Flexible Packaging - Private Companies Report profiles more than 170 private U.S. producers and distributors of paper, plastic and other flexible packaging. This information will assist in making decisions concerning acquisitions, joint ventures and cooperative agreements.

Examine the report highlights, sample pages and table of contents on the following pages and see how Flexible Packaging - Private Companies Report can serve as a valuable decision making tool for your company.

Brochure Index

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This new report profiles more than 170 private U.S. companies active in the flexible packaging industry. To frame the industry, Freedonia analysts have prepared an overview of the market and general industry. The analysis explores the key indicators that drive demand, highlights company capabilities and annual sales, identifies private company characteristics and shows regional concentration.
### Companies Profiled

*Sample profiles on pages 4 and 5*

Abbott Associates Incorporated  
Acadia Industries Incorporated  
Accutech Packaging Incorporated  
Advance Polybag Incorporated  
Advanced Baggine Technology Incorporated  
Advanced ABDAG Packaging Incorporated  
Adventek Incorporated  
All American Poly Corporation  
American Packaging Corporation  
Ampack Packaging Incorporated  
Ampac Industries  
Amko Plastics Incorporated  
Interstate Packaging Corporation  
Ocean Packaging  
APC Manufacturing Company  
Apple & Orange Plastics Incorporated  
Apple Plastics Incorporated  
Orange Plastics Incorporated  
Apple Converting Incorporated  
Atlas Bag Incorporated  
Automated Packaging Systems Incorporated  
B.A.G. Corporation  
Composite Container Company  
Super Sac Manufacturing Corporation  
Bancroft Bag Incorporated  
Bulk-Pack Incorporated  
Coating and Laminating Specialties Inc.  
Shipping Systems Incorporated  
Bay Packaging Incorporated  
BayPac  
BayStat  
Beacon Converters Incorporated  
Belmark Incorporated  
Blako Industries Incorporated  
Bomarko Incorporated  
BMK Printing Incorporated  
Bonita Packaging Products  
Bradley's Plastic Bag Company  
Bryce Corporation  
BPX Films  
Johnson & Bryce Incorporated  
Simpro Incorporated  
Buckeye Packaging Company Incorporated  
Bulk Lift International Incorporated  
Burrows Paper Corporation  
C&H Packaging Company Incorporated  
Cadillac Products Incorporated  
Cady Industries Incorporated  
The Cannon Group Incorporated  
PDI Plastics  
Sanec International  
Carroll Products Incorporated  
CDF Corporation  
Cello-Foil Products Incorporated  
Cello-Pack Corporation  
Central Bag Company  
Valley Bag & Supply Company  
Champion Plastics Incorporated  
Clark Container Incorporated  
Clear-Lam Packaging Incorporated  
The Cloth Bag Company  
Com-Pac International Incorporated  
Continental Products  
PDI Converters Incorporated  
CrayeX Corporation  
Datofilm Incorporated  
Deluxe Packages  
Dixie Packaging Incorporated  
Durallam Incorporated  
Sudpack USA  
Duro Bag Manufacturing Corporation  
Eastern Poly Packaging Company Incorporated  
Emerald Packaging Incorporated  
ENE Plastics Incorporated  
Excelsior Transparent Bag Manufacturing Corp.  
Extra Packaging Corporation  
Flexseal International Packaging Corporation  
Fabricon Products Incorporated  
Film Fabricators Incorporated  
Filmquest Incorporated  
Columbus Packaging Incorporated  
Panaflex Packaging Incorporated  
Plicon Incorporated  
Plystar Incorporated  
R-P Packaging Incorporated  
Firstline Corporation  
Fisher Container Corporation  
Precision Clean Products  
Flex-O-Glass Incorporated  
Warp Brothers Company  
FLEXCON Packaging Systems  
Flexicon Incorporated  
Freedman Bag Company  
Friedman Bag Company Incorporated  
The Friend Group Incorporated  
Gateway Packaging Company  
Percy Kent Bag Company  
Glenroy Incorporated  
GMI Group  
Foil Laminating Incorporated  
Glenmark Industries Incorporated  
Varipak Incorporated  
Grayling Industries Incorporated  
Great American Packaging Incorporated  
Halpak Plastics Incorporated  
Hampshire Paper Corporation  
Heritage Bag Company  
Hood Companies  
Charleston Packaging Company  
QPF LLC  
Southern Bag Company LLC  
Hueck Foils LLC  
InterFlex Group Incorporated  
Jumbo Bag Corporation  
Kapak Corporation  
Kendall Packaging Corporation  
