



INVEST IN  
SPAIN



OFICINA ECONÓMICA Y COMERCIAL  
DE LA EMBAJADA DE ESPAÑA EN CANTÓN  
西班牙驻华大使馆广州经济商务处



# 西班牙，您在欧洲的伙伴 Spain: Your Partner in Europe

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2022电子烟行业第六届规范发展宣贯会  
暨首届出口服务发展大会

The Sixth E-cigarette Industry Standard & Compliance  
Conference, The E-cigarette Export Trade Development  
Conference



# 西班牙在波特钻石模型上的竞争优势

## The competitive advantages of Spain on Porter's Diamond Model

各国可以利用自身可用的因素，而政府可以充当催化剂，以改善一个国家在全球竞争性经济环境中的地位。

Nations can exploit factors available to them and governments act as catalysts to improve a country's competitive position.

企业战略  
结构、竞争  
Firm Strategy,  
Structure  
and Rivalry

生产要素  
Factor  
Conditions

需求条件  
Demand  
Conditions

支持产业  
Related and  
Supporting  
Industries



国家在生产要素上的地位对于在特定行业中竞争必不可少，例如高素质专业人才或基础设施

The nation's position in factors of production, such as skilled labor or infrastructure, necessary to compete in a given industry.

生产要素  
Factor  
Conditions

Firm  
Strategy,  
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and  
Rivalry

Demand  
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Related  
and  
Supportin  
g  
Industries

- 良好的基础设施  
Excellent infrastructure
- 商业支持政策  
Pro-business policies
- 税收政策  
Taxation





# 良好的基础设施

## EXCELLENT INFRASTRUCTURE

1

## 生产要素:良好的基础设施

西班牙优良的基础设施助力企业大幅度节省物流成本

**The excellent infrastructures of Spain mean huge savings in logistic costs**

- 西班牙是全球基础设施最好的5个国家之一

**Spain is among top 5 countries with the best infrastructure**

- 高铁领导者: 比德国和意大利的总和还多

**Leader in high-speed railways: more km than Germany and Italy combined**

- 就集装箱货物吞吐量, 3个大海港 (阿尔赫西拉斯, 巴塞罗那, 瓦伦西亚) 入围全球主要港口

**3 major seaports (Algeciras, Barcelona, Valencia) are listed among top ports worldwide in terms of container traffic**

- 连接美洲和非洲与欧洲的航空运输枢纽

**Air transport hub for routes linking the Americas and Africa to Europe**



西班牙是通往第三市场许多合作机会的桥梁  
Spain is a bridge to cooperation opportunities in third markets



## 1 生产要素: 商业支持政策

- 西班牙提供进入世界最高消费力市场的机会  
Spain provides access to the largest consumer market in the world
- 与日本、韩国、新加坡、澳大利亚、新西兰、加拿大、墨西哥等多个国家的自由贸易和优惠贸易协定  
Free trade and preferential trade agreements with Japan, Korea, Singapore, Australia, New Zealand, Canada, Mexico and many other countries
- 加强双重征税和投资保护协议, 提高西班牙投资者在拉丁美洲市场的竞争力  
Enhanced double taxation and investment protection agreements with enhance the competitiveness of Spanish investors in Latin America markets
- 在北非和中东拥有强大的商业和金融影响力  
Strong commercial and financial presence in North Africa and Middle East

