Caps & Closures -
Private Companies Report

• Profiles the top private US producers of caps and closures
• Analyzes outlook for caps and closures
• Reveals annual sales and employment

An essential tool if you are involved with...

* Mergers and Acquisitions
* Cooperative and Licensing Agreements
* Joint Ventures
Caps & Closures - Private Companies Report profiles more than 140 private U.S. producers of caps and closures. 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 Caps & Closures - Private Companies Report can serve as a valuable decision making tool for your company.

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This new report profiles more than 140 private U.S. companies active in the caps and closures 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.

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Companies Profiled

* Sample profiles on pages 4 and 5

3C Inc.
ABA Packaging Corp.
Ace Paper Tube Corp.
Airlite Plastics Corp.
Alico Packaging Inc.
All American Containers Inc.
Allied Mold & Die Corp.
All-Pak Inc.
American Star Cork Co. Inc.
Andler Bottle Co.
APM Inc.
Arma Tool & Die Co. Inc.
Arrowpak Inc.
Arroyo Packaging
Bel-Art Products Inc.
Berk (O.). Co.
Kols Containers
Berlin Packaging
Knap-Pac Containers Inc.
Berry Plastics Corp.
Cardinal Packaging Inc.
Poly-Seal Corp.
Bettis USA Inc.
Blackhawk Molding Co. Inc.
Boardman Molded Products Inc.
C+N Packaging Inc.
Cameo Metal Products Inc.
Captive Plastics Inc.
Stull Technologies Inc.
Champion Container Corp.
Chicago Paper Tube & Can Co. Inc.
Cin-Made Packaging Group
Cincinnati Container Co.
Clayton Corp.
Cobra Plastics Inc.
Colt’s Plastics Co. Inc.
Comar Inc.
Comet Tool Co. Inc.
Connecticut Cap and Seal Inc.
Consolidated Container Co.
Continental Glass & Plastic Inc.
Cork Supply Group
Newpak USA
Courtesy Corp.
Creative Packaging Corp.
Cron Engineering Co.
Crown Packaging International Inc.
Custom Bottle Inc.

Lerman Container
Custom Paper Tubes Inc.
Danbury Plastics Inc.
Decorative Container
Drug & Cosmetic Sales Corp.
Drug Plastics & Glass Co. Inc.
Top Seal Corp.
Easy Cap Corp.
Elopak Inc.
Erie Plastics Co.
Expac Corp.
Eyelematic Mfg. Co. Inc.
Flex Plastic Inc.
Flex Products
Flocon Inc.
Freund Container Inc.
Glass Vials Inc.
The Guardian Cork Co.
Gutmann (Ferdinand) & Co.
Henry Pak Inc.
Hocker Mfg. Co. Inc.
Hoffer Plastics Corp.
Indeco International Inc.
AFA Products Inc.
Continental Sprayers International Inc.
Inmark Inc.
Innovative Molding Inc.
Integrated Liner Technologies Inc.
International Plastics & Equipment Corp.
Jelinek Cork Corp.
Johnson (SC) & Son Inc.
Kaufman Container Co.
Kerr Group Inc.
KNR Inc.
Twin City Bottles
Kranson Industries Inc.
Packaging Plus Services Inc.
TricorBraun
Lanco York Inc.
Landis Plastics Inc.
Letica Corp.
Lumelite Plastics
M&H Industries Inc.
M&N Plastics Inc.
MAC Closures Inc.
Lukian Plastic Closures Inc.
Magenta Corp.
Mangar Industries
Master Molded Products Corp.
McKernan (EJ) Co.
McKernan Packaging Clearing House
MedSource Technologies Inc.
Tenax Corp.
Menda Scientific Products Inc.
Menda Products
Midcall Packaging Technologies
Mocap Inc.
Mold-Rite Plastics Inc.
Montebello Packaging
Nagl Mfg. Co.
Neocork Technologies Inc.
Newark Liner & Washer Inc.
Newburgh Molded Products Inc.
Niagara Plastics Co.
Nomacorc LLC
Olcott Plastics Inc.
Orca Inc.
Pac-Tec Inc.
Pacer Plastic Products Inc.
Package Supply & Equipment Co. Inc.
Packaging Concept Co. Inc.
Packaging West Inc.
Paradigm Packaging Inc.
Waddington Jaycare LLC
Parkway Plastics Inc.
Pearce Plastics Inc.
Penn Bottle and Supply Co.
Eastern Caps and Closures
Penn-Wheeling Closure LLC
Phoenix Closures Inc.
Phoenix UnLtd. Ltd.
The Plastek Group
Spectrum Molding and Engineering Inc.
Plastic Products Co. Inc.
Poly-Tainer Inc.
CMD Corp.
Polytop Corp.
Portola Packaging Inc.
Consumer Cap Corp.
PPC America LLC
Precise Technology Inc.
Premtium Packaging LLC
PrimaCORK
Quintex Corp.
Reliable Cap & Closure Inc.
Richards Packaging Inc.
Rieke Corp.
Rieke Packaging Systems
RTC Inc.
Sanner of America Inc.
Savoye Packaging Corp.
Scholle Corp.
Sinclair & Rush Inc.
Software
StockCap
VisiPak
Smith Container Corp.
Supreme Corq Inc.
Sussex Technology Inc.
Sweetheart Cup Co. Inc.
Tech Industries Inc.
Tekni-Plex Inc.
Action Technology
AGR Medical Rubber
Thomas Erie Inc.
Topline Products Co. Inc.
Tulox Plastics Corp.
Van Blarcom Closures Inc.
WB Bottle Supply Co. Inc.
Weatherchem Corp.
Western Plastics Corp.
Wiley Cork Co. Inc.
YES Technologies
Yellowstone Environmental Science Inc.
ZapatA International Corp.
Detailed Company Profile

