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INVESTIN
SPAIN

Spain, a leading location for Automotive Industry

西班牙，一个汽车产业的领先之地

Madrid 16/01/2025
马德里 16/01/2025

Spain for Automotive Industry and Smart Mobility

西班牙

汽车工业
和智慧出行



Index 目录

- 1** | Key facts and International position of the Automotive Industry in Spain.
西班牙汽车行业的主要情况和国际地位。
- 2** | Market Acces and Logistics.
市场准入和物流。
- 3** | Human resources. Productivity.
人力资源和生产力。
- 4** | Smart mobility and Electric vehicles.
智慧出行和电动汽车。
- 5** | Public Support: grants and incentives for business and investment
政府扶持：商业和投资方面的补助和激励措施
- 6** | Summary of competitive advantages and business opportunities.
竞争优势和商业机会总结。

1 | Key facts and International position of the Automotive Industry in Spain

西班牙汽车产业的主要情况和国际地位。

Spain 2nd largest car manufacturer in Europe – 8th worldwide (2023)
 西班牙是欧洲第二大整车制造国 - 全球第八大 (2023)

- 2.45 Million vehicles in 2023
- 2023年产量245万辆汽车
- 323,255 electrified vehicles. 13.2% market share.
- 323255辆电动汽车, 占市场份额的13.2%
- 78.1bn Turnover OEM's in 2023
- 2023年整车企业销售781亿欧元
- 10% of GDP * industry as a whole
- 产业总体占GDP*10%
- 9% of employment 2Million Jobs **
- 200万个岗位**, 占就业的9%
- 18% of spanish exports (OEM+autoparts)
- 占西班牙出口的18% (整车OEM和汽车零部件)
- €18.8 bn trade surplus OEMs in 2023.
- 2023年OEM贸易顺差达188亿欧元。
- 10% of Spanish R&D&I
- 占西班牙研发创新的10%

- 18 plants of OEM's ***
- 18个OEM工厂
- 1,000 Auto-parts providers
- 1000个零部件供应厂商
- 10 Automotive clusters
- 10个汽车集群
- 47 Technology Centres
- 47个技术中心



Source : ANFAC SERNAUTO annual report– Spanish Technology Platform Secretariat of State for R&D&I Move to the Future

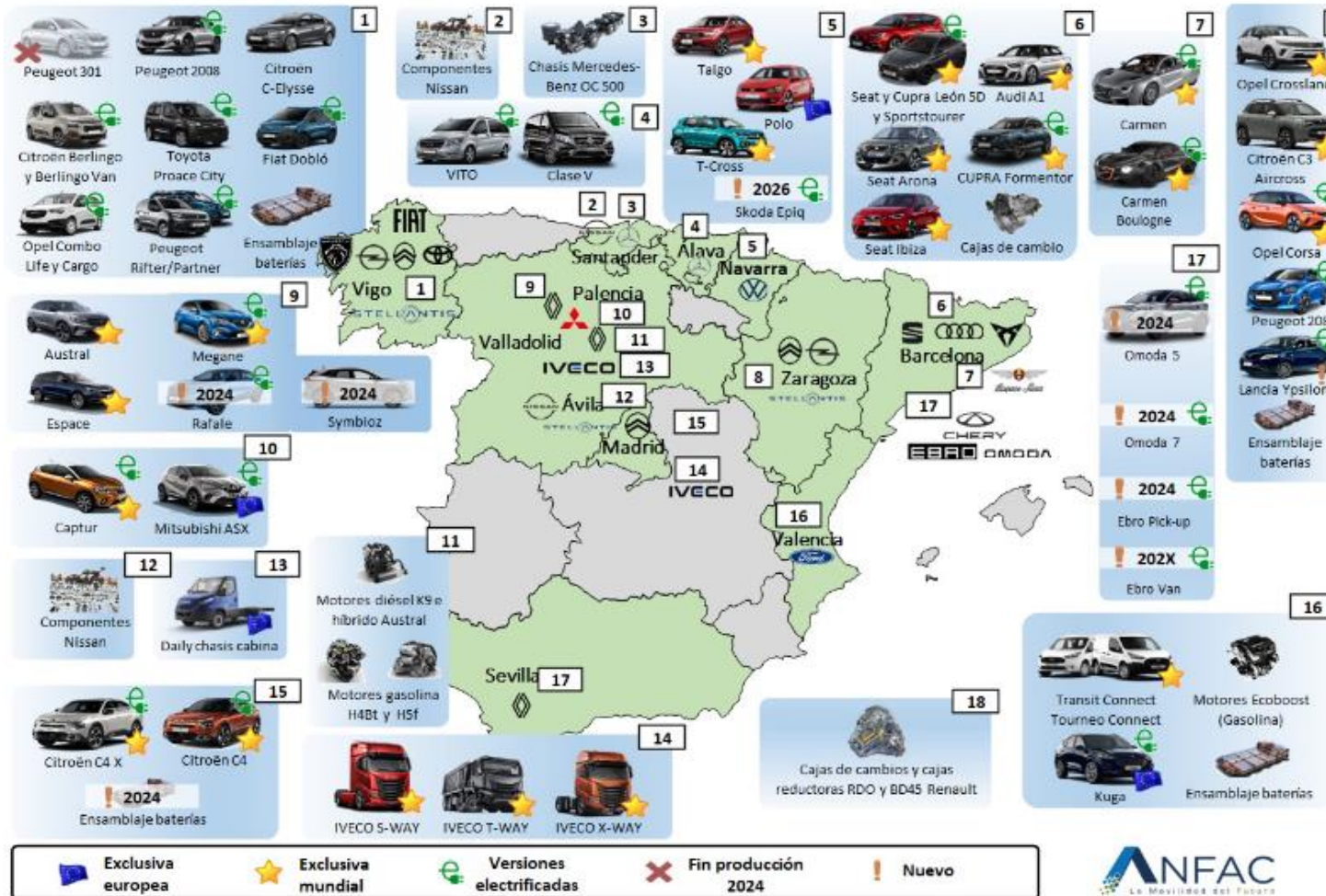
* Share on GDP of OEM + autoparts` turnover- including distribution, financing, and related activities OEMs + ** Including distribution, services, gas stations, financing, insurance transport, driving Schools*** assembly plantas and componentes – Seville gearboxes i.e

Automotive Industry in Spain

Plants and models

西班牙汽车产业

工厂和车型



Models 2023-2024

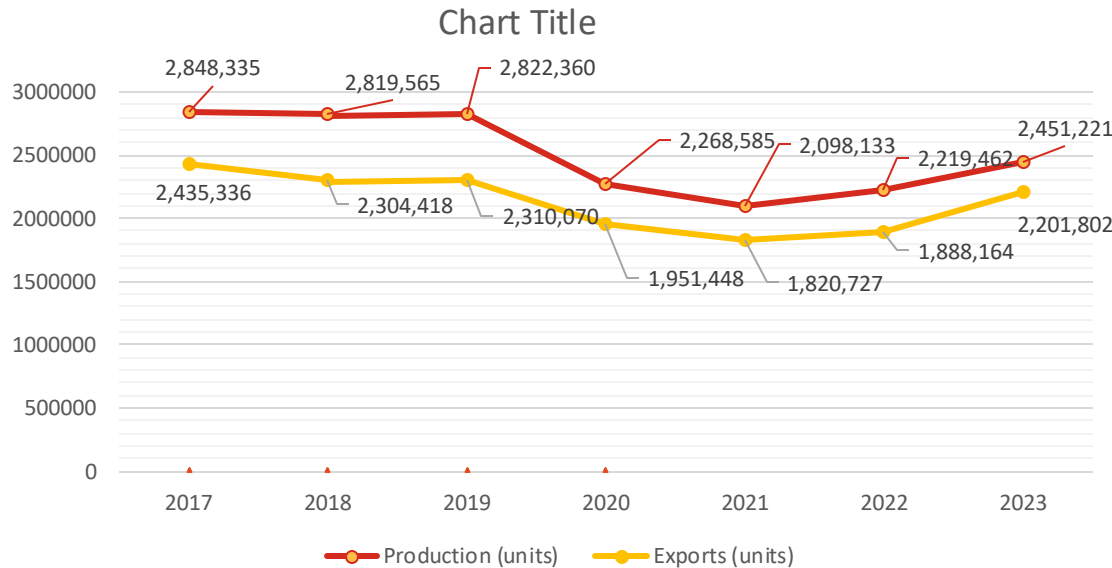
2023-2024车型

- 44 models
- 44个车型
- 25 electrified versions *
- 25款电动车*
- 21 worldwide exclusive models
- 21款全球独家车型