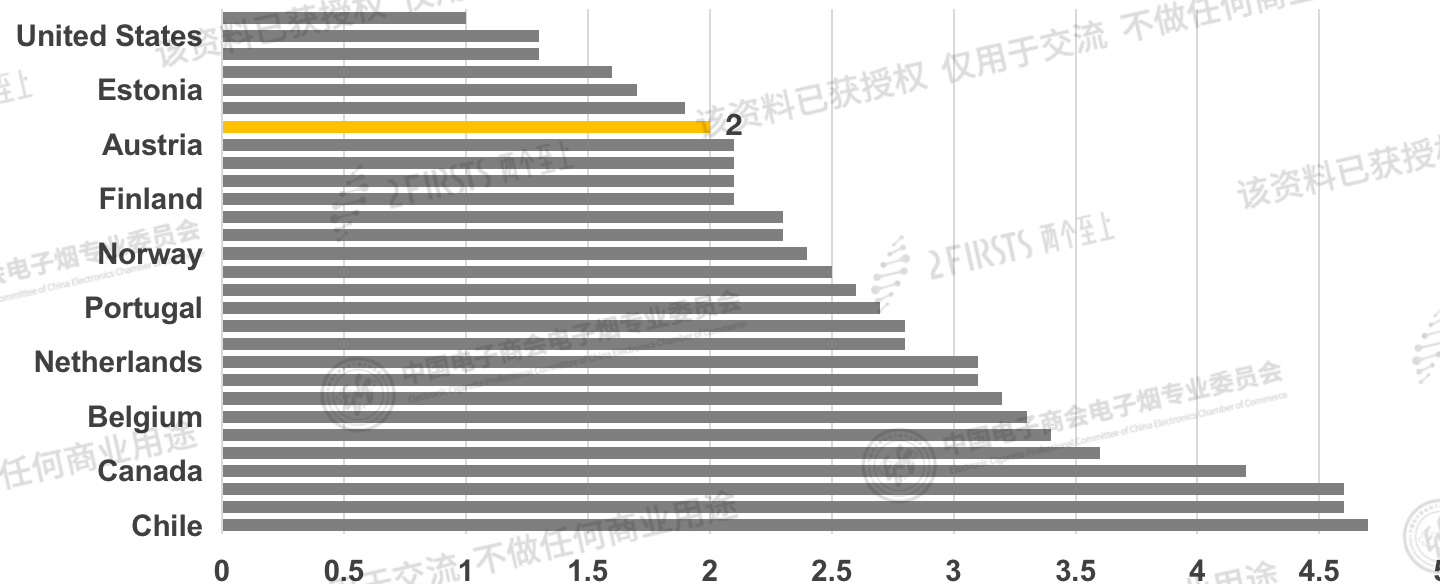


公司税收负担低于大多数发达经济体

Corporate tax burden is below most advanced economies

## Tax on corporate profits 2020 (% GDP)

Source: OECD



25% 公司所得税 Corporate Income Tax

个人所得税 Personal Income Tax:  
19% 居民 residents;  
24% 非居民 non-residents

增值税率 VAT rate:  
21% 标准 standard;  
4% & 10% 减少 reduced

19% 预扣税 Withholding Tax

资产增值税 Capital Gains Tax:  
23% 居民 residents  
19% 非居民 non-residents



国内市场对该行业产品或  
服务的需求性质。

The nature of home-  
market demand for the  
industry's product or  
service.

Firm  
Strategy,  
Structure  
and  
Rivalry

Factor  
Conditions

Related  
and  
Supportin  
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Industries

需求条件  
Demand  
Conditions

- 高购买力的市场  
High purchasing power  
market
- 欧洲内部市场  
European internal market
- 稳定的经济环境  
Stable economic  
environment