More than 140 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.

APM Incorporated
441 Industrial Way
Benicia, CA 94510
County: Solano
County Code: 06095

Phone: 707-745-8060
Fax: 707-745-0371
Web Address: http://www.apmglobal.com

Key Cap & Closure Products: manufacture and distribution of metal, plastic and other closures

Related Census Code SIC(s): 3089; 3466; 3499; 5085; 5113; 5199

SIC Description(s): miscellaneous plastic products; crowns and closures; miscellaneous fabricated metal products; wholesale industrial supplies; wholesale industrial and personal service paper; wholesale miscellaneous nondurable goods

APM is a manufacturer and distributor of packaging components, such as bottles, caps and closures, for the wine, spirits, food and beverage markets. The Company’s customers range from large multinational firms to sole proprietor companies. APM operates manufacturing, warehouse and sales offices in Benicia, California; Montreal, Quebec, Canada; and Lourosa, Portugal. These facilities occupy a combined 190,000 square feet.

APM manufactures metal and plastic closures used in wine and spirits

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Caps & Closures - Private Companies Report #1427
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.

Mangar Industries
97 Britain Drive
New Britain, PA  18901
County:  Bucks
County Code:  42017

Phone:  215-230-0300
Fax:  215-230-0133
Web Address:  http://www.mangar.com

Annual Sales:  
Employment:  
Key Executive:  Douglas Coleman, CEO
Key Cap & Closure Products:  die-cut lids
Related Census Code SIC(s):  2675
SIC Description(s):  die-cut paper and paperboard and cardboard

Mangar Industries converts a wide range of materials for use in packaging sterile medical devices. Products include preformed pouches and die-cut lids. The Company operates a 35,000-square-foot facility at its headquarters in New Britain, Pennsylvania, with production capabilities in excess of 100 million pouches per year. Mangar produces die-cut lids for small- and medium-volume standard and custom containers.

