From January to August 2011, China’s medium and heavy plate industry sold 3.6324 million tons of ultra heavy plates, up 24.16% year on year; 15.1482 million tons of heavy plates, up 12.74% year on year; 23.1046 million tons of medium plates, up 8.91% year on year. The sales volume of ultra heavy plate grows significantly faster than those of the other two types, and the growth rate of medium plate has become limited.

According to a survey on the medium and heavy plate production lines of 28 companies, as of the end of 2010, there were three companies whose medium and heavy plate capacity exceeded 5 million tons, and their total capacity reached 19.10 million tons, accounting for about 15.92% of the total capacity of China. There were 15 companies whose medium and heavy plate capacity exceeded 2 million tons, and their total capacity reached 54.75 million tons, accounting for 45.63% of the total capacity. The survey results show that the concentration ratio of China’s medium and heavy plate industry needs to be further enhanced.

The report makes an in-depth analysis on the characteristics and development of China medium and heavy plate industry, elaborates on the output, sales volume, import and export, prices, and sheds light on the competitive pattern and key companies in the industry.
Medium and heavy plate business accounts for about 50% of the total revenue of Nanjing Iron and Steel (600282.SH). Currently, Nanjing Iron and Steel has a medium and heavy plate capacity of 3.80 million tons. Nearly 50% of the demand for medium and heavy plates lies in ship plates. Nanjing Iron and Steel is building a 4700mm heavy plate mill with the capacity of 1.60 million tons, which is expected to be put into production in June 2013. In H1 2011, the medium and heavy plate output of Nanjing Iron and Steel was 1.8026 million tons; the gross margin was 7.79%, down 1.17 percentage points year on year, mainly because the demand for ship plates was not huge.

Chongqing Iron & Steel (601005.SH) is the largest plate production base in western China. Its medium and heavy plate output was about 2.10 million tons in 2010, and is expected to be about 3 million tons in 2013.

Jinan Iron and Steel (600022.SH) will acquire Yinshan Profile Steel in the next two years. The main products of Yinshan Profile Steel include wide steel strips, wide and heavy plates, with one 4300mm wide heavy plate production line. Currently, Jinan Iron and Steel has a medium and heavy plate capacity of 5.50 million tons. In 2010, it sold 3.4625 million tons of medium and heavy plates, up 1.91% year on year; and it gained sales revenue of RMB12.36744 billion, up 6.24% year on year.
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