

NEW TECHNOLOGIES AND CONSOLIDATION SHAPE OUTLOOK FOR TOP LABS

VM'S 20TH ANNUAL REPORT TRACKS IMPACT ON LARGEST WHOLESALERS



TOP LABS
VM 2012

BY ANDREW KARP / GROUP EDITOR, LENSES + TECHNOLOGY

NEW YORK—To the casual observer, little has changed in wholesale optical laboratories over the past two decades. The essential lab functions—fabricating prescription eyeglass lenses, selling eyeglass frames, contact lenses and other optical products and services—continue to be performed by most labs every day. Job orders are still being processed, and lenses are still being surfaced, coated, edged, inserted into frames, inspected and shipped to customers.

Yet sweeping changes have taken place in wholesale labs since 1992, the first year *Vision Monday* published its Top Labs Report, as anyone who has worked in or closely watched the optical industry in recent years can attest. Advances in lens processing technology—most notably increased automation and the advent of free-form lens surfacing—have brought greater efficiencies to lab operations and boosted labs' profits. Additionally, widespread consolidation resulting from numerous mergers and acquisitions has created large, supplier-owned wholesale laboratory networks that continue to grow and have radically redrawn the competitive "landscape" over the past two decades.

These two forces—automation and consolidation—continue to shape the outlook for the industry's largest wholesale laboratories, according to VM's 2012 Top Labs Report. Conducted annually

by VM, the newly released report compares net sales, Rx sales, Rx jobs per day and other key indicators for the 12 months ending August 31, 2012 with data from the prior 12 months and 1992.

Among the Report's key finding is that combined net sales for the Top Labs, including both supplier-owned lab networks and the independent labs, reached a record \$2,303 million in 2012, up 4.1 percent from 2011. Rx sales for the Top Labs—the primary criterion for ranking them—totalled \$1,957.5 million collectively, up 4.4 percent over 2011. The Top Labs produced a total of 133,692 Rx jobs per day, or roughly 33.4 million Rx jobs annually, a 2.5 percent increase over last year.

Top 5 Supplier-Owned Networks

The past 12 months were especially productive for the Top 5 Supplier-Owned U.S. Wholesale Lab Networks. Collectively, the Top 5 generated \$1,710 million in total net sales, up 5.7 percent over 2011. Total Rx sales, which is based on the labs' core business of surfacing and finishing prescription lenses and is the primary basis of the Top Labs rankings, totaled \$1,532.1, a 6.6 percent increase over 2011. Rx lenses sales comprised 92 percent of Total Net Sales for the Top 5 Labs, flat with 2011.

The number of Rx jobs per day for the Top 5

climbed to 102,900, up 3.2 percent over 2011. The average proportion of uncut lens jobs among the Top 5 is 35 percent, flat with 2011. The Top 5 currently operates 192 individual lab locations, one more than in 2011. The Top 5 work force consists of 9,414 employees, up 3.2 percent from last year.

The Top 25 Independents

On an individual basis, some independent labs made gains in 2012. Collectively, though, the performance of the Top 25 Independent Labs declined slightly from 2011. Total aggregate net sales for the Top 25 Independents in 2012 is \$593.1 million, a 0.7 percent decrease over 2011. Total aggregate Rx sales for the Top 25 fell to \$425.4 million, down 3.4 percent from 2011.

Rx sales accounted for 92.1 percent of net sales for the Top 25, down 1.7 percent from 2011. Unit sales among the Top 25 shrank to 30,792 Rx jobs per day, down 3.5 percent from 2011. Uncut lenses, on average, accounted for 36.4 percent of Rx jobs produced by the Top 25, up 11.3 percent over 2011.

The total number of lab locations operated by the Top 25 decreased to 75, one less than 2011. The size of the Top 25 labs' work force decreased 8.2 percent from 2011, to 2,564 employees.

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VM's Top Labs Performance Analysis

VM's Top 5 Supplier-Owned U.S. Wholesale Lab Networks

	2012 (\$millions)	2011 (\$millions)	% change
Total Net Sales	\$1,710.0	\$1,612.0	+5.7%
Total Rx Sales	\$1,532.1	\$1,430.7	+6.6%
Avg. Rx Sales as Percentage of Total Net Sales	92.0%*	91.7%*	+0.3%
Total Rx Jobs Per Day	102,900	99,600	+3.2%
Avg. Percent of Uncuts	35%	35%	0%
Total Number of Lab Locations	192	191	+0.5%
Total Number of Employees	9,414	9,119	+3.2%

VM's Top 25 Independent U.S. Wholesale Labs

	2012 (\$millions)	2011 (\$millions)	% change
Total Net Sales	\$593.1	\$597.3	-0.7%
Total Rx Sales	\$425.4	\$439.9	-3.4%
Avg. Rx Sales as Percentage of Total Net Sales	92.1%**	93.7%**	-1.7%
Total Rx Jobs Per Day	30,792	31,876	-3.5%
Avg. Percent of Uncuts	36.4%	32.3%	+11.3%
Total Number of Lab Locations	75	76	-1.3%
Total Number of Employees	2,564	2,774	-8.2%

Rx Sales represent the majority of revenue for most of the Top Labs. However, the following are exceptions, and therefore were not included in calculating the Average Rx Sales as a Percent of Total Net Sales:

*Does not include Nassau Vision Group Laboratories, which has Rx sales of 26 percent; remaining 74 percent of Nassau's Total Net Sales is from stock lens business.

**Does not include Walman Optical or Diversified Ophthalmics, which have Rx sales of 46 percent and 47 percent respectively. Remaining percentage of Walman's and Diversified's Total Net Sales are from various other products and services.

Source: Vision Monday estimates

How the Big Wholesale Labs Measure Up in 2012

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A 20-Year Lookback

Comparing VM's Top Labs of 1992 to today's Top Labs clearly illustrates the scope of change in the wholesale lab sector. For example, in 1992, VM's Top 25 labs, all of which were then independently owned, generated about \$533 million in sales. In 2012, VM's Top 25 Labs—now including both supplier-owned and independently owned labs—are expected to generate approximately \$1.6 billion in sales, a 67.5 percent increase. In 1992, the Top 25 processed about 50,000 Rx prescription jobs daily; this year, they are expected to produce approximately 132,034 Rx jobs per day, a 62 percent increase over 1992. These dramatic shifts are being driven by automation and consolidation.

