电力公司（根据市值）同时也是美国第二大风电运营公司。Iberdrola is the 4th-largest utility company in the world (in terms of market capitalization) and the 2nd largest wind power operator in USA.
- ❖ 西班牙基础设施行业在海外市场居全球领先水平。The Spanish infrastructure sector is a world leader in foreign markets.
 - 根据2020年工程新闻记录（ENR）专门出版发布的排名，ACS集团名列国际承包商全球排行榜之冠。ACS Group is the leading international contractor in the world in 2020, for the ninth consecutive year, according to the ranking published by the specialized publication Engineering News Record (ENR).
 - 西班牙沙特合资企业Al Shoula集团运营着麦加-麦迪纳之间的高铁。The Al Shoula Group, a Spanish-Saudi consortium, runs the high-speed train between La Mecca – Medina.
 - 巴拿马运河扩建项目由西班牙领导的联合体建设。The Panama Canal expansion project has been built by a Spanish-led consortium.
 - 全球每10家交通基础设施特许经营商中有6家是西班牙公司。6 out of 10 Worldwide Concessionaires of transportation infrastructures are Spanish Companies.

中国企业和西班牙企业在第三国的合作机会。



Cooperation opportunities for Chinese and Spanish companies in third countries.



机场：商业基础设施和游客的主要入口

Airports: Business Infrastructure & Tourist Main Entrance



2.832 亿人次游客 (2023)

283.2 Mill. Passengers (2023)

欧洲通往拉美的枢纽

European hub to Latinamerica

AENA 管理西班牙46座机场和2座直升机机场

AENA manages 46 airports and 2 heliports in Spain

铁路：高速网络

Railway: High Speed Networks



领先的高铁设计者和开发者

Leading designer and developer of high-speed trains.

高速网络在全球排名第二 (欧洲排名第一)

2nd largest worldwide (1st in Europe) in High-Speed Network.

高速路：物流枢纽和公路基础设施

Highways: Logistics Hubs and Road Infrastructures



欧洲最大的高速路网:17,551公里

Largest EU highway network: 17,551 km.世界

上最佳道路质量指标之一

One of the best indexes of quality of roads in the world

信息技术和电信网络

ICT and Telecommunication Networks



欧洲排名第一的光纤网络

1st in Europe in network fiber optic cable

欧洲最佳的宽带渗透率 (固定和移动)

The best bandwidth penetration (fixed and mobile) in the EU

世界移动通讯大会-巴塞罗那

Mobile World Congress - Barcelona

港口：世界物流平台

Ports: World Logistics Platforms



阿尔赫西拉斯，巴塞罗那和瓦伦西亚位列欧洲十大集装箱港口

Algeciras, Barcelona & Valencia, among the top 10 European container ports

29个集装箱码头 29 Container Terminals.

46个港口 46 Ports.

2700万人次旅客 (2022) 27 Mill. passengers. (2022)

