

Top Labs Show Agility in 2011

Leading wholesalers adapt to new technologies and retail market shifts

**Top
Labs
VM 2011**



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NEW YORK—The ability to be agile in response to changing market conditions is a necessity for any business, but it's crucially important for wholesale laboratories, the vital link between optical suppliers and eyecare professionals. Fortunately, the optical industry's biggest, most influential labs are up to the task.

According to new data from VM's 2011 Top Labs Report, the biggest independent and supplier-owned wholesaler laboratories are adapting to meet the changing needs of the independent eyecare professionals (ECPs) and retailers that comprise their customer base. Most made at least modest gains this year, and some made significant strides forward.

Among the main reasons for growth among VM's Top Labs was the continuing proliferation of digital lenses and lens processing technology. The emergence of more compact and affordable digital surfacing equipment has allowed even smaller labs to enter the market, which, despite the initial investment required, has proved to be profitable for most labs. Additionally, the advent of private label digital lenses is creating a new

revenue stream for digital surfacing labs.

VM's Top Labs Report, published annually since 1992, ranks the 30 Top Labs by Rx sales (pairs of prescription lenses produced) and the number of Rx jobs produced per day. It provides a detailed look at the performance of the Top 25 Independent U.S. Wholesale Labs and the Top 5 Supplier-Owned U.S. Wholesale Lab Networks.

Retail Gains Fuel Wholesale Growth

For the 12 months ended June 30, 2011, independent ECPs and retailers generated \$13.9 billion in revenue, out of an industrywide total of \$32.2 billion, according to the Vision Council's VisionWatch survey. Compared to dollar revenues from two years ago, independents were up by 2.4 percent in total, spread equally over the past two years.

In particular, rising lens and frame sales among independents helped boost revenues for VM's Top Labs. During the same 12-month period, lens sales rose 1.0 percent among independents and frames sales grew by 3.2 percent, an \$88 million increase from the year-ago period, according to VisionWatch.

Combined net sales for the Top Labs, including both the supplier-owned lab networks and the independent labs are projected to reach \$2,209.3 million in 2011, up 4.5 percent from 2010. Total Rx sales will reach a record \$1,870.4 million, a 5.3 percent increase over 2010. The Top Labs will collectively produce a total of 131,476 Rx jobs per day, or approximately 32.9 million Rx jobs annually, a 3 percent increase over 2010.

Top 5 Supplier-Owned Networks

Gains among the Top 5 Supplier-Owned Lab Networks in 2011 is a product of both organic growth and the result of acquisitions (see related story, Top Labs in the News on page 48). Collectively, the Top 5 will generate \$1,612 million in total net sales, up 5.5 percent over 2010. Total Rx sales, which is based on the labs' core business of surfacing and finishing prescription lenses and is the basis of the primary ranking of the Top Labs, will total \$1,430.7 a 5.8 percent increase over 2010. Rx lenses sales will comprise 91.7 percent of Total Net Sales for the Top 5 Labs, flat with 2010.

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VM's Top Labs Performance Analysis

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

| | 2011 (\$millions) | 2010 (\$millions) | % change |
|---|----------------------|----------------------|-------------|
| Total Net Sales | \$1,612.0 | \$1,524.0 | +5.5% |
| Total Rx Sales | \$1,430.7 | \$1,347.2 | +5.8% |
| Avg. Rx Sales as Percentage of Total Net Sales | 91.7%* | 91.5%* | +0.2% |
| Total Rx Jobs Per Day | 99,600 | 96,370 | +3.4% |
| Avg. Percent of Uncuts | 35.0% | 35.6% | -1.7% |
| Total Number of Lab Locations | 191 | 193 | +1.0% |
| Total Number of Employees | 9,119 | 9,425 | -3.4% |

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

| | 2011 (\$millions) | 2010 (\$millions) | % change |
|---|----------------------|----------------------|-------------|
| Total Net Sales | \$597.3 | \$585.2 | +2.0% |
| Total Rx Sales | \$439.7 | \$423.0 | +3.8% |
| Avg. Rx Sales as Percentage of Total Net Sales | 93.7%** | 92.2%** | +1.6% |
| Total Rx Jobs Per Day | 31,876 | 31,127 | +2.3% |
| Avg. Percent of Uncuts | 32.3% | 33.6% | -4.0% |
| Total Number of Lab Locations | 76 | 79 | -3.9% |
| Total Number of Employees | 2,774 | 2,805 | -1.1% |

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 29 percent; remaining 71 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 Total Net Sales are from various other products and services.

Source: Vision Monday estimates

Leading Wholesalers Adapt to Market Shifts

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The number of Rx jobs per day for the Top 5 will climb to 99,600, up 3.4 percent over 2010. The average proportion of uncut lens jobs among the Top 5 is 35 percent, flat with 2010.

The Top 5 currently operate a total of 191 individual lab locations versus 193 in 2009. The Top 5 work force consists of 9,119, down 3.4 percent from last year.

On an individual basis, 2011 has been a mixed year for the Top 5 Supplier-Owned Wholesale Lab Networks. Essilor and VSP Optical Laboratories grew their Rx sales, while Carl Zeiss Vision Laboratories and Nassau Vision Group Laboratories were down slightly in Rx sales; Hoya Vision Care was even with 2010. Essilor, Hoya and VSP produced more Rx Jobs per day in 2011 than in 2010; Carl Zeiss and Nassau Vision Group fell below last year's levels.

