Summary: Caraustar Industries Inc. Nov 03

Description:
The ratings on Austell, Ga.-based Caraustar Industries Inc. reflect its high debt leverage stemming from weak market conditions, limited product diversity, volatile raw material costs, and industry overcapacity, partially offset by its leading market position in tubes and cores and efforts to substantially reduce costs and working capital. Caraustar manufactures 100% recycled paperboard, which is converted into folding cartons, tubes and cores, gypsum wallboard facing paper, and specialty items such as puzzle pieces. Paperboard markets are mature, and recycled paperboard is subject to product substitution with virgin grades. Consumer spending and industrial production primarily drive demand for Caraustar's products. Industry demand for paperboard packaging has declined in each of the past three years, and meaningful volume improvement is unlikely until...

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

Action: Review

Standard and Poors RatingsXpress Credit Research provides in-depth coverage of international corporates, financial institutions, insurance companies, utilities, sovereigns and structured finance programs. RatingsXpress Credit Research lets users determine the credit rating of holdings and identify key factors underlying an issuer's creditworthiness, distinguishes the different risk exposures for new and existing deals, and provides an understanding of how their analysts interpret key regulatory, political and environmental events and their economic impact.

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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