城市交通：智慧城市

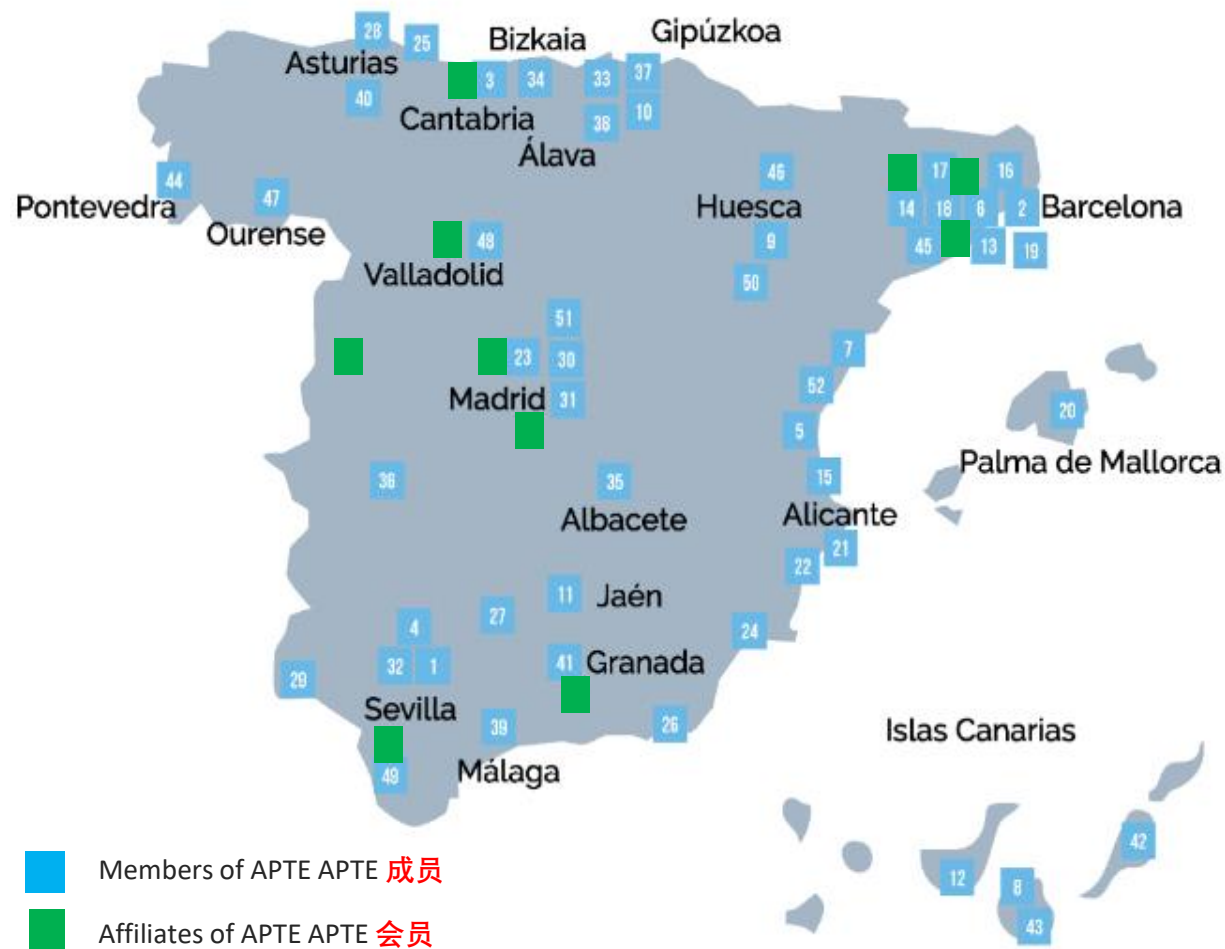
Urban Transport: Smart Cities



高度发达的交通基础设施：大容量的城市路网和基于地铁、地方铁路以及公交路网的高效公共交通系统

Highly developed transport infrastructure: high-capacity metropolitan road network and an efficient public transport system based on Metro, and local railways, and a network of bus routes.