The Top 25 Independents

Fourteen of the Top 25 Independents will increase their net sales in 2010. Twelve of the Top 25 will increase their Rx sales versus this year, and 13 will increase their Rx jobs per day production.

The total aggregate net sales for the Top 25 Independents in 2011 will be \$597.3 million, a 2 percent increase over 2010. This continues a rebound from 2009, when net sales for the Top 25 decreased 4.2 percent from the prior year.

Total aggregate Rx sales for the Top 25 will climb to \$439.7 million, a 3.8 percent increase over 2010 and a 7 percent increase over 2009.

Rx sales will account for 93.7 percent of net sales for the Top 25, up 1.6 percent from 2010. Unit sales among the Top 25 will rise to 31,876 Rx jobs per day; the 2.3 percent increase reversed last year's decline from 2009. Uncut lenses, on average, will account for 32.3 percent of Rx jobs produced by the

Top 25, down 4.0 percent over 2010.

The total number of lab locations operated by the Top 25 will decrease from 79 in 2010 to 76 in 2011. The size of the work force among the Top 25 labs will decrease slightly, from 2,805 in 2010 to 2,774 employees in 2011.

The composition of the Top 25 changed significantly in 2011. Winchester Optical, which ranked 19th among the Top 25 Independents in last year's Top Labs Report, was acquired by Essilor, a Top 5 Lab. Additionally, Harbor Optical, which ranked 22nd among the independents last year, was acquired by top ranked Walman Optical.

Three labs moved into the Top 25 Independents this year: Eye-Kraft Optical of St. Cloud, Minn., which ranked 23rd, rejoined the group for the first time since 2008. Pinnacle Optical of Birmingham, Ala., and Optic Blue of Lubbock, Texas ranked 24th and 25th, respectively. ■

More →



Vision Monday's TOP LABS – 2011

(IN ALPHABETICAL ORDER)

Balester Optical

Founded: 1934

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

No. of Locations: 1

No. of Employees: 89

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, Marc Balester, Mark Pekar

Trade Names: Balester Optical Co.

Key Markets: Eastern U.S.

2011 Est. Net Sales: \$14.3 million

Rx Sales: \$13.7 million

No. of Rx Jobs/Day: 885

Percentage of Uncut Jobs: 54%

Comments: In-house AR brands: Crizal, Crizal Alize, Crizal Avance with Scotchgard, Zeiss Super ET Plus, Carat Advantage and Essilor's House Ez. In-house digital brands: Varilux Physio Enhanced, Comfort Enhanced, Definity and Definity Short, Essilor Ideal, Balester Advanced, Balester Ultimate, Accolade Freedom, Shamir Autograph II, Spectrum and Element, all Varilux 360 and Eyecode products. Lens brands: Varilux, Definity, Transitions, Kodak, SunSensors, Hoya, Shamir, Zeiss, Seiko, Pentax, NuPolar, Xperio, Cop-

pertone, iRx, EOS, Sun Rx, Phoenix, Trilogy, Instashades, Life Rx, AO Compact Ultra, Pixel Optics and Balester digital Pals and SV. Frame brands: Stetson, Sophia Loren, Randy Jackson, Via Spiga, Bulova, BUM, Just-Match-It, Bratz, Nickelodeon, Austin Reed, Manish Arora, Mayhem. Other Products: Smart Mirror, Smart Centration, i-Terminal and VisiOffice Value, Kid's & Drilled Rimless Packages, 2nd Pair Program, Eyenovate Polarized Clip System, Balester Direct Rx Program, ABO/NYSSO Certified Education, VSP, VBA, IDOC, Vision Source, On-line ordering-VisionWeb, Eyefinity, E-Dr.com, Remote Tracing, 24 hour On-line order status, Essilor Edge, Practice Plus Program, Shamir and Zeiss Rewards.

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

2011 Est. Net Sales: \$10.5 million

Rx Sales: \$10.5 million

No. of Rx Jobs/Day: 500

Percentage of Uncut Jobs: 25%

Comments: Well-established, full-service lab

www.brothersoptical.com

CSC Laboratories

Founded: 1967

HQ./Main Lab Location: Watsonville, Calif.

No. of Locations: 2

No. of Employees: 175

Key Executives: Dong K. Kim, group president/CEO; Bu Kim, senior VP, manufacturing; Paul Yoon, VP, operations; Greg Kohmescher, CFO; Robert C. Kim, legal counsel; Mike Kim, GM, Microcoating Laboratory; Jim Serruys, GM, Ocular Laboratories

Owners: Kim Family

Trade Names: CSC Laboratories, (Watsonville, Calif.); Microcoating Laboratory (Watsonville, Calif.); Ocular Laboratories (San Jose, Calif.); Boutique Design

Key Markets: U.S., Central and South America, Caribbean

2011 Est. Net Sales: \$34.5 million

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Rx Sales: \$32.8 million

No. of Rx Jobs/Day: 1,860

Percentage of Uncut Jobs: 30%

Comments: Complete lab services; authorized manufacturer of Crizal/Crizal Alizé; Teflon, PureCoat, Zeiss Carat AR coatings. Authorized manufacturer of Shamir Autograph freeform; Varilux 360 Enhanced, Definity & DRX. Exclusive manufacturer of Intellect Free-Form Solution. VSP Contract Lab; Offers Rx Express Unlimited frame and lens program. Offers complete range of stock lenses. Frame product line consists of 250 upper-middle to high-end fashion styles under CSC's own trade names, plus a new Exotic Wood Collection manufactured in Europe.

www.csclabs.com

Carl Zeiss Vision Laboratories

Founded: 2000

HQ.: San Diego, Calif.

