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SPAIN

西班牙新能源市场及投资机遇

Renewable Energy Market and Investment Opportunities in Spain

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1. 西班牙经济概况

Spanish Economic Overview





- ❖ **世界第14大, 欧盟第4大经济体：国民生产总值 1.2 万亿 美元.**
- ❖ **World's 14th largest economy and the 4th largest economy in the EU: GDP worth 1,278 billion USD.**

- ❖ **世界第14大贸易服务出口国, 2020年货物出口全球排名第18位.**
- ❖ **14th largest exporter of commercial services worldwide and 18th ranked exporter of merchandise trade in 2020.**

- ❖ **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一.2019年游客超过8千3百万人.**
- ❖ **2nd country worldwide in international tourist arrivals and in receipts (1st in Europe) in 2019. More than 83 million international tourists in 2019.**

- ❖ **2020年世界第11大外资接收国, 第15大对外投资国.**
- ❖ **11th largest economy in terms of accumulated inward FDI stock and 15th in outward FDI stock in the world in 2020.**

- ❖ **总人口4670万, 500万出生于国外.**
- ❖ **Total population of 47 million. More than 5 million are foreigners.**

西班牙吸收的外国直接投资存量居全球第十一位

Spain is the 11th largest economy in terms of accumulated inward FDI stock in the world

2021 接收外国直接投资存量 百万美元

2021 Inward FDI Stock			
	Economy	Mill USD	Share
1	United States	13.619.023	30%
2	China + HK	4.086.213	9%
3	United Kingdom	2.634.202	6%
4	Netherlands	2.576.225	6%
5	Singapore	2.007.270	4%
6	Canada	1.437.837	3%
7	Switzerland	1.369.626	3%
8	Ireland	1.362.510	3%
9	Germany	1.139.106	3%
10	Luxembourg	1.013.915	2%
11	France	977.990	2%
12	Spain	819.725	2%
13	Australia	770.258	2%
14	Belgium	604.647	1%
15	Brazil	592.761	1%
16	Mexico	578.792	1%
17	Russian Federation	521.876	1%
18	India	514.292	1%
World		45.448.812	

Source: UNCTAD, WIR 2022.

2021 对外直接投资存量 百万美元

2021 Outward FDI Stock			
	Economy	Mill USD	Share
1	United States	9.813.545	23%
2	China + HK	4.664.123	11%
3	Netherlands	3.356.858	8%
4	Canada	2.285.325	5%
5	United Kingdom	2.166.414	5%
6	Germany	2.141.269	5%
7	Japan	1.983.858	5%
8	Switzerland	1.578.515	4%
9	France	1.544.964	4%
10	Singapore	1.346.395	3%
11	Ireland	1.273.778	3%
12	Luxembourg	1.272.822	3%
13	Belgium	691.297	2%
14	Australia	618.855	1%
15	Spain	600.808	1%
16	Italy	553.321	1%
17	Korea, Republic of	551.549	1%
18	Sweden	447.500	1%
World		41.798.485	

Source: UNCTAD, WIR 2022.

在西班牙有超过**16,000**间外资公司横跨不同的经济产业. **Over 16,000 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的目的地

Spain is the world's 5th greenfield projects and 4th innovative & high-end greenfield activities destination, according to FDI Markets

2021年世界十大绿地目的地

Financial Times **2021年世界十大创新和高端绿地业务目的地**

Top 10 Greenfield Destinations in the World 2021					
	Country	Projects	Capex USD M.	Jobs created	Companies
1	USA	1,677	86,078.5	159,014	1,410
2	Germany	1,215	40,762.5	54,386	1,081
3	UK	1,075	44,479.2	95,958	893
4	Spain	827	27,370.2	89,529	580
5	UAE	536	7,159.0	25,997	500
6	Poland	511	21,871.3	123,304	359
7	China	481	31,500.1	133,049	403
8	France	465	12,479.9	30,001	387
9	India	455	15,726.8	117,536	372
10	Mexico	376	19,910.9	92,464	312
	Rest	7,260	360,541	908,552	--
Total		14,878	667,879.6	1,829,790	9,336

Source: FDI Markets, 2021. USD Million.

Top 10 Innovative & High-End Greenfield Activities(*) Destinations in the World 2021					
	Country	Projects	Capex USD M.	Jobs created	Companies
1	USA	319	9,307.4	36,231	302
2	UK	170	3,851.3	13,589	165
3	Germany	158	3,812.8	9,427	144
4	Spain	134	3,611.1	10,008	116
5	India	111	4,257.1	24,489	91
6	Ireland	92	4,304.7	8,983	87
7	Singapore	82	3,108.1	5,225	81
8	Canada	80	10,156.6	9,725	74
9	Poland	74	2,909.7	8,157	62
10	UAE	73	1,564.3	4,220	71
	Rest	1,047	64,004	115,674	--
Total		2,340	110,887.2	245,728	1,737

Source: FDI Markets, 2021. USD Million.