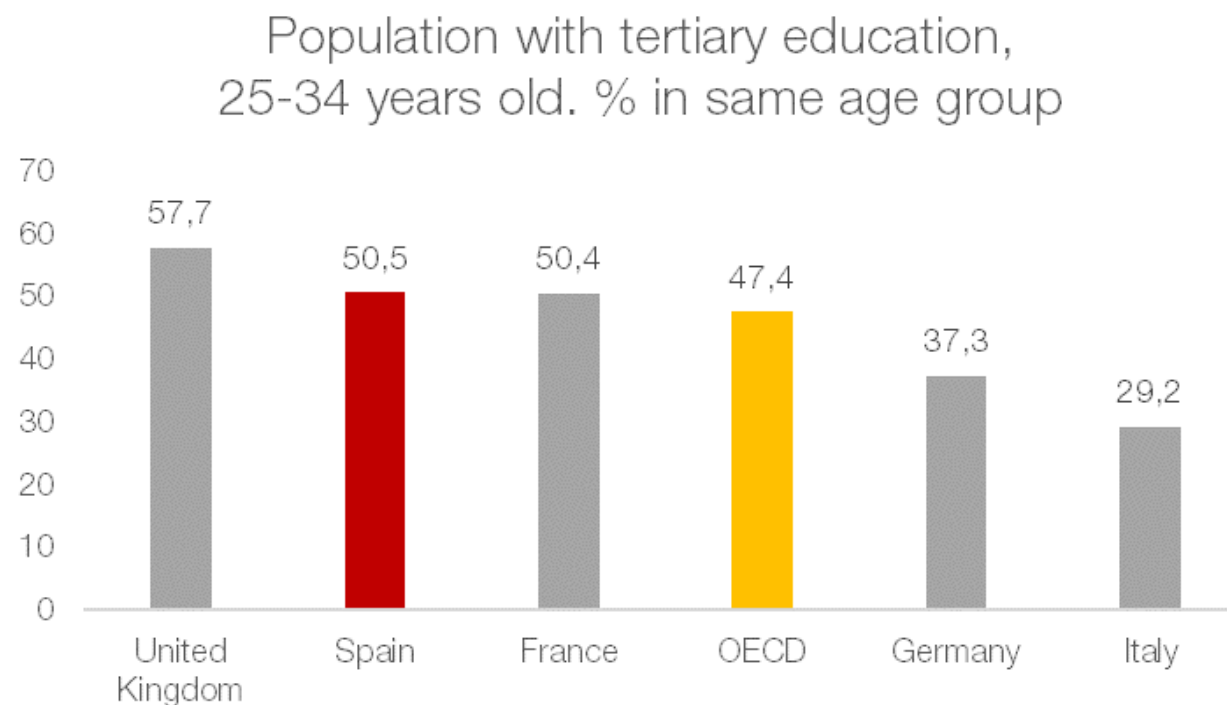
技术业务发展的卓越基础设施 Excellent infrastructure for Technology Business Development
西班牙有超过**70座**技术园区。 More than 70 Technology Parks in Spain



西班牙科学技术园区协会（APTE）的**64家**园区共有**8000多**家企业。
64 parks in the Association of Science and Technology Parks of Spain (APTE), hosting over 8,000 companies.

人力资本 Human Capital

- 与欧洲最大的各经济体相比，西班牙在受过高等教育的人数上在欧洲占有重要地位。
- Spain occupies a prominent position in Europe in number of persons with tertiary education, compared to the biggest European economies



Source: OECD. January 2024. Note: Data 2022

西班牙商学院是学术界最知名的商学院之—Spain Business Schools are among the most renowned in the academic world

Best Business Schools 2023-24

European Business School

Rank	School name	Country
1	SDA Bocconi	Italy
2	IESE Business School	Spain
3	IMD	Switzerland
4	Insead	France / Singapore
5	London Business School	UK
6	IE Business School	Spain
7	Mannheim	Germany
8	St. Gallen	Switzerland
9	University of Cambridge	UK
10	University of Oxford	UK
11	Esade Business School	Spain
...		
14	ESIC	Spain
...		
18	Eada Business School	Spain
...		
20	EAE	Spain