No. of Locations: 18

No. of Employees: 1,125

Key Executives: Joe Donahoe, Claude Labeeuw, Tonya Ray, Dave Jochims, Steve Ballenger

Owner: Carl Zeiss Vision

Trade Names: Carl Zeiss Vision—B&W, Carl Zeiss Vision—Cumberland, Carl Zeiss Vision—Florida, 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

2011 Est. Net Sales: \$154 million

Rx Sales: \$146 million

No. of Rx Jobs/Day: 10,500

Percentage of Uncut Jobs: 25%

Comments: Network of full-service laboratories. Proprietary products include Teflon Clear Coat lenses, Zeiss, SOLA, AO. VSP contract lab.

www.vision.zeiss.com

Cherry Optical

Founded: 1999

HQ./Main Lab Location: Green Bay, Wis.

No. of Locations: 1

No. of Employees: 30

Key Executives: Adam Cherry, Lynn Cherry, Joe Cherry

Owners: Adam Cherry, Lynn Cherry, Joe Cherry

Trade Names: Lenstock.Com, What's New University, TDZ Scratch Coating, Independence, Independence HD, HD SV.

Key Markets: North America

2011 Est. Net Sales: \$7.5 million

Rx Sales: \$7.1 million

No. of Rx Jobs/Day: 275

Percentage of Uncut Jobs: 18%

Comments: Specializes in free-form progressive and digital optics. Proprietary products include Varilux, Crizal, Hoya Phoenix, Hoya progressives, Hoya Super High Vision. Offers "What's New University" and other educational programs; safety Rx programs.

Classic Optical

Founded: 1970

HQ./Main Lab Location: Youngstown, Ohio

No. of Locations: 1

No. of Employees: 100

Key Executives: Dawn Friedkin, Chief Operating Officer; Rodney Remsey, 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: Friedkin family

Trade Names: Classic Optical Lab

Key Markets: national

2011 Est. Net Sales: \$15 million

Rx Sales: \$15 million

No. of Rx Jobs/Day: 2,300

Percentage of Uncut Jobs: 3%

Comments: Specializes in volume contracts to managed vision care organizations, governmental agencies and correctional institutions as well as direct to more than 3,000 eyecare providers nationally. Offers full menu of proprietary free-

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Top Labs That Made News in 2011

NEW YORK—The pace of mergers and acquisitions in the optical laboratory sector slowed considerably in 2011. The most obvious reason was the nation's battered economy, which caused many optical companies to shy away from making major cash outlays or financing deals and instead concentrate on maintaining their core business.

Another reason for the slowdown in M&A activity is that, unlike 10 or 15 years ago, many of the more desirable independent labs—most of which ranked among VM's Top Independent U.S. Wholesale Labs—have already been cherry picked, mainly by VM's Top 5 Supplier-Owned Labs. Yet some significant lab purchases did occur over the past 12 months, mainly by Essilor International, which is still pursuing a growth strategy that emphasizes acquisitions.

In October, 2010, Essilor International announced that it had acquired a majority interest in Reliable Optics, a Brooklyn, N.Y.-based prescription laboratory. Reliable Optics generates approximately \$4.3 million in revenue per year, according to Essilor. Lab principals Howard Fried, OD and Eddie Purman remained on board.

In January, Essilor announced that it had acquired two significant independent wholesalers: Winchester Optical, in New York State, with revenue of around \$9.3 million, and NEA Optical, based in Jonesboro, Arkansas with revenue of

\$3.7 million. Both labs are now part of Essilor's network of partner labs. The management team at Winchester Optical, headed by Brian Lynch, and NEA Optical, headed by Jim Evans, remained in place.

Essilor announced in August that it acquired a stake in Caveo Optical, a prescription laboratory in Phoenix, Ariz. with \$1.5 million in revenue.

Essilor also closed two small branch labs this year: Duffens Optical, a branch of Essilor Laboratories of America in Hannibal, Mo. shut its doors on July 29, after 63 years in business; Essilor also closed its Custom Optical branch in Macon, Ga.

Among VM's Top Independent U.S. Wholesale Labs, the largest independent lab operator, Walman Optical, acquired Harbor Optical, an independent lab in Traverse City, Mich. The purchase price was not announced. According to a Walman spokesperson, no changes are anticipated in the lab's current management team, which is headed by Geff Heidbrink.

Harbor Optical was founded in 1997. It was ranked number 22 among VM's 2010 Top 25 Inde-

VM's Top 5 Supplier-Owned U.S. Lab Networks 2011 Rx Sales

(\$ millions)

| | | |
|---|----------------------------------|---------|
| 1 | Essilor | \$995.1 |
| 2 | Hoya Vision Care | \$180.0 |
| 3 | Carl Zeiss Vision Laboratories | \$146.0 |
| 4 | VSP Optical Laboratories* | \$84.6 |
| 5 | Nassau Vision Group Laboratories | \$25.0 |

Source: Vision Monday estimates

*Does not include contract labs

VM's Top 5 Supplier-Owned U.S. Lab Networks 2011 Rx Jobs Per Day

| | | |
|---|----------------------------------|--------|
| 1 | Essilor | 69,900 |
| 2 | Hoya Vision Care | 11,800 |
| 3 | Carl Zeiss Vision Laboratories | 10,500 |
| 4 | VSP Optical Laboratories* | 5,400 |
| 5 | Nassau Vision Group Laboratories | 2,000 |

Source: Vision Monday estimates

*Does not include contract labs

pendent Wholesale Labs, with estimated Rx sales of \$6.5 million dollars.