Spanish Vehicle production
 Spanish automotive industry to remain global key player
 西班牙汽车生产
 西班牙汽车业仍将是全球主要参与者

- **Spanish plants set to manufacture 3 million vehicles** 西班牙工厂计划生产300万辆汽车
- **2.45 Million Made in Spain vehicles in 2023 - 10,4% up on 2022** 2023年西班牙制造汽车数量为245万辆，较2022年增长10.4%
- **3% of global production and 12% of European market share** 占全球产量的3%和欧洲市场份额的12%

Spanish vehicle production and exports (units)
 西班牙汽车生产和出口 (辆)



Units by type 车型分类

- **78% Passenger cars and pick-ups 1,907,050 units**
- 78% 乘用车和皮卡 1,907,050 辆
- **22% Commercial and industrial vehicles- 544,171 units**
- 22% 商用及工业车辆——544,171辆

Source ANFAC <https://anfoc.com/actualidad/la-produccion-de-vehiculos-encamina-su-recuperacion-registrando-un-crecimiento-del-104-en-2023/>

Complete and flexible supply chain
完整、灵活的供应链

- 1,000 companies €41.5 bn turnover in 2023
- 1,000 家公司 2023 年营业额达 415 亿欧元
- 75% of the value of the vehicle.
- 占汽车价值的 75%
- 61% of Spanish Auto Parts exported to 170 countries
- 61% 的西班牙汽车零部件出口到 170 个国家
- €25.1 bn export value of auto-parts in 2023. 9.5% up on 2022
- 2023 年汽车零部件出口额达 251 亿欧元, 比 2022 年增长 9.5%
- 204,650 people directly employed, 332,550 total
- 直接就业岗位 204,650 个, 总计 332,550 人
- €1.7bn Industrial Investment in 2023
- 2023 年产业投资达 17 亿欧元
- €1.3bn Investment in R&D&i in 2023 3.1% of turnover.
- 2023 年研发和创新投资达 13 亿欧元, 占营业额的 3.1%

**Spanish companies among top
global players**
全球顶尖企业中的西班牙公司

Panasonic

FICOSA

CIE Automotive

GESTAMP
AUTOMOCION

GRUPO
ANTOLIN

fagor-ederlancaidea

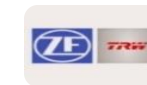
MONDRAGON

sernauto

Supply chain
Global providers
供应链
全球供应商

Multinational partners:
跨国合作者

- Germany 德国
- France 法国
- Italy 意大利
- USA 美国
- Canada 加拿大
- India 印度
- Austria 奥地利
- Japan 日本
- UK 英国



Sources: SERNAUTO (Spanish Association of Automotive Parts and Component Manufacturers) Corporate sources.

- **€4bn average annual investment (OEM Auto Parts).**
- 平均每年投资 40 亿欧元（OEM 汽车零部件）。
- **10% of total industrial investment in R&D&I.**
- 占工业总研发创新投入的 10%。
- **1,500 new industrial robots per year. 55% of Spain's industrial robots.**
- 每年新增 1,500 台工业机器人，占西班牙工业机器人总数的 55%。
- **10 strategic industrial projects for Electric and Connected led by OEM's**
- 10 个由汽车OEM制造商主导的电动和网联战略工业项目
- **Next Generation investment: € 2,975 million public investment €11,900 million private investment to develop the industrial supply chain for Electric and Connected Vehicle**
- 下一代投资：29.75 亿欧元政府投资，119 亿欧元私人投资，用于开发电动和联网汽车的工业供应链



Mercedes-Benz

SPAIN MOST ATTRACTIVE COUNTRY IN EUROPE FOR NEW AUTO INDUSTRY PROJECTS :

西班牙是欧洲最具吸引力的汽车产业新项目国家：

- **1st destination for automotive Greenfield Projects in Europe in the last 5 years 2019- 2024 (by capex)**
- 2019年至2024年的5年期间欧洲汽车绿地项目的首要目的地（按资本支出计算）
- **€12bn CAPEX by 57 companies, creating 21,601 Jobs**
- 57 家公司投资 120 亿欧元，创造 21,601 个就业岗位

Destination Country 目的地国	Capex € millions 资本支出计算 百万欧元	Projects 项目数	Jobs created 就业岗位	Companies 公司
Spain 西班牙	12.032,9	104	21.601	57
United Kingdom 英国	11.797,1	152	23.813	90
Germany 德国	11.689,5	210	16.455	151
Turkey 土耳其	6.231,3	103	13.797	88
Slovakia 斯洛文尼亚	5.373,2	22	11.626	20
Serbia 塞尔维亚	5.210,0	42	23.365	33
Hungary 匈牙利	5.051,9	86	17.386	58
Poland 波兰	3.137,2	65	17.205	55
France 法国	2.598,8	115	9.463	74
Russia 俄罗斯	1.397,2	22	9.254	20
Total 35 countries 共计35个国家	75.407,6	1.230	213.371	699

Data for companies investing in Emerging Europe and Western Europe in automotive components and automotive oem sectors between January 2019 and August 2024.

Automotive Industry in Spain
 International Position – Country ranking vehicle production
 西班牙汽车产业
 国际地位 - 汽车产量国家排名

Ranking 30 years ago
 30年前的排名

- 1. USA 美国 
- 2. Japan 日本 
- 3. Germany 德国 
- 4. France 法国 
- 5. Italy 意大利 
- 6. UK 英国 
- 7. **Spain 西班牙** 

Others 其他

- South Korea 韩国
- Czech Republic 捷克
- Romania 罗马尼亚

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、德国和西班牙保持了前 10 名球员

Ranking (2023)
 2023年的排名

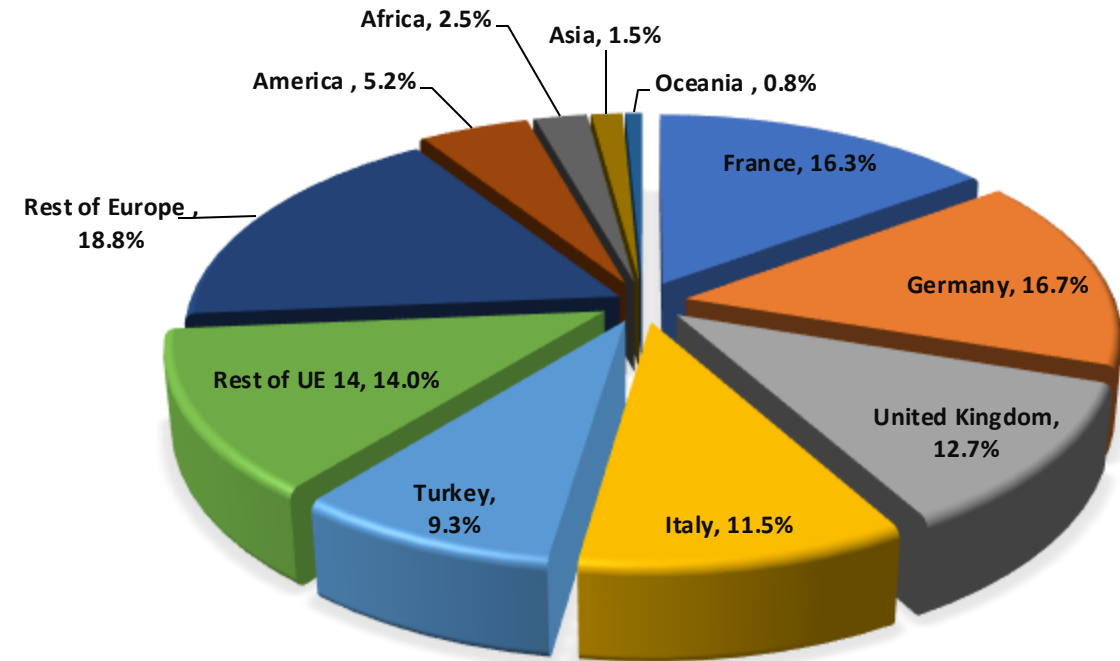
- 1. China 中国 
- 2. USA 美国 
- 3. Japan 日本 
- 4. India 印度 
- 5. South Korea 韩国 
- 6. Germany 德国 
- 7. Mexico 墨西哥 
- 8. **Spain 西班牙** 
- 9. Brazil 巴西 
- 10. Thailand 泰国 