Source: Bloomberg



ESADE

ie

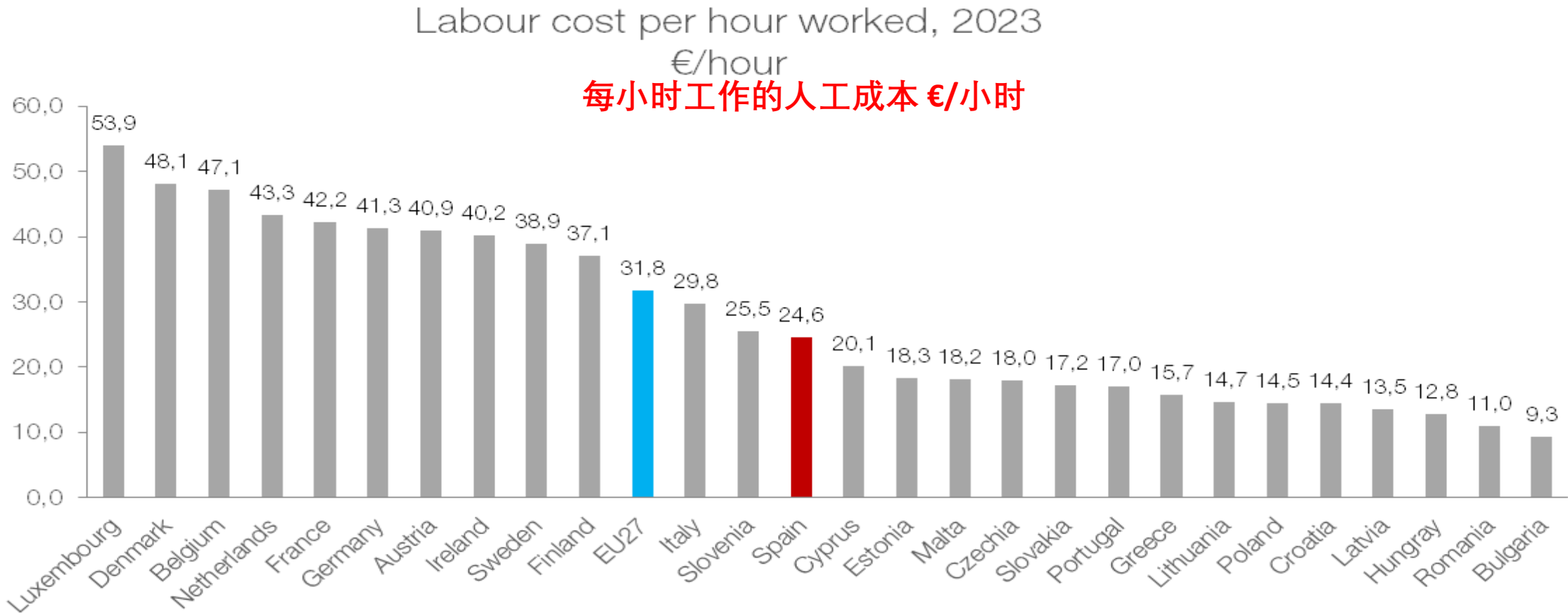
eada®

MBA ranking, 2024

Rank	School name	Country
1	University of Pennsylvania: Wharton	US
2	Insead	
3	Columbia Business School	US
3	SDA Bocconi School of Management	Italy
5	IESE Business School	Spain
	Northwestern University, Kellogg School of Management	US
6	MIT: Sloan	US
8	London Business School	UK
9	Cornell University: Johnson	US
10	University of Chicago: Booth	US
...
17	Esade Business School	Spain
20	IE Business School	Spain
94	Eada Business School Barcelona	Spain