In other Top Labs news, K Optical, a Michigan-based independent optical lab that is part of Precision Optical Group, moved to a new location in Farmington Hills to accommodate its growth. K Optical's new office is about 6,000 sq. ft., which is six times the capacity of their old space.

On a sad note, two noted executives from among the Top Labs died in 2011: Hal Rothstein, co-owner and president/CEO of Hirsch Optical and Jonathan Balester, an owner of Balester Optical and a former president of the lab. ■

akarp@jobson.com

VM's Top 25 Independent Wholesale Labs by 2011 Rx Sales

(\$ millions)

| | | |
|----|------------------------------|-------|
| 1 | Walman Optical | 108.0 |
| 2 | CSC Laboratories | 32.8 |
| 3 | Luzerne Optical | 31.5 |
| 4 | Rite-Style Optical | 22.7 |
| 5 | US Optical | 20.0 |
| 6 | Three Rivers Optical | 18.4 |
| 7 | Expert Optics | 18.2 |
| 8 | ICare Labs | 17.4 |
| 9 | Robertson Optical | 16.4 |
| 10 | Precision Optical Group | 16.0 |
| 11 | Classic Optical Laboratories | 15.0 |
| 12 | Balester Optical | 13.7 |
| 13 | Diversified Ophthalmics | 13.4 |
| 14 | Hirsch Optical | 12.1 |
| 15 | FEA Industries | 12.0 |
| 16 | Perfect Optics | 12.0 |
| 17 | Brothers' Optical Laboratory | 10.5 |
| 18 | MJ Optical | 9.3 |
| 19 | Toledo Optical | 9.2 |
| 20 | Cherry Optical | 7.1 |
| 21 | Superior Optical Labs | 6.2 |
| 22 | Optical Prescription Lab | 5.0 |
| 23 | Eye-Kraft Optical | 4.8 |
| 24 | Pinnacle Optical | 4.3 |
| 25 | Optic Blue | 3.7 |

Rx sales estimates for calendar year 2011 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 estimates

VM's Top 25 Independent Wholesale Labs by 2011 Rx Jobs Per Day

| | | |
|----|------------------------------|-------|
| 1 | Walman Optical | 6,850 |
| 2 | Classic Optical Laboratories | 2,300 |
| 3 | Luzerne Optical | 1,950 |
| 4 | CSC Laboratories | 1,860 |
| 5 | ICare Industries | 1,750 |
| 6 | FEA Industries | 1,623 |
| 7 | Precision Optical Group | 1,600 |
| 8 | Three Rivers Optical | 1,600 |
| 9 | Robertson Optical | 1,450 |
| 10 | US Optical | 1,400 |
| 11 | MJ Optical | 1,200 |
| 12 | Rite-Style Optical | 1,100 |
| 13 | Diversified Ophthalmics | 1,020 |
| 14 | Expert Optics | 920 |
| 15 | Balester Optical | 885 |
| 16 | Hirsch Optical | 800 |
| 17 | Eye-Kraft Optical | 573 |
| 18 | Perfect Optics | 550 |
| 19 | Toledo Optical | 530 |
| 20 | Brothers' Optical Laboratory | 500 |
| 21 | Superior Optical Labs | 375 |
| 22 | Optical Prescription Lab | 300 |
| 23 | Cherry Optical | 275 |
| 24 | Optic Blue | 240 |
| 25 | Pinnacle Optical | 225 |

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 estimates

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form lenses including variable and fixed progressive designs; office/task and single vision.

www.classicoptical.com

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.

2011 Est. Net sales: \$28.5 million

Rx Sales: \$13.4 million

No. of Rx Jobs/Day: 1,020

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. Authorized Varilux distributor. VSP contract lab. Signet Armorlite partner lab. Operates on-site AR coating facility producing branded AR lenses such as PureSite Preference Platinum. Offers free-form digital surfacing. Offers eyeglass and contact lens packages and Perfect View frame-and-lens value packages; Practice Maximus optometric practice management software; certified continuing education seminars and staff training. Markets PureSite brand of stock lenses. On-line and electronic ordering. Remote frame tracing. Services and programs include Frames Travel Programs, Transitions Day at the Races, RIP, Perfect View, DBAN, Eye to the Sky. Member of the OLA



and AR Council. 2006, 2007, 2008 and 2010 OLA Top Ten Web Site of the Year. 2009 Top Web Site. www.divopt.com

Essilor

Founded: 1996

HQ./Main Lab Location: Dallas, Texas

No. of Locations: 137

No. of Employees: 6,275

Key Executives: Real Goulet-president, Mike Nathe-senior VP ELOA, Rick Long- senior VP Partner Labs, Brad Staley-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, Collard Rose Optical, Crown Optical, Custom

Eyes, Custom Optical, 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, 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, Reliable Optics, S&G Optical, Select Optical, Southern Optical, Southern Optical, Southwest Lens, Spectrum Optical, Sunstar Optical, Sutherlin Optical, Top Network, Tri-Supreme, Truckee Meadows, Twin City Optical, Vision Craft Inc, Vision Pointe, Winchester, WOS Optical

Key Markets: Local and National

2011 Est. Net Sales: \$1.1 billion

Rx Sales: \$995.1 million

No. of Rx Jobs/Day: 69,900

Percentage of Uncut Jobs: 37%

Comments: Nationwide network of full-service labs. Proprietary products include LiteStyle/Ultra LiteStyle Lenses, Crizal AR Coatings, Sharpview. Programs include Education Series and Need Based Solutions. www.eloa.com

Expert Optics

Founded: 1979

HQ./Main Lab Location: Shorewood, Ill.