<https://es.statista.com/estadisticas/611251/principales-productores-automovilisticos-del-mundo-por-vehiculos-fabricados/>

2 | Market Access 市场准入

International Trade / Vehicles/ Spain global provider 国际贸易/汽车/西班牙作为全球供应商

- **89.8% of made in Spain vehicles shipped to third countries in 2023**
- 2023 年西班牙制造的汽车有 89.8% 销往第三国
- ✓ **2,201,892 vehicles exported in 2023 -13,9% up on 2022**
- ✓ 2023 年出口汽车 2,201,892 辆, 较 2022 年增长 13.9%
- ✓ **90% of exports to European countries. Top 5 : France, Germany United Kingdom, Italy, Belgium, Turkey .**
- ✓ 90%出口到欧洲国家。前五个国家是：法国、德国、英国、意大利、比利时、土耳其。
- ✓ **Market diversification increasing exports to Africa (Morocco, South Africa Algeria), USA and Mexico, Asia: Japan**
- ✓ 市场多样化增加了对非洲（摩洛哥、南非、阿尔及利亚）、美国和墨西哥以及亚洲（日本）的出口



Source: . ANFAC annual report 2023 * UE 14 REST: Belgium, Netherlands, Poland,Austria, Portugal, Sweden, Denmark, Czech Republic

Europe main destination of made in Spain exports 欧洲是西班牙制造出口的主要目的地

- **Spanish market: Vehicle registrations in Spain reached 1,127,868 units in 2023 17.6% up on 2022**

- **西班牙市场：2023 年西班牙汽车注册量达 1,127,868 辆，较 2022 年增长 17.6%**

- ✓ **949,359 passenger cars .**
- ✓ 949,359 辆乘用车。
- ✓ **146,052 light commercial and pick-ups**
- ✓ 146,052 辆轻型商用车和皮卡
- ✓ **32,457 industrial vehicles and buses.**
- ✓ 32,457 辆工业用车和公共汽车。

- **European market : Access to one of the World's Largest markets**

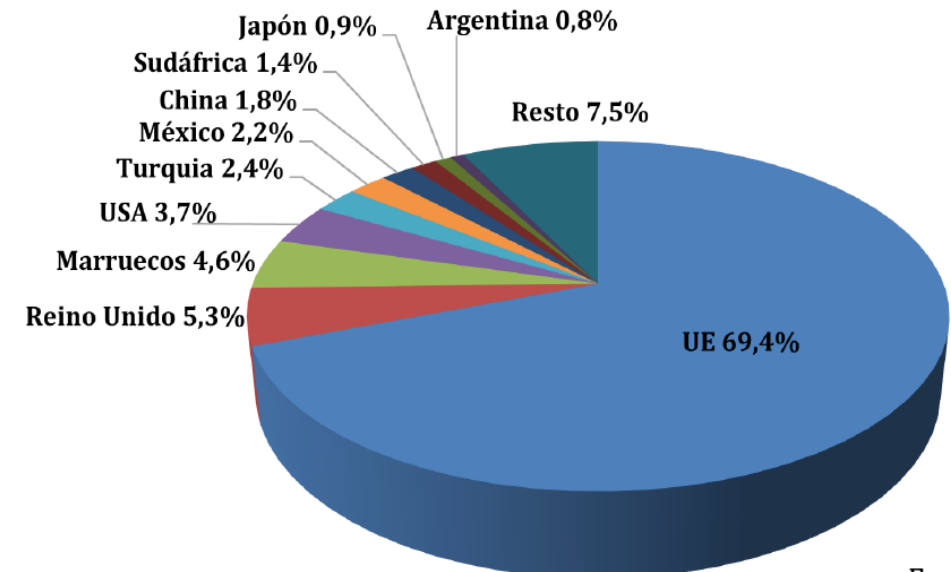
- **欧洲市场：进入世界上最大的市场之一**

- ✓ **EU 450 Million consumers with an average GDP per capita 40,823 USD in 2023(ppp 2010)**
- ✓ 欧盟消费者数量为 4.5 亿，2023 年人均 GDP 平均为 40,823 美元（2010 年 ppp）
- ✓ **90% of Spain's exports of vehicles to European countries in 2023**
- ✓ 2023 年西班牙 90% 的汽车出口到欧洲国家
- ✓ **Germany, France UK, Italy, Turkey and Belgium top 5 destinations in Europe in 2023**
- ✓ 2023 年欧洲五大目的地国：德国、法国、英国、意大利、土耳其和比利时



International Trade / Auto-Parts 国际贸易/汽车零部件

- **€25.14bn exports of Spanish auto-parts to 170 countries in 2023- 10.9% up on 2022.**
- 2023 年西班牙汽车零部件出口额达 251.4 亿欧元，比 2022 年增长 10.9%。
- **69.4% of total exports to EU countries. Top 5 destinations in EU: Germany, France, Portugal, Italy, Poland.**
- 占出口总额的 69.4% 出口至欧盟国家。欧盟前五大目的地：德国、法国、葡萄牙、意大利、波兰。
- **Increasing exports to non-EU markets:**
- 增加对非欧盟市场的出口：
- ✓ **Main country -markets outside EU: USA, UK, Morocco, China, Mexico, Turkey, South Africa, Japan.**
- ✓ 主要国家 - 欧盟以外的市场：美国、英国、摩洛哥、中国、墨西哥、土耳其、南非、日本。
- ✓ **Spanish suppliers hold investments in manufacturing plants in 35 countries.**
- ✓ 西班牙供应商在 35 个国家/地区投资了制造工厂。



Source : SERNAUTO – TARIC

Sources: SERNAUTO - External trade Commission - Secretariat of State for Trade - Estadcom data base

Logistics & Transport 物流和交通

Car Industry Logistics

汽车工业物流

- **4.97 Million vehicles were transported and shipped through Spain in 2023**
- 2023 年，西班牙运输和装运了 497 万辆汽车
 - ✓ **2.7 million vehicles were handled in Spanish Ports. 8 main ports handled 88.5% of the vehicles**
 - ✓ 西班牙港口处理了 270 万辆汽车。8 个主要港口处理了 88.5% 的汽车
 - ✓ **1.58 Million vehicles were transported by road using 217,784 trucks.**
 - ✓ 公路运输汽车 158 万辆，动用运输货车 217784 辆。
 - ✓ **650,000 vehicles were transported by train. 17.9% up on 2022**
 - ✓ 65 万辆汽车通过火车运输，比 2022 年增长 17.9%
- **Public-private commitment to boost freight transport and intermodal infrastructure, direct connections between rail network and OEMs and Auto-Parts Production Plants.**
- 公私合作承诺促进货运和多式联运基础设施建设，以及铁路网络与 OEM 制造商和汽车零部件生产厂之间的直接连接。
- **Joint initiatives by Port Authorities and Automotive clusters to improve vehicle and auto-parts terminals.**
- 港务局和汽车产业集群采取联合举措，改善汽车和汽车零部件码头。



3 | Industrial Innovation 产业创新 Smart Mobility 智慧出行

Mobility Trends 出行趋势

Alternative propulsión
替代动力

Connected vehicles
联网汽车



Mobility as a Service
出行作为一种服务

Automated Vehicles
自动驾驶车辆

Spain committed to EU Strategy for Transport and Mobility 西班牙致力于欧盟交通运输和出行战略

SMART, CONNECTED, SAFE, SUSTAINABLE TRANSPORT- SECTOR STRATEGY

智慧、互联、安全、可持续的交通运输行业战略

- Spanish Participation in **2/3** of EU R&D&I mobility projects
- 西班牙参与了欧盟2/3的研发和创新出行项目
- Spanish Automotive and Mobility Technology Platform, Move to the Future
- 西班牙汽车及移动技术平台，迈向未来