Source: Financial Times

西班牙的劳动力成本低于欧盟27国的平均水平
Labour Costs in Spain are below the EU-27 average



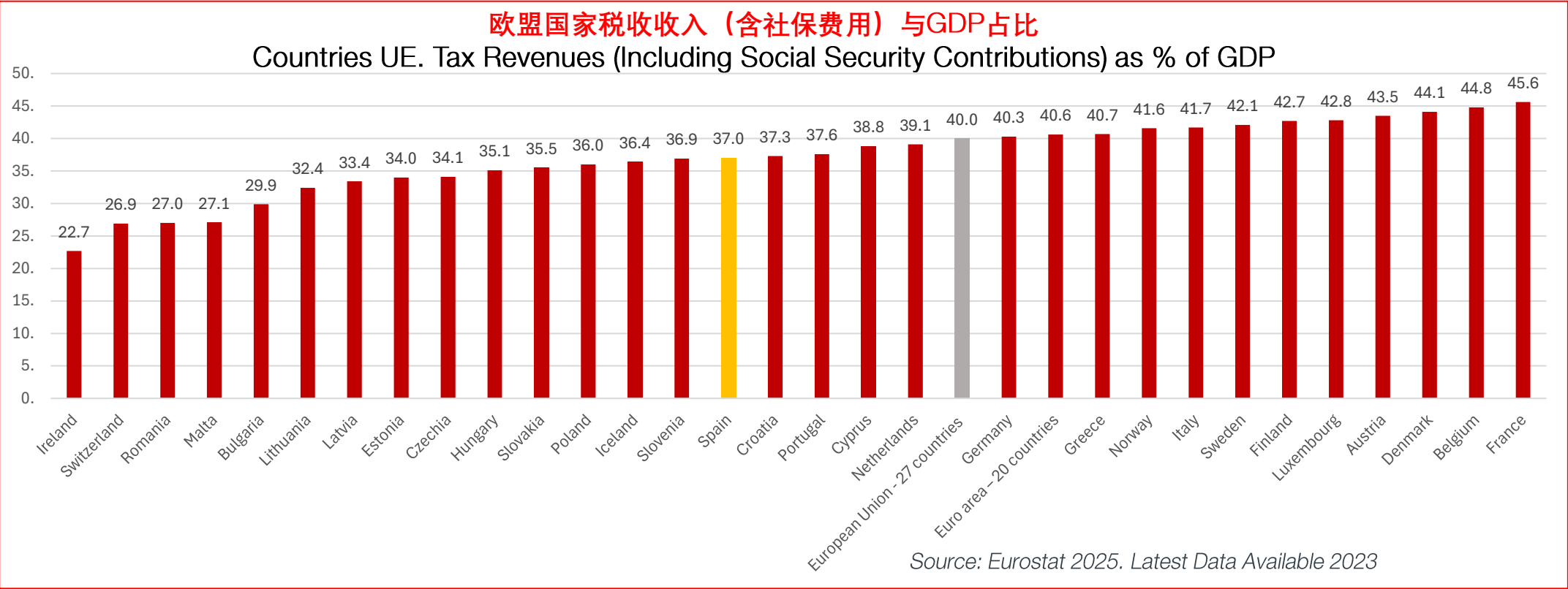
Source: Destatis 2024 (Federal Statistical Office Germany)

税收：适度的税收负担 Taxes: Moderate Tax Burden

适度的税收负担 Moderate Tax Burden

国际基准统计数据表明西班牙是税收收入（含社保费用）与GDP（37%GDP）之间的比例适中的国家，远低于欧盟的平均水平。
International Benchmarking shows that Spain is a country with a moderate ratio between Tax Revenues (Including Social Security Contributions) and GDP (37% GDP) much lower than EU average.

企业 所得税 25% Corporate Income Tax Rate: 25%



- **不可退还的补贴，国家根据欧盟生产性投资的限制和要求向各地区提供的贷款偿还补贴**

Non-refundable subsidies, subsidies for loan repayments granted to regions by the State, according to EU limits and requirements for productive investments

- **符合条件的项目包括那些旨在 (i) 设立新企业，从而开展商业活动并创造新的就业岗位； (ii) 通过增加生产能力或者在现有企业增加新的业务来扩大现有经营； (iii) 实现业务现代化**

Eligible projects are those aimed at (i) creating new establishments (launching of business activity and new Jobs); (ii) expanding existing activities with an increase in production capacity; and (iii) modernizing the business

- **合格成本：土木工程、设备和机械、工资（两年）**

Eligible Costs : Civil engineering, Equipment and Machinery, salaries (2 years)

欧盟委员会于2022年 批准的新区域援助地图 (2022-2027)

New Regional Aid Map 2022-2027 approved by the EU Commission in 2022

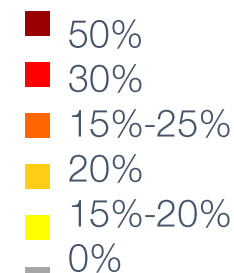
▪ 最大援助

The maximum aid intensities can be increased:

- **+10% 中型企业** +10% medium-sized companies.
- **+20% 小型企业** +20% small companies.