Increased automation in prescription lens processing has resulted in greater efficiencies. In particular, the broad implementation of lab management soft-

ware to control all of a lab's operations, plus the growing use of automated conveyor systems has significantly boosted productivity and profits. Additionally, the introduction of free-form surfacing technology, which sharply reduces inventory and eliminates time-consuming production steps, has further increased the bottom line for many labs. As these technologies have more affordable and scaled-down systems have become available, a growing number of labs have taken advantage of them.

Consolidation, the other major force influencing the wholesale lab sector, began in 1996 when Essilor, the industry's largest spectacle lens supplier, launched a vertical integration strategy and acquired three major U.S. independent distributors: The Omega Group, Southern Optical and Duffens Optical. The three companies ranked among the VM's five biggest Top Labs, and each operated multiple locations.

Essilor pursued its acquisition strategy for the remainder of the 1990s and throughout the 2000s, and is continuing to do so today. The company currently operates 136 lab locations throughout the U.S.

Its two largest competitors, Hoya Vision Care and Carl Zeiss Optical, have followed suit. Hoya currently operates 24 branches, and Zeiss operates 18 branches.

Out of VM's original group of Top Labs in 1992, 13 have been acquired by Essilor, three have been acquired by Hoya and one has been acquired by Zeiss. One of the original labs is defunct; the other seven remain independent (see chart, page 42).

By establishing large U.S. lab networks over which they exert central control, these three lens suppliers have improved efficiencies and productivity within their networks while increasing the penetration of their own branded, premium lens products. ■

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VM's Top Labs Then (1992) and Now (2012)

Top 25 Labs in 1992	Estimated Net Sales 1992 (\$ millions)	Estimated Net Sales 2012 (\$ millions)	Rx Jobs/Day 1992	Rx Jobs/Day 2012	Comments
1. The Omega Group	90.0				Acquired by Essilor
2. Walman Optical	55.0	240.0*	4,000	6,850	Independent
3. Twin City Optical	45.0				Acquired by Essilor
4. Duffens Optical	40.0				Acquired by Essilor
5. Southern Optical	40.0				Acquired by Essilor
6. Soderberg Ophthalmic Services	32.0	N/A**		N/A**	Independent
7. Dynoptic (iCare Labs)	25.0	20.5	2,800	1,750	Independent
8. DBL Management	20.0				Acquired by Essilor
9. Associated Optical	19.0				Acquired by Essilor
10. Classic Optical Laboratories	16.0	16.5	3,000	2,500	Independent
11. W.O.S.	16.0				Acquired by Essilor
12. Winchester Optical	15.0				Acquired by Essilor
13. Bell Optical Laboratory	12.0				Acquired by Essilor
14. Langley Optical	11.5				Acquired by Essilor
15. Brothers Optical Laboratory	11.4	10.5	1,000	450	Independent
16. Balester Optical	10.0	13.9	800	831	Independent
17. Commercial Optical	10.0				Defunct
18. Sierra Optical	10.0				Acquired by Hoya
19. Schmidt Laboratories	9.8				Acquired by Carl Zeiss
20. Heard Optical	9.0				Acquired by Essilor
21. Benedict Optical	8.6				Acquired by Hoya
22. Sealey Optical	8.0				Acquired by Essilor
23. Midwest Optical	7.0				Acquired by Hoya
24. Kosh Ophthalmic	6.5				Acquired by Essilor
25. Eye Kraft Optical	6.0				Independent

*Includes Soderberg Ophthalmic Services

**Merged with Walman Optical

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Vision Monday's TOP LABS – 2012

(IN ALPHABETICAL ORDER)

Balester Optical

Founded: 1934**HQ./Main Lab Location:** Wilkes-Barre, Pa.**No. of Locations:** 1**No. of Employees:** 75**Key Executives:** Heather Balester, Dale Parmenteri, Fred P. Balester**Owners:** Heather Balester, Dale Parmenteri, Susan Balester Dennis, Fred P. Balester, Patrick Balester, Jacqueline Pekar, Valerie Balester, William Balester, Dorothy Holdle, Estate of Jonathan Balester, Marc Balester, Mark Pekar**Trade Names:** Balester Optical Co.**Key Markets:** Eastern U.S.**2012 Est. Net Sales:** \$13.9 million**Rx Sales:** \$13.3 million**No. of Rx Jobs/Day:** 831**Percentage of Uncut Jobs:** 54%

Comments: In-house AR Brands: Crizal, Crizal Alize, Crizal Avance, Optifog, Zeiss Super ET Plus, Carat Advantage and Essilor's House Ez. In-house Digital Brands: Varilux Physio Enhanced Fit/Eyecode/Azia/India, Comfort Enhanced, Definity 2, Balester Advanced, Balester Ultimate, Balester Office, Shamir Autograph II and others. Lenses Brands: Varilux, Definity, Transitions, Kodak, Sun-sensors, Hoya, Shamir, Zeiss, Seiko, Pentax, NuPolar, Coppertone, Trilogi, Life Rx, Pixel Optics and others. Frame Brands: Stetson, Sophia Loren, Randy Jackson, Via Spiga, Bulova, BUM, Just-Match-It, Bratz, Nickelodeon and others. Other Products: Smart Mirror, Smart Centration, i-Terminal and VisiOffice. Balester Direct Rx Program, ABO/NYSSO Certified Education, VSP, VBA, Vision Source, VisionWeb and more.

www.balester.com

Brothers' Optical Laboratory

Founded: 1973**HQ./Main Lab Location:** Orange, Calif.**No. of Locations:** 1**No. of Employees:** 59**Key Executives:** Carlo Ragazzo, Tony Esposito**Owners:** Joseph M. Ragazzo, John Ragazzo**Trade Names:** None**Key Markets:** Calif., Ariz., Las Vegas, Oregon, Hawaii**2012 Est. Net Sales:** \$10 million**Rx Sales:** \$10.0 million**No. of Rx Jobs/Day:** 450**Percentage of Uncut Jobs:** 25%**Comments:** Well-established, full-service lab.www.brothersoptical.com

Carl Zeiss Vision Laboratories

Founded: 2000**HQ.:** San Diego, Calif.**No. of Locations:** 18**No. of Employees:** 1,000**Key Executives:** Joe Donahoe, Claude Labeeuw, Dave Jochims, Steve Ballenger**Owner:** Carl Zeiss AG, Germany

Trade Names: Carl Zeiss Vision—B&W, Carl Zeiss Vision—Cumberland, Carl Zeiss Vision—Great Lakes, Carl Zeiss Vision—Kansas City, Carl Zeiss Vision—Siouxland, Carl Zeiss Vision—Kentucky, Carl Zeiss Vision—Southwest, Carl Zeiss Vision—Northeast, Carl Zeiss Vision—North Central, Carl Zeiss Vision—Northwest, Carl Zeiss Vision—Southeastern, Carl Zeiss Vision—California, Carl Zeiss Vision—Texas, Carl

Zeiss Vision—Virginia, Carl Zeiss Vision—Georgia, Carl Zeiss Vision—Iowa.

