

Fresh Twists

Flexible packaging players continue to regroup in order to ensure future growth.

THOUGH CONSULTANTS SAY consolidation activity in the packaging industry is slowing, the face of the flexible packaging industry continues to be changed by mergers, acquisitions, and divestitures.

In *packagePRINTING*'s annual Top Flexible Packaging Converters Survey, such past participants as Duralam, Pac One, and Rex Int'l are now part of larger players' umbrella portfolios. And International Paper's flexible packaging division, sold to Exo-Tech Packaging LLC in 2001, is now called Exopack.

Of the estimated \$19 billion flexpack market, more than \$14 billion in total sales is represented in the list of survey participants below. Three quarters of those

sales can be found in the first ten companies listed.

A challenging economic climate, reflected in consolidation and bankruptcy announcements, rendered the list of survey participants a bit shorter this year. Still, slightly more than half of converters participating in both 2001 and 2002's surveys reported higher sales figures than in the previous year.

Converters responding to the survey for the past two years cite staff additions as the most common mode of expansion (25 percent), perhaps due to acquisition, over the period 2000 to 2001. Twenty-one percent have increased press capacity during this period, and 16 percent have added facilities.

In light of still-crowded capacity conditions, converters looking to snare further growth will need to get creative on where to find it. Associate Editor Jessica Millward reported in *pP*'s 2002 State of the Industry Report (March 2002), "End-use applications with the most potential for flexible packaging ... are markets ... already cultivated: fresh produce, drugs, medical/surgical, pet food, and snacks." Notably, of the 47 percent of respondents indicating expansion plans for 2002, exploring new end uses was the most popular strategy cited. In addition, unexplored geographical territory may be tough to come by. Nearly half of all respondents report serving an international customer base. □[®]

Key to rankings:

C=Combination Process; D=Digital; F=Flexo; G=Gravure; L=Letterpress; O=Offset; S=Screen; U=UV Flexo

Rank	Company	Principal Officer	2001 Rank	# of Empl.	# of Presses	# of Facilities	Processes Used
1	Sealed Air Corp. , Saddle Brook, N.J. Industries Served: Food, Protective, Specialty	William V. Hickey	2	N/A	N/A	N/A	D,F,G
2	Pechiney Plastic Pkg., Inc. , Chicago, Ill. Industries Served: Food, Meat & Dairy, Healthcare/Specialty	Ilene Gordon	NR	4,000	N/A	300	C,D,F,G
3	Bemis Company , Minneapolis, Minn. Industries Served: Meat, Cheese, Medical, Confectionary, Consumer Products	Jeffrey Curler	3	8,400	160+	43	F,G
4	Alcoa Flexible Packaging , Richmond, Va. Industries Served: Confections, Pharmaceuticals, Personal Care, Food & Beverage, Tobacco, Industrial Products	Alain A.J. Belda	1	2,500	31	8	F,G
5	Printpack , Atlanta, Ga. Industries Served: Snacks, Confections, Towel/Tissue, Bakery, Cereal	Dennis Love	4	4,200	93	21	F,G
6	AEP Industries , S. Hackensack, N.J. Industries Served: Food/Beverage, Industrial, Agricultural	Brendan Barba	5	500	15	6	F
7	Sonoco , Hartsville, S.C. Industries Served: Confectionary, Cookies & Crackers, Home & Personal Care, Beverage, Coffee	Eddie Smith	10	1,100	35	9	C,D,F,G
8	Exopack , Spartanburg, S.C. Industries Served: Pet Food, Charcoal, Building Materials, Lawn & Garden	Patrick M. Woods	NR	2,300	N/A	9	F,G
9	Lawson Mardon USA , Northbrook, Ill. Industries Served: Confectionary, Dairy, Pet Food, Photographic, Beverage	Pete Mathias	7	1,500	20	5	D,F,G
10	Bryce Corp. , Memphis, Tenn. Industries Served: Confections, Food/Beverage	Tom Bryce	9	1,200	22	5	F