最大援助强度 *大规模
The maximum aid intensity * large companies





- ❖ **面向外国投资者和游客的开放友好的社会 40.3%的游客曾到访西班牙十次以上。回头客占82%以上**
Open and friendly society to foreign investors and tourists 40.3% of our tourists have visited Spain ten or more times in their lifetime. 82% are repeat visitors.



- ❖ **根据联合国毒品和犯罪办公室（谋杀率）的信息，西班牙是世界十大安全国家之一。**
Spain is among the world's top 10 safest Country according United Nations Office on Drugs and Crime (Homicide rate).



- ❖ **卓越的高标准现代卫生系统。向外籍人士开放。西班牙的卫生基础设施建设位列世界第十三，预期寿命位列第五（WCY 2020）。**
Outstanding and modern Health System with very high standards. Open to expatriates. Spain ranks 13th World Country in Health infrastructure and 5th with longer Life Expectancy (WCY2020).



- ❖ **被联合国教科文组织列入世界遗产数量（48个）名列世界第三。历史名城、古迹和重要博物馆。**
3rd country in the world in terms of UNESCO World Heritage Sites (48 sites). Historical cities, Monuments and leading Museums.

- ❖ **被联合国科教文组织纳入生物圈保护区网络的自然区域和自然空间数量名列欧洲第二（42个，仅次于美国）**
2nd country in Europe in Natural Areas and Natural spaces declared UNESCO Biosphere Reserves (42, only behind USA with 47).



- ❖ **接待境外高尔夫游客数量名列第二，仅次于美国，拥有431个高尔夫球场。120多家SPA度假村。**
2nd country, behind USA, in receiving foreign golf tourists, with 431 courses. More than 120 Spa Resorts.



- ❖ **一年300多天的日照时间，2600多公里的绿色步道，多种滑雪设施、乡村活动。666个海滩、码头和船只被授予蓝旗生态标签，获此认证数量世界领先。**
More than 300 days of sunshine a year and more than 2,600 km of Green Tracks; various Skiing facilities; rural activities. World leader in Blue Flags Eco-Label Record) with 666 Beaches, Marinas and Boats awarded.



- ❖ **顶级美食享誉全球。**
First class Gastronomy recognized all around the world.



在过去10年里，西班牙的华人人口增加30%

Chinese population in Spain increased 30% in the last 10 years (2013: 181,701 - 2023: 232,982)

在西班牙获得学士和硕士学位的中国留学生超过12,525人(2021-2022) Bachelor and Master degree Chinese students in Spain: 12,525 (2021-2022).

在西第二代华人的主要特征：

Main characteristics second Chinese generation in Spain:

- 人口年轻化
 - 自雇或者创业
 - 社交圈中的主要角色
 - 集中在大城市
 - 良好的教育背景
- Young population.
 - Self-employed or entrepreneurs.
 - Key role in social networks.
 - Concentrated in big cities.
 - Good educational results.



