Summary: Caraustar Industries Inc. Sep 07

Description: The ratings on Austell, Ga.-based Caraustar Industries Inc. reflect its high debt leverage, cyclical and mature end markets, paperboard industry overcapacity, limited product and geographic diversity, product substitution risks, volatile raw-material costs, and weak earnings. Partially offsetting these factors are the company's efforts to reduce costs, modest capital spending requirements, and manageable near-term debt maturities. Caraustar is one of the largest U.S. manufacturers of 100% recycled paperboard. Paperboard markets are mature, highly competitive, energy intensive, and subject to product substitution from competing paperboard grades and alternative materials, such as plastics and flexible packaging. In addition, the price of the primary raw material, old corrugated containers (OCC), is volatile. Over the past two years, the company has carried out significant portfolio...

Companies mentioned in this report are:
- Caraustar Industries Inc.

Action: Review

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This product consists of a Summary Analysis: Bi-annual (at least). An abbreviated analysis containing Standard & Poor's issuer credit ratings as of the time the article was published. The analysis includes a rating rationale - the basis on which the rating was assigned - and an outlook section if the issuer is not on CreditWatch. Financial statistics are not included.

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