✓ Reinforcing the R&D structure of the industry

✓ 加强行业研发结构

✓ **246 Companies, Universities and Technology and Research Centres** working in priority R&D&I areas:

✓ 246 家公司、大学以及技术和研究中心致力于优先研发和创新领域：

• **Alternative fuels and propulsión systems**

• 替代燃料和推进系统

• **Connected, autonomous, collaborative driving.**

• 互联、自主、协作驾驶

• **Materials and lightweighting –interior spces**

• 材料和轻量化——内饰空间

• **Fabrics of the Future**

• 未来的面料

• **Talent , R&D, Standardization**

• 人才、研发、标准化



<https://www.move2future.es/nuestra-estrategia>

Green mobility 绿色出行

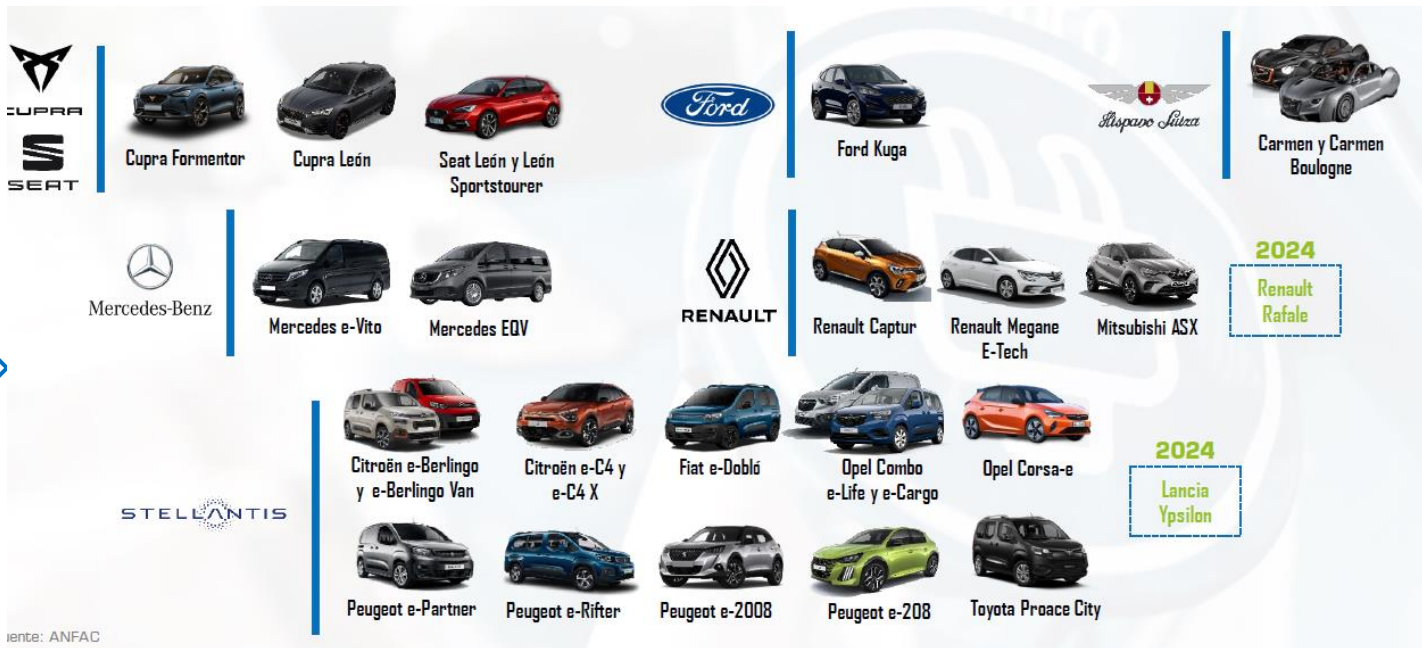
Industrial Capabilities EV 电动车行业产能



Spain will have to manufacture 700,000-800,000 EV in 2030 to keep its position as car manufacturer in Europe. (Industry Roadmap)

到 2030 年，西班牙需生产 70 万至 80 万辆电动汽车，才能保持其作为汽车制造国在欧洲的地位。（行业路线图）

Electrified models (BEV –PHEV)
13.2% of production in 2023
 2023年电动车型 (BEV -PHEV) 产量占比 13.2%



Source: ANFAC report on electrification of vehicles 2023 - a Roadmap of Automotive Industry in Spain –

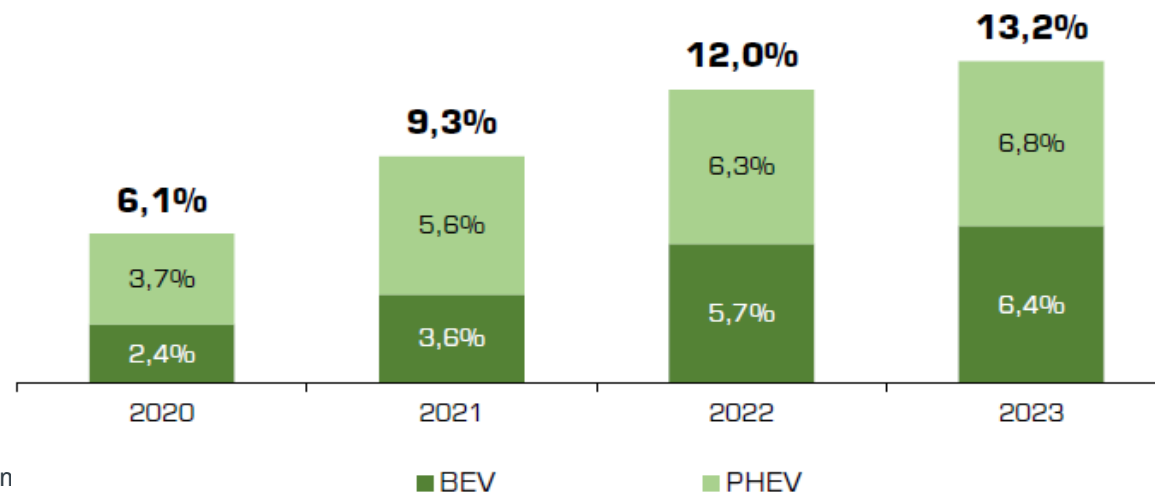
Industrial Capabilities – Production of Alternative propulsion vehicles 工业产能 - 生产替代动力汽车

323,255 electrified vehicles made in Spain in 2023, 21.3% up on 2022 (BEV-PHEV)
2023 年西班牙生产 323,255 辆电动汽车（纯电动车和插电式混合动力车），较 2022 年增长 21.3%



- **13.2% share of EV on total production in 2023 2023 年电动汽车占总产量的 13.2%**
- **Strategic Project for the development of Electric and connected vehicle PERTE VEC**
 电动和联网汽车发展战略项目，《经济复苏和转型战略性计划》电动汽车项目
- **Next generation funding :€2,975 million public investment and €11,900 million private investment by OEM's and supply chain for EV manufacturing 2022-2026**
 下一代融资：2022-2026 年电动汽车制造 OEM 和供应链的 29.75 亿欧元公共投资和 119 亿欧元私人投资