中国公民在西班牙的具体设施 Specific facilities for Chinese citizens in Spain



329所国际学校

329 International Schools



在马德里

In Madrid

- 周六有几所为中国学生开设的中文学校，由华人社区管理。

There are several Chinese schools on Saturday for Chinese students, managed by the Chinese community

- 华为和中兴的总部设在马德里北部，那里有一个很大的华人社区。

Huawei and ZTE are based in North of Madrid, hosting a big Chinese community

中国企业家协会

Chinese entrepreneurs Associations

- 西班牙中国俱乐部

China Club Spain

- 西班牙青田总会馆

General Qingtian Association in Spain

- 巴利阿里群岛华商协会

Association of Chinese Businessmen of the Balearic Islands (AECHIB)



中国银行在西班牙成立

Chinese banks established in Spain

- 中国建设银行

China Construction Bank

Location: Barcelona

- 中国工业和商业银行

Industrial and Commercial Bank of China (ICBC)

Location: Madrid & Barcelona



专门针对中国客户的搬迁公司 Relocation companies specialized in Chinese customers

- **根据欧盟委员会的规定，西班牙的外国投资体制受以下立法监管： 7 月 4 日第571/2023号外国投资皇家法令。**
- According to European Commission regulations, foreign investment regime in Spain is regulated by the following legislation: Royal Decree 571/2023 of July 4th on foreign investment

- **以下行业的并购和绿地项目须获得授权：**
- Transactions in M&A and greenfield projects will be subject to authorization in the following sectors:
 - **关键基础设施** Critical infrastructure
 - **战略技术** Strategic technologies
 - **供应关键性资源** Supply of key inputs
 - **有权访问敏感信息的企业** Companies with access to sensitive information
 - **媒体** Media

- **根据投资者的类型，第三国政府控股的企业始终需要授权。**
- Depending on the type of investors, companies controlled by third country governments will always require authorization.
 - **授权申请必须提交至贸易国务秘书处国际贸易和投资总司。**
 - Applications for authorization must be addressed to the head of the Secretary of State for Trade's Directorate-General for International Trade and Investment.

 - **通过以下链接，您可以访问投资者申请授权需要填写的表格：**
 - Through the following link you can access to the form that needs to be completed by the investor in order to request authorization:
https://comercio.gob.es//es-es/inversiones_exteriores/paginas/control-inversiones.aspx



- 2024 年，欧洲汽车制造商 Stellantis 和中国电池制造商宁德时代已同意投资 410 万欧元在萨拉戈萨建设磷酸铁锂电池工厂。
- In 2024, European carmaker **Stellantis** and Chinese battery manufacturer **CATL** have agreed to invest 4.100 million euros in the construction of a lithium iron phosphate battery plant, in Zaragoza.



- 2024年，中国汽车制造商奇瑞与Ebro-EV Motors签署协议，在巴塞罗那自贸区建立电动汽车工厂，投资额为4亿欧元
- In 2024 Chinese carmaker **Chery** signed an agreement with **Ebro-EV Motors** to set up an electric car plant in Zona Franca (Barcelona), representing an investment of 400 million euros.



- 2024 年，振石控股集团与空客签署协议，收购其在雷亚尔港（加的斯）的仓库。该项目耗资 4500 万欧元，包括一家用于风结构覆层的玻璃纤维工厂。
- In 2024, **Zhensi Holding Group** signed an agreement with **Airbus** for the acquisition of its warehouses in Puerto Real (Cádiz). The 45 million euros project consists of a fiberglass factory for wind structure cladding.



- 2024 年，中国三峡集团收购了位于穆尔西亚的 Mula 太阳能光伏发电厂，这是最大的光伏项目之一在欧洲。中国三峡集团还从西班牙公司 X-Elio 和 Nexwell Power 收购了光伏资产。
- In 2024, **China Three Gorges** has purchased the Mula solar photovoltaic plant in Murcia, one of the largest photovoltaic projects in Europe. CTG has also acquired photovoltaic assets from the Spanish companies **X-Elio** and **Nexwell Power**.



- 2024 年，中国能源公司晶科科技向马拉加的一个光伏园区项目投资了 1.35 亿欧元。该项目预计峰值装机容量为 175 MW。
- In 2024, the Chinese energy company **Jinko Technology** has invested 135 million euros in a photovoltaic park project in Málaga. This project is expected to have an installed capacity of 175 MW peak.