2

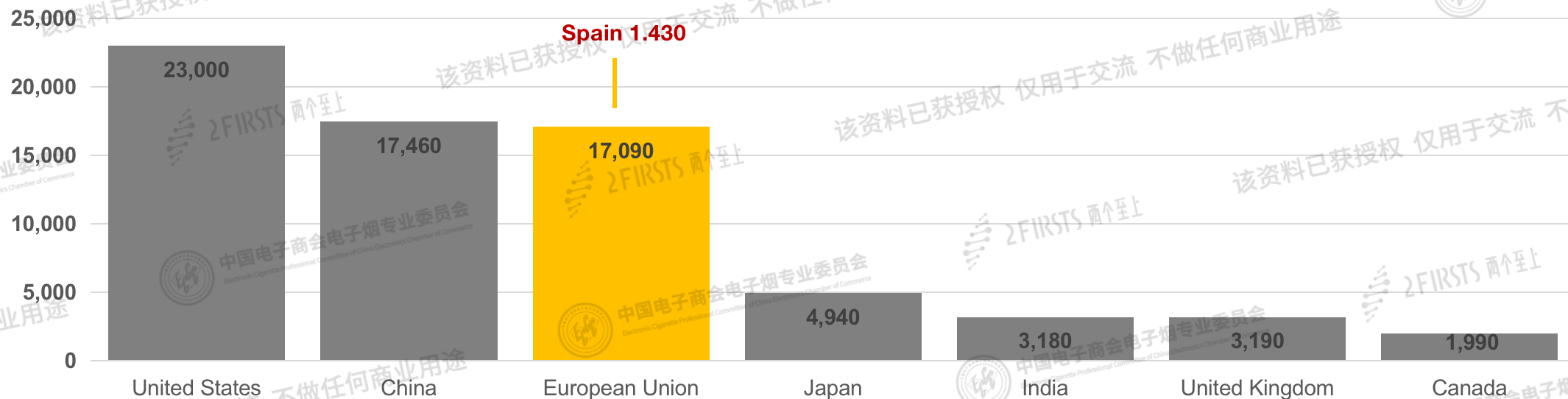
## 需求条件：高购买力的市场

作为欧盟成员国，西班牙属于世界第三大市场

**As a member of the European Union, Spain belongs to the third largest market worldwide after the US and China**

**GDP 2021 (USD billion, current prices)**

Source: International Monetary Fund







# 欧洲内部市场

## EUROPEAN INTERNAL MARKET

## 2 需求条件：欧洲内部市场

在西班牙成立公司可以得益于欧洲单一市场

**Companies established in Spain can exploit the benefits of the European Single Market**

- 货物自由流动到其他欧盟国家，没有内部障碍  
**Goods move freely to other EU countries with no internal barriers**
- 可通过自由设立和跨境交付的方式向其他欧盟国家提供服务  
**Services can be provided to other EU countries through free establishment and cross-border delivery**
- 资本可以在全球范围内不受控制地转移  
**Capital can be transferred free of controls worldwide**
- 劳工可以在其他欧盟国家自由定居并跨境流动  
**Labour can settle freely in other EU countries and move across borders**



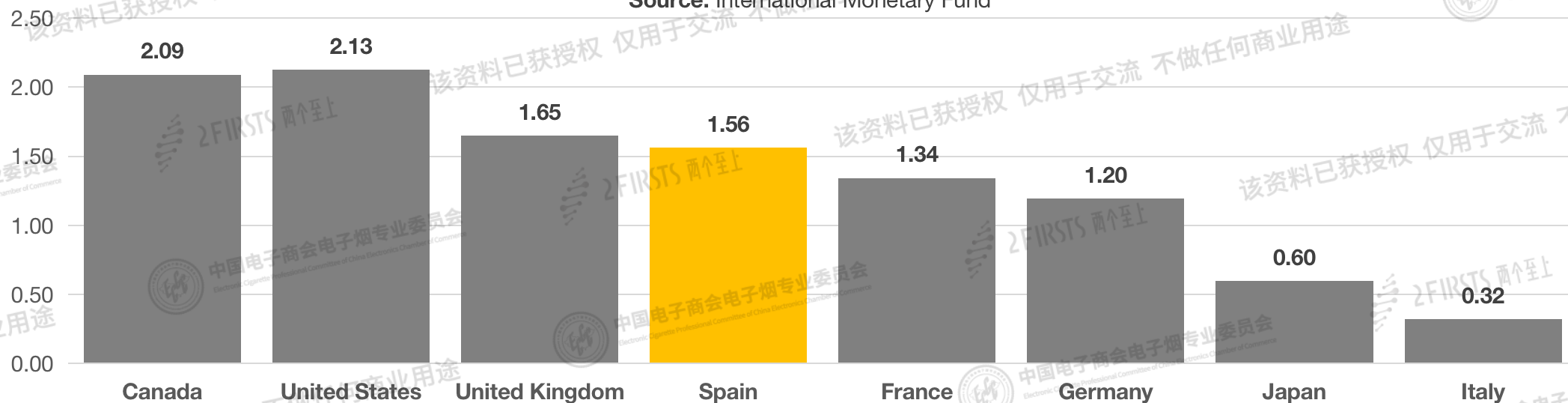
## ② 需求条件：稳定的经济环境

西班牙的经济活力为投资者提供增长机会

The dynamism of the Spanish economy provides growth opportunities for investors

### Real GDP Growth, 1999-2021 (%)

Source: International Monetary Fund





供应商产业和其他具有国际竞争力的相关产业在国内是否存在

The presence or absence in the nation of supplier industries and other related industries that are internationally competitive.