% Electrified vehicles on total production 2023
2023年电动车车辆占比



BEV
PHEV



Spain's Technological Strengths among others: 西班牙科技优势包括



- **Powertrain R&D&i ,electric propulsión systems, natural gas engines.** 动力系统研发、电力推进系统、天然气发动机
- **Battery tecnology** : lithium-ion and metal/air batteries assembly and recycling.-Battery Management System BMS 电池技术：锂离子和金属/空气电池组装和回收以及电池管理系统
- **Electronics–Connectivity** . 30,000 companies employing 400,000 technicians in the Spanish ICT Sector. 电子 – 物联。西班牙信息与通信技术领域有 30,000 家公司，雇佣了 400,000 名技术人员。
- **Digital industry and transport: Smart manufacturing and intelligent transport systems, Advanced Materials:** multifunctional materials, nanocomposites, Graphene 数字工业与交通：智能制造与智能交通系统、先进材料：多功能材料、纳米复合材料、石墨烯
- **Charging Infrastructures** 充电设施
- **Safety, Automated driving:** Spain is a Lab-country for open drive testing. Favourable regulation and fast permits 安全、自动驾驶：西班牙是开放驾驶测试的实验室国家。拥有优惠的法规和快速许可
- **Excellence in Engineering, testing and homologation** of vehicles and parts. 在车辆和零部件的工程设计、测试和认证方面表现卓越。

Sources: Spanish Automotive and Mobility Technology Platform M2F- Corporate Sources – AMETIC – Sernauto

Green mobility 绿色出行

Spanish market opportunities 西班牙本土市场机遇



To comply with EU target for CO2 emissions Spain needs 5.5 Million EV on the roads and 340,000 public charging points in 2030. 为了达到欧盟的二氧化碳排放目标，到 2030 年，西班牙需要有 550 万辆电动汽车上路行驶，并设立 34 万个公共充电站。

EV Registrations 2023 2023 年电动汽车登记

- 124,628 units of BEV-PHEV vehicles registered in Spain in 2023 (All type) 2023 年西班牙注册的（纯电动车和插电式混合动力车BEV-PHEV）汽车数量为 124,628 辆（所有类型）
- ✓ 113,784 electrified passenger cars 12% of total market share. 电动乘用车113,784辆，占总市场份额的12%。
- ✓ 10,844 Commercial, industrial vehicles and buses. 10,844 辆商用、工业车辆和公共汽车

GAS powered vehicles registrations 燃气动力汽车登记：

- 28,333 registrations of gas powered vehicles in 2023. 2023 年燃气汽车注册量达 28,333 辆

Green mobility 绿色出行 Charging Infrastructures 充电基础设施

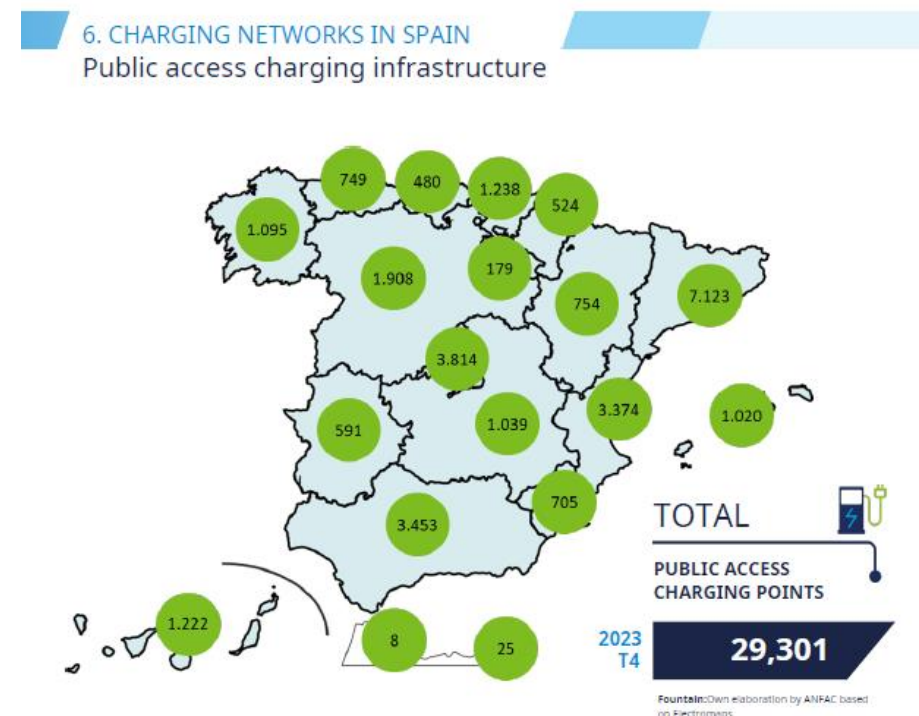
Target 2025 : 110,000 – 120,000 public charging points
2025年目标：11万 – 12万个公共充电站



Q4 2023 Data 2023年第四季度数据

- 29,301 public access charging points
29301个公共充电点
- 11,173 new public access charging points installed in 2023
2023年安装了11,173个新的公共充电站
- 621 Charging points of at least 250 kw (Charging time: less than 15 minutes)
621个至少250千瓦的充电点（充电时间：少于15分钟）

Map of public charging infrastructure for EV Q4 2023 2023年第四季度电动汽车公共充电基础设施地图

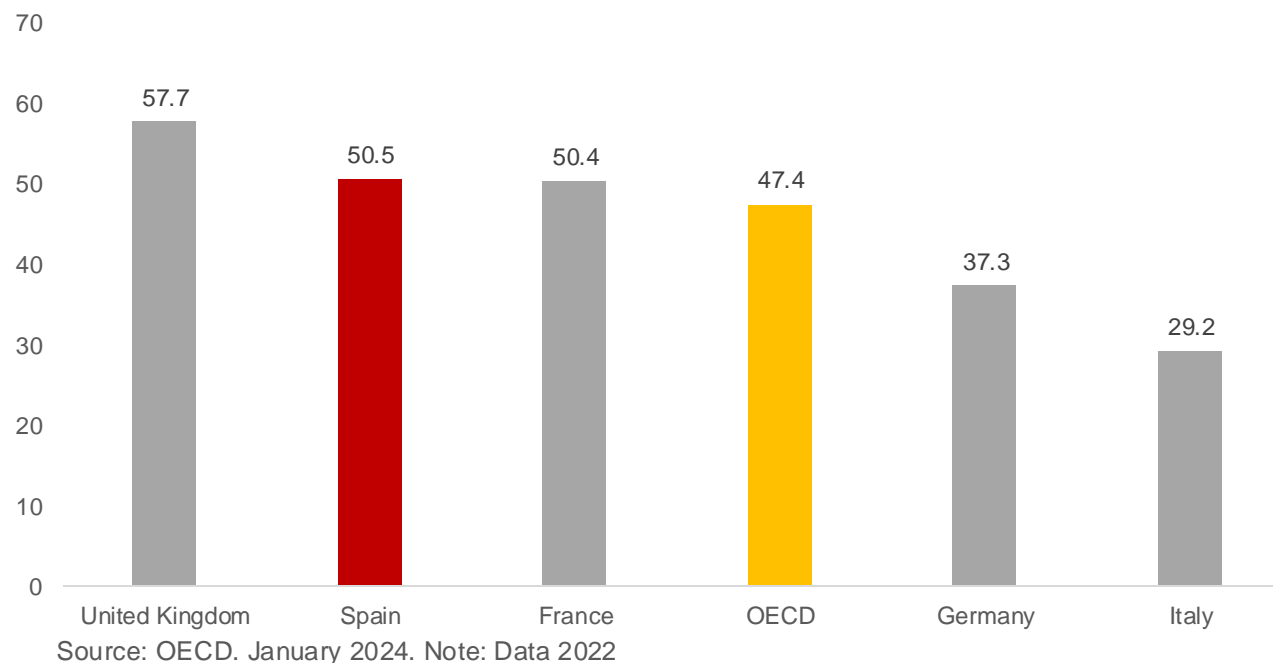


4 | Human Resources /Labour Cost
人力资源/劳动力成本
Incentives for Job creation
创造就业优惠政策

Automotive Industry 汽车产业

Human Capital : highly skilled Labor force 人力资本：高技能劳动力

Population with tertiary education 高等教育的人口
25-34 years old. % in same age Group
25-34 岁，同年齡组所占百分比，