PPC America LLC
901 Technology Way
Libertyville, IL  60048
County:  Lake
County Code:  17097

Phone:  847-816-9400
Fax:  847-816-4898

Annual Sales:  
Employment:  
Key Executive:  Peter Gamoff, President
Key Products:  plastic caps and dispensing systems
Census Code SIC(s):  3089
SIC Description(s):  miscellaneous plastic products

PPC America is a custom molder of plastic caps and dispensing systems for health, beauty, household goods and deodorant stick packaging applications. The Company mainly offers unthreaded plastic aerosol overcaps and caps for personal care products such as deodorants. PPC America has a 60,000-square-foot headquarters and production facility in Libertyville, Illinois.
Market Overview

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

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

Plastic Caps & Closures

The value of US shipments of plastic caps and closures is forecast to grow 6.8 percent per year through 2005. Unit shipments are projected to rise 4.6 percent annually to over 114 billion, a slower pace than the pace set during the 1995-2000 period. Demand is expected to increase 6.6 percent annually to $3.5 billion in 2005, ahead of the pace for growing in demand for plastic containers in general. Value growth of plastic closures will be boosted, in part, by higher raw material costs and a shift in the product mix favoring value-added products such as synthetic wine corks, and dispensing, child-resistant and tamper-evident closures, as well as items that exhibit senior friendliness and higher quality printing. In addition, ongoing technological advances in resins will contribute to gains, as will innovative closure designs and materials (e.g., cap liners and aseptic brick packs for liquids).

Plastics will outpace all other closure materials and will continue to capture market share from their metal counterparts as consumer packaging is increasingly utilizing plastic containers, and consequently plastic closures, instead of glass and closureless metal containers. This transition, largely completed in the sizable carbonated beverage market, is still ongoing in applications like sauces and condiments. Moreover, plastic containers and closures have just begun to establish a foothold in applications such as hot-filled foods like applesauce and jellies, and malt beverages. Other areas of opportunity for plastic closures exist in the replacement of closureless aluminum beverage cans by single-serve polyethylene terephthalate (PET) bottles, and the increasing use of multiple closures on such products as sport bottles with dispensers and overcaps, and gabletop juice cartons featuring plastic screw caps and spouts. Although plastic pressurized screw caps – the largest single product segment – face increasing maturity in the carbonated soft drink market, they are expected to successfully compete with aluminum and steel closures in the nascent, but potentially vast, plastic beer bottle niche due, in part, to their environmental advantages. In addition, synthetic wine corks are expected to see the fastest gains in the overall closure industry – almost 18 percent annually – albeit from a very small base.

FACTORS AFFECTING METAL CAPS & CLOSURES BY TYPE

<table>
<thead>
<tr>
<th>Type</th>
<th>Factors Spurring Growth</th>
<th>Factors Restraining Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crowns</td>
<td>Continuing gains in the maturing microbrew beer and specialty/upscale soft drink markets.</td>
<td>Competition from novel plastic closure alternatives.</td>
</tr>
<tr>
<td></td>
<td>Development of advanced liner materials, including oxygen-scavenging films.</td>
<td>Future replacement of glass beer cans replaced by plastic counterparts.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Competition from low-cost imports due to low-cost import sources primarily from Mexico.</td>
</tr>
<tr>
<td>Roll-Ons</td>
<td>Continuing use of glass closures by the wine and “New Age” beverage industries.</td>
<td>Competition from new synthetic closures, primarily in lower-end wine applications, and natural corks in upscale wine markets.</td>
</tr>
<tr>
<td></td>
<td>Favorable features relative to crowns and cork stoppers (e.g., tamper evidence, easy resealability and upscale image relative to plastics).</td>
<td></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 cap and closure 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.