No. of Locations: 2

No. of Employees: 90

Key Executives: Greg Ruden, president; Don Ruden, CEO; Bob Pommier, director of lab opera-

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tions; Mike Bradley, director of sales / Bob Hughes, Director Of Education

Owner: Greg Ruden

Trade names: none

Key Markets: National

2011 Est. Net Sales: \$19.2 million

Rx Sales: \$18.2 million

No. of Rx Jobs/Day: 920

Percentage of Uncut Jobs: 20%

Comments: Offers advanced lens processing technology, including an specialized production facility to manufacture free-form progressives including the Shamir Autograph, AO Easy HD, Compact Ultra HD, Sola HDV, Sola One HD, Zeiss Individual, Essential, Elite, Extreme & other designs from leading lens companies. Distributor of Kodak, Shamir, Varilux and Zeiss progressive lenses. 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, Chemie Magnetic Clip, Oasis Tears and Enhancer Lens Treatment. Hosts annual Optical Preview Day. Offers Lenstock web-based lens ordering and inventory management system. Distributor Sales Department inventories over 50 frame lines with a multitude of frame and lens package programs. Authorized lens processor of emPower electronic eyewear by Pixel Optics and Carrera X-cede polarized NXT by Safilo. Exclusive distributor and processor of VedaloHD sunwear featuring the HDL-3C lens technology.

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

2011 Est. Net Sales: \$5.8 million

Rx Sales: \$4.8 million

No. of Rx Jobs/Day: 573

Percentage of Uncut Jobs: 4%

Comments: Full service, VBA-approved lab. Provides free point-of-purchase brochures and counter displays. Offers lens and frame package including 130 frame styles with various lens types. Affiliated with ophthalmic buying groups including The Alliance/Buyers Edge, America's Doctors of Optometry, 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.

www.eyekraft.com

FEA Industries

Founded: 1984

HQ./Main Lab Location: Morton, Pa.

No. of Locations: 1

No. of Employees: 65

Key Executives: William H. Heffner, III, CEO; William H. Heffner, IV, advanced technology; Chrystal Colflesh, general manager

Owner: William H. Heffner, III

Trade Names: Independence Eagle

Key Markets: national

2011 Est. Net Sales: \$12.8 million

Rx Sales: \$12.0 million

No. of Rx Jobs/Day: 1,623

Percentage of Uncut Jobs: 85%

Comments: Full-service lab offering in-house AR and dip coating. Offers stock lenses, stock frames and safety frames. Website includes ordering, tracking reports, invoices. Offers Kodak CleAR. Carries most major lens brands. Proprietary products include Independence AR 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: Roz Rothstein, president; Kenneth Mittel, senior VP; Michael Rothstein, CEO/VP; Richard Salberg, director of sales; Vicki Maslah, director of professional education

Owners: Roz Rothstein, Ken Mittel, Michael Rothstein

Trade Names: CHAD and Super CHAD

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

2011 Est. Net Sales: \$13 million

Rx Sales: \$12.1 million

No. of Rx Jobs/Day: 800

Percentage of Uncut Jobs: 46%

Comments: Extensive offerings of lens and frame package programs. 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. Authorized 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, Cubavera, Elizabeth Arden, Elizabeth Arden Petites, Hershey's Eyewear, Levi's, LTX, Liberty Rec Specs, Miro Optix's Division1 sports safety, Mount Eyewear, New Balance, Perry Ellis, Style-wise & Scooby-Doo. Distributes Fantom custom clip-ons, Podreaders and Titmus safety frames. Website features special retail customer referral program.

www.hirschoptical.com



Hoya Vision Care

Founded: 2000

HQ./Main Lab Location: Lewisville, Texas

Locations: 23

Employees: 1,030

Key Executives: Barney Dougher, president; Yoshiyuki Ono, VP lens technology; Rich Montag, VP sales; Rick Tinson, VP of corporate governance; Kraig Black, VP information services; Jason White, VP finance; Doug Martin, VP group business; Greg Hicks, OD, director of professional affairs; Ray Knoll, western regional VP; Mike Dougher, eastern regional VP; Iggy Fernandez, central regional VP.

Owner: Hoya Corporation

Trade Names: Hoya Atlanta, Hoya Boise, Hoya Chicago, Hoya Cleveland, Hoya Dallas, Hoya Dayton, Hoya Denver, Hoya Eugene, Hoya Hartford, Hoya Knoxville, Hoya Largo, Hoya Las Vegas, Hoya Lewiston, Hoya Los Angeles, Hoya Michigan, Hoya Modesto, Hoya

New Orleans, Hoya Portland, Hoya Salina, Hoya San Antonio, Hoya San Diego, Hoya Seattle, Hoya St. Louis. The Hoya Free-Form Company.

