



석유화학산업 현황

2002. 2. 25

목 차

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- 2001

2002

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-

/가

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한국 석유화학산업의 규모와 위치

< > (: 10)

	1990	1995	1997	1998	1999	2000	2001 *
(A)	176,440	364,821	434,908	425,007	479,733	564,834	581,780
(B)	15,722	33,519	41,945	47,223	46,279	56,038	
(C)	4,883	13,802	17,330	21,026	20,427	25,767	25,800
(C/A)	2.8%	3.8%	4.0%	4.9%	4.3%	4.6%	4.4%
(C/B)	31.1%	41.2%	41.3%	44.5%	44.1%	46.0%	

() , 2001

< > (:)

	1990	1995	1998	1999	2000	2001 ()		
	12	58	66	70	94	83	5.5%	1,507
	33	49	28	35	45	40	2.8%	1,411
	-21	9	38	35	49	43	45%	96

< (2001) > (: 1,000MT)

		1.	2.	3.	4.	5.
(Ratio)	106,259	27,253 (25.6%)	7,315 (6.9%)	5,510 (5.2%)	5,280 (5.0%)	5,230 (4.9%)

() Tecnon

2001년 수급실적과 2002년 전망

□ 2001 () 1.8% 가, 0
- / ,

□ 2002 4%

(: , %)

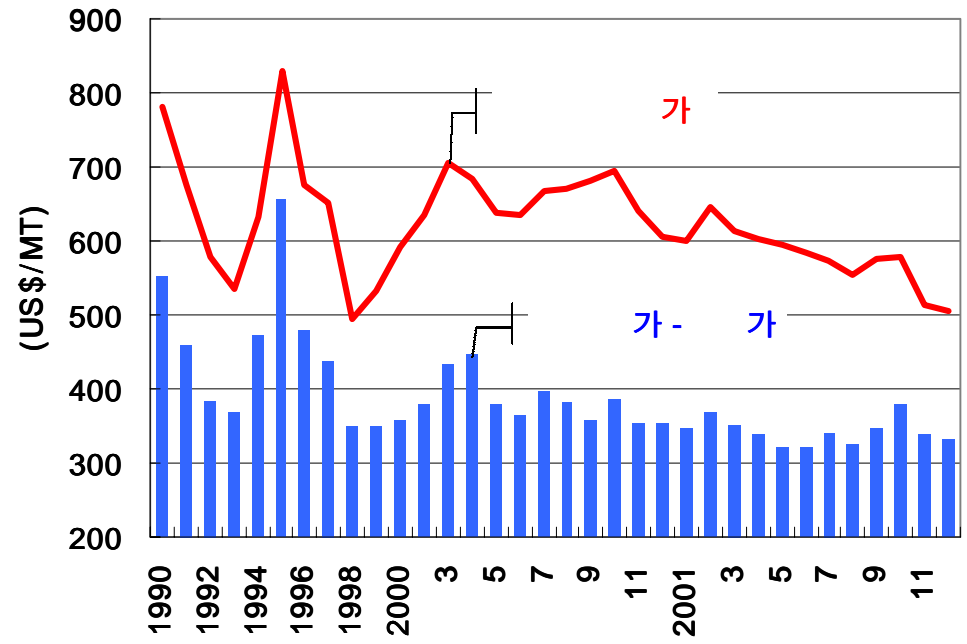
	2001				2002 ()			
	8,926 (2.4%)	134 (10.3%)	4,710 (0.4%)	4,350 (5.7%)	9,322 (4.4%)	144 (7.7%)	4,864 (3.3%)	4,603 (5.8%)
	5,767 (1.8%)	998 (6.3%)	1,863 (15.8%)	4,902 (4.3%)	5,958 (3.3%)	982 (1.6%)	1,916 (2.9%)	5,023 (2.5%)
	398 (8.4%)	30 (22.2%)	237 (9.5%)	191 (9.6%)	410 (2.9%)	30 (0.0%)	244 (3.0%)	195 (2.4%)
3	15,091 (1.8%)	1,162 (5.1%)	6,810 (3.2%)	9,443 (0.0%)	15,689 (4.0%)	1,156 (0.5%)	7,024 (3.1%)	9,821 (4.0%)

수출입 동향과 전망 ①

- 2001
 - 가 11% <652\$/MT(2000) 583\$/MT(2001)>
 - 10 가 /
- 40 43
- 2002 가 가 , 가가 2001

< > (:)

1997	6,819	4,381	2,439
1998	6,642	2,844	3,798
1999	7,017	3,520	3,496
2000	9,407	4,523	4,884
2001()	8,265	3,980	4,285
2002()	8,300	4,000	4,300