King Bag & Manufacturing Company  
Lake Michigan Packaging Products Incorporated  
Laminated Films & Packaging Incorporated  
Langston Companies Incorporated  
The Continental Bag Company Incorporated  
LINPAC Incorporated  
LPS Industries Incorporated  
M&R Flexible Packaging Incorporated  
The Marco Group  
Maine Poly Incorporated  
Millisher Incorporated  
Manchester Packaging Company  
Mangar Industries Incorporated  
Master Packaging Incorporated  
McNair Packaging Incorporated  
Mercury Plastics Incorporated  
Stretch-Vent Packaging Systems Incorporated  
The New Bedford Plastic Bag Company  
The New England Extrusion Incorporated  
The New York Packaging Corporation  
Pennsak Incorporated  
The NEXUS Plastics Incorporated  
The NS Packaging LLC  
The North State Cartons  
The North State Flexibles  
Oliver Products Company  
Overwraps Packaging LP  
The PAC ONE Incorporated  
The PAC Strapping Products Incorporated  
The Packagingmasters Incorporated  
The Packaging Concepts Incorporated  
The Packaging Dynamics LLC  
The Bagcraft Corporation  
The International Converter Incorporated  
The Packaging Materials Incorporated  
The Packaging Products Corporation  
The Papercon Incorporated  
The Pattison (Jim) Group  
The Continental Superbag Company  
The Progressive Packaging Limited  
The Stout Plastics  
The PCL Packaging Corporation  
The Gem Polymer Corporation  
The PeelMaster Packaging Corporation  
The Petrokey Plastics Incorporated  
The Phoenix Packaging Corporation  
The Phoenix Products Company Incorporated  
The Phoenix Health Care Products LLC  
The Pinnacle Films Incorporated  
The Pitt Plastics Incorporated  
The Plaspack USA Incorporated  
The Plassein Packaging Corporation  
The Key Packaging Industries Incorporated  
The Marshall Plastic Film Incorporated  
The Nor Baker Incorporated  
The Plastical Industries Incorporated  
The Rex International Incorporated  
The Transamerican Plastics LLC  
The Plastic Packaging Corporation  
The Plastic Packaging Incorporated  
The Plast Corp  
The Huntsman KCL Corporation  
The Huntsman Packaging Corporation  
The KCL Corporation  
The Poly-America Incorporated  
The Up North Plastics Incorporated  
The Poly-Pak Industries Incorporated  
The Poly Plastic Products Incorporated  
The Poly-Ply Corporation  
The Polymchem Corporation  
The Polytex Fibers Corporation  
The PPI Technologies LLC  
The PakSource Global LLC  
The Primacomp Company  
The Printpack Incorporated  
The The Pyramid Group  
The Quality Transparent Bag Incorporated  
The Dyna-Pak Corporation  
The Quintec Films Corporation  
The Reed-Lane Incorporated  
The Riffen (A.) Company  
The Robbie Manufacturing Incorporated  
The Rollprint Packaging Products Incorporated  
The Rollplast Industries Incorporated  
The Scholle Corporation  
The Custom Packaging Systems  
The Vacumet Corporation  
The Seal-It Incorporated  
The Seville Flexpack Corporation  
The Sharp Corporation  
The Shields Bag and Printing Company  
The Sigma Plastics Group  
The Delta Plastics Corporation  
The Epsilon Polyolefin Corporation  
The Essex Plastics Incorporated  
The Performance Packaging Incorporated  
The Sigma Extruding Corporation  
The Sigma Stretch Film  
The Simkins Industries Incorporated  
The Specialty Bags Corporation  
The Star Packaging Corporation  
The Static Control Components Incorporated  
The Superbag Corporation  
The TC Manufacturing Company Incorporated  
The PAK-SHER Incorporated  
The Technixa Incorporated  
The Tekni-Flex Incorporated  
The Terphane Incorporated  
The Tolis Health Care Packaging  
The Transwrap Company Incorporated  
The Trico International Packaging Incorporated  
The Trinity Packaging Corporation  
The Union Industries Incorporated  
The USA Polymer  
The Vanguard Plastics Incorporated  
The Viss Industries (USA) Incorporated  
The Vitex Packaging Incorporated  
The VPI LLC  
The Vinyl Plastics Incorporated  
The Werteman Packaging Incorporated  
The Western Plastics Incorporated  
The Westlake Plastics Company  
The Crystal-X Corporation  
The White Bag Company Incorporated  
The Wisconsin Film & Bag Incorporated  
The World Class Film Corporation  
The Wraps Incorporated  
The W/S Packaging Group  
The American Creative Packaging  
The WLGroup  
The Zenith Specialty Bag Company Incorporated
Detailed Company Profile