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

2. 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

中国是西班牙第十大投资国：116.057亿欧元 (存量)
西班牙有200 家中国企业
创造了20,000 个工作岗位

10th Investor in Spain: 11,605.7 million € (stock)
200 Chinese companies in Spain
20,000 Jobs

中国对西出口总值 (2021年) : 348.34亿欧元
中国赴西旅游人次 (2019年) : 700,748人
在西班牙居住的中国公民 (2020年) : 232,807人

Chinese Exports to Spain (2021): 34,834 Mill. €
Chinese Tourists in Spain (2019): 700,748
Residents in Spain (2020): 232,807



西班牙在中国 Spain in China

西班牙是中国第20大投资国：32.88亿欧元 (存量)
中国有500-600家西班牙公司
创造了30,674 个工作岗位

20th destination Spanish Investment 3,288 million € (stock)
500-600 Spanish Companies in China
30,674 Jobs

西班牙对华出口总值 (2021年) : 86.60亿欧元
西班牙赴华旅游人次 (2017年) : 149,600人
在中国居住的西班牙公民 (2019年) : 6,918 人

Spanish Exports to China (2021): 8,660 Mill.€
Spanish Tourists in China (2017): 149,600
Spanish Residents in China (2019): 6,918

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。2016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. INE 2020, China National Tourism Administration (CNTA) 2016.

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



3. 西班牙新能源产业

Spanish Renewable Energies Sector



西班牙：投资可再生能源的绝佳目的地。

Spain: an excellent destination to invest in renewable energy.

- 西班牙在 2020 年产生了 109,269 吉瓦时的可再生能源，占年总发电量的 43.6%（比上年增加 11.6%）。
- Spain generated 109,269 GWh of renewable energy in 2020, 43.6% of the total annual amount generated (11.6% more than the previous year).
- 最新的 RECAI (EY) 指数根据可再生能源投资和部署机会的吸引力对各国进行排名，将西班牙列为世界第 10（欧盟第 4）。
- The latest RECAI (EY) index, which ranks countries on the attractiveness of their renewable energy investment and deployment opportunities, lists Spain as 10th highest in the world (4th highest in the EU).

西班牙各行业的外商直接投资 Foreign Direct Investment by Sector

西班牙各行业的外国直接投资。存量和最近的趋势2017 - 2021
外国投资注册. 百万欧元.

Foreign Direct Investment in Spain by Sector. Stock and Recent Trends 2017 – 2021
Foreign Investments Registry. Million Euro.

Sectors 行业		Total Stock *	Investment Flows 投资流量				
			2017	2018	2019	2020	2021
1	Real Estate, Building and Infrastructures 房地产、建筑和基础设施	92,162.2	7,664.1	12,668.4	4,240.4	3,444.2	7,736.6
2	Energy 能源	64,966.2	2,659.5	3,962.5	1,046.6	1,393.3	5,831.5
3	Financial Services 金融服务	56,107.7	3,684.5	3,466.0	6,619.7	7,861.6	2,365.3
4	Retail and Wholesale 零售和批发	53,761.5	2,808.4	4,543.1	1,985.0	5,241.2	2,355.3
5	Metals and Manufacturing of other Materials 金属及其他材料制造	45,219.0	2,218.0	343.2	730.4	558.4	1,609.4
6	Food and Beverages 食品和饮料	34,256.8	1,340.9	1,788.7	1,077.3	2,013.6	1,539.0
7	ITC: Communications, Software & IT Services 通信、软件和IT服务	33,438.0	2,185.2	3,387.0	2,136.4	4,797.1	3,977.4
8	Chemicals and Petrochemicals 化学品和石化产品	26,383.2	565.0	3,752.6	1,468.7	514.8	481.0
9	Pharmaceuticals, Medical, Healthcare & Biotechnology 制药、医疗、保健和生物技术	21,999.6	1,410.2	2,860.1	450.6	591.1	603.0
10	Automotive OEM & Automotive Components 汽车代工和汽车配件	19,961.5	489.4	2,455.2	382.8	344.3	166.6
11	Transport and Logistics 交通和物流	17,917.4	3,054.8	14,975.3	493.0	1,696.8	784.8
12	Mining and Natural Resources 矿产和自然资源	17,695.1	9,375.8	221.4	167.1	20.0	9.1
13	Business Services 商业服务	16,508.6	1,232.7	1,232.4	2,222.0	1,357.4	750.9
14	Tourism 旅游	14,432.6	666.9	2,326.3	667.0	386.8	1,494.4
15	Industrial Machinery and Equipment 工业机械和设备	11,574.8	478.4	1,415.2	201.4	196.5	360.1
16	Paper, Wood and Others 纸张、木材和其他	8,231.0	17.3	63.9	1,717.4	497.0	119.9
17	Environmental industries 环境工业	7,536.4	618.3	122.7	681.1	39.6	146.7
18	Leisure and Entertainment 休闲娱乐	6,250.9	127.7	2,066.6	884.5	295.7	571.4
19	Consumer Goods 消费品	1,058.4	238.8	307.8	215.4	74.4	85.2
20	Other 其他	452.8	0.7	4.1	7.1	8.0	62.8
Total Investment 总投资		549,913.7	40,836.6	61,962.3	27,394.0	31,332.0	31,050.6
Total Productive Investment 生产性总投资		507,942.5	28,349.3	55,328.3	24,674.0	24,449.6	28,785.1

Source: Foreign Investments Registry. Ministry of Industry, Trade and Tourism 2022. Million Euro. (*) Stock 2020 data.

为什么考虑西班牙? Why think Spain:

开放性和市场规模。
Openness and market size.

外国直接投资风险非常低和的商业气氛。
Very low FDI risk and great business climate

可再生能源投资：对减碳、气候变化和能源过渡的承诺。
High renewable energy investment: commitment on decarbonization, climate change and energy transition

谢谢!

西班牙对外贸易发展和投资局 – 西班牙投资促进局：您在西班牙的伙伴
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