수출입 동향과 전망 ② - 국가별

□ 2001
가

3% Point

48%

- 가
對 가

10%

가, '98

□

3% Point , 25%

- , 가가

□

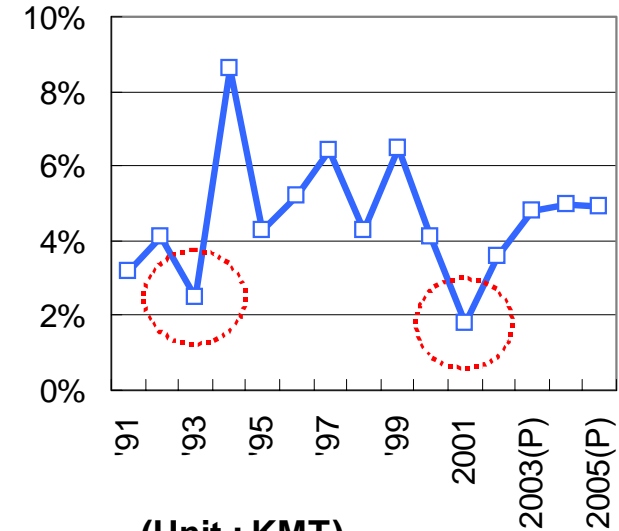
3% Point

		Ratio		Ratio
	6,070	73%	2,031	51%
	3,950	48%	79	2%
	474	6%	1,576	40%
	458	6%	72	2%
	1,188	14%	305	8%
	774	9%	872	22%
	562	7%	508	13%
	860	10%	569	14%
	8,265		3,980	

세계 주요 석유화학제품의 수급동향

- 2001 ()
 - 歐/美/日 10 (1.8%)
- 가 가
- 2000 가

<Ethylene Demand Growth Rate>



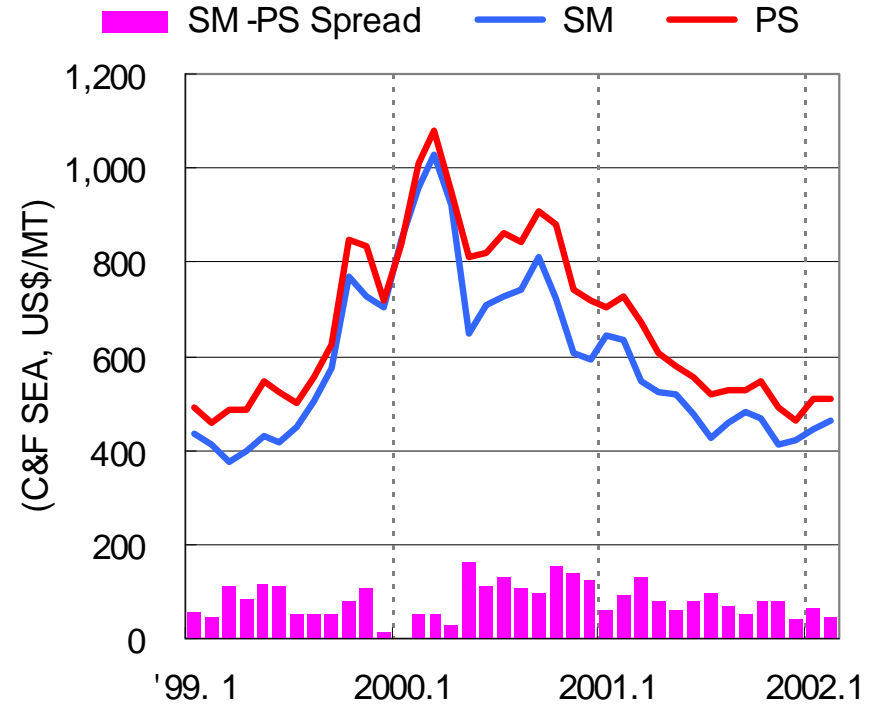
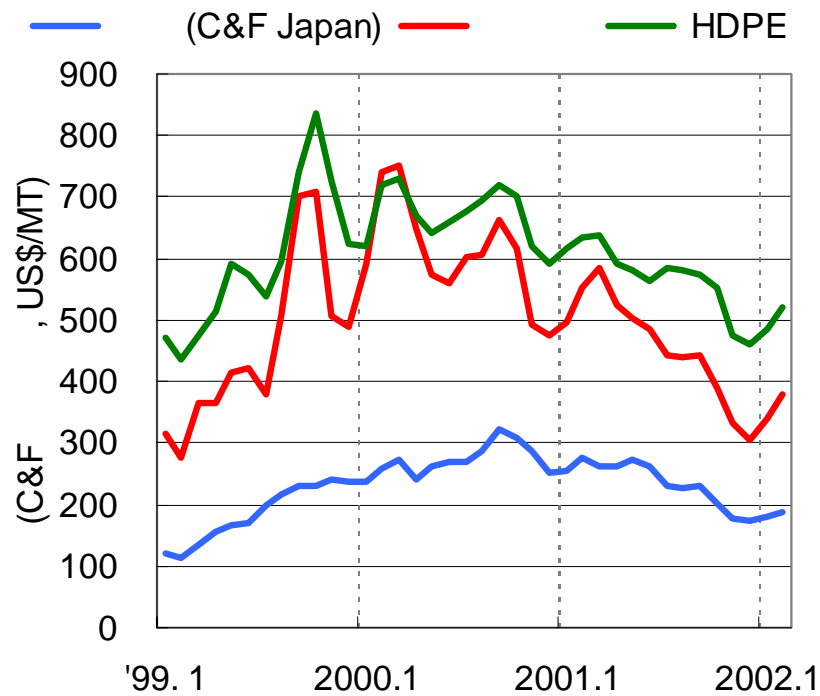
<Polyolefins World Supply-Demand Balance>