- 2024 年，专注于人工智能的南京跑码地计算技术有限公司选择巴塞罗那作为其欧洲和拉丁美洲总部的基地，因为巴塞罗那拥有全球连接和技术生态系统。
- In 2024, Chinese company **Coovally**, specialized in artificial intelligence, has chosen Barcelona, for its global connectivity and technological ecosystem, as the base for its headquarters in Europe and Latin America.

最新交易案例精选 (II) Selected Most Recent Transactions (II)

SUNGROW

- 2024 年，专注于光伏领域和储能系统的中国公司阳光电源宣布在西班牙潘普洛纳开设新的培训和创新中心。
- In 2024, the Chinese company specialized in the photovoltaic sector and energy storage systems Sungrow has announced the opening of a new Technology Center for Training and Innovation in Pamplona, Spain.

we care
WORG 百明信康



- 2023年，百明信康收购了 Diater，这是一家致力于开发和制造过敏诊断和治疗的生物制药公司，投资金额达到1.5亿欧元。
- In 2023, Worg Pharmaceuticals acquired Diater, biopharmaceutical company dedicated to the development and manufacture of allergology diagnostics and treatments. Investment amount reached 150 million euros.

WANHUA

- 2023年，跨国化工公司万华在Cornellà de Llobregat（巴塞罗那）开设创新中心
- In 2023, chemical multinational Wanhua opened an innovation center in Cornellà de Llobregat (Barcelona)

BYD
Castrosua

- 2022年，比亚迪与Castrosua签署了在西班牙生产电动巴士的框架协议。
- In 2022, BYD and Castrosua signed a framework agreement for the production of eBuses in Spain.

COSCO
SHIPPING
logitren
noatum

- 2022 年，中远海运子公司中远海运港口收购了西班牙铁路市场的运营商Logitren铁路公司51%股权。2017 年，中远海运收购西班牙Noatum 51%的股份，该公司是瓦伦西亚港和毕尔巴鄂港集装箱码头的运营者。
- In 2022, Cosco Shipping Ports, subsidiary of the Chinese shipping COSCO, acquired 51% of Logitren, Spanish operator in the railway market. In 2017, Cosco Shipping had already acquired 51% stake in Noatum, operator of container ports in Valencia and Bilbao.

Tencent 腾讯



- 2022 年，中国企业集团腾讯收购了西班牙视频游戏工作室Tequila Works的多数股权。
- In 2022, Chinese conglomerate Tencent acquired a majority stake in Spanish video game studio Tequila Works.



- 2020 年，华为在马德里建立了其新搜索引擎Petal Search的欧洲总部。2018年，华为在巴塞罗那开设了一个客户服务中心。
- In 2020, Huawei establish in Madrid its European headquarters of its new search engine Petal Search. In 2018, Huawei opened of a customer service center in Barcelona.



中国能建



- 2020 年，中国能源工程公司（CEEC）收购了工程公司：Empresarios Agrupados、Ghesa Ingeniería y Tecnología和EA servicios de explotación nucleares GNIT。
- In 2020 China Energy Engineering Corporation (CEEC) has acquired the engineering companies: Empresarios Agrupados, Ghesa Ingeniería y Tecnología and EA servicios de explotación nucleares GNIT.



中国铁建



- 2020年，中国铁建集团（CRCC）签署收购西班牙第九大建筑商Aldesa 75%的股份。2023年，中国铁建收购了99%的股份。
- In 2020 China Railway Construction Corporation (CRCC) signed the acquisition of 75% of Aldesa, the 9th biggest builder in Spain. In 2023, CRCC acquired 99% of the shareholding.



- 2017年，中国最大的眼科连锁企业爱尔眼科集团宣布收购西班牙Baviera诊所有限公司。
- In 2017 Aier Eye Hospital Group Co., the largest eye hospital chain in China, has acquired Clinica Baviera SA of Spain.

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