产业  
Related  
and  
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Industries

Firm  
Strategy,  
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Rivalry

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- 电子烟市场  
E-cigarettes Market
- 电子烟法规  
E-cigarettes regulation





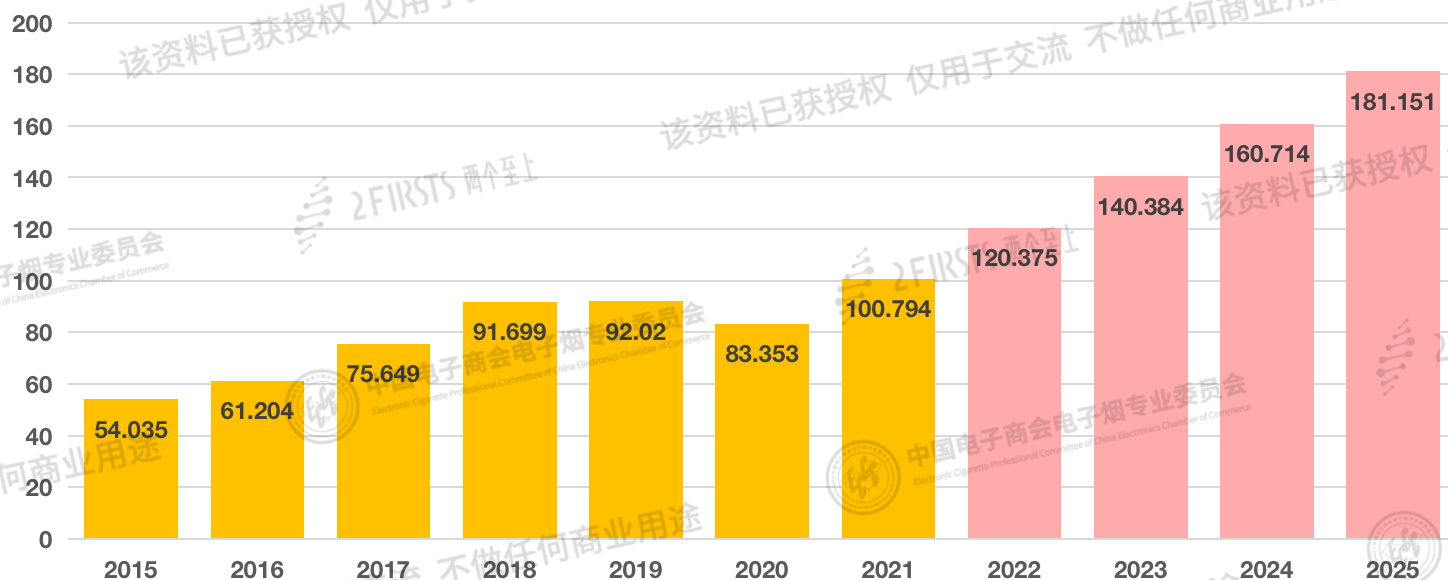
### 3 西班牙电子烟市场

电子烟在西班牙是一个不断增长的行业

Electronic cigarettes is a growing sector in Spain

#### Sales of electronic cigarettes in Spain, million USD

Source: Euromonitor



- 2020年，西班牙有60多万人消费电子烟是2016年的两倍  
In 2020, over 600,000 people in Spain consumed e-cigarettes, twice as many as in 2016.
- 预计未来几年销售额将以每年12-19%的速度增长  
Sales are expected to grow by 12-19% annually in the coming years