Key Markets: Nationwide**2012 Est. Net Sales:** \$162 million**Rx Sales:** \$145.8 million**No. of Rx Jobs/Day:** 10,600**Percentage of Uncut Jobs:** 25%

Comments: Network of full-service laboratories. Proprietary products include Zeiss brand lenses and coatings, PhotoFusion by Zeiss self-tinting lenses, SOLA and AO lenses, Teflon Clear Coat. Offers Carl Zeiss Vision Rewards program.

www.vision.zeiss.com/us

Cherry Optical

Founded: 1999**HQ./Main Lab Location:** Green Bay, Wis.**No. of Locations:** 1**No. of Employees:** 40**Key Executives:** Adam Cherry, Lynn Cherry, Joe Cherry**Owners:** Adam Cherry, Lynn Cherry, Joe Cherry**Trade Names:** What's New University, Fog Free TDZ, TDZ, Quantum HD, Quantum 2, Safety Optix, HD SV.**Key Markets:** Wis., Mich., Ill., Texas, Va., N.Y.**2012 Est. Net Sales:** \$7.4 million**Rx Sales:** \$6.7 million**No. of Rx Jobs/Day:** 315**Percentage of Uncut Jobs:** 29%

Comments: Proprietary products include Fog Free TDZ, Quantum HD & Quantum 2 PALs & HD SV. Special services/programs include 100 percent digital surfacing, 100 percent Mei milling edging technology, sports frame processing, wrap frame processing, Oakley, Maui Jim, Rudy Project, Safety Optix safety eyewear program, What's New University CE event at Lambeau Field—the largest single day optical industry event in the nation.

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Classic Optical

Founded: 1970

HQ./Main Lab Location: Youngstown, Ohio

No. of Locations: 1

No. of Employees: 125

Key Executives: Dawn Friedkin, Chief Operating Officer; Rodney Ramsey, Director, Lab Operations; Steve Mermer, Director, Information Technology; Amy Barnes, Manager, Administration & Human Resources; Mary Anne O'Toole, Manager, Sales & Customer Service; Mary Womble, Sales & Contracting

Owner: The Friedkin family**Trade Names:** Classic Optical Lab**Key Markets:** National**2012 Est. Net Sales:** \$16.5 million**Rx Sales:** \$16.5 million**No. of Rx Jobs/Day:** 2,500**Percentage of Uncut Jobs:** 3%

Comments: Offers full menu of proprietary free-form lenses including the Apex Advanced in variable and fixed progressive designs and Apex Performance in office and single vision designs. Specializes in volume contracts to managed vision care organizations, governmental agencies, correctional institutions and online and brick-and-mortar retail chains as well as direct to more than 3,000 eyecare providers nationally; Advanced IT integration services and custom IT solutions for managed care organizations and governmental agencies to streamline online ordering, manage eyeglass benefits for members and process provider professional and hardware claims.

www.classicoptical.com

Digital Eye Lab

(a division of Optical Distributor Group)

Location of Headquarters: Hawthorne, N.Y.

Founded: 2007

HQ./Main Lab Location: Hawthorne, N.Y.

Number of locations: 1

No. of Employees: 70

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The Top 25 Independent Labs in 2012 at a Glance

Lab	Net Sales	Rx Sales (% of Net)	Rx Sales	Rxs Per Day	% of Uncuts	# of Employees	Years in Business
1. Walman Optical	240.0	46	111.0	6,850	20	860	97
2. Luzerne Optical	33.0	97	32.0	2,000	48	200	39
3. Rite-Style Optical	26.0	95	24.7	1,100	21	114	64
4. US Optical	22.2	100	22.0	1,500	65	70	4
5. Digital Eye Lab	20.2	100	20.2	900	55	70	5
6. Expert Optics	21.0	95	20.0	920	22	90	33
7. Three Rivers Optical	18.5	96	17.8	1,500	45	68	43
8. ICare Labs	20.5	85	17.4	1,750	65	95	44
9. Robertson Optical	17.6	96	16.9	1,450	20	109	53
10. Classic Optical	16.5	100	16.5	2,500	3	125	42
11. Diversified Ophthalmics Laboratory Group	30.0	47	14.1	1,080	22	95	35
12. Balester Optical	13.9	96	13.3	831	54	75	78
13. Precision Optical Group	16.9	75	12.7	1,500	70	90	20
14. Hirsch Optical	13.0	95	12.4	800	35	49	34
15. FEA Industries	13.5	89	12.0	1,623	88	55	28
16. Brothers' Optical Laboratory	10.0	100	10.0	450	25	59	39
17. Toledo Optical	10.1	93	9.4	540	5	55	65
18. MJ Optical	12.5	75	9.3	1,150	53	62	24
19. Cherry Optical	7.4	90	6.7	315	29	40	13
20. Superior Optical Labs	6.3	95	6.0	375	15	46	21
21. Optical Prescription Lab	5.5	95	5.2	300	30	23	35
22. Eye-Kraft Optical	5.9	76	4.5	588	3	48	58
23. Pinnacle Optical	4.2	99	4.2	200	10	22	10
24. Laramy-K	4.2	95	3.9	330	100	29	23
25. e.magine Optical	3.9	81	3.2	240	7	15	20

Rankings are based on Rx sales. Sales estimates reflect combined sources of business for calendar year 2012 and are calculated based on information from a number of sources, which may include interviews with company management, financial disclosure documents and information from knowledgeable secondary sources. Companies with the same estimated sales are ranked alphabetically.