Key Markets: National

2011 Est. Net Sales: \$212 million

Rx Sales: \$180 million

No. of Rx Jobs/Day: 11,800

Percentage of Uncut Jobs: 18%

Comments: Nationwide network of full-service labs. Proprietary lens designs: iD MyStyle, iD InStyle, iD LifeStyle, iD Single Vision, Summit ecp iQ, Summit cd iQ, ST28 iQ, SV iQ, Distortion Free Optics, Sync, Summit ecp, Summit cd, GP Wide, GP and TACT. Proprietary lens materials: 1.70, Eyry, 1.67 Eynoa, 1.60 Eyas, 1.53 Phoenix, 1.50. Proprietary lens coatings: Super HiVision EX3, Super HiVision, HiVision, ViewProtect, Suntech photochromics and Clarity Shield 2 scratch coating. Special Services/Programs include HHP (Hoya Honors Program).

www.hoyavision.com

Icare Labs

Founded: 1968

HQ./Main Lab Location: St. Petersburg, Fla.

No. of Locations: 1

No. of Employees: 95

Key Executives: Scott Payne, chairman; Skip Payne, president; James Payne, director of IT; Danny Payne, director of operations; Greg Gehrig, CFO; James Stephany, director of sales

Owners: The Payne family

Trade Names: Icare Labs, ICL365, Sea Vision USA

Key Markets: East Coast, Southwest

2011 Est. Net Sales: \$20.5 million

Rx Sales: \$17.4 million

No. of Rx Jobs/Day: 1,750

Percentage of Uncut Jobs: 65%

Comments: Full-service, family owned and operated. Offers all major lens brands such as Varilux,

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Kodak, 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

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, Crizal Alizé, Crizal Alizé with Clear Guard, Crizal Sunshield, TD2, Teflon, Advantage, Carat and Foundation XT, EVC-enhanced visual clarity, Zeiss PureCoat, Teflon Elite, Zeiss Allure.

Key Markets: National

2011 Est. Net Sales: \$32.5 million

Rx Sales: \$31.5 million

No. of Rx Jobs/Day: 1,950

Percentage of Uncut Jobs: 48%

Comments: State-of-the-art, family owned and operated lab; offers wide range of exclusive promotions, customer incentive and educational programs. Has field-consultant force offering practice development, business reviews and private consultations. Leading producer specializes in processing all major brands of free-form progressive lenses in-house. Authorized empower! Life-Activated Eyewear 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. Operates in-house AR facilities producing EVC-enhanced visual clarity, Crizal Easy, Alize, Avance with Scotchgard Protector, Crizal Sunshield, TD2, Zeiss PureCoat, Teflon Elite, Teflon, Zeiss Allure, Zeiss Super & Gold ET, Advantage, Carat, Foundation XT and Mirror coatings. Award-winning In-House Gas Perm contact lens facility produces custom DuraCurve aspheric GP's. Provides advanced remote ordering with RxWizard, Vision-Web, Paradeyes and Eyefinity software via the Web. Vendor lab for most major buying groups. VSP & VBA approved lab.

www.luzerneoptical.com

MJ Optical

Founded: 1988

HQ./Main Lab Location: Omaha, Neb.

No. of Locations: 1

No. of Employees: 64

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

Owner: Mary Hagge

Trade Names: None

Key Markets: National

2011 Est. Net Sales: \$12.9 million

Rx Sales: \$9.3 million

No. of Rx Jobs/Day: 1,200

Percentage of Uncut Jobs: 58%

Comments: Proprietary products include Platinum HD free-form; Nyteyez and Mirage AR; Distributes Crizal and Zeiss AR, Varilux lenses. Offers TFP and Titanium frame and lens packages. 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: 8

No. of Employees: 209

Key Executives: Maureen Cavanagh, president, Irwin Kaufman, VP – CFO; Bruno Barajuan, General Manager
Owner: Essilor of America

Trade Names: Nova Optical, Nassau Lens Florida, Nassau Lens Southwest, Nassau Lens Midwest, Nassau Lens Mid-Atlantic, Nassau Lens Southeast, Nassau Lens West

Key Markets: National

2011 Est. Net Sales: \$86 million

Rx Sales: \$25 million

No. of Rx Jobs/Day: 2,000

Percentage of Uncut Jobs: 80%

Comments: Leading stock lens distributor including Crizal lenses, recently launched a new Digital Platform at Nova Optical in NJ. Offers surfacing, finishing, drill mounting, coatings and lens tinting. Varilux-authorized. Offers in-house Crizal coatings, including Crizal Avancé with Scotchgard Protector, Crizal Alize and Crizal Easy. Proprietary products include Synergy Crystal and Triumph AR Coatings; Nalco, Vanity and Lighten Up lenses. Other lens brands include Shore, Essilor, Varilux, Carl Zeiss Vision (Zeiss, AO, SOLA), Seiko, KBco, Signet Armorlite, Optima, Vision-Ease, Shamir, Specialty Lens.

www.Nassau247.com

Optic Blue

Founded: 2006

HQ./Main Lab Location: Lubbock, Texas

No. of Locations: 1

No. of Employees: 21

Key Executives: Wes Palmer, director of sales

Owner: Jason Blue

Trade Names: none



Key Markets: Texas, N.M., Okla.

2011 Est. Net Sales: \$3.9 million

Rx Sales: \$3.7 million

No. of Rx Jobs/Day: 240

Percentage of Uncut Jobs: 19%

Comments: Distributes Hoya, Zeiss and Varilux lenses. Proprietary products include Concept HD series, FreeStyl and Blue Rock Eyewear. Services include Profit Builder frame and lens program and Optical Accelerator training program.

www.opticblue.net

Optical Prescription Lab

Founded: 1977

HQ./Main Lab Location: Pelham, Ala.