More than 170 private company profiles are compiled and range from detailed to brief company descriptions. (See Samples)

All companies are individually contacted and the majority of the companies verify the data.

Hard to obtain sales and employment figures, key products and services and an overview of corporate operations are provided.

Tolas Health Care Packaging
905 Pennsylvania Boulevard
Feasterville, PA  19053
County:  Bucks
County Code:  42017

Phone:  215-322-7900
Fax:  215-322-9034
Web Address:  http://www.tolas.com

Annual Sales:  
Employment:  
Key Executive:  Carl Marotta, President

Key Products:  plastic roll stock, pouches and lidding
Census Code SIC(s):  2671; 2672; 2673

SIC Description(s):  packaging paper and plastic film, coated and laminated; miscellaneous coated and laminated paper; plastic, foil and coated paper bags

Tolas Health Care Packaging produces plastic roll stock, pouches and lidding for medical and pharmaceutical packaging. The Company operates a 50,000-square-foot converting facility at its headquarters in Feasterville, Pennsylvania, where it offers custom die-cutting, slitting, laminating and sheeting services, as well as the manufacture of sterile packaging products. At a facility in Cincinnati, Ohio, the Company performs coating operations. Additionally, Tolas’ Promedicon division provides contract manufacturing of specialty medical components and conductive coated materials for electronic medical devices. The Company’s Innovative Converters Incorporated subsidiary offers printing services.

Tolas participates in the flexible packaging industry through its production of pouches, bags, peelable structures and high barrier packaging materials for medical and pharmaceutical applications. Tolas’ sealant-based peelable structures are used for flexible medical packaging, such as peel pouches. For example, TPS 4046 is a peelable, metallized polyester-based pouch film for sterile device packaging. The material peelable-seals to itself, 1073B TYVEK and selected plastics. The product offers an excellent

Flexible Packaging - Private Companies Report #1412
These profiles give you insight into the operations of private companies, and can help you:

- Identify companies for investment, merger, and/or acquisition opportunities based on size, products, and location.

- Evaluate the position of your competitors based on sales and/or employment figures.