Source: Vision Monday

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Top Labs in the News

NEW YORK—2012 has been a busy year so far for several of VM's Top Labs.

The year got off to a fast start in early January, when Essilor International announced it had acquired CSC Laboratories, which ranked number two in VM's 2011 Top Labs Report. The purchase price was not announced.

Based in Watsonville, Calif., CSC Laboratories was owned by the Kim family, which retains a minority share. The company is headed by D.K. Kim, who founded the company in 1967. CSC Laboratories also operates a branch in San Jose, Calif.

Essilor also announced in January that it had acquired Professional Ophthalmic Laboratories in Roanoke, Va.

Also in January, VSP Global acquired a majority interest in two wholesale prescription laboratories that it owns in partnership with Carl Zeiss Vision: Perfect Optics in Vista, Calif. and CZV Florida in Clearwater, Fla. The Perfect Optics transaction involved VSP buying out shares of the company owned by individual members of its management team. Perfect Optics was ranked as the 16th largest U.S. independent wholesale lab in Vision Monday's 2011 Top Labs Report.

With the ownership shift at CZV Florida, the lab has changed its name to Zeiss/VSP Lab, Tampa

VM's Top 5 Supplier-Owned U.S. Lab Networks 2012 Rx Sales

(\$ millions)

1.	Essilor	\$1,058.0
2.	The Hoya Free-Form Company	\$193.5
3.	Carl Zeiss Vision Laboratories	\$145.8
4.	VSPOne Optical Technology Centers	\$112.8
5.	Nassau Vision Group Laboratories	\$22.0

Source: Vision Monday

Bay. Carl Zeiss Vision retains a minority position in both Perfect Optics and CZV Florida.

In April, Essilor announced that it acquired a majority interest in Optic Blue, a prescription laboratory based in Lubbock, Texas. Optic Blue ranked 25th among U.S. independent labs in VM's 2011 Top Labs Report.

In May, Essilor acquired a majority interest in Central Optical in Youngstown, Ohio. Owner Lloyd Yazbek retains a share of the company which generates \$11 million in annual revenue, according to Essilor. In a related development, Yazbek and his wife, Linda Yazbek, purchased a minority interest in Optical One, another Youngstown-based whole-

VM's Top 5 Supplier-Owned U.S. Lab Networks 2012 Rx Jobs Per Day

1.	Essilor	72,400
2.	The Hoya Free-Form Company	12,000
3.	Carl Zeiss Vision Laboratories	10,600
4.	VSPOne Optical Technology Centers	6,300
5.	Nassau Vision Group Laboratories	1,600

Source: Vision Monday

sale lab in which Essilor owns a majority share. Yazbek remains president of Central Optical.

Hoya Vision Care announced in July that it had acquired New South Optical Laboratories in Greenville, S.C. and is operating the lab under the Hoya Greenville banner.

In other Top Labs news, Adam Cherry, a partner in Cherry Optical in Green Bay, Wis., acquired a majority stake in the company. Cherry Optical was founded by his parents, Joe and Lynn Cherry, in 1999.

This month, VSP Labs changed its name to VSPOne Optical Technology Centers. ■

akarp@jobson.com

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Key Executives: Scott Pearl, Managing Director; Vince Monaghan, VP of manufacturing.

Owner: Optical Distributor Group

Trade Names: None

Key Markets: National

Est. Net Sales 2012: \$20.2 million

Rx Sales: \$20.2 million

No. of Rx Jobs/Day: 900

Percentage of Uncut Jobs: 55%

Comments: 100 percent of lenses are digitally surfaced using proprietary DXT manufacturing platform. Multiple fully automated digital fabrication lines. On-site Claris HD AR coating center. Extensive on-site lens finishing center, featuring interchangeable and wrap lens finishing capability. National sales organization. "Digital Rewards" customer loyalty program. Website features proprietary online job ordering/tracking/reporting functions built specifically for the unique needs of

digital lenses. Overnight delivery across the continental U.S. on a unique mix of digital lenses from Digital 5.0, Seiko, Indo and Shamir. Continually developing next generation lens options. Proprietary products include Digital 5.0 Personalized Lens Series, Curve PAL and SV wrap designs, Claris HD AR coating.

www.Digitaleyelab.com

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VM's Top 25 Independent Wholesale Labs by 2012 Rx Sales

(\$ millions)

1.	Walman Optical	111.0
2.	Luzerne Optical	32.0
3.	Rite-Style Optical	24.7
4.	US Optical	22.0
5.	Digital Eye Lab	20.2
6.	Expert Optics	20.0
7.	Three Rivers Optical	17.8
8.	ICare Labs	17.4
9.	Robertson Optical	16.9
10.	Classic Optical Laboratories	16.5
11.	Diversified Ophthalmics	14.1
12.	Balester Optical	13.3
13.	Precision Optical Group	12.7
14.	Hirsch Optical	12.4
15.	FEA Industries	12.0
16.	Brothers' Optical Laboratory	10.0
17.	Toledo Optical	9.4
18.	MJ Optical	9.3
19.	Cherry Optical	6.7
20.	Superior Optical Labs	6.0
21.	Optical Prescription Lab	5.2
22.	Eye-Kraft Optical	4.5
23.	Pinnacle Optical	4.2
24.	Laramy-K Optical	3.9
25.	e.magine Optical	3.2

Rx sales estimates for calendar year 2012 are based on information from a number of sources, which may include interviews with company management, financial disclosure documents and information from knowledgeable secondary sources. Companies with the same estimated Rx sales are ranked by Rx jobs per day. **Source: Vision Monday**

VM's Top 25 Independent Wholesale Labs by 2012 Rx Jobs Per Day

1.	Walman Optical	6,850
2.	Classic Optical Laboratories	2,500
3.	Luzerne Optical	2,000
4.	ICare Industries	1,750
5.	FEA Industries	1,623
6.	Precision Optical Group	1,500
7.	Three Rivers Optical	1,500
8.	US Optical	1,500
9.	Robertson Optical	1,450
10.	MJ Optical	1,150
11.	Rite-Style Optical	1,100
12.	Diversified Ophthalmics	1,080
13.	Expert Optics	920
14.	Digital Eye Lab	900
15.	Balester Optical	831
16.	Hirsch Optical	800
17.	Eye-Kraft Optical	588
18.	Toledo Optical	540
19.	Brothers' Optical Laboratory	450
20.	Superior Optical Labs	375
21.	Laramy-L Optical	330
22.	Cherry Optical	315
23.	Optical Prescription Lab	300
24.	e.magine Optical	240
25.	Pinnacle Optical	200