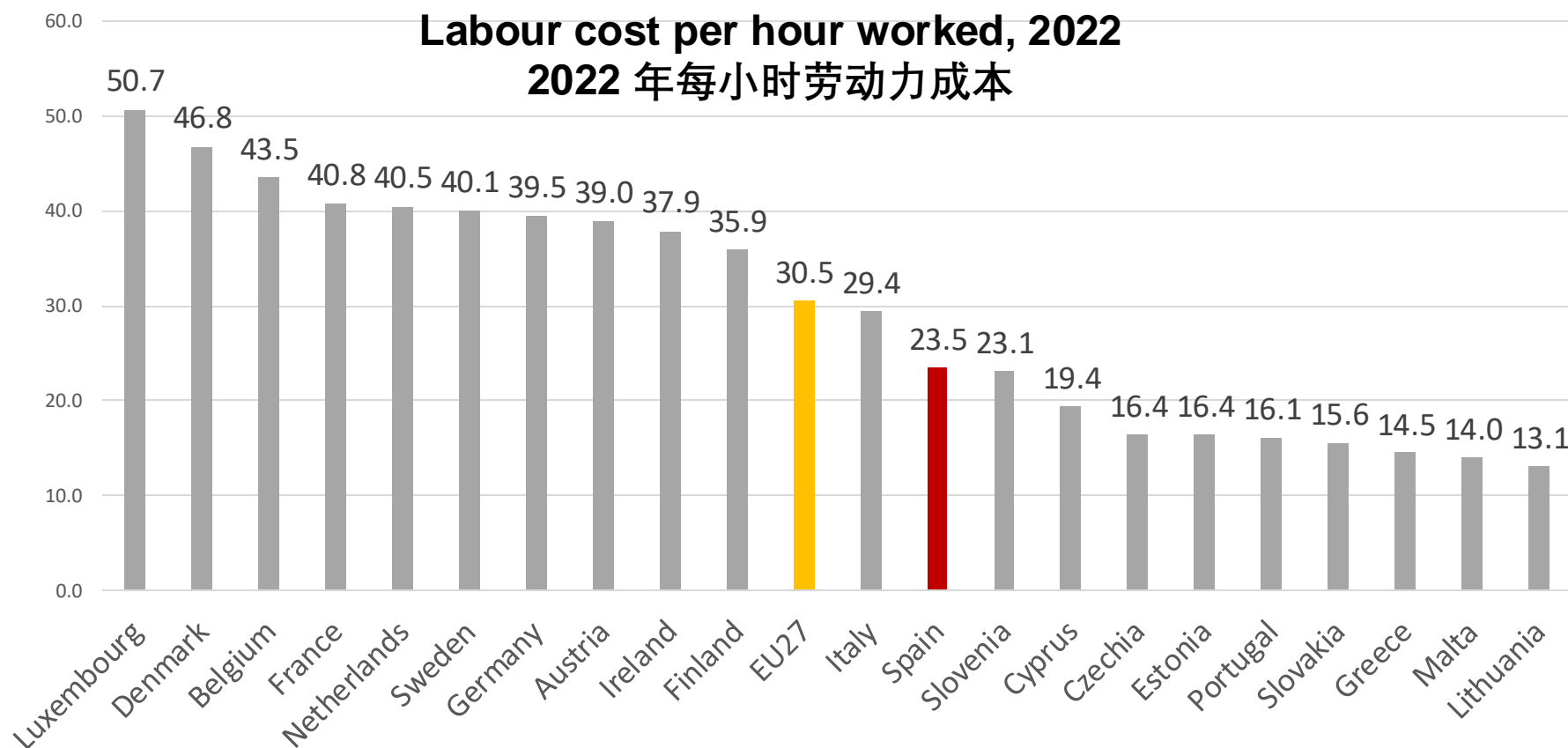
Spain over OECD average in percentage of skilled young people with tertiary education.
西班牙接受过高等教育的熟练年轻人所占比例高于经合组织的平均水平。

Availability of highly qualified Human Resources 拥有高素质人力资源

- **1,623,784 students in Spanish Universities (academic year 2022-23)** 西班牙大学在读学生人数为 1,623,784 人 (2022-23 学年)
- **354,878 new graduates from Spanish Universities (2022-23):**
西班牙大学 2022-23 年应届毕业生人数为 354,878 人：
 - ✓ **33,465 New Engineers and Architects** 新工程师和建筑师
 - ✓ **10,706 Computing and ICT graduates** 计算机和 信息与通信技术毕业生
 - ✓ **20,642 Scientific specialties (mathematics, statistics, physics, biology)** 科学专业 (数学、统计学、物理学、生物学)
 - ✓ **52,152 graduates in Health Sciences** 健康科学专业毕业生
- **1,080,963 students undertaking Vocational Training (academic year 2022.23)** 接受职业培训的学生人数为 1,080,963 人 (2022.23 学年)
 - ✓ **Dual Training Programmes by Automotive multinationals in collaboration with the Public Educational System (SEAT, VW, Daimler, Renault, NISSAN, ...)** 跨国汽车公司与公共教育系统合作开展的双元制培训项目 (西雅特、大众、戴姆勒、雷诺、日产等)
 - ✓ **356,046 students specializing in : computing and communications, electronics and electric systems, mechanical manufacturing, vehicle maintenance and transport, Equipment installation and maintenance, chemistry, building** 356,046 名学生的专业领域为：计算机与通信、电子与电气系统、机械制造、车辆维修与运输、设备安装与维护、化学、建筑

Competitive labor costs compared to main industrial economies in the EU

与欧盟主要工业经济体相比，劳动力成本具有竞争力



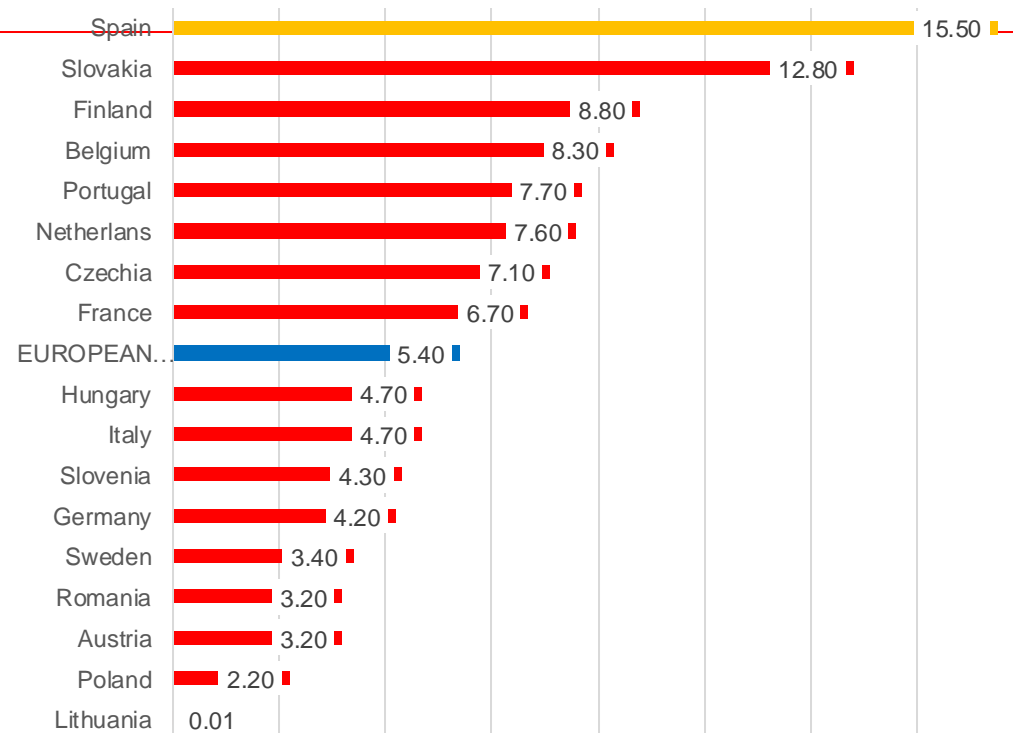
Source Eurostat 2023

- Spanish automotive plants among the most productive and efficient in the EU

西班牙汽车工厂是欧盟生产效率最高的汽车工厂之一

- Average production per direct employee of 15.5 vehicles annually

每位直接员工每年平均生产 15.5 辆汽车



Vehicle production per direct automotive manufacturing employee

汽车制造业直接雇员人均汽车产量

	%		
	2021	2022	YoY p.p.
EU27	5,1	5,4	0,3
Spain	13,4	15,5	2,1

Source: Acea, Pocket Guide 2024-25. September 2024

5 | Public Support: incentives for industrial investment 公共支持：工业投资优惠政策

Public Programmes, Grants and Incentives 公共计划、补助和激励措施



INVEST IN
SPAIN

Main National programmes for Investment in productive assets 生产性资产投资的主要国家补贴计划

- **Regional Incentives. Non-refundable subsidies for productive investment** 区域性优惠奖励措施，对生产性投资的不可退还补贴
- **Productive industrial investment support Fund (FAIIP) –loans** 生产性工业投资支持基金 (FAIIP) - 贷款
- **Spain`s Recovery Plan** 西班牙的复苏计划：

