



GOBIERNO
DE ESPAÑA

MINISTERIO
DE INDUSTRIA, COMERCIO
Y TURISMO

ICEX INVEST IN
SPAIN



OFICINA ECONÓMICA Y COMERCIAL EN CANTÓN
EMBAJADA DE ESPAÑA

西班牙驻华大使馆
广州经济商务处



西班牙-汽车工业与智能出行

SPAIN: AUTOMOTIVE INDUSTRY & SMART MOBILITY



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SPAIN: AUTOMOTIVE INDUSTRY & SMART MOBILITY

1. 西班牙汽车工业

AUTOMOTIVE INDUSTRY IN SPAIN

2. 商业与投资机遇

BUSINESS & INVESTMENT OPPORTUNITIES

3. 政府支持

PUBLIC SUPPORT

欧洲第二大、世界第九大汽车制造国 2nd largest car manufacturer in Europe – 9th worldwide

30多年来，只有美国，日本，德国和西班牙保持车辆生产前10名

In over 30 years, only USA, Japan, Germany and Spain have remained Top 10 players in vehicle production.

- 产量：210万台(2021年)

2.1 million vehicles in 2021

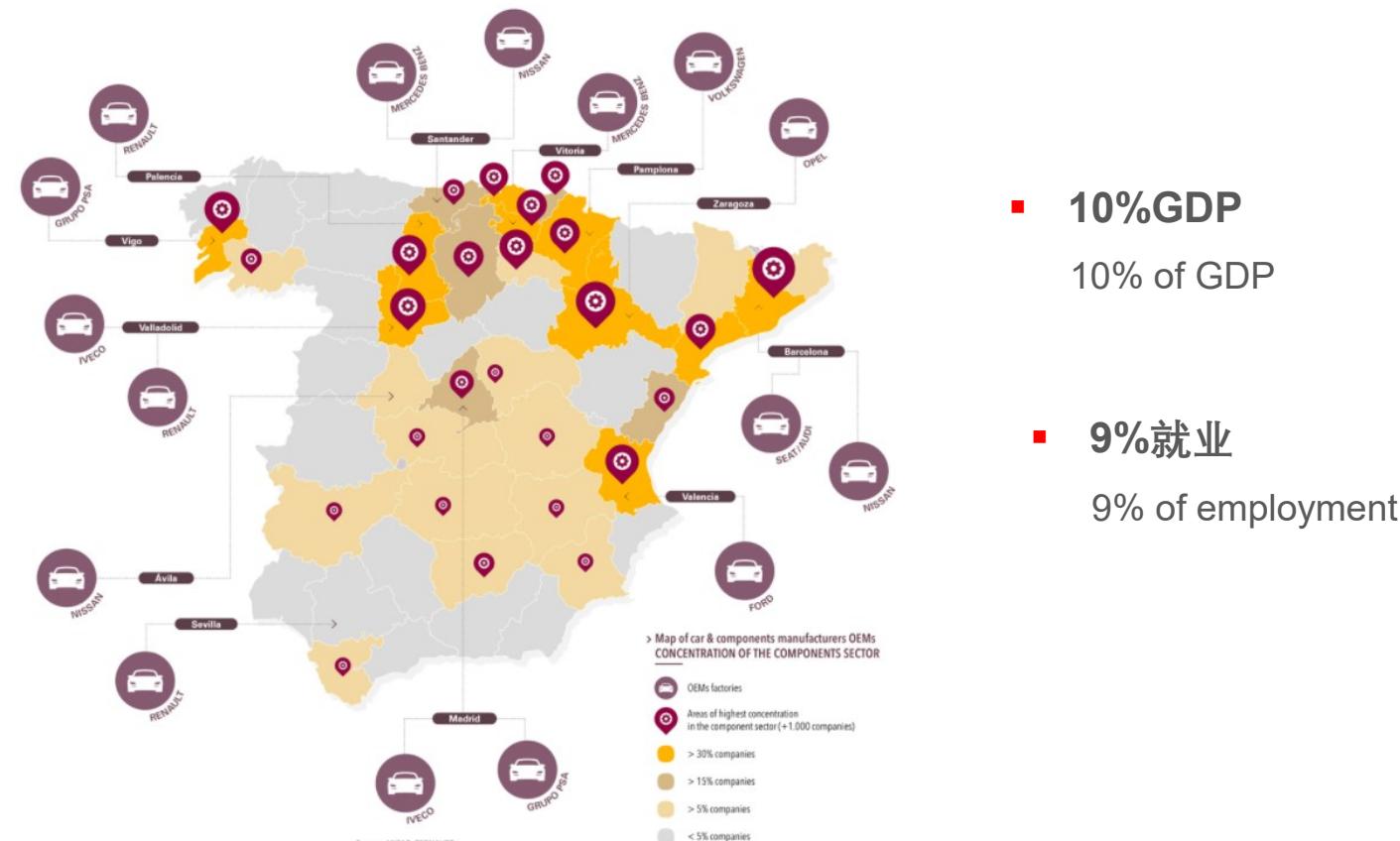
- 营业额：1000亿欧元
Turnover OEM + Auto Parts:
€100 billion