Deluxe Packages
11605 Pike Street
Santa Fe Springs, CA  90670
County:  Los Angeles
County Code:  06037

Phone:  562-692-9605
Fax:  562-692-5097

Annual Sales:
Employment:
Key Executive:  Jack Williams, CEO

Key Products:  converted packaging films, paper and foil
Census Code SIC(s):  2671; 3497

SIC Description(s):  packaging paper and plastic film, coated and laminated; metal foil and leaf

Deluxe Packages is a converter of polyethylene and polypropylene packaging films, paper and foil. Applications for the Company's products include bakery products, dried fruit, nuts, dry and liquid condiments, and writing implements. Deluxe Packages operates two manufacturing facilities: a 40,000-square-foot plant at its headquarters in Santa Fe Springs, California, which specializes in six-color flexographic printing and adhesive laminating; and a 100,000-square-foot plant in Yuba City, California, which has such capabilities as extrusion coating, lamination, adhesive lamination and cold seal application.

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**Market Overview**

The Market Overview Section discusses factors influencing supply and demand, including packaging trends and the outlook for retail sales.

This information helps you:

- Determine what external factors will impact future supply and demand
- Measure your market and sales potential based on supply and demand forecasts.
- Propose new areas for product development based on market trends & innovations.

**MARKET OVERVIEW**

**Paper-Based Flexible Packaging**

US demand for paper-based flexible packaging is projected to remain virtually flat through 2005, reaching 5.6 billion pounds, reflecting ongoing losses to plastics and the maturity of many markets. However, represents an improvement over the declining volume growth in the 1995-2000 period. Price increases will help boost dollar demand 2.4 percent billion. Also driving demand will be paper's favorable environmental profile among consumers. Paper's biodegradability, however, has been somewhat overrated, and the recycling of plastic alternatives has advanced steadily. Other factors increasing demand for paper flexible packaging are its cost efficiency and growing use in laminations with plastic and foil. Selected niche markets, such as popcorn bags, will also provide opportunities. Gains will be limited by competition from plastics.

**Types**

The principal types of paper flexible packaging are shipping sacks, retail bags and packaging papers. Paper shipping sacks, also known as multiwall bags or sacks, accounted for 35 percent of demand by weight in 2000 and offer limited prospects for growth through 2005. Growth areas include bulk packaging of food for food warehouses. Multiwall bags and sacks are typically composed of two or more layers of kraft paper, although they can also be combined with layers of plastic film, aluminum foil and metallized paper and film for additional strength and barrier properties. Multiwalls hold at least 25 pounds and are used for packaging and shipping bulk quantities of such products as cement, fertilizer, grains and chemicals.

Retail bags accounted for 36 percent of demand by weight for flexible paper packaging in 2000, but are expected to see declining growth through 2005, as they continue to be edged out by plastic bags. Paper bags encompass grocery and merchandise bags and sacks, which are primarily composed of unbleached kraft paper and may also incorporating recycled paper. Bleached kraft bags are also available and may be machine glazed to create a glossy surface for custom printing.

**FACTORS AFFECTING PAPER FLEXIBLE PACKAGING DEMAND BY MARKET**

<table>
<thead>
<tr>
<th>Market</th>
<th>Factors Spurring Demand</th>
<th>Factors Restraining Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Agriculture</td>
<td>Growing use of shipping sacks in bulk packaging of food for wholesale and retail outlets.</td>
<td>Competition from plastic alternatives, which will lead to declining demand for paper grocery bags, as well as glassine, greaseproof, oiled and wax papers.</td>
</tr>
<tr>
<td></td>
<td>Favorable performance features of grocery bags and sacks (e.g., large capacity, printable surface, self-supporting construction) tendency to break when dry.</td>
<td>Competition from rigid boxboard packaging in grain mill applications.</td>
</tr>
<tr>
<td></td>
<td>Continuing popular use of sulfite packaging paper for confectionery, baked goods, grain mill products.</td>
<td></td>
</tr>
<tr>
<td>Textile &amp; Apparel</td>
<td>Rising consumer incomes, thus spurring demand for clothing and textiles, which use paper wrapping for storage and shipping.</td>
<td>Competition from foreign imports of clothing and textiles.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Continuing inroads from plastic alternatives.</td>
</tr>
</tbody>
</table>
Industry Structure

Gain a better understanding of your competition and analyze your company’s position in the industry with information about the characteristics of leading flexible packaging manufacturers including total sales, capabilities and regional concentration.