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11	RJR Packaging , Winston-Salem, N.C. Industries Served: Food, Tobacco, Photo, Drug/Pharm.	Ric Engels	8	1,150	14	3	G
12	Pliant Corp. , Schaumburg, Ill. Industries Served: Bakery, Frozen Food, Personal Care, Consumer Retail	Richard P. Durham	11	909	42	7	D,F,G
13	American Packaging , Rochester, N.Y. Industries Served: Food/Beverage, Personal Care, Confections, Pet Food, Agricultural Chemical	P.B. Schottland	12	600	12	3	C,F,G,O
14	Bagcraft Packaging, LLC , Chicago, Ill. Industries Served: Fast Food, Supermarkets, Institutional, Retail, Pharmacy	Phil Harris	13	806	76	2	C,F,S
15	Winpak Ltd. , Winnipeg, MN Industries Served: Food	J.R. Lavery	17	905	14	3	F,G
16	Plassein International , Willington, Conn. Industries Served: Industrial Shipping Sacks, Food Packaging, Retail Packaging	Frank McNabb	NR	800	25	6	F
17	Smurfit-Stone Flexible Pkg. , Schaumburg, Ill. Industries Served: Pharmaceuticals, Military, Processed Meats	Gary McDaniel	NR	450	18	5	F
18	Mercury Plastics , Industry, Calif. Industries Served: Fruit/Vegetables, Bakery/Bread, Tortillas	Benjamin Deutsch	26	600	20	4	F
19	Phoenix Packaging , Maple Grove, Minn. Industries Served: Retail Food Packaging	Eric Jackson	19	170	8	2	C,F,G
20	Nordenia U.S.A., Inc. , Jackson, Mo. Industries Served: Health & Beauty, Food, Lawn & Garden, Pet Food, Paper Products	Paul E. Wiedlin	32	217	6	2	F,G
21	Outlook Group Corp. , Neenah, Wis. Industries Served: Meat, Direct Mail, Personal Care, Prime Label	Joe Baksha	18	510	24	2	C,F,L,S,U
22	Multi-Color Corp. , Cincinnati, Ohio Industries Served: Laundry, Beverage, Food, Personal Care	Steve Mulch	25	370	13	4	C,F,G,O,S,U

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23	Fabrene Inc. , North Bay, ON Industries Served: Lumber, Metal, Building Materials, Misc. Packaging	Grant Reeves	14	350	2	3	F
24	Cello-Foil Products , Battle Creek, Mich. Industries Served: Personal Care, Medical Appliances, Coffee, Convenience Foods, Confectionary	Ken Lesiow	22	249	11	2	F,G
25	Poly-Pak Industries , Melville, N.Y. Industries Served: Retail, Apparel, Food, Laundry/Dry Cleaners, D-I-Y	Pete Levy	23	300	24	2	F
26	Ultra Flex Packaging Corp. Industries Served: Bakery, Textile, Confectionary, Coffee, Meat	Eli Blatt	27	210	4	1	F
27	Packaging Products Corp. , Mission, Kan. Industries Served: Snack Foods, Cookies & Crackers, Bakery, Pasta, Produce	Jack L. Joslin	28	170	12	3	F
28	Western Plastics , Temecula, Calif. Industries Served: Computer-Distribution, Shipping, Foodservice-Industrial Packaging	T. Cunningham	NR	150	3	3	F
29	Uniflex , Hicksville, N.Y. Industries Served: Promotional, Healthcare, Educational, Automotive, High Technology	Herbert Barry	30	350	11	2	F,L,S
30	Coating Excellence Int'l , Wrightstown, Wis. Ream Wrap, Sugar Pouches, Food Pouches, Gum Wrap	Michael Nowak	NR	125	2	1	F
31	Seal-It Inc. , Farmingdale, N.Y. Industries Served: Dairy, Beverage, Food, Health & Beauty, Pharmaceutical	Sharon Lobel	33	220	9	2	F,G
32	Packaging Concepts , St. Louis, Mo. Industries Served: Microwave Packaging, Food Packaging, Pharmaceutical Packaging	John J. Irace	NR	247	10	3	F
33	Cadillac Products Packaging Co. , Troy, Mich. Industries Served: N/A	Robert J. Williams	39	198	3	2	F

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34	CLP Packaging Solutions , Fairfield, N.J.	Chaim Gofen	NR	195	6	1	F,G
	Industries Served: Food, Diagnostic, Medical, Protective Films, Pet Food						
35	Hood Pkg. (Plastic Film Div.) , Decatur, Ga.	T. Alvarez/L. Esterberg	40	206	11	3	F
	Industries Served: Poultry, Lawn & Garden, Confection, Pet Food, Coffee						
36	Plastic Packaging , Hickory, N.C.	Bert Brinkley	36	235	9	2	F,U
	Industries Served: Personal Care, Snack Foods, Textiles, Consumer Goods						
37	LPS Industries , Moonachie, N.J.	Madeleine Robinson	38	160	8	1	F, U
	Industries Served: Medical, Agrichem, Snacks, Pet Foods, Transportation						
38	Glenroy, Inc. , Menomonee Falls, Wis.	Roy Jablonka	52	105	2	1	F
	Industries Served: Pharmaceuticals, Personal Care, Medical, Food, Cosmetics						
39	Wisconsin Film & Bag , Shawano, Wis.	Jack Riopelle	37	216	6	1	F
	Industries Served: Medical, Automotive, Retail, Industrial, Food						
40	Excelsior Packaging Group , Yonkers, N.Y.	Ronnie Shemesh	NR	130	5	1	F
	Industries Served: Bakery, Food Service, Publishing, Medical						
41	Zimmer Custom-made Pkg. , Indianapolis, IN	Mark S. Lastovich	44	130	16	2	F
	Industries Served: Ice Cream, Snack Foods, Candy, Pressure-sensitive, Waxed Coated Papers						
42	Cello-Pack Corp. , Buffalo, N.Y.	Jim Bola	61	120	5	1	F
	Industries Served: Fragrance, Health/Beauty, Tissue, Snacks, Industrial						
43	Kendall Packaging , Milwaukee, Wis.	Eric G. Erickson	62	110	6	2	D,F
	Industries Served: Snack, Food/Dairy, Cosmetic, Medical, Confectionary						
44	Lithotype Co. , S. San Francisco, Calif.	Chris Sewell	64	57	5	2	F,O,U
	Industries Served: Food, Cosmetics, Point of Purchase						
45	Roplast Industries , Oreville, Calif.	Robert Bateman	53	150	5	1	F
	Industries Served: Grocery, Retail, Produce, Food, Inventory						