No. of Locations: 1

No. of Employees: 24

Key Executives: Danny Pugh, president; Sherry Pugh, vice president

Owners: Danny Pugh, Sherry Pugh

Trade Names: O.P.L.

Key Markets: Ala., Tenn., Miss., Ga., Fla.

2011 Est. Net Sales: \$5.2 million

Rx Sales: \$5.0 million

No. of Rx Jobs/Day: 300

Percentage of Uncut Jobs: 30%

Comments: Distributes Varilux, Hoya, Shamir, Seiko and Zeiss lenses. Operates in-house Crizal processing center with 24-hour service. Offers Crizal Performance Package. VSP, VCP and VBA-approved lab.

www.opticalprescriptionlab.com

Perfect Optics

Founded: 2006

HQ./Main Lab Location: San Diego, Calif.

No. of Locations: 1

No. of Employees: 73

Key Executives: Matt Schmidt-Wetekam, CEO; Thomas Brophy, VP, Sabine Rentschar, VP technology; Adam Winkelman, VP sales and marketing

Owners: Matt Schmidt-Wetekam CEO, Thomas Brophy, VP operations, Sabine Rentschar, VP finance, Adam Winkelman, VP sales

Trade Names: Perfection FF, Perfection Blue AR

Key Markets: national

2011 Est. Net Sales: \$12 million

Rx Sales: \$12 million

No. of Rx Jobs/Day: 550

Percentage of Uncut Jobs: 10%

Comments: Specializes in free-form, digital surfacing. Proprietary products include Perfection free-form lens series, Perfection Blue AR coating. Offers sports Rx manufacturing for most major sun and sports frame brands. Offers Perfect Academy series of educational programs.

www.perfectopticslab.com

Pinnacle Optical

Founded: 2002

HQ./Main Lab Location: Birmingham, Ala.

No. of Locations: 1

No. of Employees: 22

Key Executives: Greg Blackwell, Jeffrey Crooks

Owner: EyeCare Associates, Inc. & Greg Blackwell

Key Markets: Southeast

2011 Est. Net Sales: \$4.5 million

Rx Sales: \$4.3 million

No. of Rx Jobs/Day: 225

Percentage of Uncut Jobs: 8%

Comments: Proprietary products include Icon HD line of digital progressive lenses. Services and programs include ProClean EZ frame and lens package; Chemistrie Lens Layering System; full digital surfacing lab and Crizal processing center.

www.pinnacleoptical.com

Precision Optical Group

Founded: 1992

HQ./Main Lab Location: Creston, Iowa

No. of Locations: 3

No. of Employees: 115

Key Executives: Shannon Waigand, Holly Ferber, Judy Hodge, Stephanie Brammer, Melanie Crago, Deb Larson, Lance Christensen, Mike Kellman, Warren Herron

Owner: Mike Tamerius, Matt Somers

Trade Names: Precision Optical Group, Inc., K Optical Laboratory, CRX Laboratories

Key Markets: U.S., Canada, Virgin Islands, China, Puerto Rico

2011 Est. Net Sales: \$17.8 million

Rx Sales: \$16.0 million

No. of Rx Jobs/Day: 1,600

Percentage of Uncut Jobs: 55%

Comments: Full service lab offering low pricing and same day service nationwide. Distributes semi-finish blanks and lab supplies to other wholesalers throughout the U.S., Canada and China. Offers four in-house AR coatings including Clear AR along with Crizal and Teflon options. Customized Industrial Safety Programs, VSP, VBA, VCP authorized laboratory. Proprietary products include Courage Coating, Elite Clear AR, Value Line frame and lens package, low cost name brand progressives.

www.poglabs.com

Rite-Style Optical

Founded: 1948

HQ./Main Lab Location: Omaha, Neb.

No. of Locations: 1

No. of Employees: 112

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

Owner: Lee family

Trade Names: RSO Advantage AR, Rite Protect

Key Markets: Midwest, Southeast, Texas

2011 Est. Net Sales: \$24.2 million

Rx Sales: \$22.7 million

No. of Rx Jobs/Day: 1,100

Percentage of Uncut Jobs: 25%

Comments: Full-service lab specializing in digitally surfaced free-form lenses. Over 50 percent of all PALs produced at RSO are free-form, with designs

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from 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). 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

HQ./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.

2011 Est. Net Sales: \$17.1 million

Rx Sales: \$16.4 million

No. of Rx Jobs/Day: 1,450

Percentage of Uncut Jobs: 20%

Comments: 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, Teflon and Zeiss. Distributes Carl Zeiss, Shamir, Seiko, Signet Armorlite, Vision-Ease, Younger, Hoya, Essilor and other major lens brands. 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. Approved VSP, VBA, VCP contract labs. Offers frame

and lens packages, specializing in three-piece mounts and Chemie 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: Morgan Braly, Hal Walker, Jon Jacobs

Owner: Hal Walker, Jon Jacobs

Trade Names: Exilar and Exilar Plus

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

2011 Est. Net Sales: \$6.5 million

Rx Sales: \$6.2 million

No. of Rx Jobs/Day: 375

Percentage of Uncut Jobs: 15%

Comments: Distributes Varilux lenses. Produces Crizal coatings in-house. VSP authorized. Offers seminars, training, promotions.