Rx jobs per day estimates were calculated based on a number of sources, which may include interviews with company management, financial disclosure documents and information from knowledgeable secondary sources. Companies with the same number of jobs per day are ranked alphabetically. **Source: Vision Monday**

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Diversified Ophthalmics Laboratory Group

Founded: 1977**HQ./Main Lab Location:** Cincinnati, Ohio**No. of Locations:** 11**No. of Employees:** 95**Key Executives:** Ronald Cooke, president/CEO; Ronald Cooke, Jr., COO**Owner:** Closely held corporation**Trade Names:** DLAB, DO Southeast, DO Washington, OptiSource, PureSite, Salt Lake Optical, Summit Optical, TriOptics**Key Markets:** Ga. Idaho, Ind., Ky., La., Mich., Mont., N.C., Pa., Ohio, S.C., Tenn., Texas, Utah, Wash., Wis., W.Va.**2012 Est. Net sales:** \$30 million**Rx Sales:** \$14.1 million**No. of Rx Jobs/Day:** 1,080**Percentage of Uncut Jobs:** 22%

Comments: Full service labs with ophthalmic lens and RGP manufacturing capabilities. 2005 Transitions "Lab of the Year." Transitions Platinum Elite Laboratory. Transitions Heritage Lab. Authorized Varilux distributor. VSP contract lab. Signet Armorlite partner lab. Operates on-site AR coating facility. AR branded products includes PureSite Preference Platinum. Offers free-form digital surfacing, including PureSite Digital lenses, Essilor lenses, and Shamir lenses. Offers eyeglass and contact lens packages, Perfect View frame-and-lens value packages, certified continuing education seminars and staff training. Markets PureSite brand of stock lenses and PureSite Preference AR. Offers on-line and electronic ordering; remote frame tracing, Practice Maximus optometric office management software. Special services and programs include Frames Travel Programs, Transitions Day at the Races, seminars, RIP, Perfect View, DBAN, Eye to the Sky. Member of the Vision Council, Vision Council Lab Division and AR Council. 2006, 2007, 2008 and 2010 LabTalk Top Ten Web Site of the Year. 2009 LabTalk Top Web Site.

www.divopt.com

e.magine Optical

Founded: 1992

HQ./Main Lab Location: Tulsa, Okla.

No. of Locations: 1

No. of Employees: 15

Key Executives: Tom Yancy

Owner: Tom Yancy

Trade Names: EviewHD, Repel Plus

Key Markets: Okla., Texas, Kan., Ark., Mo.

2012 Est. Net Sales: \$3.9 million

Rx Sales: \$3.2 million

No. of Rx Jobs/Day: 240

Percentage of Uncut Jobs: 7%

Comments: Offers Team Rewards co-op marketing program; IndividualEYES marketing program for private practices; Jumpstart ABO training program; 24/7 online ordering and account access; online job tracking; LenStock stock lens ordering program.
emagineoptical.com

Essilor

Founded: 1996

HQ./Main Lab Location: Dallas, Texas

No. of Locations: 136

No. of Employees: 6,415

Key Executives: Real Goulet-president, Mike Nathe-senior VP ELOA, Rick Long- senior VP Partner Labs, Alain Mathieu-VP operations and technologies, Greg

DiPasquale – VP strategic accounts

Owner: Essilor International

Trade Names: 21st Century Optical, Abba Contact Lens, AccuRX Inc., ACO, Advance Optical, Apex, Aspen Optical, Barnett & Ramel, Bartley Optical, Beitler-McKee Optical, Bell Optical Labs, Bristow Optical, Central Optical, Collard Rose Optical, Crown Optical, CSC, Custom Eyes, Dash Lab, DBL Labs, Deschutes Optical, Duffens Optical, Dunlaw Optical, East Coast Ophthalmic, Elite Optical, ELOA New Jersey, Empire Optical, Epic Labs, Eyecare Express, Focus Optical, Future Optical FL, Future Optical TN, GK Optical, Gold Optical, Gulf States Optical, Heard Optical, Hi-Tech, Homer Optical, Jorgenson Optical, Interstate Optical, Kosh Ophthalmic, Meridian Optical, McLeod Optical, MGM Optical, Midland Optical, Milroy, NEA Optical, New City Optical, Omega Optical, Omni Optical Lab, Optical One, Inc, Optic Blue, Optical Suppliers Inc., Optical Supply, Opti-Craft, Optimatrix, Optogenics of Syracuse, Ozarks Optical, Pech Optical, Perferx Optical, Peninsula Optical, Personal Eyes Optical, Precision Optical Company, Precision Optics, Premier Optics, Professional Ophthalmic Labs, Reliable Optics, S&G Optical, Select Optical, Southern Optical, Southwest Lens, Spectrum Optical, Sunstar Optical, Sutherlin Optical, Top Network, Tri-Supreme, Truckee Meadows, Twin City Optical, Vision Craft Inc, Winchester, WOS Optical.

Key Markets: Local and National

2012 Est. Net Sales: \$1,126 million

Rx Sales: \$1,058 million

No. of Rx Jobs/Day: 72,400

Percentage of Uncut Jobs: 35%

Comments: Nationwide network of full-service labs. Proprietary products include LiteStyle/Ultra LiteStyle Lenses, Crizal AR Coatings, Sharpview. Programs include ECP University, Needs Based Solutions, Think About Your Practice, Doctor Directed Processes.

www.eloa.com

Expert Optics

Founded: 1979

HQ./Main Lab Location: Shorewood, Ill.