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46	Union Industries , Providence, R.I. Industries Served: Food, Retail, Electronics, Direct Mail, Paper Goods, Meat/Poultry/Seafood	Harley Frank	51	140	4	1	C,D,F,G,S
47	Sleeveco , Dawsonville, Ga. Industries Served: Beverage, Retail Cleaning, Pet Care, Petroleum, Agr. Chem	David Johnson	56	90	6	1	F,G
48	Hueck Foils , LLC, Wall, N.J. Industries Served: Healthcare, Specialty Food	George Thibeault Jr.	58	55	1	2	G
49	Bonita Pioneer Packaging , Portland, Ore. Industries Served: Gen. Retail Merchandise, Retail Clothing, Retail Food Services, Nursery, Bakery	John S. Gordon	42	336	40	3	F
50	Fabricon Products , River Rouge, Mich. Industries Served: Meat, Bakery, Confections, Ice Cream Novelty	Bruce L. Dinda	57	94	10	3	F,L
51	St. John's Packaging Ltd. , St. Luc, QC Industries Served: Personal Care, Bakery, Milk, Confectionary	Jacque LeClair	48	180	8	2	F
52	Primary Packaging , Bolivar, Ohio Industries Served: Insulation, Lawn & Garden	Mark Martinez	NR	81	4	1	F
53	Star Packaging Corp. , College Park, Ga. Industries Served: Meat/Poultry, Rice/Bean, Confectionary, Trading Cards, Chemicals	Ollie B. Wilson Jr.	65	83	5	2	F
54	Fisher Container , Buffalo Grove, Ill. Industries Served: Food, Retail, Medical, Pharmaceutical, Aerospace	Donald E. Fisher	63	80	2	1	F
55	Maco Group (Maco Bag) , Victor, N.Y. Industries Served: Photo, Electronics, Industrial, Food, Military	Scott Miller	60	100	0	3	F,G
56	Lally Pak Inc. , Hillside, N.J. Industries Served: Automotive, Cosmetics, Pharmaceuticals, Electronics, Frozen Food, Bakery	Henry Herbst	76	85	6	1	F
57	Syracuse Label Co. , Liverpool, N.Y. Industries Served: Food, Plastics, Hospitality, Photo, Retail	Peter Rhodes	68	125	16	1	F,L,U

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58	Buckeye Packaging , Alliance, Ohio Industries Served: Paper Goods, Hardware, Medical, Food, Publishers	John F. Davis	70	105	5	1	F
59	Catty Corp. , Huntley, Ill. Industries Served: Food, Confection, Pharmaceutical, Industrial	Bruce A. Scott	79	55	9	2	F,G
60	Prime Graphics , Wood Dale, Ill. Industries Served: HBA, Food, Medical, Pharmaceutical, Specialty	Bill Hunter	74	45	6	1	F
61	EndPak Packaging , Pico Rivera, Calif. Industries Served: Agriculture, Food Wrap, Can, Feed/Seed	Edgar A. Garcia	77	50	11	1	F
62	Technipaq , Crystal Lake, Ill. Industries Served: Medical, Pharmaceutical, Diagnostic	Phil Rosenberg	75	60	1	1	F
63	Beacon Converters , Saddle Brook, N.J. Industries Served: Sterile Medical Devices, Specialty Bakeries	Jacquelyn Daly Johnson	81	56	4	1	F
64	Carroll Products , Sterling Heights, Mich. Industries Served: Auto, Food, Medical, Housewares	Gene Stys	78	40	4	1	F
65	Plaspak U.S.A. , Antigo, Wis. Industries Served: Fresh Produce, Seafood, Toys, Firewood, Specialty	Robert Hilger	NR	115	2	2	F
66	Pennsak , Sharon, Pa. Industries Served: Pharmaceuticals, Electronics, Government, Recreational, Cosmetics	Jeffrey D. Rabiea	82	85	3	1	F
67	Northern Expediting Corp. , Union, N.J. Industries Served: Candy, Snack, Bakery	Michael Dee	86	15	4	1	F

Rankings are based on sales of printed/converted flexible packaging. All sales information is provided by participating companies, and is held in strict confidence by *pP*. Participation in this survey is voluntary.