www.superioroptical.com

Three Rivers Optical

Founded: 1969

HQ./Main Lab Location: Pittsburgh

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

2011 Est. Net Sales: \$19.2 million

Rx Sales: \$18.4 million

No. of Rx Jobs/Day: 1,600

Percentage of Uncut Jobs: 55%

Comments: Operates in-house Crizal coating facility. Produces Essilor and Shamir free-form lenses

as well as Varilux, Zeiss, Crizal, Kodak, Transitions, and proprietary TR O Seg bifocal polycarbonate in Transitions and TR O Blended Seg. Offers private label Discovery brand progressive lens and See More Valuehd and See More ICU backside fully digital progressives. Primary frame brands include Zyloware and McGee Group.

www.3riversoptical.com

Toledo Optical

Founded: 1947

HQ./Main Lab Location: Toledo, Ohio

No. of Locations: 1

No. of Employees: 55

Key Executives: Irland Tashima, Jeffrey Szymanski, Robert Lommerse, Brian Green

Owners: Kadowaki, Tashima and Green families

Trade Names: Toledo Optical, Toledo Optical Lab

Key Markets: Ohio, Mich. and Midwest

2011 Est. Net Sales: \$9.9 million

Rx Sales: \$9.2 million

No. of Rx Jobs/Day: 530

Percentage of Uncut Jobs: 7%

Comments: Proprietary products include Acclaro Elite and Acclaro antireflective lens processes, Armor XT premium scratch coating. Distributes Varilux, Shamir, and Zeiss lenses. Services and programs include dedicated sales force, extensive training and education programs such as Jumpstart Education, exclusive practice building initiatives such as "Get There From Here," a joint practice management initiative with Transitions Optical and Williams Group, Strata multi-media training series; digital surfacing capability, One Step Rx, individualized customer performance reports. Williams Group Certified Sales Consultants, Transitions Lab of the Year 2003, 2006, and 2010, Top Three Finalist for Transitions Lab of the Year 2002, 2004, 2005, 2009, VSP's People First Lab Award Winner, Transitions Heritage Ambassador Club Member, Global Optics Member, First Three Time Winner of the Transitions Lab of the Year Award, DVI Implementer



of the year, and the 2011 Mayoral Proclamation Recipient for Service "Above and Beyond".

www.toldeoooptical.com

US Optical

Founded: 2008

HQ./Main Lab Location: East Syracuse, N.Y.

No. of Locations: 1

No. of Employees: 70

Key Executives: Robert Cotran, president; Ronald Cotran, VP; Ralph Cotran, VP

Owners: Robert Cotran, Ronald Cotran, Ralph Cotran

Trade Names: US Optical-Fastest Lab in America

Key Markets: National

2011 Est. Net Sales: \$20 million

Rx Sales: \$20 million

No. of Rx Jobs/Day: 1,400

Percentage of Uncut Jobs: 65%

Comments: 100 percent digital surfacing with three robotic digital free-form machines, six digital polishers and four Zeiss AR coaters, Mei edger (sunglass wrap capabilities), traditional generator and polisher. Offers free-form products from Seiko, Zeiss, Shamir and Hoya (coming soon). Zeiss flash mirrors, Pixel Optics emPower, Carrera XCede (Safilo). Offers 24-hour service on uncuts. Zeiss-aligned, independent lab.

www.usoptical.com

VSP Optical Laboratories

Founded: 1972

HQ./Main Lab Location: Sacramento, Calif.

No. of Locations: 5

No. of Employees: 480

Key Executives: Don Oakley (President); Warren Meyer (Sr. Vice- President- Operations); Dave Delle Donne (Vice President- Business Development); Edward Morris (Vice President- Sales); Swen Carlson (Director,

Columbus); Joe Maris (Director, Sacramento); Steve Mullen (Director, Capitol Optical); Kini Odom (Director, Legends 4.0); Danny Singer (Director, Ultra Lens).

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

2011 Est. Net Sales: \$90 million

Rx Sales: \$84.6 million

No. of Rx Jobs/Day: 5,400

Percentage of Uncut Jobs: 15%

Comments: Proprietary products include Unity PLx, Reveal and Espira Progressive Lenses, Ethos AR Coating and Unity Performance Coatings, Unity Stock Lenses. Service and programs include VSP Lab Rewards Program, Second Pair Program, VSP Global Loyalty Program, On-site AR including Crizal, Purecoat, Teflon, Zeiss, Ethos and Unity Performance Coatings. In-network digital (customized/freeform) surfacing capabilities producing Unity PLx, Espira, Reveal, Shamir, Sola, Varilux and Zeiss customized progressives and Unity SVx Single Vision products. 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.

No. of Locations: 36

No. of Employees: 890

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

2011 Est. Net Sales: \$230 million

Rx Sales: \$108 million

No. of Rx Jobs/Day: 6,850

Percentage of Uncut Jobs: 20%

Comments: Complete digital surfacing and emPower capabilities supported by on-site A-R coating facilities providing Essilor, Zeiss and Ultra AR; offering Remo, Eyefinity and VisionWeb on-line ordering; Walman and Harbor University educational seminars; industry's largest independent sales force. Proprietary products include Callaway, Stepper Eyewear, Sundance, Wiggles and Wild-flower frames, Trusted Partners, ProLens premium lens packaging, Way Cool Frame Cool, Valuline and Bridge to Success seminars. Soderberg MyTee-Lite lenses, MaximEyes, Transitions Ultimate Rewards, Be Young Be U programs and Partners for Growth seminars. Harbor Individual Eyes and Innexus web programs, Members of Transitions Heritage Labs.

www.walman.com, www.oseyes.com, www.harboroptical.com ■

READ MORE ONLINE:

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