(Unit : KMT)

		2000	2001	2002	2003	2004	2005	AAGR		
								'00-'01	'01-'02	'01-'05
Tecnon 2000	Capacity	94.3	101.2	105.6	108.4	112.2	117.1	7.2%	4.4%	3.7%
	Demand	82.6	87.6	93.1	98.6	104.2	110.2	6.1%	6.2%	5.9%
	Balance O.R.	11.8	13.5	12.5	9.8	8.0	6.9			
		87.5%	86.6%	88.2%	91.0%	92.9%	94.1%			
	Capacity	95.7	102.7	107.0	110.7	114.4	119.8	7.2%	4.3%	3.9%
	Demand	82.8	85.3	89.4	94.5	99.9	105.7	3.1%	4.9%	5.5%
	Balance O.R.	13.0	17.4	17.6	16.2	14.5	14.1			
		86.4%	83.1%	83.6%	85.3%	87.3%	88.2%			

가격 동향

□ 2000 가 , 2001 가 , 2002 1 2 가

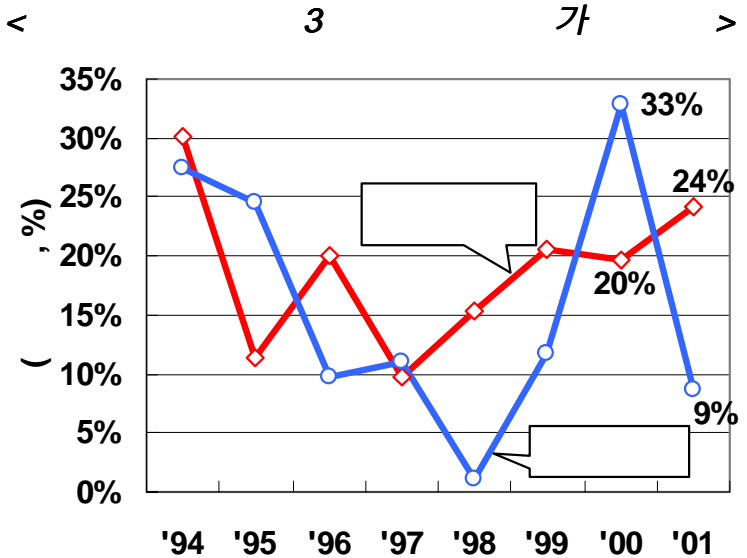


중국 수입 - 석유화학업계의 주요 이슈 ①

□ 2001 3 24% 가, < 3 가 >
 10%

- 가
- 9% 가
- PS, ABS, PX, PA, AB

□ PE/PP ;
 産 , 産 가



	PE		PP		PS(EPS)		TPA		PA		TDI	
	2000	2001	2000	2001	2000	2001	2000	2001	2000	2001	2000	2001
	3,187	4,352	1,640	2,087	1,605	1,600	2,505	3,117	217	162	127	126
	27%	25%	37%	31%	18%	17%	41%	40%	41%	49%	15%	21%
	11%	7%	11%	8%	11%	10%	21%	15%	22%	25%	44%	38%
	8%	11%	12%	15%	34%	36%	16%	19%	9%	6%	2%	2%
	16%	20%	1%	3%	0%	1%	1%	1%	0%	0%	0%	0%
	17%	21%	24%	25%	19%	18%	22%	25%	16%	8%	3%	3%
	11%	7%	7%	11%	1%	1%	0%	0%	0%	0%	23%	26%
	10%	9%	7%	8%	17%	17%	0%	0%	12%	12%	12%	10%