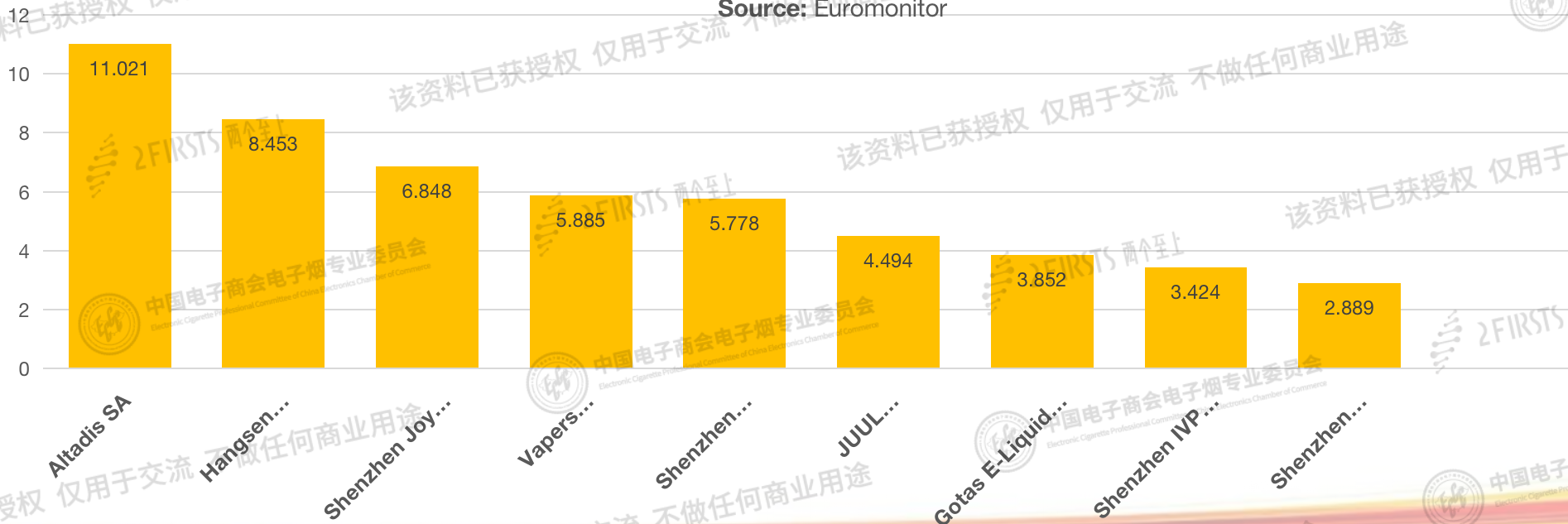
已有很多中国企业在西班牙设立分支机构

A large number of Chinese companies are already established in Spain

Main electronic cigarette companies in Spain, 2020

Sales (million USD)

Source: Euromonitor





### 3 西班牙电子烟法规



- **欧盟：**烟草产品指令 (2014/40/EU) 第 20 条规定了在欧盟作为消费品销售的电子烟的规则  
**EU:** Article 20 of the Tobacco Products Directive (2014/40/EU) lays down rules for electronic cigarettes sold as consumer products in the **EU**.
- **西班牙：**西班牙皇家法令RD 579/2017标题二的“尼古丁释放装置”管理方法  
**Spain:** E-cigarettes are included within the "Devices susceptible to nicotine release" regulated in Title II of **RD 579/2017**
- **监管机构：**公共卫生、质量和创新总局  
**Governing body:** Directorate General for Public Health, Quality and Innovation
- **监管：**通过在**欧盟共同入口 (EU-CEG)** 中注册该行业的产品和法律要求的其他信息来监控合规性  
**Regulatory compliance is monitored through the registration of the sector's products and other information required by law in the EU COMMON ENTRY GATE (EU-CEG)**





### 3 西班牙电子烟法规

任何新的或改进的电子烟产品的信息必须在投放市场前**6个月**通过欧盟共同入口（**EU-CEG**）登记

**Any new or modified e-cigarettes products must be submitted six months before they are placed on the market through the EU COMMON ENTRY GATE (EU-CEG)**

#### 标签和包装

##### **LABELLING AND PACKAGING**

为每个产品设计标签和信息页  
Design of labelling and information leaflet for each product

#### 市场研究

##### **MARKET RESEARCH**

显示每个产品的销售和消费模式  
To show the sales of each product and consumption

#### 强制性测试

##### **MANDATORY TESTING**

包含支持产品质量和安全测试的年度报告  
Annual report with tests to support product quality and safety