Strategic Project for economic Recovery and Tranformation -Electric and Connected Vehicle-PERTE VEC 经济复苏与转型战略项目-电动和网联汽车——《经济复苏和转型战略性计划》电动汽车专项

- **EIB loans and ICO funding** 欧洲投资银行贷款和西班牙官方信贷局融资

Operational Incentives, R&D&I, Human Resources 运营优惠、研发创新和人力资源

- **CDTI - Centre for Industrial Technology Development- Interantional programmes)**

西班牙国家技术与创新署 – 工业科技发展中心 — 国际项目

- **Industrial research and innovation in Manufacturing Sectors (Ministry of Industry, Trade and Commerce)** 制造业的工业研究与创新（工业、贸易和商业部)

- **Connected Industry 4.0 –(Ministry of Industry, Trade and Tourism)** 互联工业 4.0 –（工业、贸易和旅游部)

- **Deductions and grants for hiring and Training.** 招聘和培训费用扣除和补助

- **Other R&D&i programmes: INVEST IN SPAIN: Investment Programme for Foreign Companies R&D activities.** 其他研发与创新计划：西班牙投资促进局：外国公司研发活动投资计划

Demand Incentives - vehicle infrastructure 消费激励-汽车基础设施

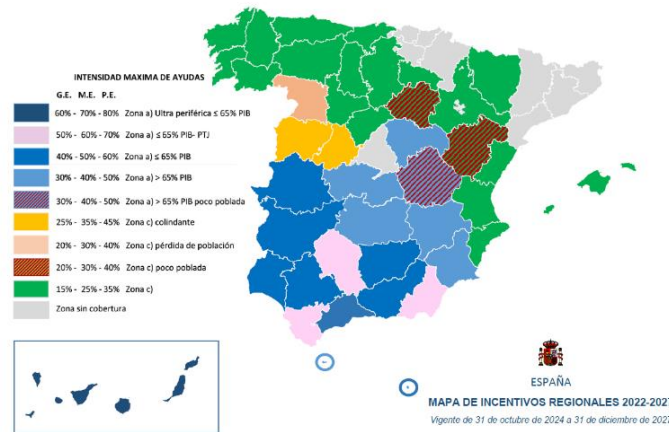
- Incentives for the purchase of “Alternative Energy Vehicles “and deployment of charging infrastructure. **MOVES PLAN**

Additional or complementary incentives for strategic projects can be granted by the Autonomous Communities

- 购买“替代能源汽车”和部署充电基础设施的鼓励措施**MOVES**计划。大区可以为战略项目提供额外或补充优惠刺激措施

- **Non-refundable subsidies granted to regions by the State, for productive investment, according to EU limits and requirements.** 国家根据欧盟的限制和要求，为各地区进行生产性投资而提供的不可退还的补贴。
- **Eligible projects are those aimed at (i) creating new establishments that give rise to the launching of business activity and generate new jobs; (ii) expanding existing activities with an increase in production capacity or starting up new activities in the same establishment; and (iii) modernizing the business.** 符合条件的项目旨在 (i) 创建新机构，从而开展商业活动并创造新的就业机会； (ii) 扩大现有商业活动，提高生产能力或在同一机构内开展新商业活动；以及 (iii) 实现商业现代化。
- **Eligible Costs : investment in tangible and intangible assets, wage costs arising from job creations (over two years)..** 符合条件的费用：有形和无形资产投资、因创造就业机会而产生的工资费用（两年以上）。。

Regional incentives map : máximo aid intensity by Region 地区激励措施图：按地区分列的最高援助强度



Investment / Industrial investment Fund – FAIP 投资、工业投资基金——生产性工业投资支持基金



INVESTIN
SPAIN

Productive industrial investment support fund (Ministry of Industry and Tourism) 生产性工业投资支持基金 (工业和旅游部)

PURPOSE 目标

PROMOTE NEW PRODUCTIVE INDUSTRIAL INVESTMENT (industrial manufacturing and services)
促进新的生产性工业投资 (工业制造和服务业)

PROVISION 拨款

€1,900
Million
19亿欧元

TYPES OF PROJECTS 项目类型

Creation, transfer or upgrade/modification of industrial establishments
工业企业的创建、转让或升级/调整

Improvement and modernization of existing manufacturing lines. 现有生产线的改进和现代化

Implementation of “Connected Industry 4.0” technologies 实施“互联工业 4.0”技术

FINANCING 资金支持

ORDINARY LOANS, SHAREHOLDER LOANS, EQUITY 普通贷款、股东贷款、股权

FROM €200,000 TO €60 MILLION 从 20 万欧元到 6000 万欧元
FUNDING UP TO 75% OF ELIGIBLE INVESTMENT 资助最高达 75% 的合格投资

LOANS : 10-year repayment period, 3-year waiting period 贷款: 10 年还款期, 3 年宽缓期

INTEREST RATES 利率:

- ORDINARY LOANS: EURIBOR 6 months + 1.07 depending on Project and company rating. 普通贷款: EURIBOR 6 个月+1.07, 取决于项目和公司评级。
- SHAREHOLDER LOANS : from EURIBOR 6m + 2.07% fixed tranche – from EURIBOR 6m +2.83% variable tranche. 股东贷款: 来自 6 个月欧元银行同业拆借利率 + 2.07% 固定部分 – 来自 6 个月欧元银行同业拆借利率 +2.83% 浮动部分。
- EQUITY From 11.72-points revaluation. depending on company and project’s characteristics 股权从 11.72 点重新估价。取决于公司和项目的特点

Detailed information and application at https://www.sepides.es/fondo_faiip

https://www.mintur.gob.es/PortalAyudas/FAIP/DescripcionGeneral/Documents/FORMULAS-DE-FINANCIACION-Y-CONDICIONES_OCTUBRE-DICIEMBRE-2024-1.pdf

Strategic Project for Economic Recovery and Transformation –PERTE VEC 经济复苏与转型战略项目— PERTE电动汽车专项

DEVELOPMENT OF A COMPLETE ECOSYSTEM FOR ELECTRIC AND CONNECTED VEHICLES 为电动汽车和联网汽车开发完整的生态系统

PURPOSE 目标	PROVISION 2022-2026 2022年至2026年条款	TYPE OF PROJECTS 项目类型	FINANCING 资金支持
DEVELOPMENT OF A COMPLETE SUPPLY CHAIN FOR ELECTRIC AND CONNECTED VEHICLES MANUFACTURING 开发电动汽车和联网汽车制造的完整供应链	<p>€2,975bn public investment 29.75亿欧元公共投资</p> <p>€11,900bn private investment 119.00亿欧元私人投资</p>	<p>New lines or adaptation of existing lines for EV manufacturing. 新建生产线或改造现有生产线以制造电动汽车。</p> <p>Battery and EV essential components manufacturing- 电池和电动汽车重要部件制造-</p>	<p>Grants and loans - mixed instrument *. 补贴和贷款——混合工具*</p>
DEPLOYMENT OF CHARGING INFRASTRUCTURES AND DEMAND INCENTIVES 充电基础设施部署及消费刺激	<p>€1,100 bn public investment 11亿欧元公共投资</p> <p>€ 7.608 private investment. 76.08亿欧元私人投资</p>	<p>Charging stations and incentives for acquisition of EV 充电站和购买电动汽车的消费刺激措施</p>	<p>*i.e Call PERTE VEC 2023 Battery supply chain – Budget €550 Million grants €287 millio loans (already solved)</p>
PROFESSIONAL TRAINING AND 5G NETWORKS 专业培训和5G网络	<p>€35 Million 3500万欧元</p>	<p>Vocational and dual training programmes 职业培训和双元制培训项目</p>	<p>*例如 PERTE VEC 2023 电池供应链补贴招标 – 预算 5.5 亿欧元补贴, 2.87 亿欧元贷款 (已落实)</p>