중동 신증설 - 석유화학업계의 주요 이슈 ②



- 2000 3 (230) 가
570 , 3
- 2002 2003 , 2004
2



- 71
- NPC Olefins(#6 #11, 5),
Aromatic(#3 #4, PX 120), TPA -PET(#1 #2, TPA
70)
2002
- Funding

선진 메이저기업의 동향

□ : 1 M&A , 가
 : 2 가
 - '90 (DuPont /)

□ ; ,
 - '90 ,
 - '90 M&A
 - PP '94 14社 2002 4社 PS '97 9
 2001 4

< PP/PS >

	PP		PS	
	1994	2002末	1997	2001末
	2,581 14社	2,867 4社	1,486 9社	1,227 4
2社 Share	184 27%	717 73%	165 37%	307 63%

국내 석유화학산업의 문제점

□ 2 Player 가

<5 Player > (:)

	PE	PP	PS	ABS	PVC	
(A)	3,624	2,531	1,151	990	1,250	9,546
(B)	1,569	1,114	456	281	930	4,350
(B/A)	43%	44%	40%	28%	74%	46%
Player	8	8	6	5	2	

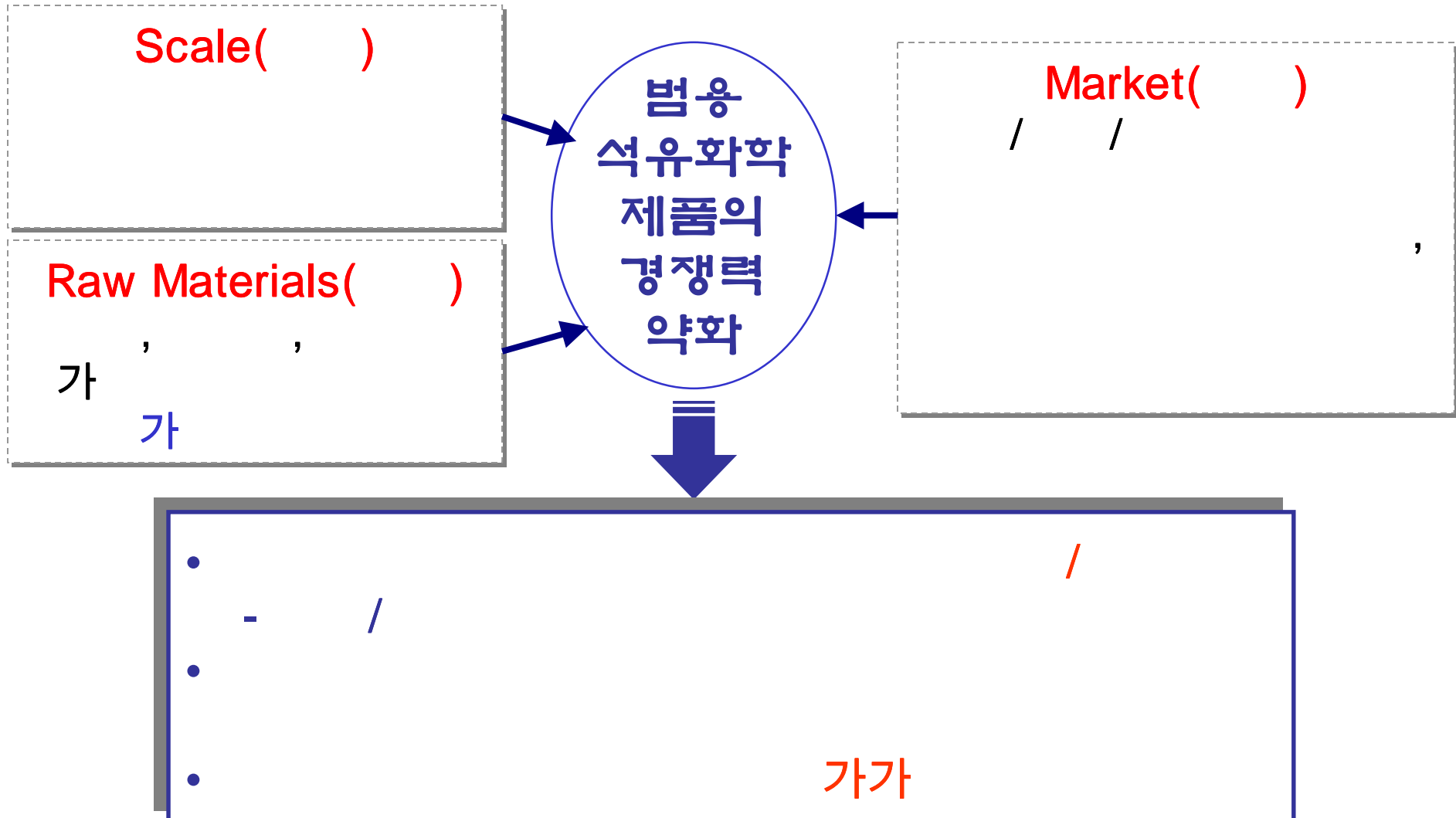
□ , / 가 가

- '97 IMF '99

PVC (LG)