- 10%GDP

10% of GDP

- 9%就业

9% of employment



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
80%乘用车
80%Passenger cars and pick-ups

18%商用车辆 18%
Commercial vehicles

2% 工业车辆
2%Industrial vehicles



- 10个汽车制造集群
10 Automotive clusters
- 43个技术中心
43 Technology Centres
- 生产38个车型，16个电动车 (2020-2021)
38 models manufacture, 16 electrified versions in 2020-2021.

西班牙积极响应欧盟运输与交通战略 Spain committed to EU Strategy for Transport and Mobility



- 西班牙参与**2/3**的欧盟交通研发创新项目
Spanish participation in **2/3** of EU R&D&I mobility projects
- **2021 年 195,000 辆西班牙制造的电动汽车**
195,000 Made in Spain Electrified-vehicles in 2021.
目标: **2030年500万电动车上路**
Target: 5 million in 2030
- **2022 年 15,772 个公共充电点**
15,772 public charging points in 2022.
目标: **2030年11万个**
Target: 110,000 in 2030

① 西班牙汽车工业 AUTOMOTIVE INDUSTRY IN SPAIN

西班牙汽车零部件产业-全球供应商 Spain's Auto Parts industry, a global provider.



发动机、变速箱、车顶系统
Engine, Gearbox, Roof systems



天窗、门、驾驶舱
Overheads, Doors and trims, Cockpits



底盘、动力总成、电动动力总成
Chassis, Powertrain, Electric powertrain



动力总成、安全和热系统
Powertrain, Safety, Thermal System



车身产品、底盘、机械
Body products, Chassis, Mechanisms



后视系统、指挥与控制、电动汽车
Rear View Systems, Command & Control, eMobility

过去 5 年欧洲第二大汽车绿地项目目的地

2nd destination for automotive Greenfield Projects in Europe in the last 5 years

- 平均每年投资40亿
€4 billion average annual investment
- 总投资的10%用于研发创新
10% of total industrial investment in R&D&I
- 每年增加1500个机器人占全国工业机器人的55%
1500 new industrial robots per year. 55% Spain's industrial robots.
- 生产38个车型，16个电动车
38 models manufacture, 16 electrified versions in 2020-2021.



超过80%的生产出口到全球100多个国家

Over 80% of production exported to over 100 countries

拉丁美洲 (6.38亿)

- 与美国并列成为拉丁美洲地区第一大投资方
- 和区内国家有10项投资保护协议
- 和区内国家有19项避免双重征税协议

Latin America (638 million)

- #1 Investor in Latin America jointly with USA
- 10 Investment protection agreements
- 19 double taxation agreements



欧盟 (5.13亿)

- 世界上最大的经济体和消费市场
- 货物、服务、资本、劳动力的自由流动
- 成员国的关联协议

European Union (513 million)

- Largest economy and Consumer market in the world
- Free movement of goods, services, capital, workers
- Association agreements with candidate countries



中东和北非(4,37亿)

- 和区内国家有8项欧洲-地中海协会协议
- 和区内国家有18项投资保护协议
- 和区内国家有21项避免双重征税协议

MENA countries (437 million)

- 8 Euro-Mediterranean Association Agreements
- 18 Investment protection agreements
- 21 double taxation agreements



2 商业与投资机遇 BUSINESS & INVESTMENT OPPORTUNITIES

- 电动发动机和部件 Electric engines and components.
- 电池技术：材料和组件 Battery technologies: materials and components.
- 充电基础设施 Charging infrastructures.
- 汽车共享、城市交通 Car sharing, urban mobility.
- 冲压、五金件、轻量化 Stamping, metal parts, lightweighting.
- 先进材料复合材料 Advanced materials composites.
- 工程塑料 Engineering plastics.
- 动力总成：电动汽车传动系统 Powertrain: e-vehicle transmission systems.
- 电子产品、网格集成、半导体 Electronics. Grid integration. Semiconductors.
- 自动驾驶系统 Automated driving systems.
- 智能运输系统，传感器，数据分析 Intelligent transport systems, sensorics, data analytics.
- 轻型电动汽车制造 Light Electric vehicles manufacturing.
- 数字工厂 – 4.0 系统和技术 Digital Factory – 4.0 systems and technologies.
- 工程设计- 测试 - 处理 Design Engineering – Testing – Homologation.