This information helps you:

- Evaluate diversification opportunities based on product lines of other private companies.
- Understand barriers to entry based on industry concentration.
- Develop positioning strategies based on size of competitors.

Selected Private Plastic Flexible Packaging Companies

<table>
<thead>
<tr>
<th>Company</th>
<th>Corporate Sales (mil $)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flexicon</td>
<td>10-15</td>
</tr>
<tr>
<td>Friedman Bag</td>
<td>36</td>
</tr>
<tr>
<td>Gateway Packaging</td>
<td>5</td>
</tr>
<tr>
<td>Glenroy</td>
<td>35-40</td>
</tr>
<tr>
<td>GMI</td>
<td>35</td>
</tr>
<tr>
<td>Grayling Industries</td>
<td>14</td>
</tr>
<tr>
<td>Great American Packaging</td>
<td>15</td>
</tr>
<tr>
<td>Halpak Plastics</td>
<td>15</td>
</tr>
<tr>
<td>Hampshire Paper</td>
<td>15</td>
</tr>
<tr>
<td>Heritage Bag</td>
<td>15</td>
</tr>
<tr>
<td>Hood</td>
<td>15</td>
</tr>
</tbody>
</table>

* Sales are 2000 estimates of total corporate sales including products other than plastic flexible packaging.
Private players in the $17 billion flexible packaging industry are most active in film-based primary and other plastic packaging.

Eight private producers each had total flexible packaging sales of over $150 million in 2000, the largest of which had over $800 million and was one of the overall leaders in the plastic segment.

The top private producers of plastic flexible packaging in the US accounted for 21 percent of the market in 2000, while another five private companies controlled 18 percent of the paper flexible packaging market.

Private companies dominate production in the highly fragmented conventional textile bag segment and are also common in the flexible intermediate bulk container and aluminum foil segments; private participation is limited, however, in steel strapping.

Reflecting the consolidation trend in the packaging industry, four major private firms have expanded via acquisitions since 1999, and two other significant suppliers were purchased by public firms.

US demand for flexible packaging is forecast to increase 5.8 percent per year to $22.6 billion in 2005.
The Freedonia Group, Inc. is a leading international industry report/database company.

Since 1985, Freedonia has published over 1,600 titles covering areas such as building materials, chemicals, plastics, industrial components and equipment, household goods, coatings and adhesives, health care, packaging, security, and many other industries.

Private companies reports encompass not only Freedonia’s notable industry forecasts, but also market shares, product information and sales and employment figures for private companies. Corporate analysts are constantly monitoring privately-held companies to provide the most up-to-date and comprehensive profiles. Freedonia is able to gather and prepare this proprietary information based on our reputation as a leading market research firm.

By obtaining Freedonia’s report on private companies in the flexible packaging industry you will be able to:

- Identify companies for possible investment, merger, and/or acquisition opportunities based on size, products and location.
- Measure your market and sales potential based on demand forecasts.
- Propose new areas for product development based on material trends.
- Develop positioning strategies based on size and geographic location of competitors.
- Evaluate diversification opportunities based on product lines of other private companies.
- Understand barriers to entry based on industry concentration and market shares.
Freedonia’s clients include major US and international companies in the manufacturing, services, consulting and financial sectors.

Typical purchasers of Freedonia studies:

- Key Executives
- Corporate Planners
- Market Researchers
- Financial Analysts
- Information Centers
- New Product Developers
- Merger & Acquisition Specialists

Since 1985 we have provided research to customers ranging in size from global conglomerates to one person consulting firms. More than 90% of the industrial companies in the Fortune 500 use Freedonia research to help with their strategic planning.

Some of Freedonia’s customers in the flexible packaging industry include: Bemis, International Paper and Printpack Incorporated.