Metal Caps & Closures - Private Company Characteristics

There is a limited and declining number of private producers of metal caps and closures due, in part, to the high level of concentration and greater barriers to entry compared to plastic caps and closures. However, firms ranging from small producers such as $3 million Chicago Paper Tube & Can, to much larger manufacturers like $150 million Comar are active in this segment. Some private metal cap and closure companies are diversified into a wider range of packaging components. An example is Cameo Metal Products, with annual sales under $5 million. The company's metal components for the cosmetic, personal

Selected Private Plastic Cap & Closure Producers

<table>
<thead>
<tr>
<th>Company</th>
<th>Corporate Sales (mil $)*</th>
<th>Products</th>
<th>Markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colt's Plastics</td>
<td>20</td>
<td>Child-Resistant</td>
<td>Food</td>
</tr>
<tr>
<td>Comar</td>
<td>150</td>
<td>Dispensing</td>
<td>Household Chemicals</td>
</tr>
<tr>
<td>Comet Tool</td>
<td>3</td>
<td>Threaded</td>
<td>Pharmaceuticals</td>
</tr>
<tr>
<td>Consolidated Container</td>
<td>&gt;100</td>
<td>Unthreaded</td>
<td>Other Unspecified</td>
</tr>
<tr>
<td>Cork Supply</td>
<td>1</td>
<td>Other Unspecified</td>
<td></td>
</tr>
<tr>
<td>Courtesy</td>
<td>1</td>
<td>Beverages</td>
<td></td>
</tr>
<tr>
<td>Croan Engineering</td>
<td>3</td>
<td>Cosmetics/Toiletries</td>
<td>Food</td>
</tr>
<tr>
<td>Danbury Plastics</td>
<td>90</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drug Plastics &amp; Glass</td>
<td>&lt;1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Easy Cap</td>
<td>40</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elopak</td>
<td>90</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Erie Plastics</td>
<td>90</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Sales are 2000 estimates of total corporate sales including products other than plastic caps and closures.
Private players in the $3.8 billion US caps and closures industry are most active in the plastic segment. A number of these firms are significant suppliers of plastic screw caps, aerosol overcaps, dispensing and child-resistant closures, and synthetic corks.

Private companies are also major producers of metal crowns and paperboard lids; as well as significant suppliers of imported natural wine corks.

Reflecting the consolidation trend in the industry, four leading private producers have been involved in acquisitions or divestitures since mid-1999.

Six private producers each had total cap and closure sales of over $50 million in 2000, and two of these had over $100 million.

The top six private producers of caps and closures accounted for 14 percent of the US market in 2000, and all are active in the fast-growing plastic segment.

US demand for caps and closures is forecast to increase 5.2 percent annually to $4.9 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 caps and closures 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.
Our Customers

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 caps and closures industry include: Berry Plastics, Crown Cork & Seal, Owens-Illinois and Portola Packaging.

Because Freedonia is a source for reliable information, our forecasts have been cited in numerous publications such as *The Wall Street Journal*, *Packaging Digest* and *Plastics News*. 
Caps & Closures
US cap and closure demand will grow 5.3% annually to 2005, driven by a shift in the mix toward value-added configurations such as dispensing and child-resistant closures. Also supporting unit gains will be the development of novel closure applications like aseptic liquid food packaging, as well as rising use of dual closure packaging configurations. This study analyzes the $3.8 billion US cap and closure industry to 2005 and 2010 by material, product and market. It also details market share and profiles key companies.
#1392. 4/01. $3,700

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, Plant, 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. $3,200

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 $6 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 Containers - Private Companies Report
Eight private US producers have plastic container sales of over $150 million, three of which were among the seven US market leaders. In addition, six other private firms had plastic container sales of at least $100 million. This report profiles over 100 private US firms (e.g., Berry Plastics, Consolidated Container, Graham Packaging, Liquid Container/Plaxicon, Plastipak Packaging) and lists them by product and location. It also forecasts industry demand, details market share and reviews acquisitions.
#1317. 9/00. $3,200

Plastic Containers
Plastic container demand in the US will grow over 4% annually. Three-fourths of all plastic containers by weight are bottles, which will also log the best growth driven by markets such as drugs, soft drinks and beer. High density polyethylene (HDPE) will remain the most widely used resin, while polyethylene terephthalate (PET) grows the fastest. This study analyzes the $10 billion US plastic container industry to 2004 and 2009 by resin, type and market. It also details market shares and profiles key firms.
#1306. 8/00. $3,600

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, prefllable 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
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