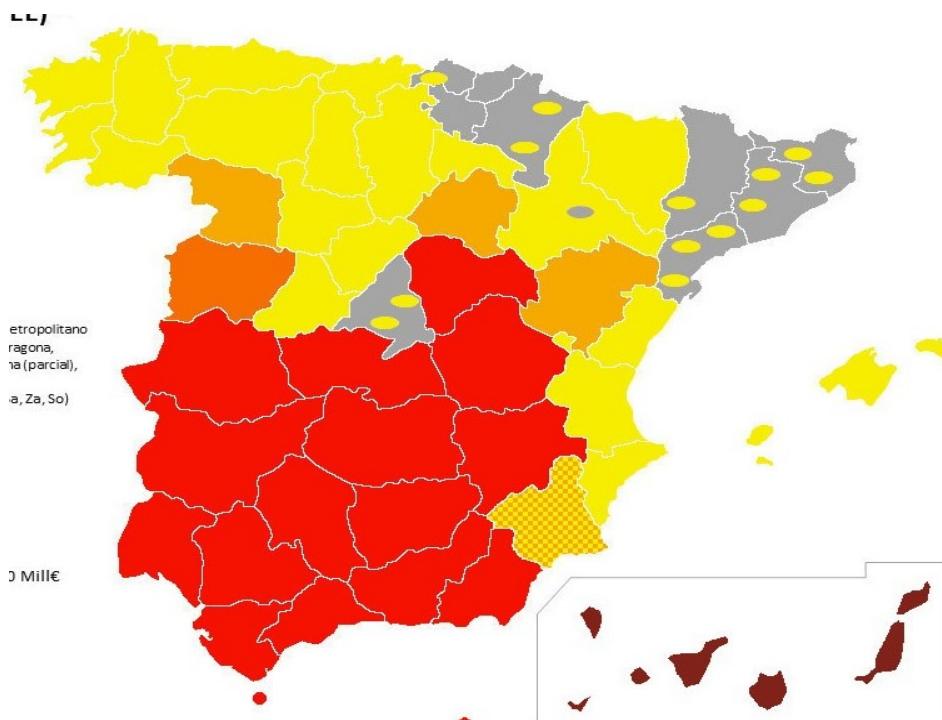
- **西班牙复苏和转型计划(2021-2026),为促进数字和绿色过渡和加强西班牙经济: 1,400亿欧元**
Spain's Recovery and Resilience Plan 2021-2026 - To promote digital and green transition and the strengthening of the Spanish economy: €140 billion.
- **电动车和网联汽车专项计划-为电动车和网联汽车制造开发完整的生态系统: 43亿欧元。**
PERTE Electric and Connected Vehicles - To develop a complete ecosystem for electric and connected vehicle manufacturing: €4.3 billion.
- **招聘和培训激励措施, 雇主能够得到相应的员工社保缴纳优惠**
Incentives for hiring and training. Reduction in the employer's social security contributions.
- **MOVES计划: 购买替代能源车辆和充电基础设施部署的激励措施**
MOVES Plan: incentives for the purchase of Alternative Energy Vehicles and Deployment of Charging Infrastructure.

投资：区域激励措施

Investment: regional incentives.

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.



最大援助强度 *大规模

The maximum aid intensity * large companies

- 50%
- 30%
- 15%-25%
- 20%
- 15%-20%
- 15%

- 特定地区增加 (+10%)。

Increased intensity aid in several regions (+10%).

- 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.

- **西班牙投资促进局**提供全面的帮助，涵盖投资者的所有需求，包括法律、财务、劳工、运营和市场调查.

INVEST IN SPAIN offers integral assistance covering all the needs of investors, including legal, financial, labour, operations and market research.

- **西班牙驻华大使馆广州经济商务处**致力于推廣西班牙作为投资目的地国家，向中国企业及投资者在西营商与投资全程提供服务.

Economic & Commercial Office of Spain in Guangzhou promotes Spain as a business destination and follows up on the needs of Chinese investors doing business in Spain.

向中国企业在西班牙投资全
程提供支持

Provide support for Chinese
enterprises to invest in Spain
throughout the process

与国家及地方政府部门沟通
的单一窗口

Single window to communicate with
national, regional and local
administrations

帮助投资者巩固和扩大在西
投资

Help investors to consolidate &
expand their investments in Spain

欧洲第二大、世界第九大汽车制造国

2nd largest car manufacturer in Europe – 9th worldwide





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