- (/) 가

석유화학산업의 과제와 대책



① 납사 및 대체원료의 0세율 적용

□ 가 60 70% 가 , 가

□ () ,

- 가 900 3.8%

<

>

	1%	0.2%	0.38%	0%	0%	

□ WTO 2004

- () 1%(5%) , () 0%

□ 0

② 산업용 B-C유 특소세 폐지

□ 2001 7 B-C (2006)가

-
-

가
가

< 가 > (: \$/Bbl)

가	41.51	37.64	22.46	27.00	30.60	23.80	22.60
()	(100)	(91)	(54)	(65)	(74)	(57)	(54)

() (2001.12)

□ B-C 550 (2006)
가 (2.3%)

-
-

가

) B-C 11% 2 (

□

-

③ 산업용 부탄 특수세인하/판매부과금 면제



’



7

- : () 114,000 () 704,000 (2006.7)
 () 19,031 (2001.7)



가

- (40,000)
 -

1 1



) ()
 < >

()	2000		2001()		2002()	
		(%)		(%)		(%)
가	129	7.0	121	6.2	107	11.6
	2,922	33.7	3,309	13.2	3,558	7.5
	116	18.0	138	19.0	117	15.2
	304	3.8	371	22.0	365	1.6
	3,471	20.2	3,939	26.6	4,147	5.3

- 3.5%

④ 여수산단 이주대책 비용분담 철회

- 가 1967 80
 , , 가
 - 22 3.6%, 52 3.4%
- (3,360)
 (360)
- 가 ,
 - VOC 90%) (5
 - 가 가
 가,
 - , 가
- 가 가 가

⑤ 촉매류의 관세환급대상 원재료 인정

- 가
 - , 가
 -
- ,
 - (TPA 17 ,)
 - : 가 ,
 - 가
- - “ ” , 가
 - ,
 - 가 ,

⑥ 물이용 부담금 부과 제외

□ 2, / 3 /

□ 3
3
(2002 7 17) 110 /

- 110 / 가 140 / 250 / 77%

- , 가
- 가 193
(48 / x365 x110 / =193)

□ / 가
, , /
,

• 가

⑦ 출자총액 제한제도 개정안 수정건의

- : 10 , 17 2
- : 25%
- () : 2001.3 / , ,
- (, 2002.4.1)
 1. 25%) 가 (
 - 2.
- 1. 10% , 2
 - () SK 2.5 , SK 18% 10%
 - () SK
 - 2.

⑧ 수입규제 및 통상마찰에 적극 대응

□ 8 21 (1.4)

□ ,
- 3~4

□ ,

< >

			()
	EPS, PS, PVC	PPG*	10.7
		PVC	0.4
	NBR, TPA, PS, , EPR, PG, SBR	Polyisobutylene*	15.3
E U	PET Chip	-	94.0
		-	11.0
	-	*	0.2
	-	PVC	11.0
	-	*	2.3
	15	6	21 133.7

[]

주요 석유화학제품의 증장기 수급전망

□ 2005

-

가
64%

1.5%/yr,

3.7%/yr

2001 58%

2005

(1,000MT)		2001	2002	2003	2004	2005	AAGR '01-'05
	(A)	9,546	9,796	9,796	9,796	9,796	0.6%
	(B)	4,350	4,603	4,847	5,104	5,374	5.4%
	(B/A)	46%	47%	49%	52%	55%	
	(A)	6,175	6,175	6,695	6,895	6,895	2.8%
	(B)	4,902	5,023	5,128	5,236	5,346	2.2%
	(B/A)	79%	81%	77%	76%	78%	
	(A)	458	458	458	458	458	0.0%
	(B)	191	195	201	207	213	2.8%
	(B/A)	42%	43%	44%	45%	47%	
	(A)	16,179	16,429	16,949	17,149	17,149	1.5%
	(B)	9,443	9,821	10,176	10,547	10,934	3.7%
	(B/A)	58%	60%	60%	62%	64%	