No. of Locations: 2

No. of Employees: 90

Key Executives: Don Ruden, CEO; Greg Ruden, president; Bob Pommier, director of laboratory operations; Bob Hughbanks, manager of training and education

Owner: Greg Ruden

Trade names: Expert Best, Expert Essential, Expert Elite, Expert Extreme

Key Markets: National

2012 Est. Net Sales: \$19.2 million

Rx Sales: \$20 million

No. of Rx Jobs/Day: 920

Percentage of Uncut Jobs: 22%

Comments: Operates three free-form production lines that process lens designs from the leading manufacturers including: AO Easy HD, Compact Ultra HD, Seiko Succeed, Seiko Supercede, Seiko Surmount, Shamir Attitude, Shamir Autograph, Shamir Element, Shamir Office, SOLA HDV, SOLA One HD, Varilux Com-

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fort DRx, Varilux Physio DRx, Zeiss GT2 3D, Zeiss GT2 3DV, Zeiss Individual. The Crizal AR coating line capable of processing brands from SOLA, Zeiss, and Essilor. Signet Armorlite Partner Lab, Carl Zeiss Vision Premier Lab and member of Global Optics. Teflon Clear Coat, Crizal and Kodak Clear coating facility in-house; also producers of Zeiss foundation XT, Carat and Carat Advantage lens treatments, Chemistrie Magnetic Clip, Oasis Tears and Enhancer Lens Treatment. Hosts annual Optical Preview Day. A.B.O.-certified sales force offers in-office education. Offers Lenstock web-based lens ordering and inventory management system. Inventories over 50 frame lines with various frame and lens package programs. Authorized processor of emPower electronic eyewear by Pixel Optics and Carrera X-cede polarized NXT by Safilo. Exclusive distributor and processor of VedaloHD sunwear.

www.expertoptycs.net

Eye-Kraft Optical

Founded: 1954

HQ./Main Lab Location: Saint Cloud, Minn.

No. of Locations: 1

No. of Employees: 48

Key Executives: Floyd Lehne, president; Lawrence Lahr, VP; Michael Moeller, treasurer

Owner: Patricia Negaard

Trade Names: Eye-Lite, Eye-Lite Poly, Sun-Lite

Key Markets: National

2012 Est. Net Sales: \$5.9 million

Rx Sales: \$4.5 million

No. of Rx Jobs/Day: 588

Percentage of Uncut Jobs: 3%

Comments: Full service, VBA-approved lab. Provides free point-of-purchase brochures and counter displays to help educate patients. Offers lens and frame package including 130 stocked, high quality frame styles from nine manufacturers with various lens types. Accepts many forms of insurance, including MN Care. Affiliated with buying groups including The Alliance/Buyers Edge, America's Doctors of Optome-

try, Association of Eye Care, Centers/Pearlman Buying Group, Block Vision Buying Group, C&E Vision Services, Hayes Marketing, Newton Professional Purchasing, Ophthalmic Education Institute, Wisconsin Vision Associates. Offers same-day service at no extra charge. Offers various AR coatings including Crizal and Crizal Alizé.

www.eyekraft.com

FEA Industries

Founded: 1984

HQ./Main Lab Location: Morton, Pa.

No. of Locations: 1

No. of Employees: 56

Key Executives: Chrystal Colflesh, general manager; Chris Heeneey, operations manager; William H. Heffner, IV, IT and marketing

Owner: William H. Heffner, III

Trade Names: Independence, Eagle

Key Markets: National

2012 Est. Net Sales: \$13.5 million

Rx Sales: \$12.0 million

No. of Rx Jobs/Day: 1,623

Percentage of Uncut Jobs: 88%

Comments: Full-service lab offering in-house Independent AR and dip coating. Participates in third-party programs. VBA only. Offers stock lenses, stock frames and safety frames. Website includes ordering, tracking reports, invoices. Offers Kodak CleAR. Carries most major lens brands except Varilux. Proprietary products include Independence AR, personalized progressives including wrap compensation and lenticularization, personalized multifocals and Eagle free-form progressives.

www.feaind.com

Hirsch Optical

Founded: 1978

HQ./Main Lab Location: Farmingdale, N.Y.

No. of Locations: 1

No. of Employees: 50

Key Executives: Michael J. Rothstein, CEO; Roz Rothstein, president; Kenneth Mittel, senior VP; Vicki Masliah, director of professional education; Richard Salberg, director of sales

Owners: Roz Rothstein, Kenneth Mittel, Michael J. Rothstein

Trade Names: CHAD and Super CHAD

Key Markets: N.Y., N.J., Pa., Conn.

2012 Est. Net Sales: \$13 million

Rx Sales: \$12.4 million

No. of Rx Jobs/Day: 800

Percentage of Uncut Jobs: 35%

Comments: Offers proprietary AR coatings applied in-house: CHAD (Clear, Hard, Anti-Reflective, Durable) and premium coating Super CHAD. EZ Rx, Eyefinity and VisionWeb on-line ordering and remote tracing. Accredited educational seminars. Award-winning Varilux distributor, Essilor Gold Advantage Plan lab, Transitions Platinum Elite Lab, Zeiss Premier Distributor, Shamir ReCreating Perfect Vision Partnering Lab, Signet Armorlite Lab Partner, Hoya lens distributor. VSP and VBA contract lab. Vendor for Block Buying Group and Alfred J. Villavecchia Buying Group. Offers all Crizal, Hoya, Zeiss, glass and mirror coatings. Ophthalmic frame lines include Apple Bottoms By Nelly, Bill Blass, Cadillac Eyewear, Hello Kitty, Hershey's Eyewear, Jill Stuart, Levi's, LTX, Liberty Rec Specs, Miro Optix's Division1 sports safety, Paula Deen, Perry Ellis and others. Distributes Fantom custom clip-ons, Podreaders and Titmus safety frames. Website features special retail customer referral program.

www.hirschoptical.com

The Hoya Free-Form Company

Founded: 2000

HQ./Main Lab Location: Lewisville, Texas

Locations: 24

Employees: 1,040

Key Executives: Barney Dougher, president; Yoshiyuki Ono, VP lens technology; Rich Mon-

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Zeiss and Hoya. Offers customized services and pricing on lenses and frames. Operates in-house Crizal AR coating center. Offers own ICE AR brand. In-house digital lab produces Essilor, Varilux, Shamir and own legacy series. Proprietary brands include ICE AR, Legacy digital lenses. Authorized distributor of all major lens brands. Manufactures specialized sport prescription lens products including SeaVision dive masks. www.icare.com, www.icl364.com

Laramy-K Optical

Founded: 1989

HQ./Main Lab Location: Indianola, Iowa

No. of Locations: 1

No. of Employees: 29

Key Executives: John Larson, general manager

Owners: Janet Benjamin, Keith Benjamin, John Larson

Trade Names: None

Key Markets: Worldwide

2012 Est. Net Sales: \$4.2 million

Rx Sales: \$3.9 million

No. of Rx Jobs/Day: 330

Percentage of Uncut Jobs: 100 percent

Comments: Uncut-only lab. Proprietary products include Integrity Series lenses, including free-form products such as the Radical SV to the Rebel and three other progressive designs to AR coatings, including UVARity with RB Tech. Also processes Shamir and Seiko free-form products, as well as glass lenses. Online store offers wide range of tools, accessories and consumables. OpenOptix online education program offers ABO and NCL Certification Study Guides. www.laramyk.com

Luzerne Optical Laboratories

Founded: 1973

HQ./Main Lab Location: Wilkes-Barre, Penn.