€1.9 bn already allocated to industrial projects 2022-2024 (Next call 2025)
已为 2022-2024 年工业项目拨款 19 亿欧元 (下次拨款时间为 2025 年)

6 | Competitive advantages and Business Opportunities Success stories 竞争优势和商业机会成功案例

Summary of competitive advantages 竞争优势总结

- Solid Industrial base and leading International Position 产业基础雄厚 国际领先地位
- Productive and flexible Manufacturing plants 高效灵活的制造工厂
- High Investment in innovation 创新高投资
- Powerful and innovative industrial supply chain and Auto-Parts industry
强大创新的产业供应链和汽车零部件行业
- Availability of highly qualified and competitive human resources 拥有高素质和有竞争力的人力资源
- Industry investment in professional Training and continuous training 行业对专业培训和再培训的投资
- Ecosystem for innovation, high participation in European New Mobility R&D Projects 创新生态系统，高度参与欧洲新移动出行研发项目
- Market Access : privileged Export Platform towards EU, Latin-America, North-Africa 市场准入：面向欧盟、拉丁美洲、北非的优势出口平台
- Open Country for Foreign Investment. Public Support for business development 向外商投资开放的国家；为企业发展提供公共支持
- Vast structure of Incentives for business Development, investment and R&D&i activities 为企业发展、投资和研发活动提供广泛的激励机制



Automotive Industry Business opportunities 汽车行业商机

AREAS OF OPPORTUNITY R&D&I AND INDUSTRIAL PROJECTS 研发创新和工业项目机会

- Stamping, metal parts, lightweighting 冲压、金属零件、轻量化
- Advanced materials composites 先进材料复合材料
- Engineering plastics 工程塑料
- Electric engines and components (permanent magnets) 电动发动机和零部件 (永磁体)
- Powertrain: e-vehicle transmission systems. power electronics
动力传动系统：电动汽车传动系统、电力电子
- Battery technologies: materials and components (cells, cathodes, separators, electrolyte, Battery Management System) 电池技术：材料和组件 (电池、阴极、隔膜、电解质、电池管理系统)
- Electronics .Connectivity. Grid integration. Semiconductors 电子、连接、电网集成、半导体
- Automated driving systems: Spain Lab-country for open drive testing fast **permits**
自动驾驶系统：西班牙开放驾驶测试快速许可实验室国家
- Intelligent transport systems, sensorics, data analytics, cybersecurity
智能交通系统、传感器、数据分析、网络安全
- Charging infrastructures 充电基础设施
- Light Electric vehicles manufacturing 轻型电动汽车制造
- Digital Factory – 4.0 systems and technologies 数字工厂 – 4.0 系统和技术
- Design Engineering – Testing – homologation 设计工程 – 测试 – 认证



www.move2future.es

Investment Projects 投资项目

Success stories 成功案例



2022 – 2026 €10bn investment by SEAT VW Group in Spain FUTURE FAST FORWARD PROJECT

SEAT S.A. and the Volkswagen Group have announced their intention to mobilize 10 billion euros to electrify Spain as part of their commitment to the country and developing the electric vehicle.

The company is willing to invest together with the external supply chain for the electrification of VW plants in Martorell and Pamplona and for the localization of electric battery production in Valencia", Volkswagen Group aims for a production capacity of 40 GWh annually and plans to employ more than 3,000 people in Valencia.

“This would represent the single largest industrial investment in Spanish history. The Future: Fast Forward program would include the installation of a battery cell factory in Sagunto, Valencia”

2022 – 2026 西雅特大众集团在西班牙投资 100 亿欧元 未来：快速前进项目

西雅特集团和大众集团宣布，他们打算动用100 亿欧元完成西班牙电气化，作为他们对该国和开发电动汽车的承诺的一部分。该公司愿意与外部供应链共同投资大众在马尔托雷尔和潘普洛纳的工厂电气化以及在瓦伦西亚本地化电池生产”，大众集团的目标是每年生产40吉瓦时，并计划在瓦伦西亚雇用 3,000 多名员工。“这将是西班牙历史上最大的单笔工业投资。未来：快速前进计划将包括在瓦伦西亚的萨贡托安装电池工厂”

<https://www.seat-mediacentre.com/smc/seat-sa/seat-sa-news/company/2022/SEAT-SA-and-Volkswagen-Group-to-mobilize-more-than-7-billion-euros-to-electrify-Spain.htm> | [La gigafactoría de baterías de Grupo Volkswagen comenzará a construirse en 2023 \(auto-revista.com\)](https://www.la-gigafactoria-de-baterias-de-grupo-volkswagen-comenzara-a-construirse-en-2023-auto-revista.com)

Investment – EV Batteries 2022-2024

2022年至2024年投资 – 电动汽车电池

2nd call PERTE Electric and Connected Vehicles SUPPLY CHAIN FOR BATTERY MANUFACTURING 第二轮《经济复苏和转型战略性计划》电动和联网汽车电池制造供应链专项补贴招标

26 PROJECT BY 21 COMPANIES * 21 家公司参与的 26 个项目 *

€628 Million public funding allocated -€3.3bn induced private investment 拨付 6.28 亿欧元公共资金 - 吸引 33 亿欧元私人投资

EXAMPLES案例:

FORD – BATTERY ASSEMBLY IN -ALMUSSAFES- VALENCIA 福特 – 位于瓦伦西亚阿尔穆萨菲斯的电池组装

BASQUEVOLT - SOLID STATE CELL MANUFACTURING PLANT –VITORIA-BASQUE COUNTRY

BASQUEVOLT - 固态电池制造工厂 - 维多利亚 - 巴斯克地区

BASF- BASE METALS REFINING PLANT –TARRAGONA –CATALUÑA 巴斯夫基本金属精炼厂 – 塔拉戈纳 – 加泰罗尼亚

RENAULT ESPAÑA- BATTERY ASSEMBLY – PALENCIA AND VALLADOLID- CASTILLA Y LEÓN 雷诺西班牙 - 电池组装 - 帕伦西亚和巴利亚多利德 - 卡斯蒂利亚和莱昂

GESTAMP – BATTERY BOX LOWER COVER ASSEMBLY – BARCELONA 海斯坦普 – 电池盒下盖组装 – 巴塞罗那

STELLANTIS ESPAÑA- PRODUCTION AND ASSEMBLY OF BATTERIES VIGO- MADRID- ZARAGOZA

STELLANTIS 西班牙 - 维哥 - 马德里 - 萨拉戈萨电池生产和组装

SEAT – BATTERY ASSEMBLY LINE FOR SEAT AND CUPRA –MARTORELL –CATALUÑA

SEAT – SEAT和 CUPRA 电池装配线 - 马尔托雷尔 - 加泰罗尼亚

ENVISION – GIGAFACTORY-CÁCERES-EXTREMADURA 远景 – 卡塞雷斯-埃斯特雷马杜拉超级工厂

LOTTE ENERGY MATERIALS- ELECFOIL PRODUCTION PLANT –TARRAGONA-CATALUÑA 韩国乐天能源材料公司 电子箔生产厂-塔拉戈纳-加泰罗尼亚

Source Ministry of Industry and Tourism

* List of approved projects <https://www.mincotur.gob.es/PortalAyudas/PERTE-BAT/Concesion/2023/Paginas/PropResDefinitiva.aspx>

<https://www.mincotur.gob.es/es-es/recuperacion-transformacion-resiliencia/Paginas/perte.aspx>

<https://planderrecuperacion.gob.es/noticias/conoce-proyectos-produccion-baterias-aprobados-perte-VEC-II-prtr>



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