#### 产品

##### **PRODUCT:**

- 组成和成分  
Composition and ingredients
- 制造过程  
Manufacturing process

##### **Quality and safety requirements**

- 质量和安全要求

##### **requirements**

##### **requirements**

- 销售量，按产品分类  
Sales volume, by product

- 哪些公司应该在欧盟共同入口登记？

##### **WHO SHOULD REGISTER IN THE EU-CEG?**

总部设在西班牙的电子香烟制造商、进口商和分销商  
**Manufacturers, importers and distributors of electronic cigarettes having their head office in Spain**

- 通过欧盟共同入口向公共卫生总局通报哪些信息？**WHAT INFORMATION MUST BE COMMUNICATED TO THE DIRECTORATE-GENERAL FOR PUBLIC HEALTH THROUGH THE EU-CEG?**

该部门的产品必须满足哪些质量和安全要求？

What quality and safety requirements must the products in the sector meet?

### 3 西班牙电子烟法规

- 标签上注明的尼古丁浓度  
on the labelling

Nicotine concentration stated

- 最大储液器体积大小：2毫升  
size: 2 ml

Maximum reservoir volume

- 补充液体最大限制：每瓶容量 $\geq 10\text{ml}$ ，尼古丁含量 $\geq 20\text{mg/ml}$   
Maximum limits for refill liquids: 20mg/ml nicotine and bottles of 10ml volume
- 健康警告：“本产品含有尼古丁，是一种高度成瘾的物质。不建议非吸烟者使用该产品。”  
Health warning: "This product contains nicotine, a highly addictive substance. It is not recommended for use by non-smokers."

立法草案，逐步使电子烟和新型烟草设备的制造、分销和零售标准与传统烟草相一致  
Draft legislation to progressively bring the manufacturing, distribution and retailing standards for e-cigarettes and new tobacco devices into line with conventional tobacco.



提案由欧洲议会正式通过后，将在未来五年内逐渐阻止电子烟在政府许可的烟草店之外销售  
If approved in a parliamentary vote, it would gradually prevent their sale outside government-licensed tobacconist shops over the next five years.





西班牙驻华大使馆广州经济商务处致力于推广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提供服务

**The 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**

商务与投资专业团队  
**Team of specialized trade and investment experts**

为中国企业在西班牙设立提供支持  
**Provide support to Chinese companies established in Spain**

推广西班牙产品、技术、服务  
**Promote Spanish products and technologies and business cooperation**



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、运营和市场研究

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

提供全程支持与服务  
从项目选址到招聘

**Door-to-door support services  
from location advice to  
recruitment**

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**

给投资者提供投后服务

**Continuous support to  
longstanding investors through  
aftercare services**



西班牙投资促进局为投资者在整个投资周期提供不可或缺的支持

**INVEST IN SPAIN** provides integral support to investors along the investment cycle

投资推介  
Investment  
Promotion

投资者会议  
Investor  
Meetings

投后服务  
Aftercare  
Services

个性化定制  
报告  
Investment  
Proposal

项目执行  
Investment  
Execution





## 总结 Conclusions

西班牙为电子烟领域的中国公司提供了进入一个巨大且不断增长的市场的机会  
Spain offers Chinese companies in the E-cigarettes sector access to a huge and growing market.

西班牙政局稳定，法律体系健全，政策透明度高  
Spain has a stable political situation, a sound legal system, and high policy transparency 投资者可以充分

西班牙工业是全球参与者，为投资者提供了许多互利合作的机会  
Spanish industries are global players that offer many opportunities for mutually beneficial cooperation to investors

投资者可充分利用西班牙的竞争要素：高素质劳动力、亲商政策，优良的基础设施以及进入欧盟市场  
Investors have full access to the competitive factors of Spain such as a skilled labour force, pro-business policies and excellent infrastructure and to the market of the European Union



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# 感谢您的关注 THANK YOU FOR YOUR ATTENTION

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