No. of Locations: 1

No. of Employees: 200

Key Executives: Jack Dougherty, president; Lorraine Dougherty, VP; Neil Dougherty, GM; John Dougherty, VP purchasing

Owner: Dougherty family

Trade Names: Polar365, SightStar, PhotoFashion, DuraCurve, Crizal Easy UV, Crizal Alizé UV, Crizal Avancé UV, Crizal Sunshield UV, Crizal UV with Optifog, TD2, Teflon, Advantage, Carat and Foundation XT, EVC-enhanced visual clarity, Zeiss PureCoat, Teflon Elite, Zeiss Allure.

Key Markets: National

2012 Est. Net Sales: \$33 million

Rx Sales: \$32 million

No. of Rx Jobs/Day: 2,000

Percentage of Uncut Jobs: 48%

Comments: Field-consultant force offers practice development, business reviews and private consultations. Specializes in processing all major brands of free-form progressive lenses. Authorized empower! laboratory. Manufactures SightStar, Polar365, PhotoFashion, Varilux, Zeiss, Definity, Transitions, Essilor, Shamir, Kodak, Hoya, Polycore, Optima, Pixel Optics, Kaenon, Seiko, Vision-Ease, Marinelli, DriveWear premium lenses and difficult Rx's. Offers frames, frame/lens package programs, Chemistrie eyewear, stock lenses, sunglasses, safety eyewear, soft contacts, low vision and pharmaceuticals. In-house AR facility producing EVC-enhanced visual clarity, Crizal Easy UV, Alizé UV, Avancé UV, Crizal Sunshield UV, Crizal UV with Optifog, TD2, Zeiss PureCoat, Teflon Elite, Teflon, Zeiss Allure, mirror coatings and more. Award-winning in-house gas perm contact lens facility produces custom DuraCurve aspheric GP's. Provides advanced remote ordering with RxWizard, Visionweb, Paradyes and Eyefinity software via the Web. Vendor lab for most major buying groups. VSP & VBA approved. www.luzerneoptical.com

MJ Optical

Founded: 1988

HQ./Main Lab Location: Omaha, Neb.

No. of Locations: 1

No. of Employees: 62

Key Executives: Marty Hagge, Parke Wilkinson, Matt Hagge, David Mize, Morrie Hagge, Michael Hagge

Owner: Mary Hagge

Trade Names: None

Key Markets: National

2012 Est. Net Sales: \$12.5 million

Rx Sales: \$9.3 million

No. of Rx Jobs/Day: 1,150

Percentage of Uncut Jobs: 53%

Comments: Proprietary products include Platinum HD digital; Varilux digital; Nyteyez and Mirage AR; Distributes Varilux and Zeiss lenses. Offers Titanium frame and lens package. Distributes contact lenses. Offers on-line ordering and job tracking. www.mjoptical.com

Nassau Vision Group/ Nova Optical Lab

Founded: 1939

HQ./Main Lab Location: Northvale, N.J.

No. of Locations: 7

No. of Employees: 209

Key Executives: Maureen Cavanagh, president; Neil Rosen, VP - Sales and Ops; Mark Levitas, Director of Finance; Bruno Barajuan, General Manager

Owner: Essilor of America

Trade Names: Nassau Vision Group, Nova Optical, Nassau Lens Florida, Nassau Lens Southwest, Nassau Lens Midwest, Nassau Lens Southeast, Nassau Lens West

Key Markets: National

2012 Est. Net Sales: \$87 million

Rx Sales: \$22 million

No. of Rx Jobs/Day: 1,600

Percentage of Uncut Jobs: 80%

Comments: Nova offers a variety of products servicing premium PALs such as Varilux S, Definity and Unique as well as value offerings such as Ideal and Shoreview Digital. The company installed digital equipment in May of 2011 and recently installed a second Crizal coating machine. www.Nassau247.com

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ish blanks and lab supplies to other wholesalers throughout the US, Canada, China and UK. Customized industrial safety rx programs, VSP, VBA & VCP authorized.

www.poglabs.com

Rite-Style Optical

Founded: 1948

HQ./Main Lab Location: Omaha, Neb.

No. of Locations: 1

No. of Employees: 114

Key Executives: George Lee, CEO; Larry Lee, president

Owner: Lee family

Trade Names: RSO Advantage AR, Rite Protect

Key Markets: Midwest, Southeast, Texas

2012 Est. Net Sales: \$26.0 million

Rx Sales: \$24.7 million

No. of Rx Jobs/Day: 1,100

Percentage of Uncut Jobs: 25%

Comments: Full-service lab specializing in free-form lenses and in-house AR coating. Main lens brands include Seiko, Shamir and Zeiss plus private-label Geo-Form. Offers proprietary line of Kodiak premium AR coatings, include Acro (VSP category D) and Integ (VSP C) and Xzilon-EZ clean hydrophobic lens coating. The RSO Safety Rx division covers corporate accounts nationally as well as safety programs for independent ECPs. RSO is affiliated with Eyefinity/VSP, Vision Source, Vision-Web and Red Tray Optical.

www.ritestyle.com

Robertson Optical Laboratories

Founded: 1958

H.Q./Main Lab Location: Loganville, Ga.

No. of Locations: 3

No. of Employees: 109

Key Executives: Owners and Glenn Hollingsworth, director of lab operations

Owners: Calvin W. Robertson, Jr., Richard L. Robertson, Gordon "Scotty" Q. Scott, Jr., Calvin "Chip" W. Robertson, III

Trade Names: Robertson Optical Laboratories, Robertson Optical Laboratories of Columbia, Robertson Optical Laboratories of Greenville.

Key Markets: Southeastern U.S.