Because Freedonia is a source for reliable information, our forecasts have been cited in numerous publications such as The Wall Street Journal, Flexo Market News and Packaging Digest.
Extruded Plastics -
Private Companies Report
In the $46 billion US extruded plastics industry, eight private companies have related annual sales over $200 million, with another 20 having extruded product sales over $100 million. This report profiles 160+ private US extruders (e.g., Advanced Drainage Systems, Hancor Holdings, Johnson [SC] & Son, Pliant, Primex Plastics, Printpack, Sigma Plastics, Westlake Group) and lists them by product and location. The report also forecasts industry demand, presents market share data and reviews acquisition trends.
#1389. . . . . . . . . 2/01. . . . . . . . . . $3,600

Sterile Packaging
US demand for sterile packaging will grow 5.4% annually to 2005. Stimulants include an aging population, more stringent infection control standards and the convenience of sterile packaging configurations. Blister packs and clamshells will grow the fastest, while thermoformed trays provide the best opportunities based on surgical and diagnostic test kits. This study analyzes the $1.3 billion US sterile packaging industry to 2005 and 2010 by product and market. It also evaluates market share and profiles key firms.
#1377. . . . . . . . . 2/01. . . . . . . . . . $3,600

Paper Versus Plastic in Packaging
Demand for competitive paper and plastic packaging in the US will reach 86 billion pounds in 2004. Advances will be stimulated by steady growth in the foodservice sector and improvements in barrier properties and strength. Plastic will continue to encroach on paper’s market share. This study analyzes the 77 billion pound US competitive paper and plastic packaging industry to 2004 and 2009. It provides data and forecasts by material, type and end-use, presents market share data and profiles leading companies.
#1357. . . . . . . . . 1/01. . . . . . . . . . $3,700

Plastic Film
Performance, cost and environmental advantages will stimulate plastic film growth in the US, as will technological advances in metallocene resins and other areas. Low density polyethylene will remain the dominant film, although significantly better growth is anticipated for high density polyethylene and polypropylene. Packaging will remain the major market. This study analyzes the $13.4 billion US plastic film industry to 2004 and 2009 by type and market. It also presents market share data and profiles key firms.
#1291. . . . . . . . . 7/00. . . . . . . . . . $3,700

Pharmaceutical Packaging -
Private Companies Report
Seven US private firms each have total pharmaceutical packaging sales of at least $40 million. More than 50 other private companies have total corporate sales of at least $40 million, including products other than pharmaceutical packaging. This report profiles over 150 private US firms (e.g., Comar, Courtesy, Gulf States Paper, Huntsman Packaging, Kerr Group, Sharp, Tekni-Plex) and lists them by product and location. The report also forecasts industry demand, evaluates market share, and reviews acquisitions.
#1267. . . . . . . . . 5/00. . . . . . . . . . $3,200

Pharmaceutical Packaging
Demand for drug packaging in the US will grow nearly 4% annually in the next five years. Blister packaging, prefillable syringes and child-resistant dispensing closures will lead gains. Pouches and strip packs will also do well based on expanding unit dosage and cost advantages over blister packs. Plastic bottles will retain the largest market share. This study analyzes the $3.9 billion US drug packaging industry to 2004 and 2009 by product and material. It also evaluates market share and profiles key firms.
#1263. . . . . . . . . 4/00. . . . . . . . . . $3,700

Converted Flexible Packaging
Efforts to reduce costs and protect the environment will be the driving forces in US flexible packaging demand. Plastic films will extend their leadership based on extensive applications and improved materials. Food packaging markets will remain dominant because of diverse uses and needs for lower costs and longer shelf lives. This study analyzes the $10 billion US converted flexible packaging industry to 2003 and 2008 by material, resin and market. The study also details market share and profiles key firms.
#1211. . . . . . . . . 1/00. . . . . . . . . . $3,600

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