2012 Est. Net Sales: \$17.6 million

Rx Sales: \$16.9 million

No. of Rx Jobs/Day: 1,450

Percentage of Uncut Jobs: 20%

Comments: On-site free-form technology and digital grinding offering service and quality on Carl Zeiss Customized lenses, Shamir Freeform lenses, Seiko Freeform lenses, and ROL Coze Freeform Lenses. Full service labs servicing southeast for over 50 years with new lens products and new technologies. Two on-site AR coating facilities providing AR1, Duralux, Ultra-Clean, Ocean, Teflon, and Zeiss. MEI edging. Distributes Carl Zeiss, Shamir, Seiko, Signet Armorlite, Vision Ease, Younger, Hoya, Essilor and other major lens brands. Approved VSP, VBA, VCP contract labs. Authorized EmPower lab. Offers frame and lens packages, specializing in three-piece mounts, wraps and Chemistrie Custom Clips. Member VCA and OLA. Offers online ordering and job tracking.

www.robertsonoptical.com

Superior Optical Labs

Founded: 1991

HQ./Main Lab Location: Ocean Springs, Miss.

No. of Locations: 1

No. of Employees: 55

Key Executives: Hal Walker, president; Jon Jacobs, vice president

Owner: Hal Walker, Jon Jacobs

Trade Names: Exilar and Exilar Plus

Key Markets: Southeast

2012 Est. Net Sales: \$6.3 million

Rx Sales: \$6.0 million

No. of Rx Jobs/Day: 375

Percentage of Uncut Jobs: 15%

Comments: Offers in-house digital lens processing; distributes Varilux Hoya, Younger and Transitions lenses. Produces Crizal coatings in-house. Offers value packages, education, Powerpoint programs. VSP authorized.

www.superioroptical.com

Three Rivers Optical

Founded: 1969

HQ./Main Lab Location: Pittsburgh, Pa.

No. of Locations: 1

No. of Employees: 68

Key Executives: Mary Ann Zappas, Joe Seibert, Steve Seibert

Owner: Seibert Family

Trade Names: None

Key Markets: Mid-Atlantic, Southeast, Midwest, Northeast

2012 Est. Net Sales: \$18.5 million

Rx Sales: \$17.8 million

No. of Rx Jobs/Day: 1,500

Percentage of Uncut Jobs: 45%

Comments: Operates in-house Crizal coating facility. Produces Essilor and Shamir Freeform lenses as well as Varilux, Zeiss, Crizal, See More Easy Clean top coat. Transitions, and proprietary TR O Seg bifocal and TR O SEG in all resins materials. Offers private label Discovery brand progressive lens and See More Valuehd and See More ICU backside fully digital progressives.

www.3riversoptical.com

Toledo Optical

Founded: 1947

HQ./Main Lab Location: Toledo, Ohio

No. of Locations: 1

No. of Employees: 55

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VSPOne Optical Technology Centers

Founded: 1972

HQ./Main Lab Location: Sacramento, Calif.

No. of Locations: 7

No. of Employees: 750

Key Executives: Don Oakley, President; Warren Meyer, Sr. Vice- President—Lab Operations; Edward Morris (Vice President- Sales); Swen Carlson (Vice President—Central Regional Lab Operations); Danny Singer, Vice President—Eastern Region Lab Operations; Joe Maris (Vice President—Western Lab Operations).

Owner: Vision Service Plan

Trade Names: VSP Lab Columbus, VSP Lab Sacramento, Legends 4.0, Ultra Lens, Capitol Optical, UNITY PLx, Reveal and Espira Progressive Lenses, UNITY SVx Single Vision, UNITY Performance Coatings, Ethos AR Coating.

Key Markets: National

2012 Est. Net Sales: \$120 million

Rx Sales: \$112.8 million

No. of Rx Jobs/Day: 6,300

Percentage of Uncut Jobs: 15%

Comments: Proprietary products include Unity Performance Optics (Lenses & Coatings), Reveal, Ethos Lenses, Unity Stock Lenses. Services and programs include VSP Lab Rewards Program, Second Pair Program, VSP Global Loyalty Program, On-site AR including Crizal, Zeiss, and Unity Per-

formance Coatings. In-network digital (customized/freeform) surfacing capabilities producing Unity Progressive Lenses, Reveal, Shamir, Sola, Varilux and Zeiss customized progressives, Unity SVx Single Vision products and Unity CVx computer lenses. Mei and A&R automated finishing technology. Distributors of Hoya, Seiko-Pentax, Signet Armorlite, Transitions, Varilux, Vision Ease, Younger and Zeiss products.

www.vsplab.com

Walman Optical Company

Founded: 1915

HQ./Main Lab Location: Minneapolis/St. Paul, Minn. and Brooklyn Park, Minn.

No. of Locations: 36

No. of Employees: 860

Key Executives: Marty Bassett president/CEO; Charles Pillsbury, executive VP; Doug Schlauder-aff, executive VP, Craig Giles, executive VP, Bryan Schueler VP.

Owner: Employee-owned

Trade Names: Walman Optical, Soderberg Optical, Harbor Optical, SEOCO Optical, Walman Soderberg Instruments, X-Cel Contacts, Hydrogel Vision Corporation, ImageWear, Ultra Optics, ADO Buying Group, Preferred Select Buying Group.

Key Markets: National

2012 Est. Net Sales: \$240 million

Rx Sales: \$111 million

No. of Rx Jobs/Day: 6,850

Percentage of Uncut Jobs: 20%

Comments: Complete digital surfacing and finishing capabilities supported by on-site AR coating facilities providing Essilor Crizal, Zeiss and Ultra AR; offering Remo, Eyefinity and VisionWeb online ordering; Walman U and Harbor University educational seminars; exclusive Optical Help Desk; industry's largest independent sales force. Proprietary products include Acclaim brand digital lenses, Callaway, Stepper Eyewear, Sundance, London Fog, Wiggles and Wildflower frames, Trusted Partners, Innexus Web sites, ProLens premium lens packaging, Way Cool Frames, Valu-line, practice marketing and practice building seminars. Soderberg MYTEE-Lite premium lens program, MaximEyes, Ultimate Rewards, Be Young Be U programs, What's Your Game Plan and Partners for Growth seminars. Harbor Individual Eyes and Innexus web programs; member of Transitions Heritage Labs.

www.walman.com, www.roseeyes.com,

www.harboroptical.com

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